



“Imagine we can meet face-to-face. Things are back to normal. Except they’re not. Because what people expect—as customers, employees, and humans—has changed.”

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COVID-19 and Customer Experience: Understanding the Impacts, and Actions to Take in Response.



A message from our founder and president

Friends and colleagues:

Imagine we can meet face-to-face. Things are back to normal. Except they're not. Because what people expect as customers, employees, and humans has changed.

I'm sure that like me, most of you are still processing what this means—to our families, your day-to-day life, your job, and your business. Small consolation: none of us is alone in this.

Yes, I'm worried for my family, for my employees and their families, for our clients and our friends. And I know you are, too.

At the same time, we must also plan for the future to the degree we can. For all of us, this means figuring out how to “un-pause” our family lives in ways that are measured and safe.

For many of us, this also means figuring out what this re-start means to our businesses, our employees, and our customers. That's where this guide comes into play.

Because every McorpCX client is working to figure this out as well, with many asking us to look at this situation through the lens of customer experience.

Given the common questions we're hearing, we wanted to share some of our analysis and perspectives with you, too. Some of the topics we've been asked to explore—many of which we summarize in this guide—include:

- When and how is this likely to end?
- What is (or will be) the impact on our customers and on our business?
- Is there anything we can or should do now?
- What does this mean for customer experience?

While there is no specifically agreed path to tomorrow and “normalcy” (whatever that looks like) there is a growing consensus among the experts that there will be a tomorrow.

But as business leaders, we also need to recognize that the time to act is now.

Warm regards,

Michael Hinshaw

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“History and societies do not crawl. They make jumps. They go from fracture to fracture, with a few vibrations in between.”

– Nassim Nicholas Taleb in *The Black Swan* (2007)

A Black Swan event—everything has changed. Hasn't it?

Black swans—highly improbable and unpredictable events with severe consequences—aren't a good thing, and they certainly aren't supposed to happen often. The Financial Crisis crippled the economy scarcely more than a decade ago in what was then touted as a once-in-a-lifetime economic collapse.

Now, with a global pandemic requiring billions to adapt to a reality of self-isolation and the (hopefully temporary) evisceration of many business models, our economy teeters at the edge of a precipice once more.

This said, there is both scientific and political consensus that “this too shall pass.” Unsurprisingly, though, there is far less consensus on when that might be or what that means.

Customers' experience expectations are being revolutionized and probably won't return to what they were yesterday any time soon, if ever.

Customers have gotten used to home delivery, assisted shopping, and curbside pickup. Businesses are discovering that virtual working works. And all of us are embracing digital modes of interaction even more than we were already.

So, it's not realistic to expect that your employees and customers will automatically “just return” when the future arrives. You are going to have to fight for them.

Given this, we want to help you understand possible outcomes for this crisis and share with you what we believe are the best responses both immediately and in the future as downstream effects increasingly manifest themselves.

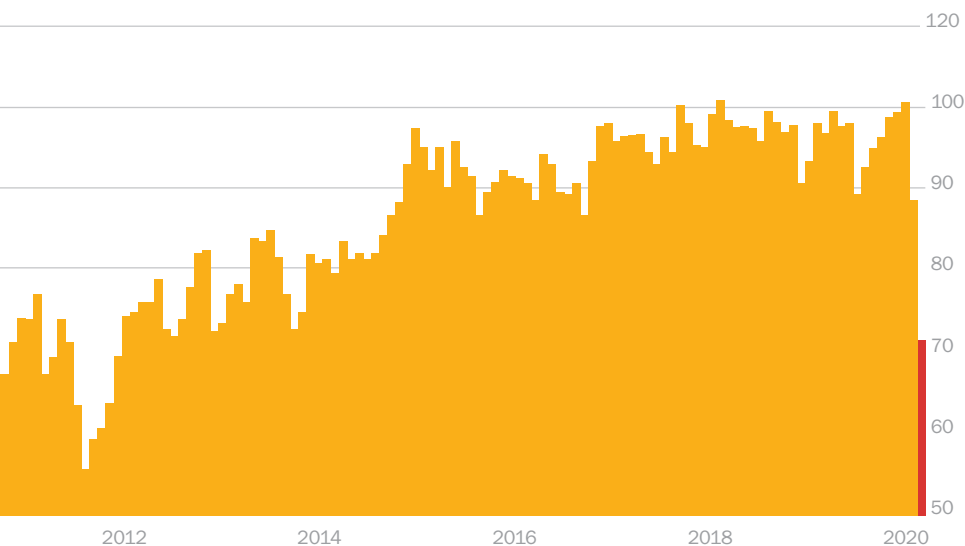
To that end, we've kept a close eye on how customers' needs, habits, and mindsets have changed as this situation develops and on experts' opinions regarding what to expect moving forward.



“If you dislike change, you’re going to dislike irrelevance even more.”

– General Eric Shinseki

3 ways your customers have changed



Source: tradingeconomics.com, University of Michigan

Consumer confidence has dropped from some of the highest ratings over the past 10 years; now it’s approaching the lowest.

Customers are anxious and worried.

As uncertainty persists and the economic outlook becomes even more foreboding, people are postponing purchases, turning to less expensive options, and choosing what they need rather than what they want.

1

As of May 1st 2020, over 30 million Americans have filed new jobless claims ¹, and >35% of the global workforce (~1.5 billion) work in sectors that face a severe decline in output and are thus at risk of unemployment or furlough. ²

In China, which is beginning to emerge from their period of isolation, a recent survey found that 41% of nearly 1,000 participants said they would reduce spending to prepare for future crises. ³

Whether directly affected or not, people have reason to be anxious and worried. And when people feel that way, they can be quick to anger—especially when feel they aren’t treated right.

Digital adoption is accelerating.

The adoption of digital technology was already on the rise before the COVID-19 crisis. The crisis has supercharged this trend in

a way that will change the world of customer experience as we know it.

2

At the beginning of this year, the video-conferencing service Zoom had 10M customers per month, which were mostly

business meetings. Now it has a mix of more than 200M business and social customers per month, most of whom used it for business meetings. ² As for e-commerce indicators, the share of Chinese consumers shopping online over the age of 45 increased by 27% from Jan-Feb 2020. ⁴

We can only guess what transformations this crisis will deliver as further adoption of digital experiences becomes an integral part of society and life in general.



Expectations have changed.

This crisis has caused a cultural shift that cuts across traditional geo- and demographic lines.

3

And while some groups of consumers have been hit (in some cases a lot) harder than others, customer expectations for service and experience have radically changed across the board. Confidence and trust have

eroded. Emotions are running high and close to the surface.

And health concerns are top of mind for everyone, with online searches for health and wellness products skyrocketing along with interest in home medical devices like pulse oximeters and oxygen concentrators. ⁵ In China, how “healthy” a car’s configuration is (antibacterial materials, air filters, etc.) is now the most widely shared purchase consideration. ⁶

“Insanity is behaving the same way tomorrow as yesterday and expecting the same results.”

– McorpCX, with (significant) credit to Albert Einstein

3 ways business has changed

Workplace has a new definition.

While the concept of working from home has gained some traction in recent years with more and more companies popping

1

up to serve and enable the remote workforce, it’s overshadowed in global culture by the concept of working in an office.

Despite years of evidence that virtual working can deliver 20% or more in productivity due

to reduced travel time and expense, this crisis has forced companies to rapidly adapt their workforce strategy to account for the reality of sheltering in place, creating unprecedented momentum.

The fact that this momentum was forced makes no difference—this may have been the push needed for WFH (work from home) to become a common fixture in the global workplace, delivering benefits in cost savings, ability to work in the midst of future crises, and competition for top talent.

Industry is transforming.

With in-person purchases and face-to-face meetings off the table, supply chains disrupted, and no definitive end in sight for

2

isolation measures, business is reeling.

At the end of March, The National Restaurant Association suggested that of number US restaurants already closed permanently rose to 11% or 72,683 restaurants in April. ⁷ Similarly,

an early April study of American non sole-proprietorship firms with under 500 employees found that 54% had either closed or expected to close soon. ⁸

Yet at the same time, Amazon, Instacart and other businesses that give consumers what they want, how they want it are rapidly expanding. Instacart for example hired 300,000 workers in a month and plans to hire an additional 250,000. ⁹



The Coronavirus pandemic is radically accelerating business transformation and consumer adoption of digital technology.

Your customers want things done differently.

Amazon Prime's 2-day delivery model has transformed customer expectations of not just retail but virtually all

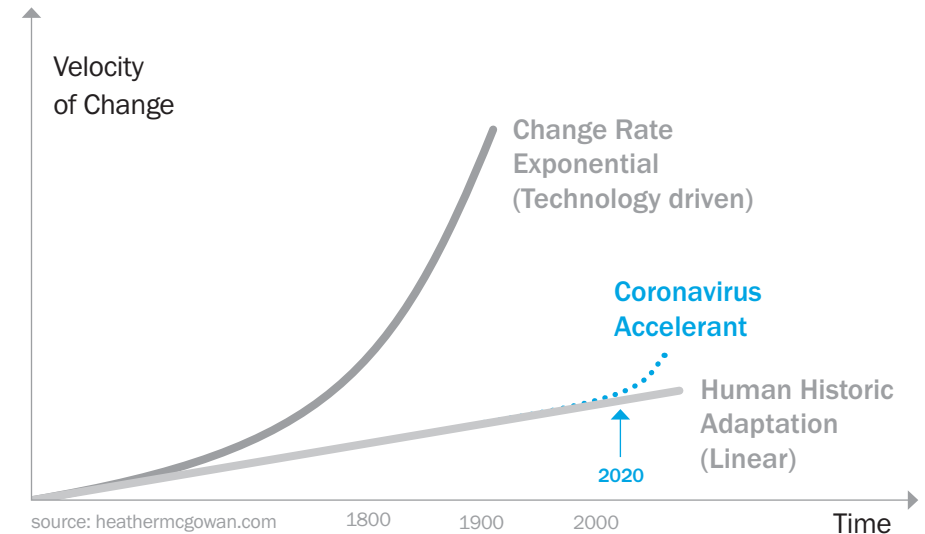


industries over the past 20 years.

And this crisis is further fueling these shifts: customers of all ages and demographics are embracing available technologies, facilitating digitally-driven experiences

ranging from home delivery of groceries, drugs, and cars to video conferencing.

Interestingly, the financial crisis coincided with the launch of the iPhone in 2008 and accelerated adoption of digital capabilities such as social media, and interaction mediums like chat.



We can only guess what transformations the COVID-19 crisis will deliver as further adoption of digital experiences becomes an integral part of society and life in general.

But one thing is clear: no matter what happens, customers are going to continue to expect what they want—when, where, and how they want it. And to thrive, companies must deliver.

What your business can do now to prepare

Customer experience is all about understanding and responding to customer expectations in ways that drive business results.

But in today’s—and likely tomorrow’s—world, your customers’ needs and expectations are likely evolving in rapid and surprising ways.

As a result, business needs to respond rapidly as well, and in many cases do so with greater risk and access to fewer resources. For the near future at least, businesses have smaller margins for failure (and more opportunities to fail), and more focus on ROI as a required outcome of any customer experience investments.

There are no easy paths through a scenario such as this—we get it. But the reality is that regardless of your business or sector, you need to do something.

You must act for your customers and employees of course, as well as for other audiences such as partners if for no other reason that you are doing something—and that you have a plan for tomorrow.

How is COVID-19 affecting your business?

Understand what kind of business or sector you’re in and how this is affecting you—and use this knowledge to plan and act accordingly.

- 1. Your sector is decimated: Hunker down and survive.**
Think airlines, hotels and brick-and-mortar retail including Delta, Hilton, and Nordstrom.
- 2. Your sector is surviving: Use your best efforts to maintain progress.** Think retailers like Home Depot and Walmart.
- 3. Your industry is thriving: Capture market share. Or, don’t let a crisis go to waste.** Think digital and home delivery services like Amazon, Netflix, and Instacart.

In each of these scenarios, it’s important to plan for a path forward through an uncertain future. The challenge is that it can’t be addressed with a single plan.

You’ll need multiple scenarios to continuously review and prioritize, detail, and activate as the future becomes clearer.

Be proactive and anticipate the future.

Today: Be Proactive.

Communicate: Actively provide relevant information (safety, support, delivery, etc.) to your customers.

Empower Teams: Arm your teams with information they need to proactively communicate with and respond to customer concerns.

Assess Your Customer Experience: Review your end-to-end experience to find, prioritize, and close any gaps that you find.

Listen to Your Customers: Assess and tune your listening capabilities to deeply understand changing customer needs.

Understand Changing Journeys: Identify changes in attitudes and importance across journeys and touchpoints, and prepare for potential shifts you'll need to make.

Tomorrow: Anticipate the Future.

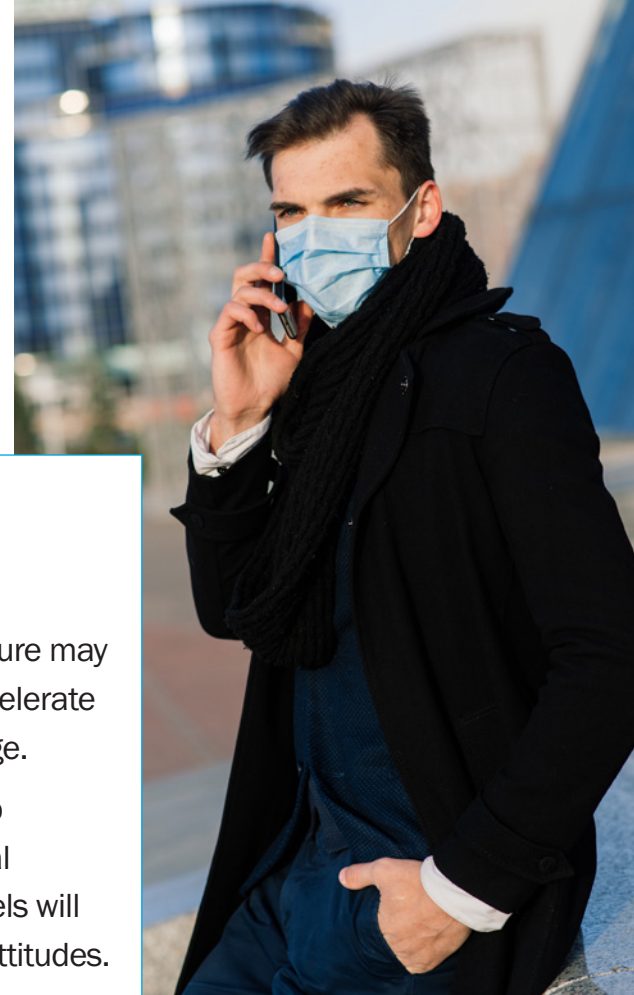
Prepare to Act: Recognize that your future may look a lot different than the past, so accelerate your ability to assess and react to change.

Plan for Shifts: As “must-haves” end up replacing “need-to-haves,” organizational priorities, resources, and business models will shift, as will customers’ behaviors and attitudes.

Prepare for Transitions: Plan for inevitable employee and customer transitions as normal life resumes.

Accelerate Digital Transformation: Most companies have started this, but it’s more important than ever today and in a post-COVID world.

Identify New Opportunities: In times of great change, great opportunities abound. Find and act on them.



Recognize that this likely won't be short-term; we should consider that opening the economy is more of a "dial" than a "switch."

Hope for the best, plan for the worst: 3 scenarios for a return to normal

It's clear that this isn't going away overnight.

And while the exact *when* is unknown, the *what* isn't: the treatment of symptoms to reduce fatalities, wide-spread vaccinations, and population-level or "herd" immunity (when enough of the population has resistance to halt the spread from person to person).

The question is as simple to ask as it is complicated to answer: "How long must self-isolation and distancing measures remain in place until we can resume some semblance of normal life?"

The three scenarios we've outlined for a 'return to normal' in upcoming months and years share common success factors. In fact, the biggest disparity isn't in what we need to do, it's in how long it will take us to do it, and how we must maintain it.

On the pages that follow, we've compiled our analysis of research and expert perspectives across the spectrum of sociology, epidemiology, healthcare, economy, and business.

Here's what we learned:

- **Scenario One: Normalcy in 2020** (Least likely outcome)
- **Scenario Two: Mid-to-late 2021** (An optimistic possibility)
- **Scenario Three: 2 to 3 years out** (Most likely scenario)

6 Things Must Happen to Return to (New) Normal:

Different scenarios aside, experts agree that some combination of these 6 things must happen to move past COVID-19 and towards a "new normal."

1. Learn something about the virus that makes us more confident about resuming various activities.
2. As activities resume, continue and elevate measures to protect those who are most vulnerable to the virus, and continue prevention of large gatherings.
3. Develop treatments to mitigate the impact of infection, thereby reducing infection-to-mortality ratios.
4. Obtain more and better-targeted testing to give us a fuller picture of the spread of the virus and prevalence of COVID-19 antibodies.
5. Develop and widely administer a COVID-19 vaccine.
6. Reach population-level (herd) immunity across key populations and geographies either through infection or vaccination.

While some political and business executives express hope, virtually no healthcare experts express confidence in this scenario.

Scenario One: Normalcy in 2020 *(Possible, but likely only temporary)*



What this might look like:

Experts agree that opening doors for business in the United States will need to happen on a “rolling” basis with stay at home and social distancing protocols starting to relax, followed by a return to normalcy in half-measures, first with physical distancing at work and in public that allows for lower risk individuals to resume life as usual.

This will be followed by increasing levels of normalcy with the hardest hit areas being the last to return. This said, constant vigilance on re-occurrence will be required with the strong probability that a repeated surge will bring rapid escalation of mitigation measures again.

Likelihood of this occurring:

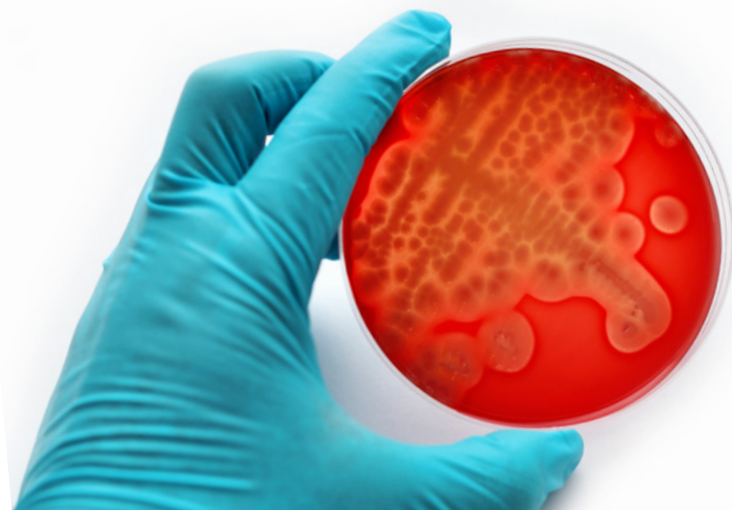
Zeke Emanuel, a bioethicist who presented a plan with the Center for American Progress to end the coronavirus crisis earlier this month, is “not wildly optimistic” about the possibility of restarting the economy this summer:

“We still don’t have a consistent shelter-in-place policy nationally... we need infrastructure for testing in real time... [and] we need real contact tracing that you can do...very rapidly.” As for large gatherings, “realistically, we’re talking Fall 2021 at the earliest.” ¹¹

What needs to happen for this scenario to become reality:

For this shortest timeline to be possible, there are a series of things which would need to occur sometime between now and mid-year (Q2) of 2020. We will need to...

1. Find an effective treatment for the worst symptoms of the coronavirus NOW and begin ASAP.
2. Learn some things about the virus that make us more confident about being able to resume activities.
3. Implement more and better-targeted testing to track immunity and paint a detailed picture of spread.
4. Ensure the safety and comfort of people to move about and congregate in ‘socially distant’ ways once isolation measures begin to lift.



Positive signs:

Dr. Anthony Fauci, the US government’s top infectious disease expert, recently indicated that expanded testing for coronavirus antibodies would be available soon. ¹²

With immunity data, the US Government could theoretically issue immunity certificates which would allow holders to resume their lives.

“We may actually have substantial immunity already, through mild infections,” according to William Hanage, an epidemiology professor at Harvard. To that point, we’ve already learned that a significant portion—somewhere between 25 and 50%—of infected carriers are asymptomatic. ¹³

Cautionary notes:

Whether testing is expanded, immunity certificates are issued, or a treatment for the coronavirus is found today, expect significant lead time as testing and treatment are administered and as the economy opens back up in stages.

Though this is the shortest potential timeline for returning to life as usual, and thus the best for the economy, even a month of the current conditions has crippled vast sectors of the economy.

“We know now that we can get hit by a catastrophic outbreak... It can happen again, so we need to be prepared to respond in a much more vigorous way.”

– Dr. Anthony Fauci

Scenario Two: Mid-to-late 2021 *(An optimistic possibility)*

What this might look like:

This scenario could go in one of two ways:

1. In the first, the new coronavirus behaves like the flu, slowing its spread through the summer and picking back up in a “fall wave” as temperatures and humidity fall.
2. In the second, the new coronavirus isn’t affected by the summer season and continues to spread.

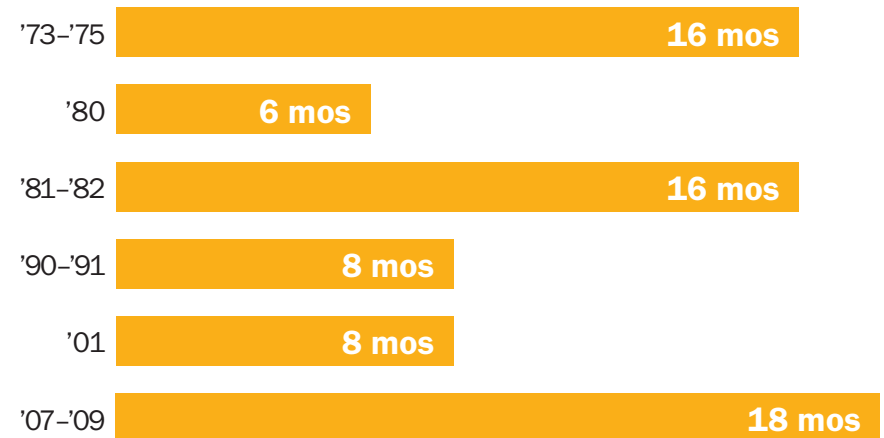
In each scenario, current social distancing measures carry through into the second half of the year, reducing the severity of the current wave.

Likelihood of this occurring:

In an open letter to the White House, the National Academy of Sciences reported: “given current data, we believe that the pandemic likely will not diminish because of the summer, and we should be careful not to base policies and strategies around the hope that it will.”

In any case, this scenario is far more likely to play out than a shorter one considering that we have mostly heard things about the new coronavirus that make us less confident about resuming various activities, and that a pandemic with a two-week incubation time is unlikely to pack its bag and head home after a few months.

Peak to trough duration of U.S. recessions (1970–present)



Source: First Round Review (firstround.com/review):
The Founders Field Guide for Navigating This Crisis

It’s becoming clearer that we are moving towards—if not already in—a recession. So getting to a place where we feel relatively safe reopening the economy will be a critical benchmark.

The urgency to resume normal life needs to be tempered by an awareness that “prematurely ending social distancing would [have]...major human consequences.” ¹⁰

What needs to happen for this scenario to become reality:

For either subset of this timeline to occur, there are a series of things which would also need to occur sometime between now and mid-year (Q2) of 2020. We will need to...

1. Know if the number of new coronavirus dips significantly by mid-June; if it does, we'll know it's seasonally sensitive. ¹⁵
2. Maintain social distancing measures in order to slow transmission, regardless of seasonal sensitivity.
3. Implement more and better-targeted testing to track immunity and paint a detailed picture of spread.
4. Ensure the safety and comfort of people to move about and congregate in 'socially distant' ways once and if isolation measures begin to lift.

Positive signs:

Seasonal sensitivity would complement existing containment efforts and drive infections down as summer arrives, which would provide a much-needed chance for care providers to regroup and prepare for a potential “fall wave” of infections.

It could also provide a reason to look forward to summer: if infections and transmissions fall to a negligible rate, we may see some easing of social distancing restrictions and potentially reopening of restaurants and bars.

If the new coronavirus ends up being seasonally sensitive, a wave of fall infections like that of the Spanish Flu in 1918 is likely, though not guaranteed. ¹⁶

Cautionary notes:

While the flu is typically seasonal, that's not necessarily the case when there's a new strain of flu going around for which individuals don't have immunity. ¹² Additionally, if a human coughs or sneezes enough of the virus “close enough to the next susceptible person, then temperature and humidity just won't matter that much.” ¹⁵

Sacrificing the economy in the short term to save lives makes perfect sense, but if we're going to spend a year or more in lockdown, the downstream effects of a standstill this long would further devastate the economy.



Scenario Three: 2 to 3 years out *(Most likely scenario)*

What this might look like:

No matter what transpires in the coming months, researchers will be scrambling to develop a vaccine for the new coronavirus.

The soonest anyone can expect to see a vaccine, if at all, will be Spring 2021. “Anything faster than that would be world-record, lightning speed.” If the vaccine is a “rough draft” that needs to be “polished,” you can tack another six months or year onto that timeline. ¹⁷

Likelihood of this occurring:

This scenario factors in the least amount of unknowns, and unfortunately, it’s the most likely. While a vaccine may take a year or more to develop, it’s just as likely that no one develops an effective vaccine.

Ambitious timelines might lead one to believe that vaccines currently under development will be here sooner than later—if at all—but vaccines take a notoriously long time to test: during the 2002-2003 SARS crisis, the vaccine wasn’t ready for 20 months. ¹⁸



Phases of clinical development for a vaccine:

Phase I:

This evaluates the vaccine’s safety and ability to generate an immune system response in a small group of people.

Phase II:

This tests many people, potentially hundreds, to determine the right dosage levels.

Phase III:

This tests thousands of people to analyze the safety and effectiveness of the drug.

“These steps take time, so that’s going to be the rate-limiting step in determining whether there’s going to be a vaccine available in time for this epidemic.”

– Dr. Pete Hotez, TCH Center for Vaccine Development

What needs to happen for this scenario to become reality:

For this timeline to occur, there’s not much that we need to do beyond what we’re already doing. If nobody did anything at all, this would most likely be the timeline as well. There is no specific benchmark for this scenario to occur, but best efforts need to be made nonetheless. We need to...

1. Continue striving to develop an effective vaccine.
2. Implement more and better-targeted testing to track immunity and paint a detailed picture of spread.
3. Ensure the safety and comfort of people to move about and congregate in ‘socially distant’ ways once and if isolation measures begin to lift.



Positive signs:

If a vaccine isn’t developed, it’s not the end of the world (health-wise). Population-level immunity might be well on its way by mid-2021 and could potentially have reached an effective level by that point. In that case, degrees of freedom from social distancing would likely be won in the meantime. ¹⁹

Cautionary notes:

Even if an effective vaccine is developed, life won’t return to normal immediately: it will be time-consuming and logistically complicated to coordinate distribution of ~350 million vaccines.

If the shortest timeline for returning to normalcy is the best option for the economy, then the longest is the worst. It’s reasonable to expect that millions more will lose their jobs before life-as-usual resumes.

It’s doubtful that government assistance programs will support that many people for 12 or more months, and with so many restaurants and retail stores shuttered, there’s a distinct possibility that there simply won’t be enough jobs.

“Instead of comparing our lot with that of those who are more fortunate than we are, we should compare it with the lot of the great majority of our fellow men. It then appears that we are among the privileged.”

– Helen Keller, *We Bereaved*, 1929

Actions to take to prepare for these scenarios

Scenario One: Normalcy in 2020

(Possible, but Likely Temporary)

- Focus on customer listening and understanding (and maybe some targeted research to clarify your understanding).
- Make sure you know who your most important customers (and employees) are—which ones you will fight for the hardest.
- Clarify what is new about customer expectations and prioritize a few things.
- Establish a continuous improvement posture and capability to measure and act responsively as this “new normal” evolves.
- Focus on quick fixes and hits that you can activate and collect benefits from.

Scenario Two: Mid-to-late 2021

(Optimistic Possibility)

No leader can be blamed for not forecasting this wave and the shutdown that has occurred. This said, every business can and should be blamed for not being prepared for another limited wave this winter. So adopt the same actions as for Scenario 1, and...

- Assess strategies that would allow you to thrive in a shutdown in Fall/Winter 2020/2021.
- Accelerate digital first (recognizing this is NOT just a crisis response action).
- Boost multichannel listening and analytics insight to drive action.

Scenario Three: 2 to 3 years out

(Most Likely)

This may require a reimagining of your business, preparing for potentially radical shifts in customer expectations of experience. So, adopt the same actions as for Scenario 1 and Scenario 2, and...

- Engage in some “blue sky” strategic thinking to imagine a world of post-COVID-19 expectations.
- Consider evolving capabilities like AI, Machine Learning (ML) and multichannel behavioral insights.
- Embrace “digital first”...on steroids.
- Elevate agile business models.
- Account for potential societal and regulatory shifts in areas such as healthcare, the “gig economy,” services, and others.

“There is no such thing as absolute value in this world.
You can only estimate what a thing is worth to you.”

– Charles Dudley Warner, *My Summer in a Garden*, 1871

If you're interested in planning for what's next, we can help.

Where do you need to go?

With a robust set of proven assessment and action planning services, we exist to help companies like yours understand changing customer behaviors and attitudes and how to respond to them.

Many of those services are based on our “future-back” methodology, which asks and answers three fundamental questions:

- 1. *Where are we today?***
Understand our current reality.
- 2. *Where do we wish to be tomorrow?***
Define the future we wish to enable.
- 3. *What must we do to close this gap?***
Articulate what we must do to achieve our desired future.

We're actively helping businesses like yours navigate these unprecedented changes and the implications to employee and customer experience.

Three ways we can help

From agile, 2- to 6-week experience mapping sessions for immediate insights to transformational initiatives that can reimagine your CX vision and competitive plan to capture additional customers and employees, we can help.

Regardless of your specific customer and employee experience-related need—CX strategy, design, measurement, customer understanding or organizational change to name a few – we know that different levels of fidelity are relevant for different situations.

Which is why we offer 3 ways to engage in each of our core practice areas, from lower- to higher-fidelity and depth. They include:

- **Compass:** 2-day ‘boot camp’ to codify the challenges and opportunities you face, and set high-level direction;
- **Actionable:** 3 to 6 weeks to develop a defensible, actionable roadmap involving multiple constituencies;
- **Comprehensive:** 10 to 12 weeks to develop a comprehensive roadmap and action plan with cross functional participation and consensus building.

If you're interested in learning more, email hello@mcorp.cx or call 415-526-2655.

An outside perspective can accelerate action

5 reasons why outside, independent help is important:

Clients tell us our independent customer and employee experience expertise helps them better meet their goals.

Some of the reasons why include:

- 1.** Internal teams are busy with the day-to-day, and the impacts of this crisis make it hard to make time to prepare for the future.
- 2.** We provide a deep knowledge base and frameworks for the improvement and management of CX and EX.
- 3.** It's easy to embrace what's succeeded in the past. Independent help can bring fresh perspectives.
- 4.** It's easier to identify relevant, innovative practices and activities from companies inside and outside your industry.
- 5.** An external expert perspective is often better able to move management to action than internal teams.

What it's like to work with McorpCX:

Independently recognized as a top customer experience consulting and services company, we've enabled and helped guide customer-centric organizations since 2002.

We are experts at driving experience-led business success in an increasingly customer-centric world.

And in a world where things are changing as significantly as they are, we've heard from our clients that an external perspective is critically important to drive action when internal teams are mired down in what's happening now and must be dealt with today.

- Our role is to drive customer-driven insights, clarity, and action to meet defined business objectives.
- We activate insights to give you deeper understanding.
- Our clients benefit from our wide perspective of what others are doing and best practices across the industry.

After all, customer experience is all we do and all we have ever done. Our senior team members bring decades of experience to bear, marrying an ability and willingness to not just advise but (when needed) help you do the work.

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