



Is contactless sales the new reality for industrial products?

June 2020



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Abstract

- » Will COVID-19 be the trigger for transformation to a digitally-driven customer engagement and sales operations for industrial products organizations?

Will the immediate changes required in the “**Now**” phase fundamentally shift how front-end operations of industrial products organizations function in the “**Next**” and “**Beyond**” phases?

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What is the New COVID Normal for sales in industrial products?



To say that COVID19 has disrupted businesses and the changes triggered has people, social, business and economic impact is to but pontificate on the obvious. However, the task for firms to reinvigorate the sales and marketing set up in the new normal is a key change for Indian organizations long focused on expanding just their physical footprint and reach. Transition using digital means is both the new normal for the sales team to work and for customers to interact. That needs some thinking, doing, and more importantly, acknowledging and changing. In fact, the on-ground situation has given challenger brands the opportunity to leapfrog established players if they do not get the digital story right and wait for the physical world to go back to as before.

□ So, what exactly is new in the New Normal?

The consumer has already been in transition, even before COVID. Stages such as research and consultation, selection of specific brand/ models are already digital in the purchase process. However, what has now changed is that negotiation, transaction and internal reviews have also started to migrate to digital. The fence sitters are left without an option but to change.

The industrial products sector has a mix of big B2B clients, a large number of smaller B2MSME clients, followed by the branded consumer facing products sold through B2B2C and B2C channels. The common factor across the non B2B value chain is the reliance on the distribution channel partners as a prime interface with the end customer and playing a critical role of influencer in the purchase decision. This interface is where the maximum change is taking place presently. An integrated platform with a digitally enabled agile salesforce will become a critical criterion for not just consumer engagement and sales conversion but also dealer engagement and internal sales team reviews.

Current path to purchase for a customer of industrial products:

Awareness	Consideration	Purchase
Manufacturer's websites, videos, television ads, blogs (R)	Online catalogue (R/C)	E-commerce portals- Amazon (R)
Online magazines (R/C)	AR/VR In-store(/home) experience centres / hardware stores (R)	Manufacturer direct purchase (C)
Dealer Boards, OOH/Billboards (R/C)	Store locator (R)	Online Aggregators (R/C)
Aggregators websites	TOT/Commercial discussions (R/C)	

R: Retail Customer; C: Commercial Customer

What are the execution challenges faced by the industry in the New Normal?



A

Limited F2F customer engagement activities (such as, trade fairs/product demo) due to both customer reluctance and restrictions on physical presence. This will impact both on-ground market coverage and local activation programs. Hence both generation and conversion will face issues on the ground and not generate the same returns on spend.

B

Limited reach and engagement of key stakeholders like financiers and influencers (such as, builders, contractors, and mechanics)

C

Transition of lead generation, conversion, financial closure, delivery, old stock liquidation and collection across stakeholders workstreams onto the digital platform (multiple legacy systems with non-integrated hand offs- Remember all the times we read but did not act on the seamless digital customer experience)

D

Reprioritization of existing trade spends from physical engagement mediums (for example, mass-market activation to support immediate liquidity needs of trade partners)

E

Dynamic demand management (including dispatch planning) to enable agile decision making as markets change their COVID colour codes and hence, government restrictions

F

Delays in credit collections and cash becoming the king.



What are the plausible solutions the industry needs to think about to address the challenges?

1

Maximization of immediate impact from existing initiatives- things need to change now and not wait for the completion of long-term initiatives (CRM functionalities, dealer stock planning, logistics planning, call centre for customer and dealer contacts, learning applications for DIY guides, work from home tools)

3

Cost effective and quick technology enablement that can enable working in present times to meet requirements (such as, pipeline and contract management)

2

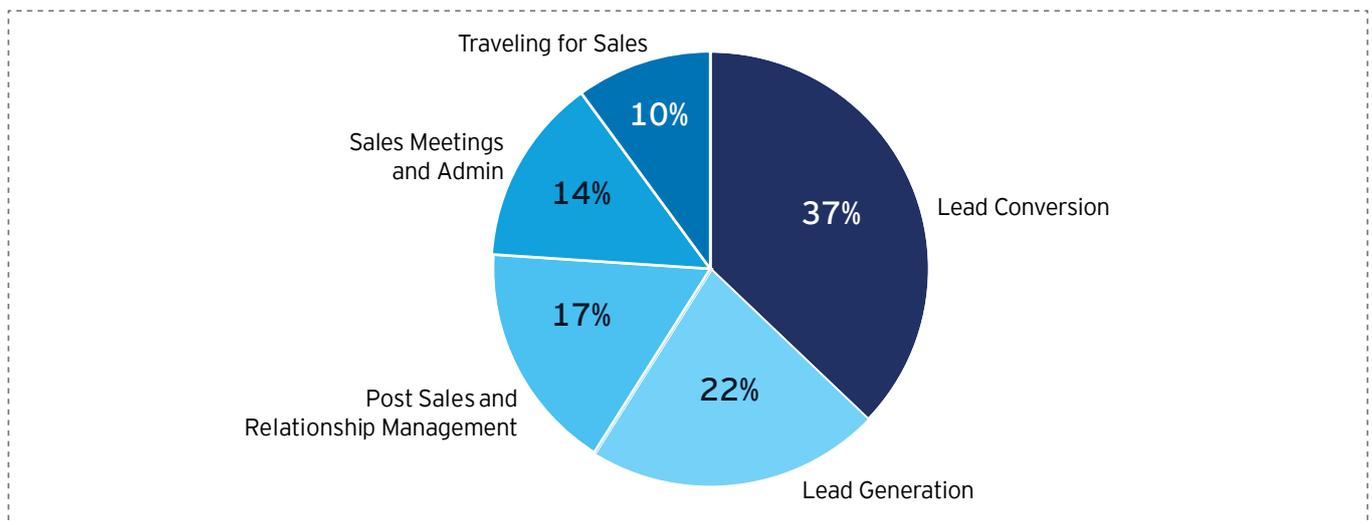
Immediate modifications done on existing platforms for "Now" requirements- little tweaks that go a long way, especially on using data and removing roadblocks (Customer Engagement Centres- applications with customer records typically including account, contact information, purchase history, service history, open marketing offers, trouble ticketing and escalation)

4

Change management and build programs to drive use of digital assets in the S&M organization- Sales is notoriously resistant to change and this is an excellent opportunity (Sales reporting- Sales Pipeline Report, Beat activity report, Campaign performance report, Lead source effectiveness report, Case summary report etc.)

However, while the immediate is important, this is the time to also take decisions and act on digital initiatives which truly change existing operating models. Since governments across nations are using this crisis to bring about the tough reforms, businesses should follow.

□ How did sales people spend their time 5 years ago?



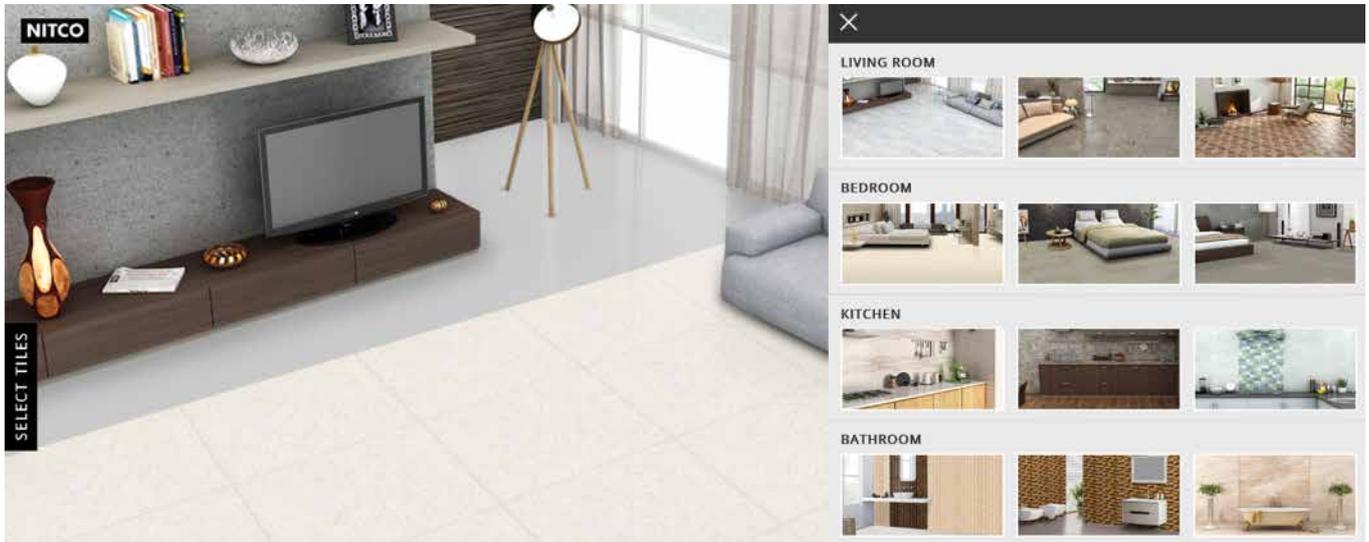
Source: CSO Insights 2014

While organizations have been moving to digital platforms in the lead generation and customer awareness mode (refer examples below), lead conversion, relationship management and some others like sales reviews are still largely done in person. This transaction ability, bringing about industrial consumerism and change in how sales teams internally function is where the new normal will have a greater impact.

Various companies in Industrial products segments have been adopting new digital means for consumer experiences



Nitco Visualiser- VR-aided pick and choose



Nitco Tiles lets the consumer play with tiles and concept combinations, thereby giving the consumer the virtual experience of their future homes (<https://www.nitco.in/vvr/livingroom1.html>)

Tata Steel - material estimator and KT modules

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Tata Steel lets the consumer choose from home designs, help connect with service providers like architects and engineers, masons and nearby dealers and estimate the amount of steel required based on built-up area.

<https://aashiyana.tatasteel.com/>

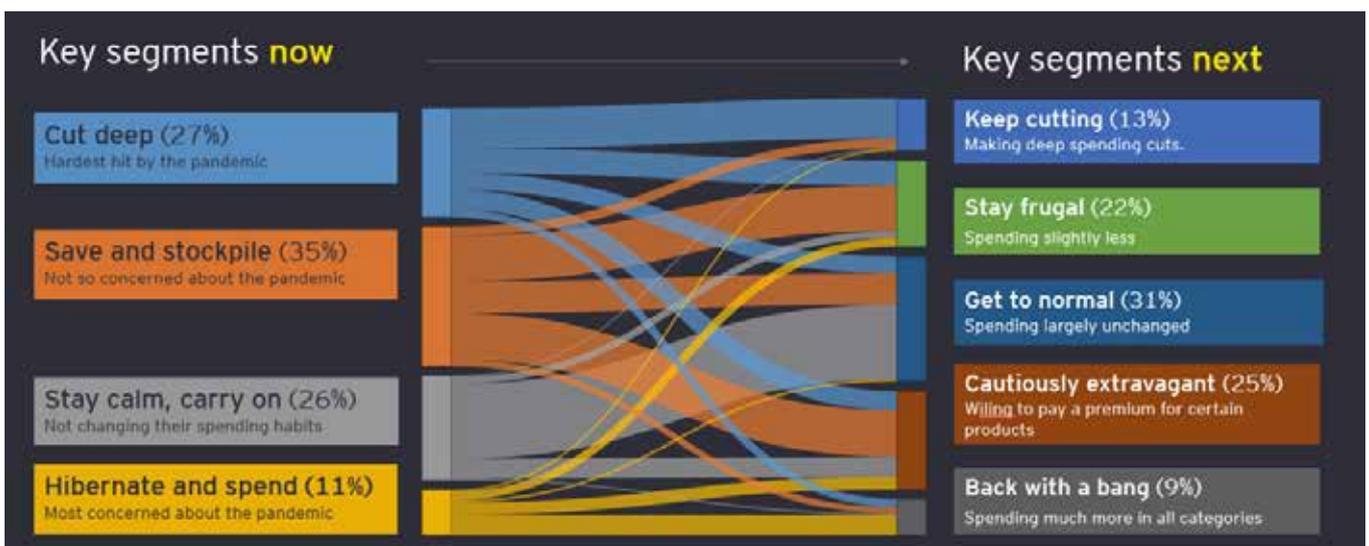
Ultratech - home building guide



Ultratech guides the consumer with the budget, checklist for land related queries and choice of the right materials for construction. The guide also helps with an EMI calculator against home loans, and estimates the amount of steel required based on built up area.-
<https://www.ultratechcement.com/> ,<https://www.ultratechcement.com/solutions/home-builder>

Changing consumer behaviour - EY Future Consumer Index

The EY Future Consumer Index is a global research that is tracking how consumer preferences are changing the world over in response to the COVID Normal and also the timelines for the same. In the past, the general view was that Indian consumers would follow global trends but with a time lag. This lag may significantly reduce in the new normal. In fact, given the demographics, geography and infrastructure availability in India, the market may lead western nations in a few trends.



Source: EY Future Consumer Index (Global EY Research in April 2020)

While a switch to online could become entrenched into consumer behaviour, four key segments have emerged from the crisis which are expected to evolve into five in the near term.

Now (Each organization will need to map their customer sets relevant to categorizations)

- » The weekly shop returns: **67%** of respondents are visiting stores less often and **64%** are shopping less frequently. **49%** are purchasing only essentials. However, **31%** are shopping more online.
- » “Hibernate and spend” have seen the biggest shift online with **39%** of this segment are ordering more online while for “Stay calm and carry on” the figure is **20%**.
- » “Cut deep” has the biggest changes in shopping with **75%** of this segment visiting fewer stores. **78%** are doing less shopping overall and **64%** are only purchasing essentials.

Next (Organizations need to identify the disruption levels in their industry and see where their customers are likely to evolve)

- » Uneven growth in voice: **24%** globally are using voice activated assistants to buy more and this varies between **47%** for the “Back with a bang” and **10%** for “Get to normal”.
- » Online entrenchment depends on group with **51%** of “Back with a bang” expect shop online more in the coming months but **36%** of “Keep cutting” expect to shop online less.
- » Interestingly **42%** customers believe that the way that they shop will fundamentally change as a result of the outbreak.

Contactless sales - the new reality and immediate imperative for industrial products



Industrial products organizations could benefit from following four strategies in these uncertain times

1 *Contactless sales operations and customer engagement*

2 *Distributor/ dealer liquidity management and operations oversight*

3 *Trade spend planning and execution: net revenue management*

4 *Enablers for activation of contactless engagement*

1 **Contactless sales operations and customer engagement**

While the physical sales process is becoming remote, sales pitch, smart communication, stories and personal experiences will remain crucial even going forward. Today, businesses have shown digital adoption by utilizing several automation tools and techniques to acquire leads, an end to end seamless operation across the entire sales process still seems to be amiss. Contactless sales channels provide solutions across the value chain and enables organizations to deal with the challenges "Now and Next" and to transform the organization for "Beyond".

Contactless sales operations (no long days at dealers and no longer hours of travel far away!)

- ▶ Dynamic monitoring of markets at district/tehsil level- status of which market is under lock down and when they open up
- ▶ Create virtual (tele-call/video conference, SMS) daily beat for field team to connect with DSEs, dealers, customers and influencers for sales and aftersales operations
- ▶ Develop SOPs/guidelines to execute virtual beat for field team
- ▶ Revisit and modify virtual beat to hybrid (virtual + physical) as and when markets open up
- ▶ Develop a self- learning module (video) and train field work force on new ways of working
- ▶ Tracking pipeline conversion using and developing digital triggers and dashboards for conversion efficiency improvement with digital triggers for exception management (inter stage handovers, dealer operations and fund management etc.)
- ▶ Assess call center capabilities - Increase in-house call center strength or hire external agencies for quick ramp-up

Digital customer engagement (They are the ones who finally pay!)

- ▶ Deploy analytics including propensity to buy models, prospect prioritization models etc. to enable data led decision making
- ▶ Develop O-2-O (online to offline) capabilities- booking and payment facilities on website/app and delivery through dealership
- ▶ Digital customer interaction and communication medium (product catalogue, demo video, query resolution, option to book, request engagement etc.)
- ▶ Delivery, payment and aftersales support: guidelines/SOPs on hygiene and health safety for in-store, home visit (delivery or pick-up) and on-site service
- ▶ Service plan to be prioritized based on account strategy:
 - a. B2C accounts -premium outlets- SO's | General trade outlets- contact centres
 - b. B2ECA/SME -Class A/Key accounts- SSO/ASM | Class B/C accounts- contact centres (ECA - Emerging Corporate Accounts)

Digital stakeholder engagement (Succeed together than Do It All Alone)

- ▶ Engaging with the larger infrastructure digital ecosystem for customer/ target group and influencer engagement/contractors
- ▶ Financier/NBFCs tie up for special offers/schemes and digital loan disbursal process
- ▶ Dealer supported 'contactless' insurance and finance for customers (online application, credit check, payment, loan disbursal etc.)
- ▶ Tie-up with relevant e-commerce providers and relevant apps (used by other members for both communication and enquiry generation)
- ▶ Tech enabled platforms for collaboration with financier community and digital auto ecosystems for engagement with contractors and other influencers

In the current scenario, retail universe coverage is determined by number of sales team which lacks flexibility, while through contactless model the coverage could potentially be higher, being economically efficient.

2 Distributor/dealer liquidity management and operations oversight

The contactless model needs to identify and onboard distributors along with the earlier planned front-end sales team, to drive the planned change. There is a need to map existing fulfilment centres for delivery while the contact centres act as co-ordination centres for enquiry and deciding on the other commercial agreements.

For B2C brands, while key stores and SKUs identification needs to be done "Now", the entire retail network and serviceability in terms of MOQs/ redefined packaging needs and cost to serve needs detailing in the "Next" phase.

For SME specifically there is a need to evaluate existing distributor service centres while mapping external service centres to act as order fulfillers basis government functioning permissions (municipal corporation limits)

There is a need to initiate sales team training, with simultaneous contact centre set up/ utilizing existing services, to execute contactless sales model.

3 Trade spend planning and execution: net revenue management

- ▶ Creating analytical existing spend map and identify areas affected by lockdown and social distancing
- ▶ Identifying top micro-markets depending on the lock down situation and prioritize spends at market-product-spend axis in real time using data dashboards
- ▶ Creating a real time spend dashboard to monitor spends and identify triggers for change
- ▶ Creating descriptive dashboards to show enquiry generation, conversion and investments in spend
- ▶ Developing analytical triggers for spend management (descriptive dashboards to aid decision making rather than prescriptive analytical models, refined later to more evolved pricing and trade spend tools)

Setting up the enablers for activation of contactless engagement

To run the contact centre and digital engagement, one needs to do the following, Now and Next

Now	Next
Set up the Tele-calling Technology and Digital Apps	<ul style="list-style-type: none"> ▶ Set up the Tele-calling Engine and Digital Order Taking applications ▶ Set up the Analytics engine for Order Suggestions
Coordinate and communicate with distributor / stockyard in each region creating Tele-calling Beats	<ul style="list-style-type: none"> ▶ Regular coordination and communication with the distributor and stockyard, to be maintained for efficient and timely delivery to support tele-sales setup
Drive coverage and expansion through minimal personnel intervention and contactless sales initiatives (outbound and inbound)	<ul style="list-style-type: none"> ▶ Once onboarded/ activated, follow up calls on a fixed day and time for sales or digital engagement for orders ▶ Allow inbound calls from retail outlets for orders ▶ Create dynamic beats for sales team (where restrictions removed) to bill laggard outlets

New roles and processes

	Key Role	Need for alignment	Challenge
Tele Caller	Retail sales order generation and capture	Order capture to be in sync with SO working beats and distributor delivery schedule	Ability to leverage distributor and SO connect to generate orders as per beat working routine
Sales officer (Distributor - BM/ Sr Salesperson)	Objection handling and key account management	SO market working needs to be in sync with follow up call routine of tele caller	Managing objections and directing sales orders to tele callers
Distributor	Market Fulfilment of sales orders	Market delivery schedule and capacity to be in sync with orders generated	Managing the scale and service levels for order fulfilment

Through set review mechanisms and real time control alerts, the program would arrest leakages and monitor

Dynamic monitoring of markets

at district/ industrial clusters/ exports- status of which market is under lock down/ when they open, for demand sensing and response preparation

Impact assessment

on existing pipeline at district/tehsil/ industrial cluster level and the planning and monitoring for the pipeline build for the next month and the upcoming season period

Plan creation for offline pipeline generation

using existing data bases, enable using analytics

Pipeline conversion tracking

with quick digital triggers and dashboards for conversion efficiency

Measure planned engagement

with consumer, customer, influencer, explore collaboration with financier, through extension of tech enabled platforms

Exception management performance

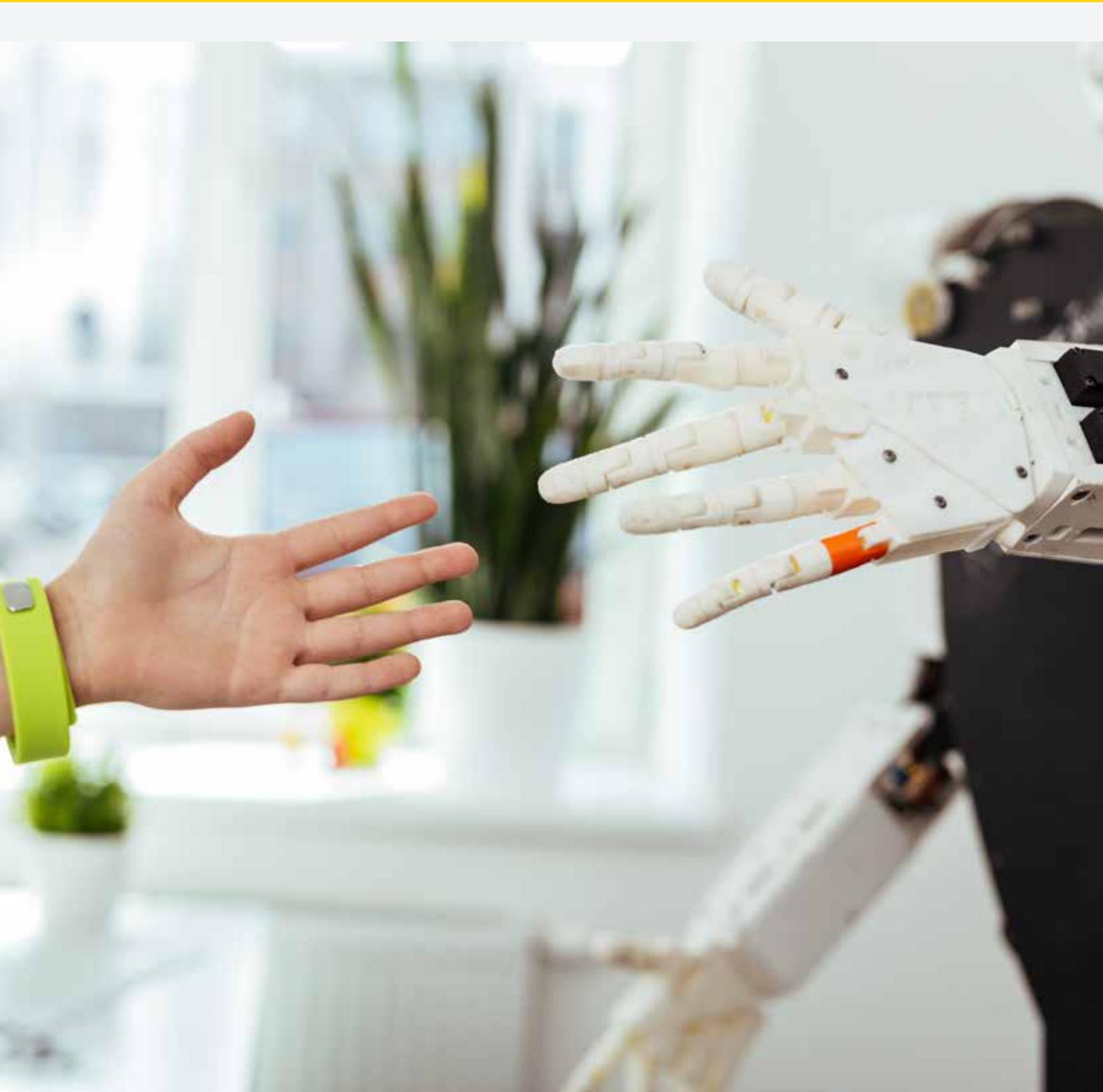
utilizing quick digital dashboards triggers (inter stage handovers and pipeline movement, dealer / ECA/SME operations and fund management etc.) with cost to serve monitor

of daily activity contactless

Sales force performance

- a. Through virtual means (tele-call/video conference, SMS) daily beat conduct for field team to connect with DSEs, dealers, customers and influencers for continuity of sales and aftersales operations
- b. Adherence to developed SOPs/guidelines to execute virtual Beat for field team (as laid in Step 2 and 3)
- c. Revisit and modify virtual Beat to hybrid (virtual + physical), as and when markets open

A contactless digital customer journey



The contactless sales channel is true only when all the stakeholders come together on the digital platform to create a seamless digital journey for the customer throughout from the awareness stage to the purchase stage.

Awareness stage

Customers will have full access to product designs, ongoing offers, product features, testimonials and reviews, videos. 360-degree view, VR experience of model homes. This experience can be made more conversational by allowing customers to chat with specialized online technical assistants anytime, anywhere. This is specifically important as the Industrial Products are generally capital purchases and risks are high in terms of non-performance. The conversation can be carried out via video calls through call centre activation or live messaging to help customers with more information, address queries and enable them in making the right purchase decisions. Responsiveness to all queries is very critical.

Benefits for manufacturers

Increase in sales pipeline, Access to customer data, New product demand- market assessment.

Benefit to customers

Access to complete home decor related information across buying channels

Consideration stage

Customers can customize their preferred model using the home configurator, while instantly viewing the prices and the nearest dealer locator. A price calculator and stock replenishment status will enable customer plan purchasing decisions. Only the organized players of the tiles, steel and cement industry allow online purchase. The aggregators are into online purchase only.

Benefits for manufacturers

Better stock planning, Customer insights and preference.

Benefit to customers

Price comparison and delivery visibility

Purchase stage

This stage will contain online customer information (due diligence of the end customer). A liability sharing arrangement can be explored with the Manufacturer/dealer/aggregator for bad loans. The negotiation process can also be carried out through a chat window or over a call with the sales representative, with a best price guarantee. Terms of delivery can be done as site delivery or warehouse delivery. Post sales service related to customer care and quality can be addressed through video calls with the technical centre.

Benefits for manufacturers

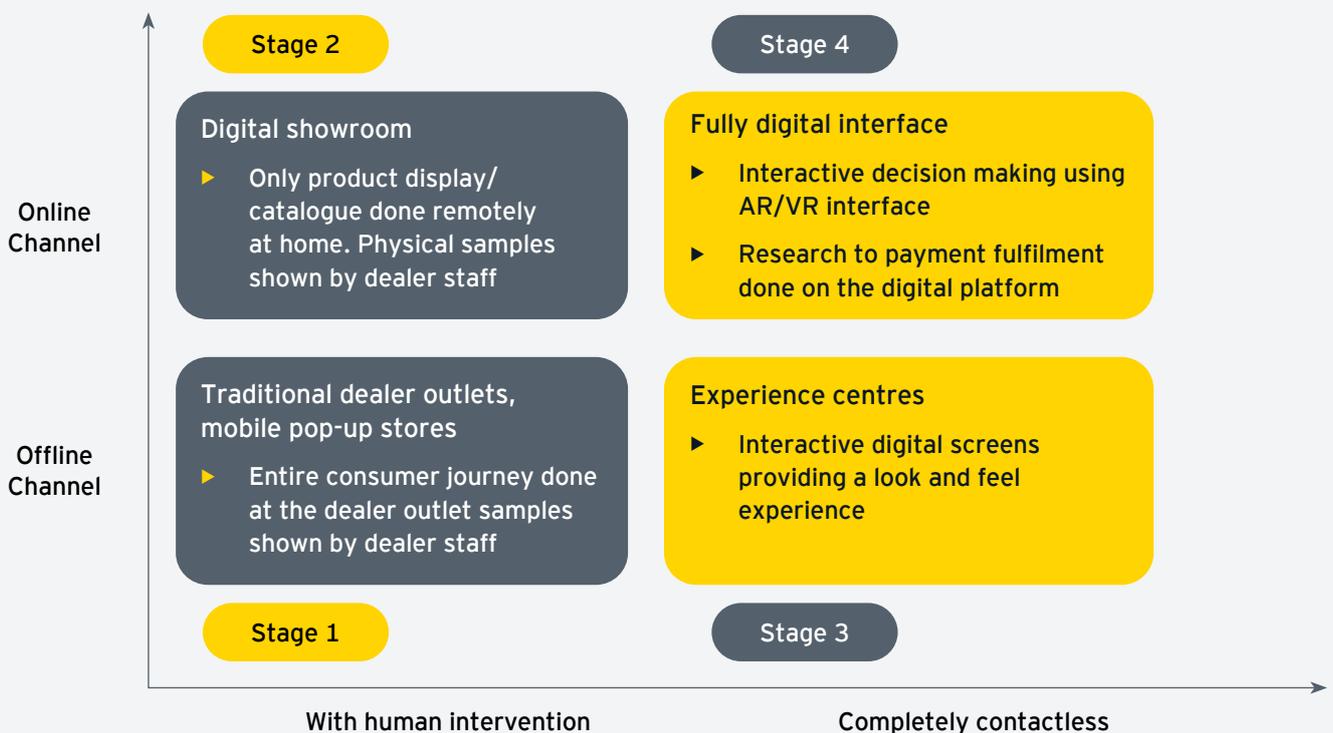
End customer purchase data

Benefit to customers

Seamless online purchase

Milestones and stage gates in the journey of digital customer engagement

Gone are the days where the consumer needs to visit the dealer/showroom/sample residential flats for the touch and feel experience. The new non-traditional showroom formats (experience centres/studios) will be crucial in delivering the digital experience, and to go one step forward, top tile players are already in the space where the consumers can have a virtual tour of their future kitchen or home through the Visualiser. The brand's digital presence of customer interface channel/tools help increase their geographical outreach. Though we believe that the migration to such a stage would be staggered, it will surely deliver all the expectations from a real salesman. Meanwhile, manufacturers and aggregators should also deploy an integrated online portal and ensure that the online conversations are seamlessly integrated into offline conversations and result into customer fulfilment.



In addition to setting up direct customer engagement platforms, industrial products organizations will need to move to online engagement beyond local market activations and trade fairs that they are used to. Along with them, the ecosystem will also evolve. For example, payment gateways will need to enable large value transactions typical in B2B sales.

52%

of consumers in 6 Asian countries declare to be cutting down on leisure outdoor activities and are spending more time at home.

What consumers are doing more:

44% Short video app

34% Social Media

42% video website app

26% Online music

37% News platforms

Source- Kantar Research, 2020

Post coronavirus crisis:

78% of Indian consumers said they will prefer to increase usage of digital payments going ahead

Economic Times

How can EY help

EY India is helping various organisations revisit their channel and go-to-market strategies with an objective to enhance customer centricity and profitability. Apart from extensive domain expertise, we have a set of unique capabilities, that can help you effectively chart your end to end “Phygital” sales experience map. (Refer Table below)

 <p>EY Digital Tools</p>	<p>EY's Market mapping tool, Beat Creation Tool, Order Generation Tool with Tele-Caller and Digital Analytics enables decision across parameters to deliver enhanced value, high customer experience with reduced costs.</p>
<p>Asterisk Dashboard</p>	<p>ASTERISK Supply collaboration platform - addressable demand basis material and capacities availability, E2E visibility of FG stock, daily tracking of execution, and call center like performance management.</p>
<p>FCUX</p>	<p>Design thinking led customer segmentation, journey design, development of front-end customer communications and digital engagement tools.</p>
<p>Customer Experience Management</p>	<p>Capture real time customer feedback across various stages of the sales lifecycle (in search, in store and in use).</p>
<p>MarkTech Platform</p>	<p>Data driven personalized marketing platform with capability of self-learning, automated campaigns, NBO/ NBA and lead nurturing.</p>
<p>C Centric</p>	<p>Conceptualizing and implementing CRM solutions - on premise CRM implementations, that includes Propensity modelling social CRM cloud CRM, SaaS CRM, and Artificial Intelligence (AI) and Robotic Process Automation</p>
<p>EY's Wavespace™</p>	<p>It is an innovation lab which simulates end to end customer journey, enables creative design, brings alignment and collaboration.</p>
<p>Alliance Partner</p>	<p>EY is a major alliance partner for Microsoft, SAP, Adobe and Salesforce.</p>



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EYIN2006-005
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