



Shape your future

Connected. Powered. Trusted.

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Shape your future

We are facing a period of huge change and uncertainty. The coronavirus pandemic will have long-lasting impacts across all industries.

Organizations know they need to re-invent themselves to thrive in the new reality but what to do first – and how to do it – is not so clear.

We have been looking to the future and working with clients to determine how their industry sector, business functions, global markets and digital capabilities are going to change. We have also developed practical and viable ways to lead things forward. The result is a systematic accumulation of insights, tools and solutions that provide detailed routes to agility, resilience and profitable growth.

It turns out that, for all the uncertainty and ambiguity, there may be an optimum shape for your organization to deliver sustainable growth and success. We even know broadly what it looks like.

We can provide thought-leading insights into the future, and we can show you what works for other people, and what doesn't. Together we can draw up an actionable roadmap to execute a progressive and risk-enhanced transformation journey based on your priorities and opportunities.

We know the future will be very different, which is why we need to start shaping it today.

We start by helping you ask the right questions...

- 01** Is our business prepared to respond effectively and adapt to unforeseen disruptions?
- 02** Is our business prepared to meet evolving customer expectations?
- 03** Are we leveraging the latest advances in technology to aid remote collaboration, segment crucial suppliers, and leverage predictive data?
- 04** Is every part of our business wired for digital success?
- 05** How do our skills map to the workforce of the future?
- 06** Have we built stakeholder trust across our business?
- 07** How do we position ourselves to gain competitive advantage and succeed in the new reality?
- 08** How do we unlock valuable insights from our data?
- 09** Can automation solve our regulatory challenges?



Mobilize your business to own your future

If you were building a future-ready business from first principles, you would build stronger connections between customers and experiences, talent and technology, data and decision-making, inputs and outcomes.

If you could step beyond legacy and convention to explore the art of the possible, you would exploit the power of technology, unique insights and artificial intelligence to enhance effectiveness, efficiency and agility – ultimately driving high performance.

If you wanted to thrive and grow in a world that is volatile, uncertain, complex and ambiguous, you would build active risk optimization into everything you do, inspiring consumer trust while building a solid platform for continuous, confident and commercial innovation.

If you could do this as it ought to be done, ideas of connection, empowerment and trust must surely guide your journey to potentially yield twice the impact for your business.²



Rebuild your business around your customers to create a borderless organization, where people and technology interact for new levels of productivity and value creation.

Create a nimble, scalable business. Harness the latest technologies, leading business practices and tested solutions for a smarter, faster path to the right operating model.

Proactively manage risk and regulation, from compliance and operationalization to the transformation cycle, building confidence and inspiring stakeholder trust.

² Eight capabilities of a connected enterprise, Forrester and KPMG, 2016, 2018

Connected.

Connect the dots, double the impact

Today's customers are better informed and more demanding than ever before. Markets are unstable with continuing disruption and upstart challenges to the accepted order. Sustainable growth in a digital world depends on a new order of customer-centricity. Processes are aligned across all functions. And technology, talent and external partners work together to meet customers, effectively and profitably, on their own terms.

The future is about breaking down silos and getting connected. KPMG defines eight clear capabilities of a connected enterprise. Independent validation¹ confirms that organizations who invest purposefully in these areas are twice as likely to meet customer expectations, achieve their business objectives and deliver return on their digital investment.

Each of the eight capabilities is, intuitively, a good thing to achieve in its own right, but put them together and you supercharge the impact of transformation. KPMG Connected Enterprise provides cutting-edge sector insights, maturity diagnostics, sector blueprints and target operating models to support an accelerated transformation journey. Driving progress against every one of the eight capabilities, we can guide you on where and how to begin your journey and provide all the support you need to get there.

In this new reality, every element is focused on delivering the intentional customer experience, nothing is wasted and new sources of value are dragged to the surface. Deep insights support the decision-making that shapes disruptive innovation. Advances in technology align customer

and employee experiences, combining automation with human judgement, machine learning and empathy. And every investment is calibrated to deliver the right customer experience, profitably.

The bottom line of connected thinking is shared interest: everybody benefits from a virtuous circle of value creation – from customers and colleagues, to the wider ecosystem of stakeholders, partners and communities. KPMG Connected Enterprise harnesses the power of digital technology, accelerates value and builds trust to help achieve what matters most to you.

Connect
your business.
For 2X the
impact.

¹ 1,299 professionals involved with customer-centric strategy decisions

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, September 2018

Powered.

Power your business, accelerate value

So you want to make your organization agile, efficient and future-ready. How do you accelerate and sidestep the creaking, patched legacy and transform your business functions? This is a big question for business leaders. While 96% of companies are focused on transformation, 83% of executives are not confident their businesses can build and manage a new operating model.³

The answer is to use the power of cloud computing to break down barriers, increase agility and deliver step changes in performance and efficiency. This is not about recreating legacy systems on someone else's servers. Cloud is a foundational technology that supports other breakthrough capabilities, from predictive analytics to artificial intelligence and machine learning. The path to a digital operating model is attainable.

We can offer a faster start to your functional transformation by helping you envision the future of your business and implement the art of the possible: a formidable combination of leading practices and processes, tested solutions, a next-generation delivery framework and active, practical support for future upgrades and continuing evolution. Preconfigured blueprints, service delivery models, master data management and tools which have been proven in businesses like yours can be precisely tuned and customized to your strategy, culture and business context.

KPMG Powered Enterprise is available for the full range of functions and technology platforms, enabling integration across front, middle and back offices. Using and sharing data in new ways, fostering collaboration and supporting seamless commerce: this is the plumbing and wiring for a truly customer-centric, connected enterprise. It enables your workforce transformation: a confident, accelerated journey to a new operating model and value, harnessing the best technology and business thinking available, but shaped entirely by your own objectives and priorities.

³ Agile or irrelevant: Global CEO Outlook, KPMG, 2019

Trusted.

Win the trust, grow with confidence

The smartest businesses don't just manage risk, they use it to differentiate themselves from the competition. Active, insight-driven risk optimization is a value generator for the future-focused organization. A broader, deeper understanding of what might happen reduces the chances that it will. So an enterprise that is trusted is not only a safe pair of hands, but also the most confident and disruptive innovator on the block.

As the coronavirus pandemic proved, threats to business growth can come thick and fast – often without warning. Regulatory and policy landscapes change continuously. Operational risks, from third-party exposure and reputational damage to unilateral shifts in regulations, are still there in the mix. All need to be accounted for, at every stage of your transformation journey.

But if the challenges are growing, so are the opportunities to predict them, mitigate them and profit from them. For example, the issue of cyber security continues to be a top-five priority for most CEOs, especially in light of the immediate and massive pivot to support remote work that most companies had to make in response to COVID-19. And some consumers are actively limiting their adoption of technologies as a result of security concerns.⁴ Suddenly, earning and deserving people's trust becomes a business imperative: the customer-centric enterprise must provide experiences that are secure as well as seamless. And those organizations that do bring transparency, data protection and privacy rigor to the handling of data are rewarded with increased trust – and the brand loyalty and increased market share that go with it.

Almost any form of risk can be reframed as a source of competitive advantage, from enterprise risk management to compliance and regulatory reporting processes. We develop agile technology and risk-reducing frameworks that enable you to implement new business models and digital applications, safely and at scale. This goes beyond narrow issues of protection and security, using big data and predictive analytics to resolve the tension between risk and opportunity: threats are contained and governance is assured, without compromising the ability to innovate and outperform.

KPMG's enterprise-wide risk solutions deliver on the customer promise to inspire stakeholder trust.

⁴ Agile or irrelevant: Global CEO Outlook, KPMG, 2019

KPMG works with
84% Fortune 500
companies
across the world

Annual revenues
in excess of
\$29b

We have over
200,000
people in over
147 countries and territories across the world.



We are a major investor in talent through good times and hard, and we also channel around
\$1b into **innovative services, new technologies and focused acquisitions** every year.

We partner with local schools and communities to help eradicate illiteracy, distributing **over four million new books** to low-income children across more than **100 communities across the globe.**

But none of this really explains what makes us different.

So why should you be working with KPMG?

Five reasons to work with KPMG

We deliver the results that matter

KPMG is agile and versatile, working with you from strategy and design to implementation, improvement and governance. Everything we know and everything we can do is there to meet your challenges, optimize your business and help you solve your problems. This is why, if we do the work, we deliver the value.

We know how your business works

Our deep sector knowledge embraces both current trends and future challenges. We give you insight into what's coming over the hill, from threats, regulatory changes and disruptions to opportunities and innovations. It's good to work with people who know the issues and pressures you face. We also have the knowledge and experience to help you deal with them.

We know how to get things done

If you embrace a new business model, there will be implications across your organization. When you change the way you run key functions, you need to think about the impact on people, as well as processes, tax and technology. It's about joining the dots and covering the bases. Because our consultants know how business works, we also know how to put the right skills in the room to help manage the risks and enhance the value of everything we do.

We get the best out of technology

Virtually every business issue is now a digital issue, but technology must be the servant of your strategy – a means to an end. Your business strategy shapes the solution that makes the right things happen. There is no point in migrating to the cloud if you replicate all the failings of your legacy systems on somebody else's servers. Perhaps the most important aspect of our digital capability is that we can help your people get the best out of technology.

We are on your side, all the way

There are all kinds of objective reasons why clients choose KPMG, from global reach and business insight to practical innovation. But the decisive reason to work with us is the quality and commitment of the people we can put on your team. Our job satisfaction and professional fulfillment come from creating value, inspiring trust and building performance for our clients. And all our people share the same overarching goal: to make a difference today while making the world a better place for future generations.

We deliver the results that matter

We know how your business works

We know how to get things done

We get the best out of technology

We are on your side, all the way

Legacy products
to legacy-building
platforms



Big changes in consumer behavior challenge a century-old baking business to explore a digital future. Together we settle down to rebuild processes, skills and partnerships around benefits to their customers – artisan bakers with their own businesses to run. A cost-takeout exercise helps pay the way for the launch of a new digital business platform that offers on-demand services and support for the hard-working bakers of America. Leveraging **KPMG Connected Enterprise** framework, together we helped a legend of the bakery world have its recipe for success in the digital era.

Could you rebuild your business around your customers?

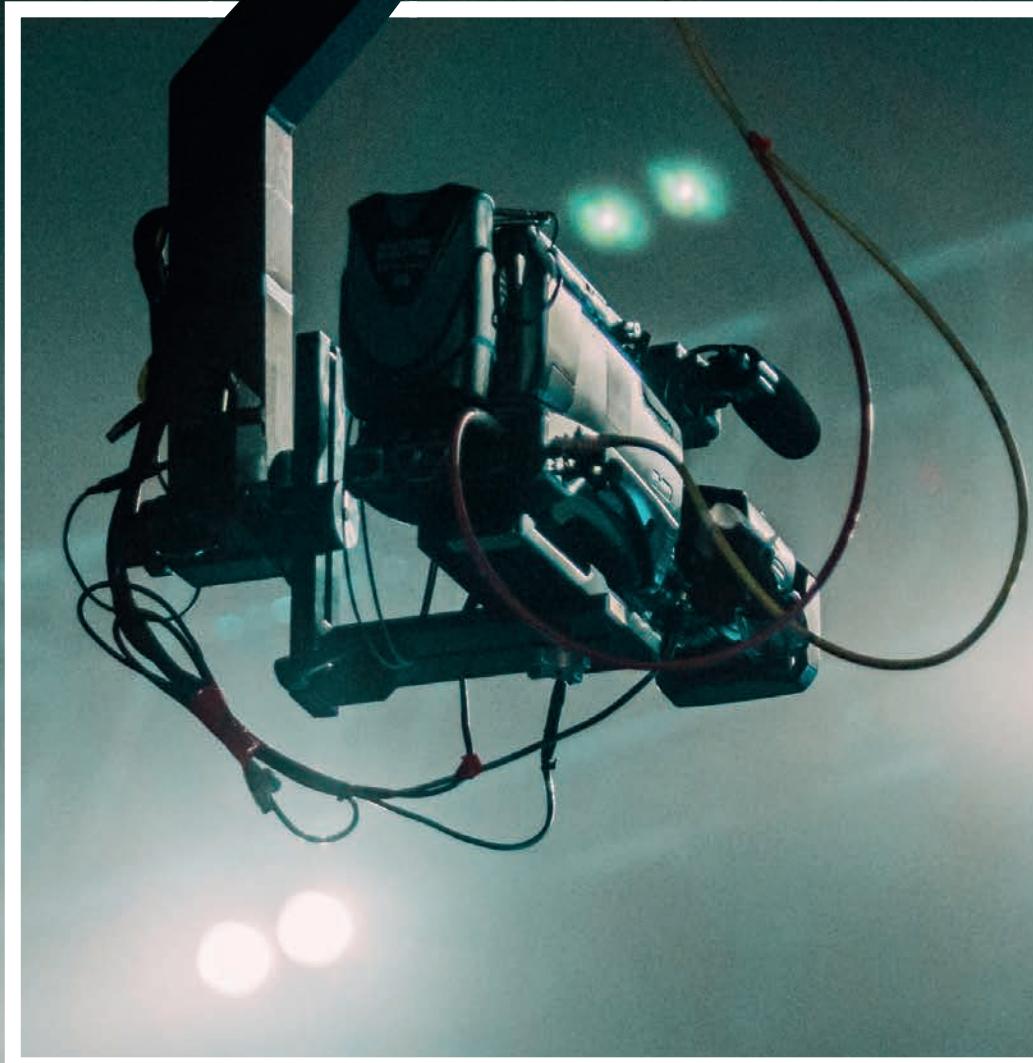
We deliver the results that matter

We know how your business works

We know how to get things done

We get the best out of technology

We are on your side, all the way



Breaking news to breaking down barriers

We work with a leading news broadcaster to bring the finance, HR and supply chain functions up to industry-leading standards with the speed and insight of **KPMG Powered Enterprise**. Then we provide the agile, business-led managed services to keep them there. Powered Evolution means minimum disruption and maximum performance. Ongoing business advancements occur as they happen. And the flexibility to ramp services up and down at will, as the business pursues an ambitious acquisition strategy. It's a rolling good-news story for today and tomorrow.

**How will you keep
your business
functions ahead
of the progress
curve?**

We deliver the results that matter

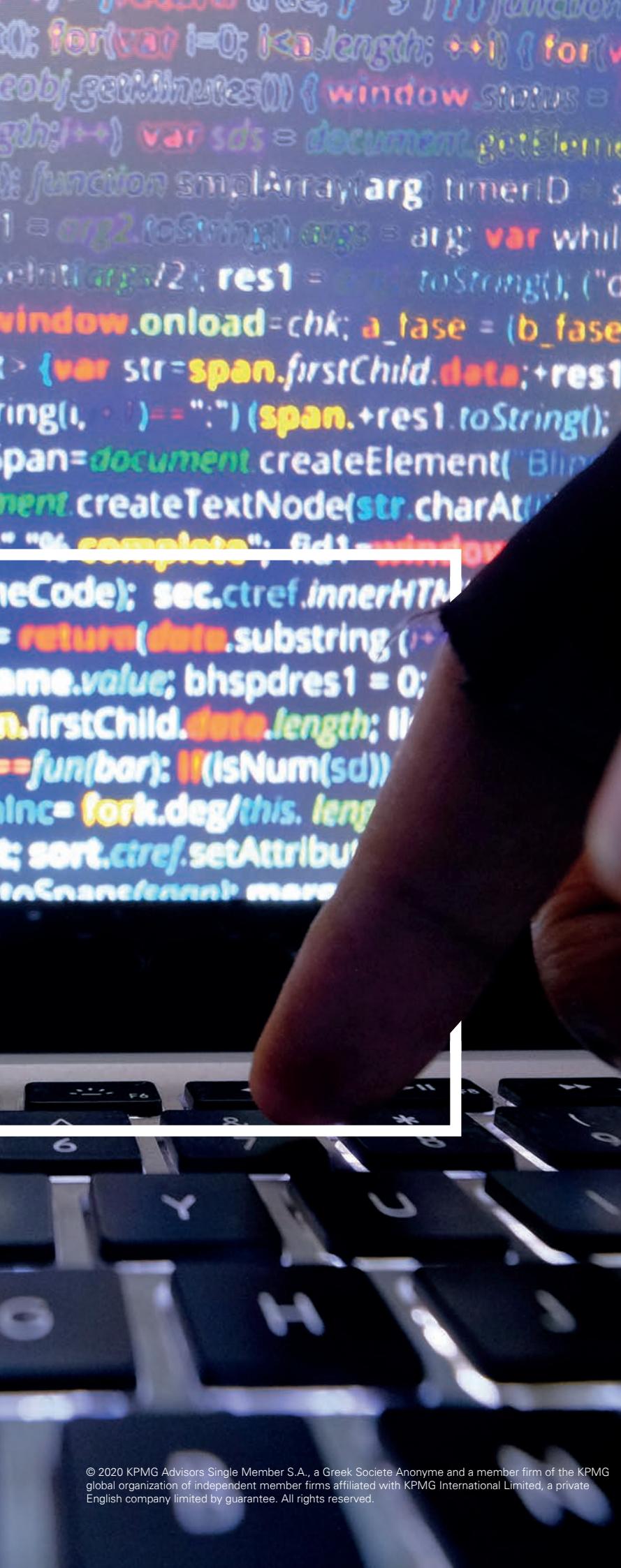
We know how your business works

We know how to get things done

We get the best out of technology

We are on your side, all the way

Cyber attacks to cyber resilience



A spike in cyber attacks at a top financial institution threatens consumer confidence and market share. We build a new kind of **fraud risk platform** that integrates open-source libraries and big-data platforms with client-specific machine learning tools. Analyzing a billion data records a week, forensic and predictive capabilities improve with every play, recognizing attack patterns, frustrating the criminals and building the trust that drives customer loyalty. And that cyber resilience also provides the foundation for trusted innovation and growth.

Does the integrity of your data inspire consumer confidence?

We deliver the results that matter

We know how your business works

We know how to get things done

We get the best out of technology

We are on your side, all the way

Customer service to customer satisfaction



A leading wireless carrier senses a mismatch between contact-center investment and customer satisfaction ratings. Deep-dive analysis shows a fragmented organization and inconsistent processes. But **connected thinking**, supported by deep analytics and advanced machine learning, could change the game for employees, as well as the customers they serve. We design the roadmap and make the journey, from vision to mobilization and value realization. Now personalized, intentional experiences are creating value for customers and company alike.

Could robots help your people function at a higher level?

We deliver the results that matter

We know how your business works

We know how to get things done

We get the best out of technology

We are on your side, all the way

Acquisition strategy to acquisition savings





We work with a global industrial transportation business on a fundamental operational performance improvement program. The aim is to improve profitability after a long period of acquisition and diversification. KPMG helped drive a **data-driven transformation** that streamlined areas of the business, from procurement to pricing, to technology management and tax. Then a deeper, analytical dig into the data releases hidden pockets of value. An all-out assault on inefficiency delivered nearly 20% improvement in earnings before interest, tax, depreciation and amortization (EBITDA) in year one. And the business is ready to grow again.

Are you making the most of the data flowing through your business?

Do we have something in your size?

We can help you change your entire business model, disrupt your sector and leap ahead of the competition. But if you simply want to focus on solving a particular business issue, we can help with that too. The opportunities are everywhere: we can work with you to own the technology agenda, manage the risk, deliver the results and drive the value.

Connected thinking applies a concerted, integrated approach to enterprise-wide digital transformation. The consulting capability that makes this possible has to draw on a very wide spectrum of skills, services and solutions. It's that depth and breadth which enable us to assemble purpose-led, multidisciplinary teams for virtually any set of client circumstances. But every one of those consulting capabilities is available as a standalone service for any challenge you might need to address.

With a wide-ranging strategic model like this, you might notice there are certain parallels with the eight capabilities of the Connected Enterprise. This is a very big, global shop. That doesn't mean you have to buy everything we've got – but it does mean we probably have what you need.

Our functional, technical and professional experience is complemented by deep sector knowledge in all the major industries. This is why we can always field people who know your challenges and identify with your priorities. It's not just about consulting, either. Our colleagues in other disciplines, from tax and risk to mergers and acquisitions, can help provide the 360° business view that picks up the unexpected consequences and collateral implications of business change.

Of course, all of the above assumes you know what needs to be done – and you might not. If you simply want to start with a chat about how things are going, that's OK too.

What do you need to get done?

Harness the power of digital transformation

Engage with your customers on their terms

Navigate the shifts and complexities of regulatory change

Bring people and technology together to outperform in your market

Secure stakeholder trust

Accelerate value at deal speed with mergers and acquisitions

... KPMG advisory can help with that.



The background of the advertisement is an underwater photograph. A person wearing a mask, fins, and a snorkel is swimming towards the left. Sunlight filters down from the surface in bright rays, illuminating the sandy ocean floor and some rocks. The water is a deep blue.

Deeper insight
delivers
customized
solutions



The speed of change calls for different and deeper forms of collaboration that go beyond the conventional consultant/client relationship.

We constantly explore new ways of working together, new permutations of talent, new perspectives on trending topics, so we can push past accepted wisdom and deliver genuinely ground-breaking answers to the big questions. We understand how to design a single roadmap for broad business improvement that incorporates how to get the best out of technology for your clients, your workforce and your business.

KPMG Ignition

A global network of more than 25 innovative spaces, KPMG Ignition Centers facilitate new ways of working with one another and our clients. Our centers help us compete for the new types of talent required by 21st century enterprises and serve as a space to collaborate and demonstrate our most innovative solutions.

KPMG Lighthouse

Our global center of excellence for data-driven technologies provides concentrated expertise, from data & analytics to intelligent automation and artificial intelligence. A network of 12,500 experts, including 1,700 specialist data scientists and engineers, support around 7,000 client engagements every year, accelerating the insight-led innovation that fuels so many successful transformation journeys.

KPMG Ignite

Our wide-ranging portfolio of artificial intelligence capabilities includes domain experience, integrated open source tools and KPMG-developed IP, frameworks and patterns. Consuming and processing diverse data components from a range of sources, the platform applies AI-based automation patterns to create intelligent workflows to solve business problems more efficiently. Current applications include cognitive contract management, customer interaction analytics, and virtual assistants and chat-bots.

KPMG Signals Repository

The universe of data is growing at an exponential rate, and AI, cognitive and predictive systems are hungry for data. KPMG Signals Repository is the listening and scoring platform that continuously harvests tens of thousands of signals of traditional and non-traditional data from public and private sources to give clients an edge in their decision-making.

You light up our world

"We have what is known in the trade as a 'deep bench.' As well as fielding exactly the right mix of skills, we can pick a team that offers a good fit with your own culture and world view. Whatever you do with KPMG, you will be working with people who understand your business and identify with your issues."



In the real world, business problems don't readily fall into convenient boxes like 'Technology' or 'Talent.' So what if we become part of your story? How does our capability line up with your needs?

Imagine for a moment that your challenges are represented by the lights in a building. Our broad capabilities will light up a different combination of windows, scaling to meet your needs. In fact, one of the key strengths of KPMG's consulting teams is the ability to put the right skills together quickly to match your specific circumstances.

Our consulting teams are organized across the world to meet client priorities. The capability is global and multi-faceted, but the delivery is agile, local and specific: the size and scope of our network gives us the power and reach to engage with the biggest issues

facing the global business community, but the true value is felt at a human level. We have what is known in the trade as a 'deep bench.' As well as fielding exactly the right mix of skills, we can pick a team that offers a good fit with your own culture and world view. Whatever you do with KPMG, you will be working with people who understand your business and identify with your issues.

Our focus on results breeds a down-to-earth consulting approach based on shoulder-to-shoulder collaboration. We can identify your priorities and see tangible value in the relationships that we build together. Trust irons out the bumps in the road. Trust helps us deal with difficult, submerged issues, quickly and effectively, before they become a barrier to progress. Trust means you know we are with you for the long game, delivering what we promise – by outcome as well as input.



"KPMG joins the leaders on the strength of its Connected Enterprise framework, which leverages organization strategy to drive end-to-end business transformation that aligns the front, middle and back offices around a customer-first mantra.

The firm also stands out for a service offering specific to change leadership that draws on contemporary developments in behavioral science and systems thinking."

ALM Report, 2018

"KPMG's innovative Powered Solution model allows the firm to prepackage IP with solutions through ecosystem partners to bring rapid results to clients"

ALM– Cybersecurity Consulting 2019

This is how the future works

Whatever you are doing today, there is increasing pressure to do it better tomorrow.

But if the future is full of challenges and uncertainties, that's where all of the opportunities are, too.

The destinations are many. And the dynamics around trends, disruptors and technologies are never ending.

Technology makes all kinds of things possible, but **possible** does not always equal profitable.

Transformation is a mindset. Agility is a currency. Resilience is an asset. Trust is your edge.

We help you prioritize for impact – mobilizing your workforce from point-solutions to business model changes.

Together we can take you beyond the hype, weave together a roadmap and accelerate results.



Let's work together to shape
your vision of the future – and
then make it happen.

Connected. Powered. Trusted.

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