

THE METAVERSE OPPORTUNITIES FOR BUSINESS OPERATIONS

DRIVE IMMERSIVE,
AUGMENTED EXPERIENCES
ACROSS YOUR ORGANIZATION



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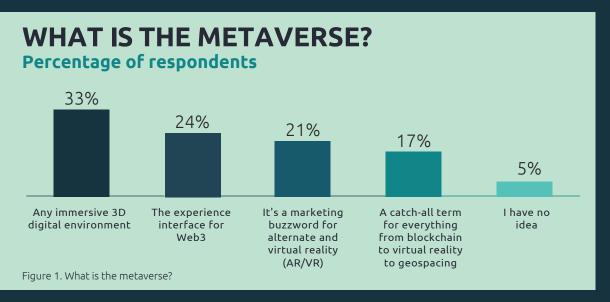


Technological terms are frequently imprecise. Different people mean different things by them – and the metaverse is a case in point. For many, it's a word that describes a virtual reality (VR) or augmented reality (AR) world inhabited exclusively by gamers or early adopters on social media platforms.

The problem with this conception is that it limits the scope of what the metaverse is, or of what it might be. These virtual or augmented worlds need not be constrained by current, consumer-oriented applications. They also have significant commercial potential. The metaverse can transform the way business works.

If the metaverse is an imprecise term, let's begin by attempting to define it. What does it mean?

<u>In a survey conducted by HFS Research</u>, for more than 20% of respondents, the metaverse was the same as VR and AR, and 5% had no idea what it is (Figure 1).



However, <u>a recent Capgemini Research Institute (CRI) report</u> states that nine in ten consumers are curious about the metaverse, with over half saying they would adopt the metaverse when it becomes accessible.

For Capgemini, the term means an open network of decentralized 3D virtual and hybrid worlds. It's a persistent place that is parallel to the physical world, which aims to combine online digital and real-life experiences with a sense of presence for users – independent of place, time, or device.

It's always active, and it's focused on real-time interaction.

EMERGING OPPORTUNITIES FROM IMMERSIVE EXPERIENCES

According to Grand View Research, from a business standpoint, by 2030 we'll reach \$4617.78 billion of turnover linked to the metaverse. Similarly, the extended reality (XR) market, which is related to the metaverse, will reach nearly \$400 billion by 2026, with a CAGR of 58% in 2021–26.

Moreover, <u>a recent Capgemini report</u> states that three in five companies are taking "a watchand-wait approach," maybe because they are not yet clear on the use cases that can be deployed, nor on the related outcomes.

To capture the full attention of tomorrow's consumers, companies will need to align their services with the digital demands of recent generations. Young people who grew up using online games have a strong digital appetite: 80% of millennials say their daily lives depend on technology.

What's more, <u>according to Capgemini's CRI report</u>, three in five consumers who own AR/VR headsets are "willing to use these for applications beyond gaming, such as browsing products or experiencing services, for instance via a virtual showroom, prior to purchasing."

Despite this, <u>an HFS Research survey</u> found that only a few CEOs, CIOs, and CTOs (Figure 2) classify the metaverse among their top three areas of investment.

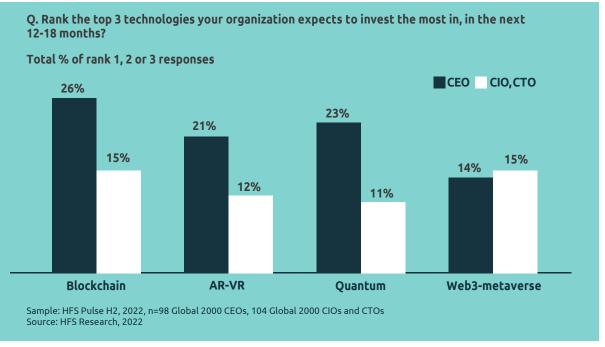


Figure 2. Top three areas of investment for CEOs, CIOs, and CTOs



Let's look at a few examples, so we can understand the transformation we'll all need to face.

Consumer

Imagine a future where customers can explore different car models in the metaverse before visiting a showroom. Not only will they be able to see the design and perhaps compare the size of the trunk with their current car, but they will be able to sit in it, and personalize colorways, functions, and other options. They'll also be able to bring the whole family with them, so everyone can be part of the virtual visit.

This immersive experience will transform the purchasing decision. At the same time, the interaction will generate data and insights for the dealers, so they can prepare for the customer's real-world visit and make it more productive.

Consumer Products and Retail companies will be able to <u>improve their instore operations</u> and customer experience by visualizing different layouts and optimizing store design. And by leveraging digital twins, they will also be able to improve product development and design through creating, evaluating, and improving virtual prototypes under real conditions.

Life Sciences

Surgeons are already using VR in a close-to-real environment to experiment with and improve new techniques, and to practice surgical procedures before operating in real life. As a result, lives will be saved: patients will benefit from more experienced surgeons, and from access to experts all over the world.

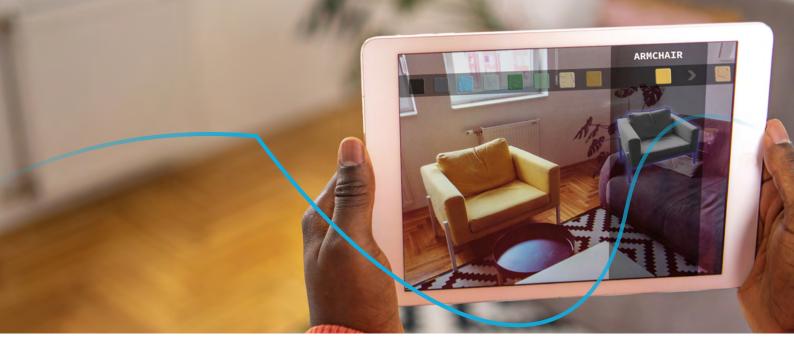
Training

It's not just about surgical training. Training in general is one of the key areas the metaverse will transform, whatever the sector or domain, quickly providing accessible and improved solutions.

For instance, new employees will be onboarded through the metaverse. This is already happening in some companies, and the immersive nature is a game changer for the first-day experience.



The metaverse concept will enable companies to engage with their customers in a new way – and, like industrialization and digitalization, it will shake up their habits and expectations. At the same time, many corporate processes will be impacted, with new immersive experiences defining business areas from training and onboarding to operational processes."



Being able to meet new colleagues from all over the world in virtual offices that mirror real ones, and virtually familiarizing themselves with the physical locations in which they will later work, is a wonderful introduction for recent recruits to their new roles.

<u>Capgemini's CRI report</u> confirms that these use cases have been identified by consumers as the most beneficial application of the metaverse (Figure 3). Indeed, seven out of ten organizations believe that immersive experiences will be a key differentiator in the market.

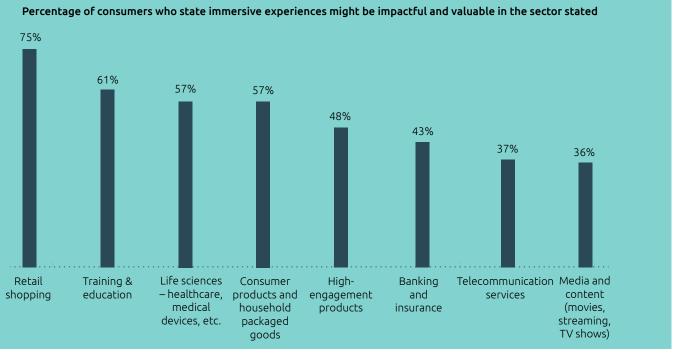


Figure 3. Percentage of consumers who state immersive experiences would be impactful and valuable in the sector stated

The immersive nature of the metaverse – sight, sound, and more – and the new levels of realtime remote collaboration it will facilitate, mean that it will add value not just to high-profile scenarios such as those above, but also to everyday business operations. They are currently at different stages of development, but they include HR, warehousing, and financial processes.

It's the immersive experience of the metaverse that's key, which:

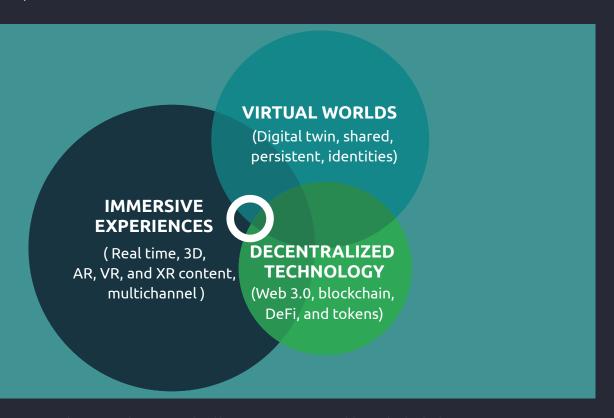
- Mirrors physical elements to test and visualize different scenarios
- Collaborates with avatars
- Invents non-existent scenarios to anticipate future cases
- Simulates and visualizes the impacts.

THE STATE OF PLAY

Because of its early adoption in gaming, the metaverse is usually associated with headsets or glasses, but in practical terms, people in a work environment won't be able to wear such devices for a long time. Headsets are ideal for fully immersive experiences, but laptops, tablets, and smartphones can also provide access.

From a data ecosystem perspective, it's likely that organizations will take advantage of existing algorithms that can be used in the metaverse with both real and virtual data. This will broaden horizons, as we'll be able to reuse all existing elements from the real world with other types of data to generate new insights and improve the user experience in both the real and virtual worlds (Figure 4).

At the same time, other technologies such as cryptography, blockchain, 3D reconstruction, artificial intelligence (AI), machine learning (ML), and the Internet of Things (IoT) will themselves develop and help the metaverse to evolve as a business platform.



 $Figure\ 4.\ The\ interaction\ between\ virtual\ worlds, immersive\ experiences,\ and\ decentralized\ technology$

The virtual world

Contrary to the real world, in which some data can't easily be gathered, the metaverse enables the collection of contextual data, which enhances its predictive value.

For instance, in digital customer operations, the unconscious behavior of customers can reveal their propensity: their interest in some items for sale within the metaverse can feed a recommendation engine or a personalized marketing incentive.

Virtual data

The current state of the art of AI is mainly based on machine learning, and the algorithms can only learn by processing a huge amount of data. The data needs to be of good quality and should be labeled by humans. If such data is not available, this would require a huge investment.

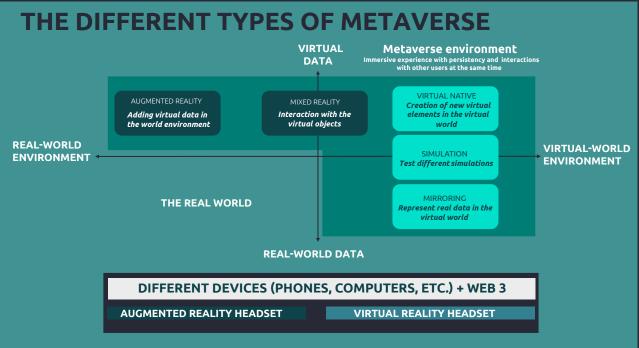
An old dream of data scientists is to be able to generate data from which the ML can learn. That's exactly what the metaverse can do: it can be used as a digital twin to emulate a real-world environment and to collect data.

While Web 3.0 promises to bring about decentralized applications and services built on blockchain technology, there are also a number of data privacy and regulatory issues. The transparency of blockchain and its potential to expose sensitive personal data and financial transactions to unauthorized parties and the lack of standardized data privacy regulations on how user data is collected, used, and shared are just two of the main concerns.

Layers of meaning

This interaction between real and virtual worlds, and between real and virtual data, makes different business models possible (Figure 5). In brief, these are:

- Using real data in the real world is of course the real world
- Using virtual data in the real world will give users an **augmented reality** for instance, using their phone or smart glasses to project virtual data into the real world. Augmented reality can be used to instantly see the number of missing stock items on the warehouse's shelf, or get virtual pointers of what needs to be done to fix a real machine
- Using real-world data in a virtual environment will enable users to get a **mirroring reality**, or a form of **digital twin**. Real data (data generated in the real world) can easily be used and transformed in the virtual world to generate new outcomes. For example, users can project a physical store organization into the metaverse so they can not only visit the simulated store, but also add virtual data to do simulations (for instance, optimizing the store's configuration by testing different scenarios)
- And finally, the full immersive situation will use virtual data in the virtual environment, as a virtual native reality. In this case, new data will be automatically generated in the virtual world to be used directly or indirectly in the real world.





The metaverse will become a digital twin environment in which organizations can visualize, test, and optimize their current processes, before implementing changes in the real world.

A virtual implementation will enable organizations to simulate different scenarios that could happen, such as peak loading periods and supply disruptions. They'll be able to visualize and analyze the consequences, and make adjustments to their process. They will also be able to create sub-processes to address any specific issues created by the scenarios for which they tested – and they'll be able to hand off the business services companies for execution in the physical world.

Indeed, team members for these third-party organizations will be able to work for different clients more easily, by immersing themselves in individual BPO metaverses that bring together workers with the same qualifications distributed across different rooms.

Each room will be dedicated to delivering an engagement, which implies that each room must have the necessary resources to respond to the customer: software and workers. Workers can move around and change rooms to interact with and deliver to another customer. The process may not be the same for different customers, but it will probably require workers with the same qualifications and levels of experience.

This model makes it possible for business services companies to offer transactional pricing to client organizations, through allocating pooled team members as needs rise and fall.



While organizations already use augmented reality to enhance their operations, a fully realized metaverse will support a more collaborative, data-driven environment.

For example, the metaverse will deliver a much more immersive experience to an organization's entire ecosystem of customers, employees, and partners to deliver improved and connected business operations.

Let's look at some use cases about how the metaverse will impact HR, customer operations, supply chain and procurement, and finance and accounting.



The global pandemic has normalized remote working, which has created a certain amount of distance between employees in some organizations. The metaverse creates life-like spaces to address the isolation and disconnectedness that can result from remote and hybrid work, and promises to bring new levels of social connection, mobility, and collaboration to a world of virtual work (Figure 6).

A smart Turing or ChatGPT-type chatbot can act as an HR concierge, providing instant assistance with the most common onboarding requests, and helping new recruits to become productive faster.

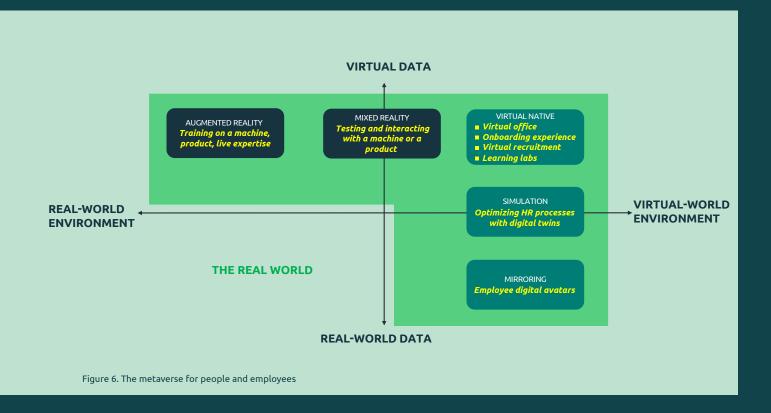
The metaverse will also be very useful for training. It can be designed to replicate the exact product, machine, or tool people will use, so they can practice virtually before doing anything in the real world. It's a great advantage to be able to try repeatedly, without fear of breaking anything – and Al-enabled digital coaches can be on hand to help. Virtual scenarios can then be added, such as security training, so people can learn how to deal with the unexpected before it actually happens.

Similarly, skills rooms enable employees to see virtually how new or other work is performed, thereby extending the range of tasks in which they can become proficient. A case in point is Microsoft's HoloLens Tool, which was used by medical students and has increased their efficiency by 60%, saving \$1,440 per trainee.

Employee digital avatars can pop in and out of virtual offices and meeting rooms in real time, walk up to a virtual help desk, give a live presentation from the dais, relax with colleagues in a networking lounge, or roam a conference center or exhibition using a customizable avatar.

<u>Capgemini's CRI report</u> states that 65% of organizations said that their employees believe that immersive technologies "will help them do their jobs better." They said it will improve collaboration and increase operational efficiency, which will reduce turnaround times and increase cost savings.

The report also quotes Dr Hendrik Witt, chief product officer, TeamViewer, who states: "Immersive technology is about speeding up your processes, lowering your error rates and improving quality in the process. Oftentimes, this is achieved through wearable computing solutions. Moreover, you can make processes for frontline workers in different industries more intuitive and flexible if you let them wear the equipment they need."



In short, the HR benefits are many and varied:

- The metaverse can bring new levels of social connection, mobility, and collaboration to a world of virtual work
- It can create life-like spaces to address isolation and workforce disconnectedness that can result from remote and hybrid work
- AI-enabled digital coaches can be constantly on hand to guide and assist employees with work or career advice
- The metaverse can accelerate skills acquisition and development at a lower cost to the business
- It provides greater scope for visually demonstrating concepts, especially for highend skill sets (e.g., aviation, automobiles, medical, manufacturing)
- There are no limitations on space or functionality. The metaverse's scope can grow in line with need.

However, there are hurdles to overcome:

- High-quality internet connectivity is a prerequisite for the metaverse experience
- VR headsets, haptics, blockchain, and other requirements can be expensive investments
- There are significant privacy and security implications, particularly in the capturing of data from people's virtual interactions
- There is a potential impact on the human, emotional contact: an addiction to virtual worlds could lead to a situation where people withdraw from real-world experiences.



Customer operations is an area that lends itself to the metaverse because it is all about augmented experiences. According to <u>Capgemini's CRI report</u>, consumers think it will give them "a more immersive, sensorially engaging way of interacting with their products and services, before and after purchase." Nine out of ten consumers are curious about it, and more than half say that they would adopt the metaverse when it becomes more accessible to them. The increased emotional link created between the consumer and the brand will lead to greater customer loyalty and retention.

The metaverse will transform customer service support. People won't need to contact a call center, fix a date for a field service engineer to visit, and then stay home that day. Instead, an agent or an AI routine will be able to guide them remotely using augmented reality or virtual reality, as they install their new broadband router or replace a part in the dishwasher.

Retail will be transformed too. Customers will be able to experience in-store shopping in the metaverse, seeing, comparing, and buying real products in the virtual world. If the product has variants or it's customizable, they will also be able to browse options and configure it, with real-time support from automated sales representatives, and perhaps also comparing notes with other "instore" customers.

This virtual experience will also be useful for commercial strategy optimization. Indeed, thanks to the virtual glasses, organizations will be able to collect more precise data about eye tracking, which can be used to optimize physical store organization. Companies will also want to reinvent their advertising strategies, because the metaverse will become an important advertising platform for virtual or real products.

<u>Capgemini's CRI report</u> states that irrespective of the stage of their consumer journeys, nearly half of consumers believe that immersive experiences will play an impactful and valuable role in their consumer journeys (Figure 7).

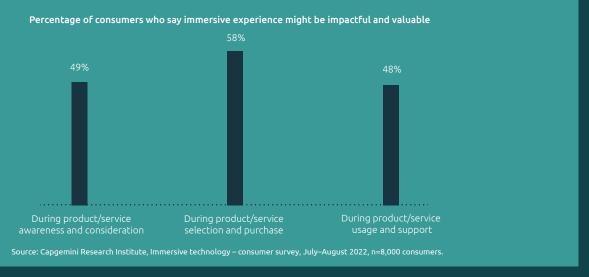


Figure 7. Percentage of consumers who feel that immersive experiences will be impactful and valuable.

Customer sales and support – metaverse scenarios

- **Customer support** new device setup and configuration, such as migrating data from an old phone to a new one, or virtual help with adding a SIM card, activating the phone, or updating a subscription
- Customer or technician support if a product or service fails, the organization and a person's avatar can walk together through diagnosis and triage with a virtual representation of the product. For instance, with a new car a customer can be guided in how to use the infotainment system, and a dealer can be shown how to remove and replace a failed engine component
- **Self-service revolution** moving from one-way YouTube content to interactive, company-branded "how-to" support where a virtual and/or live avatar provides the guidance, such as how to change a flat tire, or how to cancel or upgrade a subscription, or how to program a remote-control device
- Strategy development including support for marketing and brand, customer experience, digital identity, digital products and services, digital commerce including NFT/tokens, the future of work, and technology and operating model strategies
- Augmented products with social AR commerce, 3D visualization, and scannable product markers
- Personalized goods with real-time customization if it's clothing, customer avatars can try it on
- In-context furniture with 3D product demos, virtual staging, and interior design marketplaces
- **AR shop guidance** with indoor mapping or indoor navigation
- Shopless shopping with connected store shopping, shoppable video,
 e-commerce live streaming, and live store streaming.

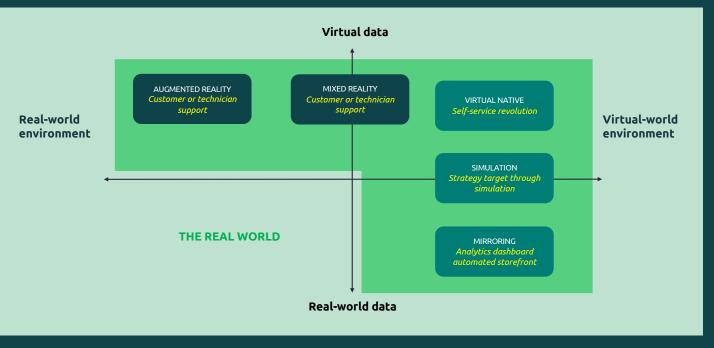


Figure 8. The metaverse for customers operations



Warehouse management provides another application for the metaverse, enabling team members to collaborate remotely on elements in the physical world (Figure 9):

- **Remote troubleshooting** AR/VR provides new opportunities for digital collaboration that would not otherwise be possible. Experts can collaborate on the physical maintenance and troubleshooting of machinery from remote locations
- Augmented training capability digital overlays and immersive simulations can be used to train staff more rapidly and effectively
- Warehouse efficiency optimization AR can significantly improve warehouse workers' efficiency by directing them in real time to locations and bins for picking
- Inventory visibility AR offers deeper insights over what's available on shelves, as well as what is moving and what is not
- Immersive scenario planning can optimize efficiency in parts of the supply chain
- **Greener and leaner** metaverse supply chain management will reduce the need for in-person management, thereby increasing operations' efficiency from both a people and carbon perspective.

The new flexibility brought to the warehouse – and the entire supply chain – by the metaverse will facilitate better order fulfilment management and greater product personalization, resulting in a more fulfilling customer experience and greater loyalty.

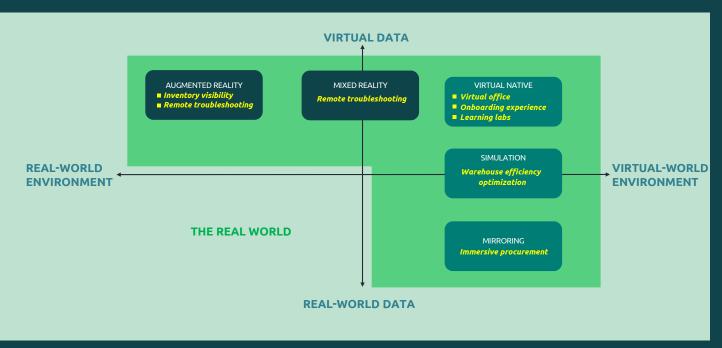


Figure 9. The metaverse for supply chain and procurement



This domain may not offer a physical world to replicate virtually in the same way as consumer products or warehousing, but nonetheless the potential benefits the metaverse can offer are considerable:

- **Simulation of frictionless finance** organizations can enter this space and perform chosen processes for instance, in an SAP S/4HANA© metaverse mirrored system, with an avatar or voice assistant helping to navigate and enable team members to complete the tasks themselves, with relevant visuals on the situation before vs. after
- CFO analytics dashboard/finance analytics hub with 3D visuals on various metrics and dependencies between them
- Outcome-based view on finance transformation using inbuilt benchmarking such as DPO,
 DSO, number of FTEs or the cost of supporting functions
- **Digital twin simulation** to visualize where the organization's processes are now and where they could be in future.

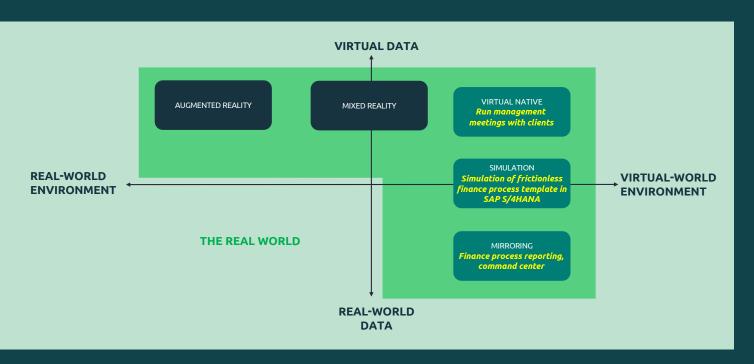


Figure 10. The metaverse for finance and accounting



The metaverse will definitively transform corporate functions as well as operational ones, but another important factor will be the potential impact on sustainability.

There will be benefits – for instance, increased use of the metaverse will reduce the need for travel – but there are also potential difficulties, in terms of the necessary data volumes and the associated storage implications, and the energy consumption implicit in handling this technology. Organizations will need to conduct an end-to-end analysis, considering CO2 emissions and all relevant laws and regulations, as well as the potential impact on cybersecurity.

The challenges aren't limited to sustainability. There are also consumer concerns. In a world in which social media is already changing people's sense of self, metaverse technology could increase the fear people have of losing control of their data, and of loss of privacy (Figure 11). Nor is this just a public concern: governments are increasingly conscious of the need to monitor and even regulate social platforms, and their attention is sure to turn in time also to the world of the metaverse.

<u>Capgemini's CRI report</u> states that moderating metaverse spaces will need to balance interactivity with privacy and security issues, all of which needs to be addressed by brands at the design stage.

According to HFS, today the "metaverse is driving excitement, but without clarity regarding its definition or potential viable economic models, it is prudent to remain cautious."

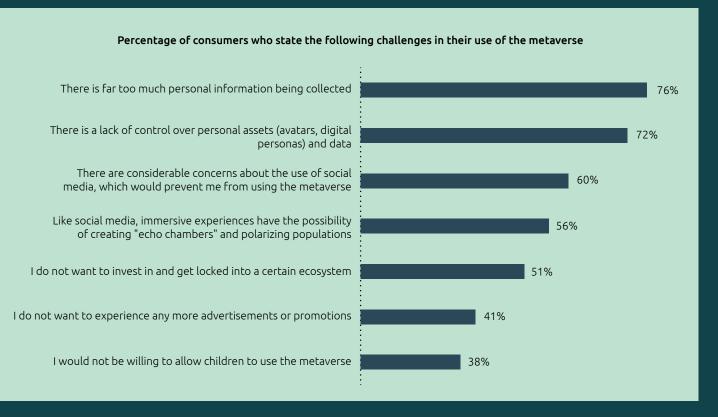


Figure 11. Percentage of customers who cite the following challenges in their use of the metaverse



In most major modern enterprises, many of the foundations needed to build a commercial metaverse – the data, the base-level technology practices, and the business processes – are already in place.

But introducing the metaverse concept could be a significant shift, and organizations will need to approach it in a way that not only minimizes disruption, but that also starts delivering results quickly.

For example, before jumping into the metaverse, <u>CMOs will need to ensure that certain prerequisites are primed</u>, such as structuring a marketing strategy based on data and real-time interactions, enabling personalization at scale, and ensuring increased customer satisfaction and engagement.

Capgemini's CRI report outlines the areas on which organizations may want to focus when harnessing metaverse technologies:

Identify and select use cases based on value delivered while maintaining consistency in brand presence

Organizations need to focus on the areas of application and the benefits for front-line employees and consumers.

This means that key pain points and challenges for end users need to be understood and addressed, so that immersive technologies can be introduced in a way that mitigates these concerns and enhances their experiences.

The technology is an enabler, and not an end in itself. Force-fitting it to a problem could lead to issues with large-scale deployment in such a fast-evolving market.

Build a center of excellence to drive the immersive initiatives at scale

A central team can scope and scale initiatives, working within and across business units, and can also educate the rest of the organization about the potential of the new technologies.

Members of this central team will of course need to be well versed in this area, but they need to be driven by the organization's demands rather than by the technology's potential.

Design measures to promote consumer privacy and safety from the beginning

Security and privacy are top of mind for customers these days, and rightly so. Organizations need to:

- Select platforms and technologies with strong content and equally strong moderation
- Abide by a strong ethical framework or create one if necessary and use it to establish guidelines for selecting platforms and technologies
- Ensure associated platforms adhere to brand values and standards
- Build portals and channels to address consumer grievances
- Establish dedicated teams for quick action, response, and resolution

Strengthen digital assets and omnichannel integration

Organizations will need to invest in the hardware infrastructure needed for the creation and delivery of metaverse experiences.

This could mean building and storing 3D models, adapting them for different platforms, ensuring that the experience is smooth across different channels, and integrating them around target use cases.

Enrich the community aspect in order to build customer retention

Building a sense of community in the metaverse, and regularly creating exciting new incentives to visit, is important in building a relationship with customers that will last. Major consumer brands in the US are already doing this.

The final focus area mentioned in the CRI report should perhaps be the first step that organizations should consider taking en route to the metaverse.

<u>The report points out</u> that this is a new and rapidly evolving area of technology, and that it's therefore unlikely that organizations will have all the requisite competencies in-house to audit current processes, assess potential, devise a strategy, design a solution, and then implement it.

The first step, therefore, might be to work with external partners who have both expertise and experience, and who can bring their knowledge of the technologies to bear on the specific use cases that will be of most benefit to the business. They can work together, and they can also engage with supply chain partners and customers, to build a metaverse that works for everyone.



Immersive Experiences

Immersive technologies have the potential to radically transform how customers and employees interact with brands, products, and systems. Ordinary digital engagement is not enough. Recent technological advances are pushing the user experience to new heights.

So, when brands creatively design experiences that use a combination of modalities (flat UI, natural interfaces, and XR), they can create multi-sensory customer experiences at various touchpoints that are not only personalized but also go above and beyond in terms of convenience and sensory appeal. They drive loyalty and advocacy.

But these experiences need to continually adapt and evolve. Capgemini's Customer Experience team supports clients to help them meet customer and employee expectations and outperform competitors. We strategize, design, build and execute immersive experiences that are contextually relevant, multisensory, and emotionally engaging. We help drive business growth for our clients by disrupting the ordinary – helping create extraordinary experiences that build memorable and emotional connections.

Capgemini's Metaverse-Lab

Capgemini believes that the metaverse will offer opportunities for a more connected and emotional experience for consumers (CX), for reinventing the employee experience (EX) and for optimizing R&D, engineering, manufacturing, operations and supply chains (Industrial Metaverse).

Capgemini set up its Metaverse-Lab, a coordinating hub for research and solutions, designed to help our clients explore the possibilities of the emerging technologies, and shape and execute their metaverse strategies. Our team comprises senior technology experts from across the Group with a strong track record in the key underlying technologies of the Web3 / metaverse and the development of disruptive actionable solutions.

Our R&D programs cover the future of immersive human-machine interfaces and controllers, work in the metaverse, digital twins, blockchain, Web3 and decentralized approaches

Our Immersive Experience and Metaverse Services

- Immersive Customer Experience (CX): We create extraordinary experiences that build memorable and emotional connections at each stage in the customer journey across devices and channels
- Immersive Employee Experience (EX): We enable your hybrid workforce by simulating physical world training and collaboration in the virtual world. This increases employee engagement while decreasing costs
- Industrial Metaverse: We help business realize the value of digital twins faster, driving profitable growth and sustainability through data-driven performance
- Metaverse Experiences: We help our clients imagine the opportunities, plan for, and create metaverse experience across CX, EX, and enterprise use cases, including technology infrastructure strategy and implementation.

We bring together our CX, EX, technology, domain and consulting talents to develop bespoke Metaverse and Immersive Experiences solutions from research through to implementation and at-scale delivery, using next generation technologies.

For more information, please visit: www.capgemini.com/services/customer-first/customer-experiences and www.capgemini.com/metaverse

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Sebastien Guibert currently heads the Intelligent Process Automation business for the Capgemini Group and leads the Business Services portfolio. After a number of years as the projects and processes portfolio head for a Capgemini client, Sebastien worked in the Data & AI space, leading the AI Center of Excellence in France. Sebastien infuses AI and technologies such as the metaverse into the heart of client solutions, driving a sustainable transformations journey to deliver enhanced productivity, efficiency, and concrete business outcomes.

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About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organisation of 360,000 team members in more than 50 countries. With its strong 55-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fuelled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2022 global revenues of €22 billion.

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