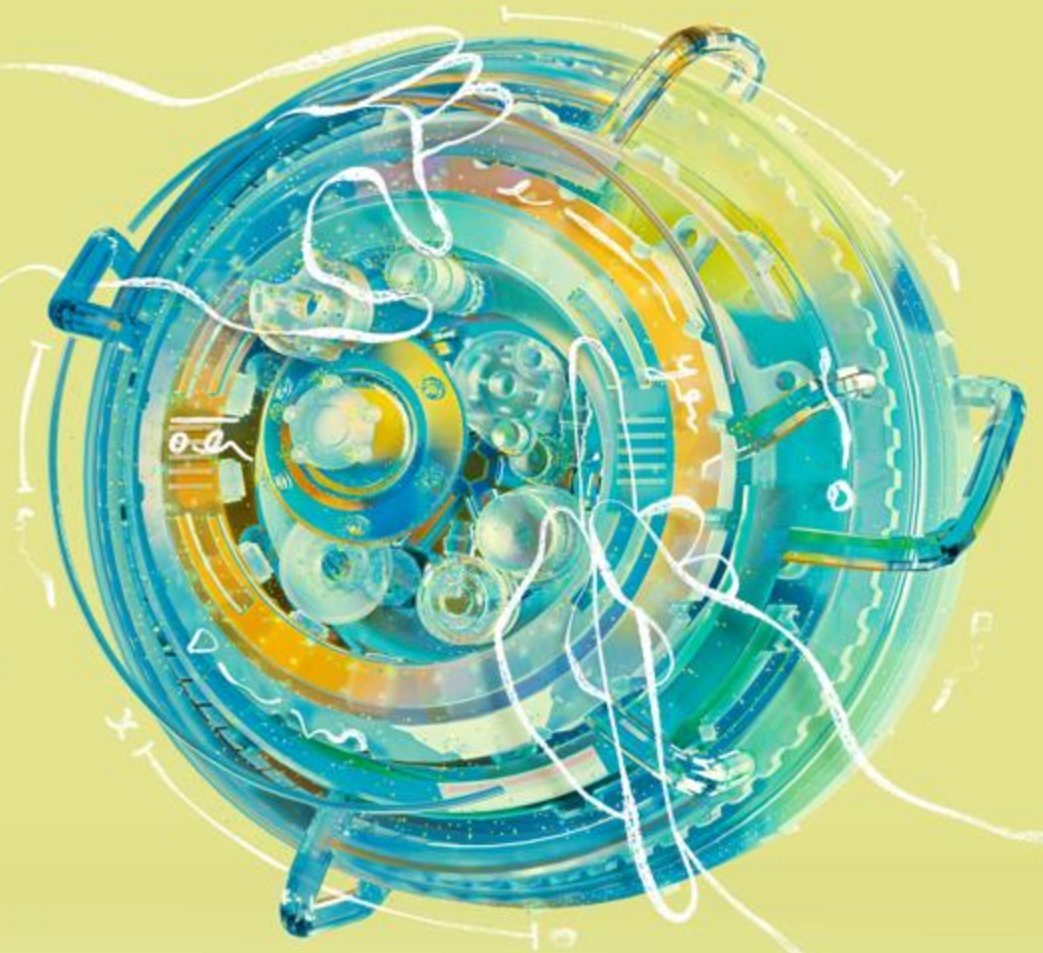


July, 2023


Deloitte Digital & Zuora Alliance

Deloitte Digital Zuora Practice Presentation

Deloitte. **zuora**
Digital



Agenda

- 
- 01 **Alliance at Glance**
Deloitte & Zuora Partnership
 - 02 **Our success stories**
References
 - 03 **Who we are**
Deloitte Digital presentation

Alliance at a glance

We are **zuora**
Global Strategic
Partner

Since 2016

We were the first large consulting firm to invest in building a Zuora practice, because we believed in the inevitable trend represented by the 'subscription economy' across all industries both in the B2B and B2C space



Our Strategic Partnership in EMEA

Deloitte has a unique positioning against the competition

Resources & Presence

- +70 Practitioners with both Functional & Technical Skills
- 28 Certifications
- 136 Badges
- 5 most active countries (IT & GR; NL, DE, FR, BE) + global collaborations

Eminence



Retail Survey
Published in
December 2022



Subscribe & Drive
POV on subscription trends in
the automotive sector
Published in April 2023

...and many other coming soon!



Projects & Industries

- +30 Projects (lives and ongoing)
- 7 Countries (IT, NL, DK, FR, DE, BE, UK)
- +5 Covered Industries

Core Capabilities

- Strategy & Design
- Configuration
- System Integration
- Accounting & Tax/Legal support

We have a strong Italian Practice focused on **zuora**



OUR LEADERSHIP



Zuora Alliance Chief

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Digital Customer Leader

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Deloitte Digital Talent Leader

Riccardo Plata (rplata@deloitte.it)



Zuora Recruiting Leader

Lucia Palomba (lpalomba@deloitte.it)



OUR HISTORY



2016

Deloitte Digital launched its 1st Zuora Project and the DD <> Zuora Partnership started



2019

Collaboration on Zuora Projects at European level, leveraging on the Italian practice



2021 - Today

Deloitte Italy is still the TOP rated Zuora Partner (according to the Zuora Partner Scorecard)



2018

Deloitte Digital opened a dedicated unit in Naples that became the 1st Centre of Excellence for Zuora



2020

Deloitte Digital opened the 2nd Centre of Excellence in Thessaloniki as proof of the growth of its practice

Our offices: DCM Smart Nearshore

DCM offers a new project approach leveraging on the best mix of competencies and expertise available in Italy and Greece

ITALY



+45 Experienced resources to ensure high quality of delivery

GREECE



+10 Resources with multi-cloud competencies

A **balanced mix** of great experience and strong competences to guarantee the high standards and high-quality delivery with a **competitive pricing model**

Deloitte Digital Key Success Factors

Deloitte Digital Italy can rely on a strong and recognized Zuora expertise of its people, thanks to the numerous projects & certifications completed

1 We are the **1st Zuora Partner** with Highest Rating According to Zuora Partner Scorecard

2 We are **successfully delivering** the most complex global Zuora Projects

3 We **Co-developed** Zuora Product with the vendor: we helped Zuora to **localize** the product in Italy and Europe

4 We developed **8 + Assets/tools** to extend and/or localize Zuora capabilities

5 We have a consistent **growth plan** for Zuora practice: our ambition is to reach 100 practitioners by the end of 2024

6 Our **expertise** can support client on the entire project lifecycle: from **design** to **Application Maintenance** and **Proactive Monitoring**

7 We can support our Customer with Strong competences and expertise **cross-industries**

8 We have direct access to Zuora bootcamp and University, with **dedicated certification path**



We are Top Rated Zuora Partner according to Zuora Partner Scorecard

Each quarter Zuora provide a quantitative evaluation of its Partners Across 4 main drivers:

- ❑ Sales Alignment
- ❑ Skills & Experience
- ❑ Project Quality
- ❑ Customer Satisfaction

These Metrics are here described

Sales Alignment

Number of **influenced deals** and **deal sourcing** are well above the other Partners



Skills & Experience

We have the **highest** number of **certified resources** compared with the Projects conducted



Project Quality

Highest number of **projects delivered on time** and **without** any implementation churn



Customer Satisfaction

According the interview performed by Zuora, our **customers** are **highly satisfied**





We have successfully delivered the most complex Zuora Projects...

Here some of our projects across 5 Major Industries:

- Automotive & Transportation
- Financial Services
- Energy & Resources
- Technology, Media & Telco
- Consumer Products

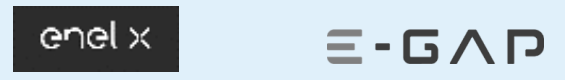
AUTOMOTIVE & TRANSPORTATION



FINANCIAL SERVICES



ENERGY & RESOURCES



TECHNOLOGY, MEDIA & TELECOM



CONSUMER





...implementing Solutions across 4 main Project Types

4 main Project Types delivered:

- ❑ Replatforming
- ❑ Start-Up / Digital Attacker
- ❑ Subscription Revamping
- ❑ Launch of New Business in Subscription

Replatforming

Replacement of the Billing Solution with Zuora and Business Process Optimization



Start-Up / Digital Attacker

Launch of a New Brand with innovative proposition & the solidity of a underlying well known corporate group



Subscription Revamping

Optimization of Company Subscription Business with a New Subscription Model and an Improved User Experience



New Business in Subscription

Design and Implementation of New Business in Subscription in addition to the other Company Business





We offer **end-to-end capability** do successfully deliver Zuora Projects

We offer a full suite of skills (creative, design, tech and strategy) to deliver successful projects with a fast Time to Market (from 6 to 12 months)

EXTENDED RANGE OF SERVICES



Our Success Stories



CRM & Billing replatforming

ISSUE

As part of its Digital Transformation and Software rationalization program, A2A Smart City was seeing support to evolve its CRM and billing tools, with the aim to achieve a 360° view of the Customers and improve the overall Customer Experience focusing on pre-sales, sales and post-sales processes.

SOLUTION

Deloitte analysis started from an accurate software selection to identify the to-be CRM and Billing systems, suggesting a solution based on SFDC and Zuora.

Zuora was identified as main system for active cycle Billing process. Through the implementation of SFDC (CRM) and Zuora (Billing) we supported the client to achieve Pre-Sales, Sales, Post-Sales and Billing processes enhancement.

The overall architecture with SFDC and Zuora integration also included legacy systems for the following processes:

- Provisioning
- Credit Management (SAP FI-CA)
- Accounting and Treasury Management (SAP FI)
- Monitoring & Reporting

IMPACT

5+ systems replaced, 2 new system implemented

1Y roadmap

4 Macro-processes involved for B2B/G Customers



fibra

An E2E pure fiber service provider launch

ISSUE

Virgin Fibra is a new company launched by Virgin in the Italian broadband market in August 2022. Deloitte supported the design and E2E implementation of this new digital attacker that aims to provide the Italian market with simplicity, transparency and a pure fiber connection.

SOLUTION

Deloitte was responsible for defining the CX, design and implementation of all sales and service processes, developing and configuring the various capabilities needed on the Salesforce (CRM & CPQ), Adobe Experience Management, Adobe Analytics, Zuora, Salesforce Marketing Cloud, Mulesoft & AWS platforms, while also ensuring overall project governance and change management activities. Virgin Fibra selected the Salesforce platform as the core component of the architecture in order to:

- implement an omnichannel, fully cloud-based contact center that would allow operators to have a 360-degree view of the customer
- centralize the management of subscription, order management and provisioning processes
- enable the monitoring of operations and customer support in a centralized way

IMPACT

- First go-live in less than 12 months after project startup
- Integrated customer support with back-office and Zuora billing system
- Reduced time to market for launch of new offerings and products
- Ease of integration with third-party platforms





enel x

Technology to increase productivity in new opportunities

ISSUE

Enel X, is the new Enel's Global Business Unit which is creating a global presence both in B2C and B2B/G markets, offering innovative energy services and technologies. In 2018 launched a Global Transformation Program regarding the new Customer Engagement Platform aimed to gain 'confluence' in terms of products and technology asset at global level. Deloitte Digital was engaged to develop a Strategy and Execution go-to-market plan for the digitization of the sales force to increase productivity for the all Enel X business line (eHome, eMobility, eIndustry and eCity)

SOLUTION

Deloitte supported Enel X on the VAS market through the X Customer platform providing specific processes and functionalities to manage the active cycle of extra-commodity services, through:

- Implementation, test and delivery: with focus on CRM and Billing platforms (SF and Zuora), the core of new XC ecosystem, design and implementation of a global platform serving multiple countries, customer segments (b2c/b/g) and product lines (eHome, eCity, eIndustry, etc) and adapting, where strictly needed, to local requirements
- Governance Set Up and Transformation Roadmap: define Program Organization structure, staff people and develop a plan and a decision escalation process. Define an overall implementation and transformation roadmap, main milestones, share guidelines considering interdependences and country specificities (e.g. Legacy system, Regulatory issue)
- Delivery Assurance: monitor and control progress to check the quality of the program outputs

IMPACT

DD was able to guarantee these benefits:

- Integrated Strategy planning and coordination considering interdependencies between the Stakeholders (Business, Commodity System, SI, Vendor)
- Communication and engagement to ensure that impacts are sustainable and achievable for all
- Rollout of the platform in multiple countries, allowing the increase of cross-selling opportunities



Connected Service Subscription Management

ISSUE

FCA (now Stellantis) and Maserati were undergoing a business transformation to build in-house subscription management capabilities as part of their Global Connected Vehicle Program. Deloitte Digital provided support for the overall solution at a global level, helping the clients to achieve Program's ambitions fast, adopting a smart and flexible approach.

SOLUTION

Deloitte Digital solution provided:

- Support marketing and finance teams to define the vision, design the solution and prioritize its delivery
- Support to ICT team to define the technical solutions and integrations between Zuora and Global Service Delivery platform for Connectivity
- A smart and flexible approach to Program Governance
- Business readiness activities plan and execution to ensure the adoption of the new subscription model maximizing internal people involvement, and support in launching the first release
- Application Maintenance Service and small system evolutions implementation after go-live

IMPACT

Based on deep expertise and knowledge developed in a number of subscription management projects, Deloitte Digital supported FCA and Maserati to achieve their project goals, by anticipating issues and reducing the impacts of risks through the identification of a MVP and the introduction of Hybrid Agile techniques.



Subscription Platform Enhancement

ISSUE

Mailup was seeking support to evolve its subscription management platform based on Zuora, to integrate it with the new ERP based on Netsuite, to decrease the effort required by recurring manual activities and to simplify internal users' adoption.

SOLUTION

Deloitte Digital helped the client in the following activities:

- As-is process analysis, functional requirement collection and technical solution definition
- Rationalization of Order to Cash processes
- Development, testing and bug fixing of automated Order-to-Cash processes
- Zuora<->Netsuite integration
- Training delivery to the impacted departments to maximise internal adoption

IMPACT

- 30+ workflows deployed on 4 different Zuora tenants
- Significant reduction of manual activities
- Integration with the new ERP up and running



Subscription Model for tyres: a new way to offer products and mobility services

ISSUE

Paving the way for the upcoming launch of the connected tyres, the IoT raise and flexible consumption trends, the client asked support to Deloitte Digital to launch a new business model for B2C customers. Besides the creation of a new B2B2C paradigm, the client envisioned a system to sell tyres set via subscription model. With the aim to transform and digitalize the customer experience, the core product was enhanced with a wide range of additional services (e.g. extended mobility services).

SOLUTION

Deloitte Digital support focused on:

- Consolidate Business Model & Vision of the initiative, design the Tyre-as-a-Service Target Operating Model from blueprint and customer journeys to the mapping of processes and capabilities and organizational impacts to enable the model and the target experience
- Solution design and implementation of a Subscription Management platform based on Zuora and integrated with Salesforce, through configuration-development-test agile cycles to target go-live of TaaS features split in MVPs both for Pilot and for roll-out phases
- Facilitate the launch of the Pilot providing the prioritization of processes and capabilities considering country needs, the go-to-market approach and the governance and streams to assure the roll-out plan

IMPACT

Deloitte has been a key partner to support the client in the definition of a new business model and to support its delivery and go-to market plan leveraging on premium automotive sector expertise and a deep knowledge developed in a several number of subscription management projects. By tapping into a new market with a new and disruptive offering, the client can step out of the market and gain a relevant competitive advantage.



Digital E2E engagement

ISSUE

Automobile engine exhaust contributes to the global warming. For this reasons, many countries around the world are prompting people to buy electric cars rather than cars with petrol motors and diesel. The more electric cars are increasing, the more recharge needs increase. Launching a new company to sell recharge services can reduce the range anxiety, recharge your own vehicle to the nearest possible location because sometimes it is difficult to find a free and useful recharge point for recharging your car, and make your recharge faster than before. In this way, customers will not waist their time to wait in front of the car until it is recharged and they may dedicate their time for something else.

SOLUTION

Deloitte Digital has been engaged by the Client to deliver an omni-channel service and customer experience across App mobile and web based on Salesforce (Service and FSL), Heroku and Zuora platforms. In this way, E-GAP has a CRM platform designed and developed to support E2E operations of customers, from pre-selling to selling and post-sales support for customers, as well as those of Drivers, from the beginning of recharge to the end with support for Driver with some difficulties to complete the recharge mission.

IMPACT

A unique solution used in more countries in the same way to provide customer with a innovative way to book recharges choosing preferred hours and locations and gather information to improve the business.



2.0 Car Sharing Platform

ISSUE

Enjoy, is an Italian car sharing service provided by Eni - one of the largest global Oil & Gas companies - that wants to improve the business model, the evolution strategy, the value proposition with multidimensional price options.

Deloitte Digital was hired by Octo Telematics (provider of the Enjoy service) to provide customers with an omnichannel service and experience on mobile devices, web and telephone channels based on Salesforce, Zuora and Analytics platforms (Tableau and Cloudera).

SOLUTION

- Program management, analysis and Low Level Design, service design, development, support during testing, training and change management
- Analysis and design of information data management and implementation
- Sprint cycles: release of autonomous functionalities through regular sprint cycles

IMPACT

- Redesign and enhance the purchasing processes more efficiently to reduce time-to-market, improve service offerings, reduce the order cycle and optimize value proposition
- Enable advanced marketing processes to promote new offers, support loyalty, better understand customer sentiment and behaviour, create and customize customer journeys 1-to-1
- Improvement of customer service and support to increase customer satisfaction and service quality, provide faster responses at a lower cost
- >k+ daily transactions managed by the platform



CPQ/Billing Replatforming

ISSUE

Mendix is a global leader in Enterprise Low-Code Application Platform acquired by Siemens in 2018. The company's quote-to-cash process was inefficient, unstandardized and mostly manual. As a result it could not support its SaaS model and aggressive growth targets anymore.

Zuora was chosen to automate and standardize the quote-to-cash process to support their subscription-based model and future initiatives (e.g. Entitlement Service, Marketplace, etc.)

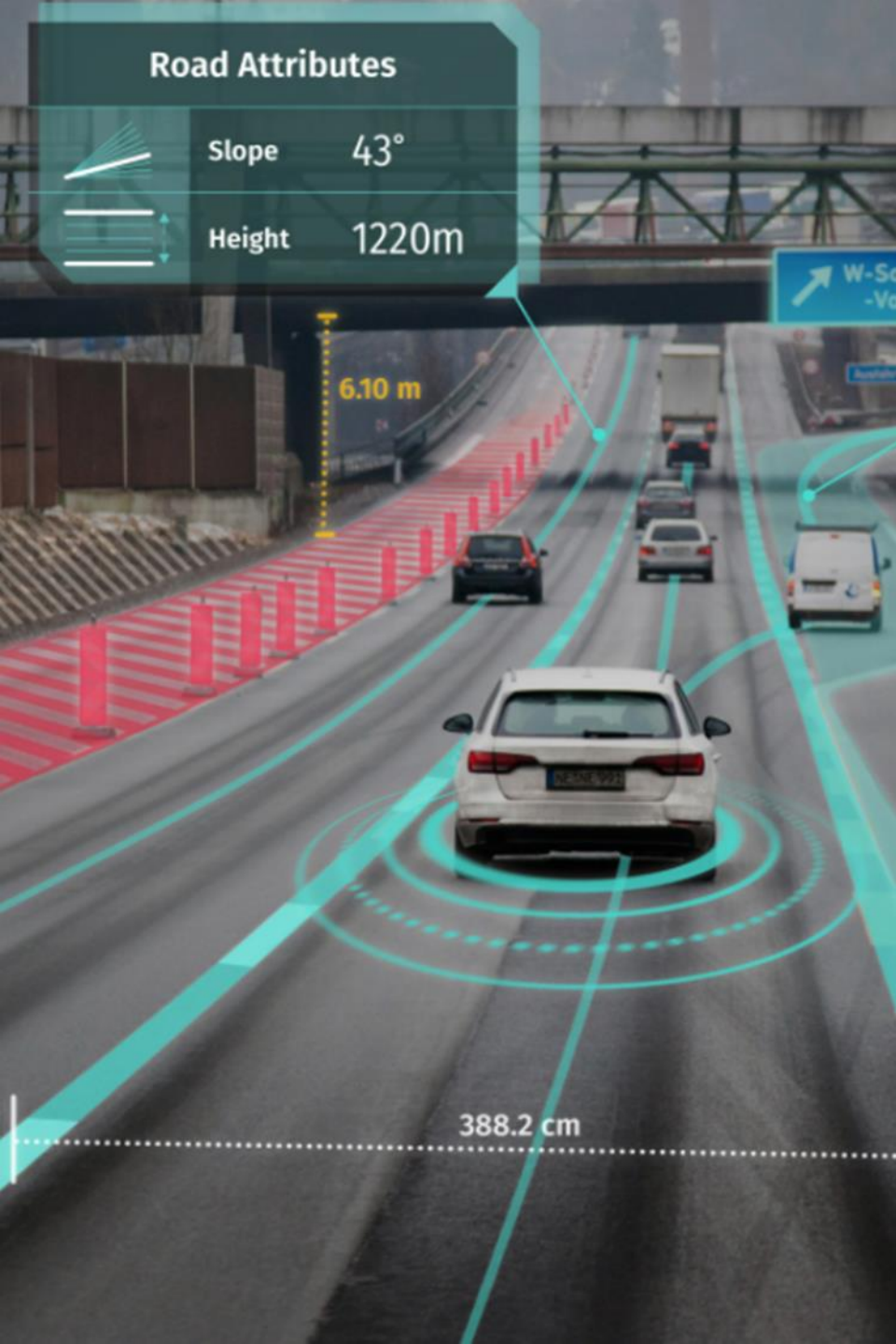
SOLUTION

Deloitte Digital together with Zuora helped the client in the following activities:

- design and implement the new Zuora and Salesforce billing and CPQ solution (Salesforce for Quote Process, Zuora Billing for Invoicing and Zuora RevPro for Revenue Recognition)
- support the integration of these solutions with related projects (e.g. Provisioning, Marketplace, etc.)
- support the rollout of the Zuora solution to additional countries
- train Mendix IT team to become independent for application maintenance

IMPACT

- Reduced Time To Market
- Increased Efficiency
- Reduced Administrative Workload



CPQ/Billing Replatforming

ISSUE

HERE is a global company serving thousands of customers at scale. Leader in mapping technology, their maps are used by over 150 million vehicles. HERE is targeting to shift from a content licensing positioning to become a modern tech company by unleashing sales opportunities through self-service partners and end-customer channels. Therefore, HERE is currently looking to optimize their E2E sales / subscription management process through the implementation of Zuora services.

SOLUTION

Deloitte Digital together with Zuora helped the client in optimizing Here Core Processes by implementing our Customer Lifecycle Management Program:

- One End-to-End Customer View
- Improve Sales Productivity & Lower the Cost of Sales
- Incentivize & Train the Right Behavior
- Improve Customer & Employee Satisfaction
- Standardized systems, tools & processes to drive scale & efficiency

IMPACT

- Capture critical subscriber lifecycle changes
- Growth over customer lifetime
- Leverage key metrics and analytics to increase net retention
- Streamline back-office operations



BIP Project: Digital Transformation Program

ISSUE

Skylogic Mediterraneo is a subsidiary of Eutelsat company, one of the largest satellite operators, operating 38 satellites worldwide for over 40 years. Client's ambition to grow in Broadband services is supported by the refocusing of the Go to Market Strategy to B2C users and the launch of two new satellites covering Europe, Africa and Middle East

SOLUTION

Deloitte support has been requested for setting up a new omnichannel platform based on Salesforce.com modules (Sales, Service, Marketing, Community and Heroku) and integrated with Zuora for enhancing customer knowledge, strengthening marketing capabilities and supporting sales activities in Europe and Africa and potentially Russia in a long-term vision.

IMPACT

The designed and implemented solution can leverage on a CPQ engine for order configuration. Management based on Zuora platform that will enable partners like Wholesalers and Resellers to sell Eutelsat products through branded communities to B2B2C customers. The new cloud infrastructure allows Marketing users to design, prepare, launch and monitor marketing campaigns and monitor Leads from multiple channels (web, social,...) using Pardot module. The Customer Services can leverage on an integrated solution with a 360 degrees customer view with reports to improve operators productivity retrieving real-time data from the OSS platform.



Subscription Revamping

ISSUE

A Leading Italian Coffee Company request Deloitte Digital support for the re-design of their current Subscription Strategy (Both B2B and B2C), with the aim of creating a more simple and user friendly Customer Experience while improving Subscription Profitability .

SOLUTION

Deloitte Supported the Client in the following activities:

- Design and Implementation of a New Subscription Strategy for the B2C segment, across 3 main Markets (IT, UK, US) using Zuora as a subscription management tool
- Design and Implementation of a Few Clicks, Netflix Oriented UX / UI for B2C
- Rollout of the B2C Subscription Strategy Across 6 Main Global Countries
- Design of a New B2B Subscription Model for Small and Medium Office Segment

IMPACT

- Expected growth in subscription profitability (2x in revenues in 2023)
- Expected reduction of subscription churn rate
- Expected growth of annual CLV



New Subscription Strategy

ISSUE

Deloitte was asked to support Clients in designing a New Subscription Model alongside the other Company Business

SOLUTION

Deloitte Supported the Client in the following activities:

- Design of a New Value Proposition
- Design of a New Subscription Strategy

IMPACT

- Expected growth in subscription profitability





Billing Functionality Implementation

ISSUE

Deloitte was asked to support Clients in implementing New Billing Feature

SOLUTION

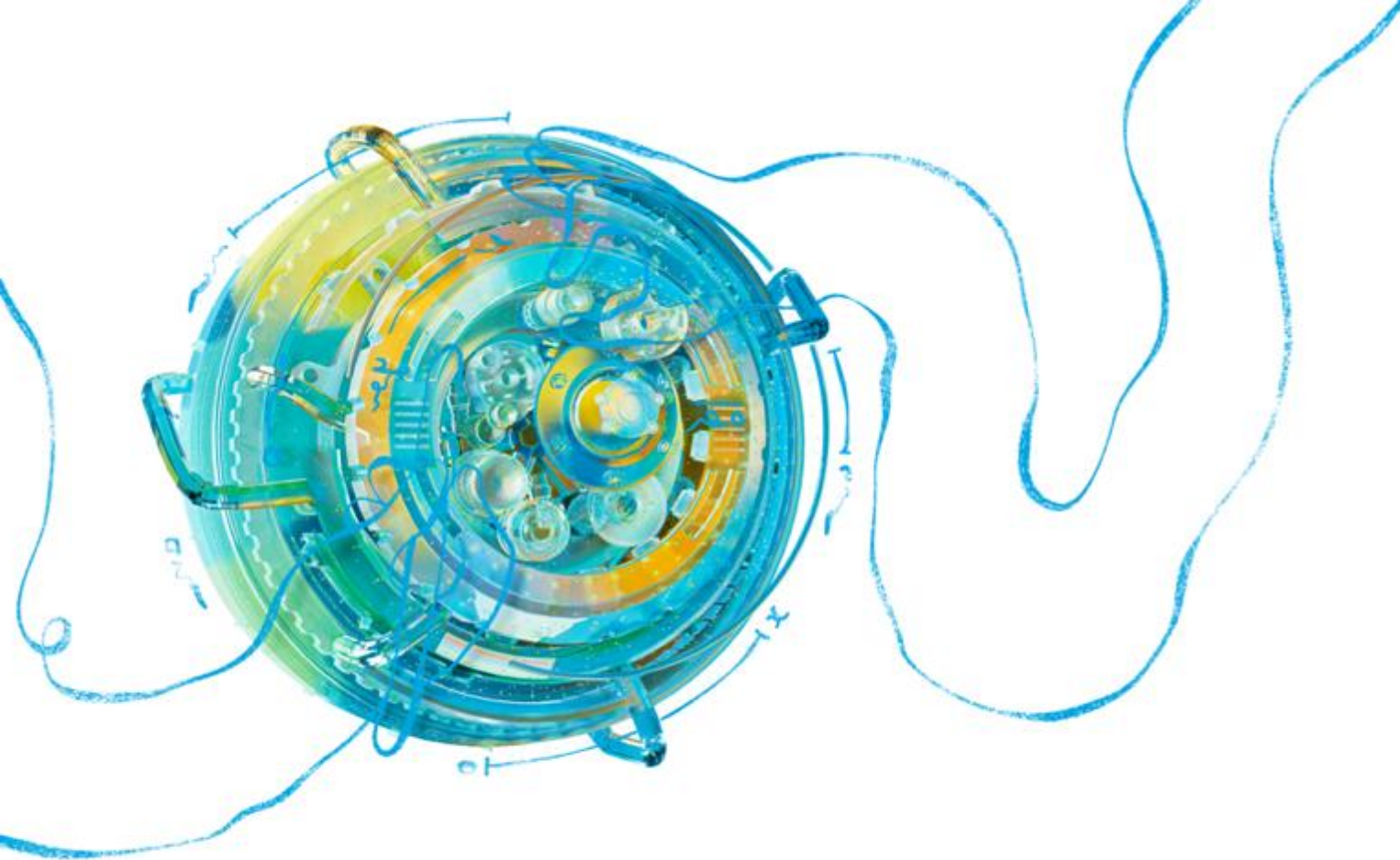
Deloitte Supported the Client in the following activities:

- Business Process Optimization
- Implementation of Billing Process on Zuora

IMPACT

- Optimized Billing Features

Who We Are



How, What, Why us?

Deloitte Digital creates **new growth** by **elevating the human experience**—with **connected ideas, technology and talent**, in a way **that only Deloitte can**. And we do this to shape a better future for every single one of us.

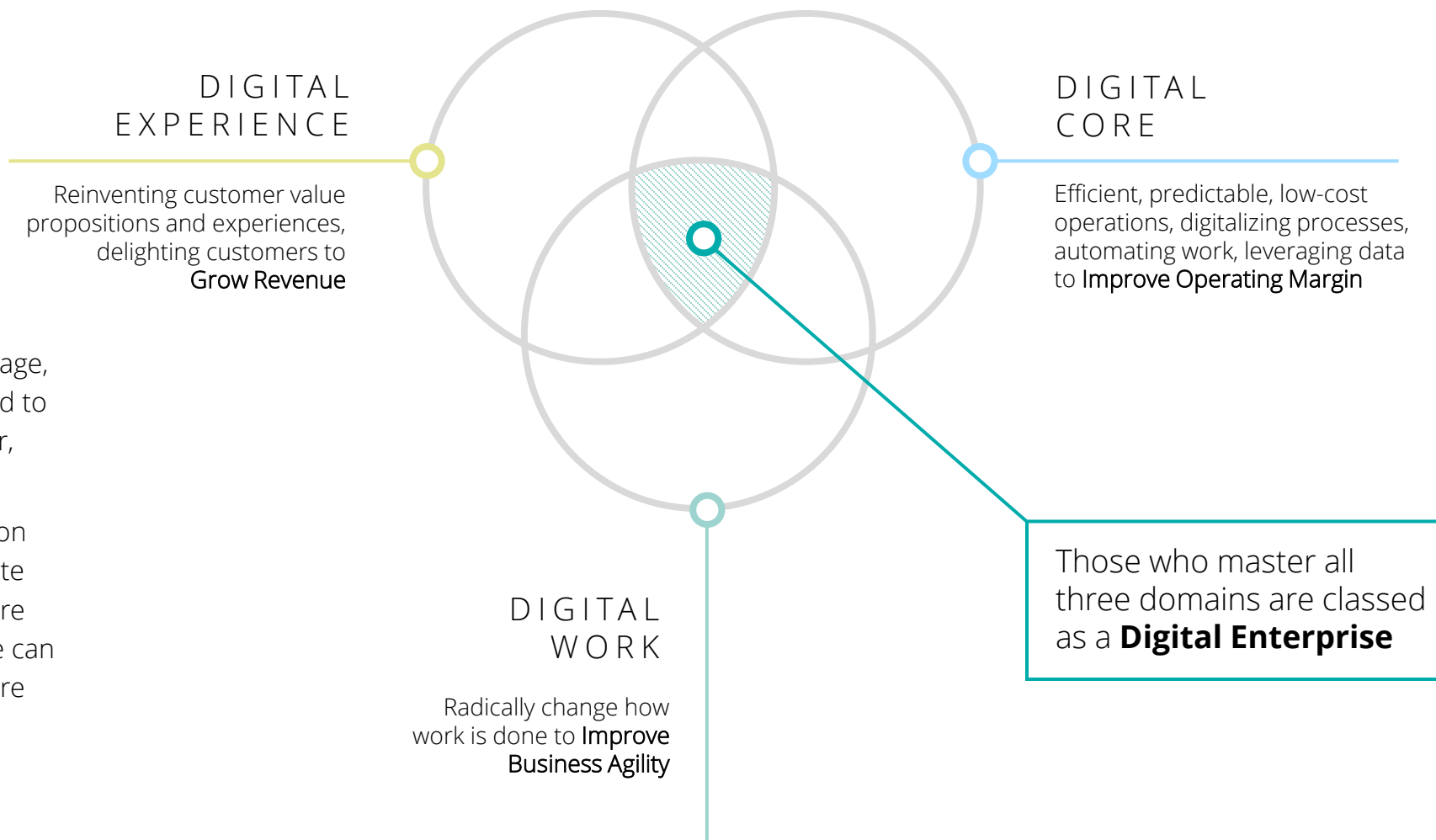
Deloitte.
Digital

Experience Consultancy

The power of Deloitte

To enable clients to thrive in the digital age, to become **digital enterprises**, they need to master three digital domains: Customer, Core and Work.

The role of Deloitte Digital is to champion the Customer domain and to orchestrate the rest of Deloitte to champion the Core and Work domains. Collectively Deloitte can then Imagine, Deliver and Run the Future for our clients.



Building sustainable and customer centric organizations



DIGITAL EXPERIENCE

- Customer Centricity
- Customer Acquisition
- Customer Analytics & AI
- Customer Journey Design
- Customer Experience Design
- Digital Care and Self Service
- Digitalized Products & Services
- Digital Business Ventures

DIGITAL WORK

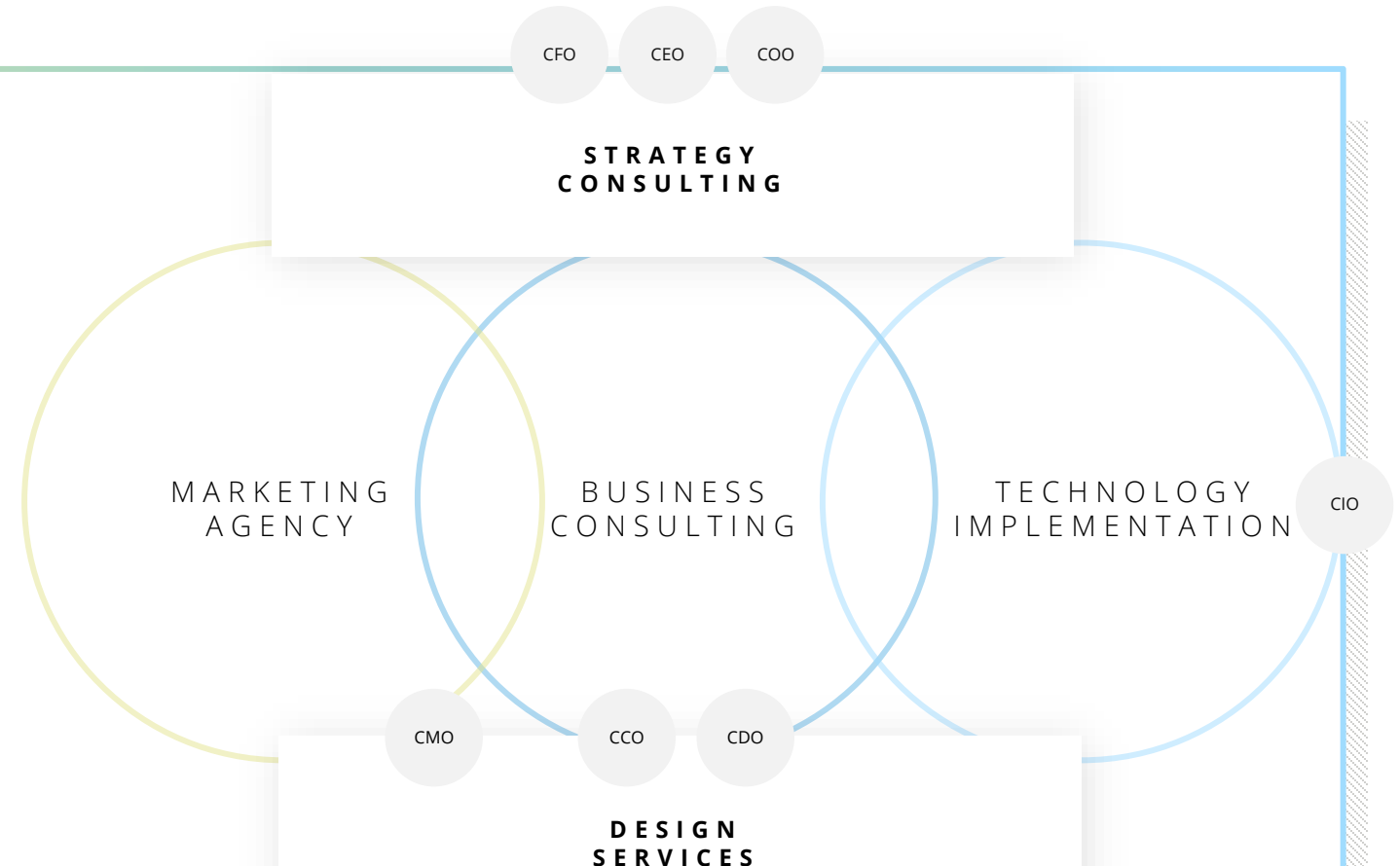
- Digital Competencies and Skills
- Digital Leadership
- Digital Workplace
- Multi-disciplinary teams
- Agile and DevOps
- Empowered People and Teams
- Digitalized Employee Journey
- Flexible Talent pool

DIGITAL CORE

- Digitalized Supply Chain
- Digitalized Distribution
- Automation of Core Processes
- Modularized Operating Model
- Data, Analytics and AI
- Cloud Adoption
- API Architecture
- Security, Privacy, Compliance


Deloitte Digital offers end-to-end capability

- Commerce key buyers have expanded to a broader set of the C-suite.
- Increasingly buyers want the full suite of skills (creative, design, tech and strategy) to build enhanced customer experiences and catalyse transformation.
- Some competitors are recognizing the changing landscape and are broadening their offerings to adapt.



Our global growth continues...

DIGITAL REVENUE

 ~20B

 30%

Asset-driven revenue

 107K

Digital experience
service professionals

REPRESENTING ...


 5%

YoY growth

 62+

Co-innovation
studios and labs

CREATIVE, AGENCY SERVICES

 200%+

3-Year growth rate



Where we are

~17,000 PRACTITIONERS IN
50+ STUDIOS ACROSS **60** COUNTRIES

● Studio ● HUB ● Delivery Center

- Camp Hill
- Chicago
- Denver
- Calgary
- Greensboro
- Los Angeles
- Mexico City
- New York City
- Orlando
- Queretaro
- Red Bank
- San Francisco
- Santiago
- Seattle
- Sao Paolo
- Toronto
- Washington DC

9,400
Americas

4,400
EMEA

3,200
APAC

- Amsterdam
- Belfast
- Berlin
- Brussels
- Bucharest
- Cape Town
- Copenhagen
- Dublin
- Dusseldorf
- Edinburgh
- Frankfurt
- Geneva
- Gothenburg
- Helsinki
- Istanbul
- Johannesburg
- Lisbon
- Łódź
- London
- Luxembourg
- Madrid
- Malta
- Milan
- Munich
- Moscow
- Oporto
- Oslo
- Paris
- Prague
- Qormi
- Reykjavik
- Riyadh
- Stockholm
- Tel Aviv
- Vienna
- Warsaw
- Zurich

- Adelaide
- Auckland
- Beijing
- Bengaluru
- Brisbane
- Canberra
- Chongqing
- Delhi
- Guangzhou
- HCM City
- Hong Kong
- Hyderabad
- Jakarta
- Kuala Lumpur
- Manila
- Melbourne
- Mumbai
- Perth
- Shanghai
- Shenzhen
- Singapore
- Sydney
- Tokyo
- Wellington



Thanks.

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