Wipro Analyst Day Presentation

T K Kurien
CEO IT Business and Executive Director
Changing landscape: customer not just CIO

Business buyers increasingly driving technology decisions.

60% Business

40% CIO

As high as approx. 60% of total technology spend with business buyers

Source - Forrester
Customer requirements have changed

1. Business value at the front end
2. Performance management through analytics
3. Technology delivering measurable business value
4. Drive innovation from end customer point of view
New Customer expectation from technology

1. Innovation at front end: Driving business value through consumerization of technology

2. Business insights: Building real-time analytics capability

3. Innovation in business model/processes
What does it mean for the customer

**Differentiation:**
1. Reaching out to different economic buyers
2. Use of technology for differentiation in market space
3. Improve efficiency of front and middle office

**Standardization:**
1. Drive predictable outcomes
2. Bring costs down
3. Standardization of processes, technology and platforms
Wipro : Built by design

Differentiation from the front driving customer value

Standardization at back office to drive predictability
Differentiation at the front

**CUSTOMER**

1. **Design**
   - Innovation closer to **customer** through Global Client Partners; focus on 138 accounts
   - **Hunting org.**
     Dedicated ecosystem created
   - **Geo Focus.**
     Dedicated country models for growing potential markets
     - India/ME, Africa, APJ, Canada, France & Germany

2. **Build/Differentiate**
   - Deep industry focus through Domain solutions and building cross industry / cross service solutions
   - **Disruptive/Emerging technology leadership**
     Cloud: Analytics: Mobility:
Differentiation at the Front

Changing Conversations: Sell Process

10% is Roadmap and 20% Customer

70% is Us

What we could do

Increase to 60% on Joint Success Roadmap with Customer
Standardization at the back

Process Standardization

Assets build

Capability for high volume / multi-tenant

Technology Accelerators

Automation

Non Linear Models

Outcome based / Managed Services

Industrialized Services
In Summary

- Accounts – Focused mining coupled with targeted hunting
- Industry Verticals
- Focus Geographies

- Run Organization

- Change Organization
  - Front End Transformation
  - Development and Deployment Process

Shift in Technology Buyers beyond CIO Organization
Strategy addressing shift in customer approach to Technology
Organization Structure aligned to the Strategy
Driving new customer requirements

Adapting to new customer paradigms: case view

OUR EXPERIENCE RETAIL GIANT

- Worked with the merchandising, marketing and supply chain divisions of the organization to use analytics as a means of driving strategy and optimize processes.
- Running end to end Program covering Next Best Offer, Life Time Value modeling, Campaign optimization and Inventory Analytics
- These programs have delivered over 2-3% top line growth and over 75m improvement in profits in the past 12 months.
Thank You
Energy, Natural Resources and Utilities

Anand Padmanabhan
SVP and Global Head, ENU
Agenda

1. Overview
2. Trends transforming the industry
3. Domain solutions
4. Design Principle
54.7% Revenue Growth YoY

Customer experience
Over 6600 dedicated people

12 years Fast Growing Business Unit in the Industry

40.25% Growth in Top 5 accounts

6 of the world's top 10 oil companies

Acquired SAIC's oil and gas business

75 clients globally

31.6% CAGR Over Last 3 Years

15+ large Utility transformation programs

Digital Oilfields

Geography Expansion

Integrating Value Chain

Domain Solutions

Analytics
Key transformational changes in the industry

- Markets shifting east
- Environment, Health and Safety
- Digital Oilfields
- Integrated Value Chain for Downstream Oil and Gas
- Smart Grids
- Changing competition environment
- Complex Regulations
- Joystick Mining

Oil & Gas
Utilities
Natural Resources
“Unconventional” frontiers

- Declining reserve in Alaska, Mexican Gulf, North Sea; Russia, Africa, SE Asia on rise
- Increase in activities in unconventional plays (Shale, CBM, Oil Sands) Asia Pacific, Australia & North America
- 84% demand growth in non-OECD countries, only 14% in OECD countries
- New partnerships with companies in emerging economies
- Massive Skilling required in new territories – Great opportunity for us
This is the New REALITY

- The US oil industry alone spent approx. $14.6 billion on sustainability, 50% increase over 2005 spends.
- O&G industry accounts for 44%+ of all low and zero carbon technology investments.
- No longer a fringe area – Government and Energy companies are paranoid after the BP Blowout.
- Business processes being revisited to align with HSE expectations.
- Emerging solutions in cap and trade, Carbon Capture and Storage, eco-financial risk management.
Digital oilfields

- 15% reduction in drilling cost with increase in production uptime by 33%
- Distributed and Complex assets, harsh terrain operations – respond to events locally, collaborate globally
- “BIG” Data - Million terabytes of seismic, geological, spatial data. Manage for 30 years, analyze in 30 second
- Integrated value chain – reservoirs, wells and production network
Parks Associates (2009) reports that over one-half of U.S. households take steps to conserve energy. Already, a strong majority of U.S. builders recognize energy-efficient amenities as the most positive influencers in selling a home.

“..Over one-half of U.S. households take steps to conserve energy..”

Major economies investing in Smart Grid

- Huge global activity in Smart Grid world.
- 50 million smart meters are currently out to tender.
- US Government announced a $3.4 Billion investment to spur Smart Grids, the largest single energy grid modernization investment in U.S. history (not including meters)
- UK mandated roll out of 47 million meters in 26 million properties by 2020 (8.6 billion pounds)
- Roll-outs and trials are currently underway in Europe, America, Canada and NZ
- China has draft legislation for a mandated roll out.
Changing competition in utilities

- Key is who maintains the primary relationship with the customer
- Telecom companies offering Home Energy Management solution
- Banks and Retailers already piloting prepaid Energy Cards
- Smart appliance market could exceed 15B USD globally by 2015

Global Smart Appliance Market by Product, 2015 (US millions)

- $3,542 for Clothes Washer
- $2,693 for Refrigerator
- $2,236 for Clothes Dryer
- $1,354 for Dishwasher
- $1,166 for Freezer

Source: Zpryme
• Automation in the core mining areas are still on papers
• Mining companies face number of constraints posed by government and environment agencies
• Mining of the Future focused on remote monitoring and control
• Telemetry, Asset Mgmt, Vehicle tracking and logistics, Environment Compliance, Human Capital Management and Energy Management are hot buttons
Design Principle

STANDARDIZATION AT THE BACK
- Domain centric CoE – domain skilling and scaling process
- Business Transformation for Utilities
- Process Solutions
- Collaborative Work Environment

DIFFERENTIATION AT THE FRONT
- Domain led consulting
- Differentiated solutions
- Rapid geography expansion
- Customer and Asset Analytics
- Creating cross industry collaboration
Thank You
Anand Padmanabhan
SVP and Global Head, ENU
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Purpose:
Wipro’s model of Think, Build, Operate for IT enabled Business Transformation

Kirk Strawser
Managing Partner & Global Head
Wipro Consulting Services
Wipro’s consulting business has grown rapidly over the last three years...

- Business has close to doubled in last 3 years
- Local operations on 4 continents
- 1600 Consultants 80 Partners
- Record of Success against new & traditional competitors

- Our Partnership group is made up of Partners from competitors including the Big 4, Accenture, IBM, Capgemini and McKinsey

- Our pyramid consists of lateral hires and MBA and undergraduate hires from top universities in India, USA and Europe
Wipro’s **strategy** is to position ourselves as a more flexible and innovative alternative to other integrated services firms.
The role of Wipro Consulting is to help position Wipro to the Lines of Business and CXX level where value is defined.

### Grow Core IT Services (CIO)
- Application development and maintenance
- Testing
- Infrastructure services

### Understand Business side Capital Project Priorities (Line of Business Heads)
- New product development
- Business transformation (HCM, Finance, Supply Chain, CRM)
- Mobility, Analytics, Risk and Compliance Reporting

### Disruptive Ideas/Innovation (CXO)
- Challenge management thinking on capital allocation
- Bring new ideas from best in class companies
- Help our clients innovate
Our capabilities are organized around three transformational agendas

**Business Transformation**
- Business Operating Model Design
- Cost and Productivity Optimization
- Product Strategy and Design
- Pre & Post Deal – M&A Services
- LEAN for Business Transformation

**Technology Transformation**
- Enterprise Architecture
- Governance, Risk and Compliance
- LEAN for IT Transformation
- Competitive Analytics
- Cloud, Mobility and Social Media

**Functional Transformation**
- Supply Chain Management
- Customer Relationship Management
- Financial Management
- Human Capital Management
- Organization Change Management
CASE IN POINT

Global Software and Entertainment Company

Redesigned entire global supply chain for physical products using leading edge analytics and supply chain segmentation matching hundreds of products to customers based on cost and velocity.

Developed new operating model, process design, requirements and IT Platform (APO)

- TOP LINE REVENUE INCREASE 2-4% ($250M-$400M)
- $250M REDUCTION OF OBSOLETE INVENTORY
Global Credit Card Firm

Created scalability to support M&A strategy and international and domestic expansion

Developed complete new target operating model, business process design and requirements for world class, global HR organization.

New global HR/HCM operating model and systems will allow the company to rapidly integrate acquisitions into their core operating model.
In summary: Wipro Consulting is helping Wipro address clients’ demands on four key dimensions...

1. Integrated Client Engagement

2. Moving up the enterprise value chain

3. Provide end to end, Think - Build - Operate solutions

4. Elevating the Wipro Brand through IP and thought leadership
Thank You

Kirk Strawser
Managing Partner & Global Head
Wipro Consulting Services

www.wipro.com/consulting
Manufacturing & Hi-Tech

NS Bala
SVP and Global Head, Manufacturing & Hi-Tech
Agenda

1. Overview of Manufacturing & Hi-Tech
2. Our strategy in the changing business environment & Case Studies
3. Summary
Manufacturing & Hi-Tech

Process – Chemicals, Metals, Glass, Plastic, Composites

- Semiconductor & Design
- Independent Software Vendor
- Automotive
- Aerospace & Defense
- Industrial Manufacturing
- Consumer Electronics
- Computer Hardware & Storage
- Appliances

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Manufacturing & Hi-Tech

Differentiation in the front

social media → design → supply chain → services → platforms

“Asset-light” organizations

Standardization at the back

manufacturing
frugal
ing engineering
Design

consumer driven manufacturing
b2b is b2c
channel engineering
cocreation and mass customization

frugal engineering

derivative chip design
value engineering
design to consumer value

new product line created for new target audience

world's smallest portable dishwasher
Supply Chain

intelligent supply chains

splintered supply chains
event driven
T3 / T4 visibility

Business reality
monolithic
demand driven
vulnerable

Investments
digital supply chains
production side analytics
shop floor mobile tracking
Services

Service Transformation Through Integrated Platform

Enabling shift to a services portfolio
Service management platform
Analytical Engine to derive insights from sensor data

Warranty Insight Solution Framework System and Method
Patented by USPTO

Service Lifecycle Management
New business model
Asset Light

- Cloud based infrastructure
- Utility based model
- Mergers and acquisition

Supplier of distributed chemical products and services

Business Process Transformation
Scalable Utility based IT Infrastructure foundation
Private/Public cloud based applications
Analytics driven transformation
In Summary

Wipro is helping customers Do Business Better by –

1. Advising customers on business process optimization & re-engineering cutting across diverse functional areas

2. Creating an ecosystem of co-innovation

3. Creating or helping adopt business platforms
Thank You

NS Bala
SVP and Global Head, Manufacturing & Hi-Tech

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Wipro BPO - Business Process Outcome

Manish Dugar
SVP and Global Head, Wipro BPO
Agenda

1. Changes influencing business
2. Design Principle: Integrated power play
3. Case Study: Business Value Delivered
4. BPO, shifting in top gear
Changes influencing business

- Share of BPO in outsourcing spend is increasing
- BPO customers shifting from functional, siloed approach to end-to-end process driven approach
- Cost reduction and operational excellence are table stakes, Access to technology and expertise to drive competitive advantage is the key driver

<table>
<thead>
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<th>Break-up of outsourcing contracts over time</th>
<th>Number of contracts</th>
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<tbody>
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<td>100% =</td>
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<tr>
<td>BPO</td>
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<td>7,646</td>
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<td>38%</td>
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<td>26%</td>
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<td>2010-2011</td>
<td></td>
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<td></td>
<td>26%</td>
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YTD comparatives with Last Year

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<th>2010-11</th>
<th>2011-12</th>
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<tbody>
<tr>
<td>134%</td>
<td>136%</td>
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New deals at new clients
New deals at existing clients
Differentiation through: Integrated Power Play

**Integrated Power Play**

- **BPO 1.0**
  - Adhoc
  - Defined
  - Process standardization
  - Labor cost savings
  - Efficiency gains
  - Quality and repeatability
  - Knowledge capture and management
  - Making the costs variable

- **BPO 2.0**
  - Linked
  - Integrated
  - Beyond cost savings
  - Transformational gains
  - Business insights

**BPO Evolution**

- **Horizontal BPO**
- **Bundled BPO**
- **Vertical BPO**

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Scaling up the value chain

Measuring Value Delivered across various Parameters

- Cost Avoidance
- Labour Arbitrage
- Productivity/Efficiency Gains
- Service Excellence
- Reputational Gains
- Revenue Enabling
- Customer Satisfaction

- Comprehensive measurement system
- Single stop shop to track & report the value delivered to customer

Over $ 1.1 B… Value delivered
CASE IN POINT

Leading Global Bank

Fragmented Processes and multiplicity of application platforms – No standardization

Rapid capacity creation
Up-to 50% reduction of fails volume
Going beyond labor arbitrage
Value Delivered – Transformation

Before

Cash Equities
- USA
- EUR
- APAC

Fixed Income
- USA
- EUR
- APAC

Processes
- Pre Matching
- Settlement
- Confirmation
- Fails
- Reconciliation

After

Cash Equities
- USA
- EUR
- APAC

Fixed Income
- USA
- EUR
- APAC

Pre Matching
- USA
- EUR
- APAC

Settlement
- USA
- EUR
- APAC

Confirmation
- USA
- EUR
- APAC

Fails
- USA
- EUR
- APAC

Reconciliation
- USA
- EUR
- APAC
Value Delivered – Shared Service Benefits

Rapid capacity creation –
- 15% YOY productivity improvement

10+ Mn USD
- Contra Revenues & IT systems Rationalization
- Funding Cost
- Short Charges Savings
- Swift Charges
- EFC and Interest

Up-to 50% reduction of fails volume
- Better process control, core process automation & reporting accuracy

Industry Leading position on Z/Yen Survey
- Wipro Teams have contributed significantly to the key metrics measured as part of the Z/Yen Survey
Case in Point

**Large Retail Chain**

Platform Driven BPO transforms procurement to Strategic Sourcing

- Standardization of processes
- Platform based transformation
Platform driven Standardization and implementation

With Non Standardized Processes

Spend & Market Analysis  Sourcing Management  Contract Management  Transactional Procurement  Invoice Payment  Performance Management

Need for:
- Pan-European model and centralization
- Standardization of process across markets
- Consolidation into 2 Wipro Delivery Centre’s

Disparate local markets

What we did?
Spend Analytics to gain visibility into price variations, e-Sourcing to drive standardization and optimization, contract management to plug discounting leaks and Supplier Performance Management for rationalization

What does this mean?
- Spend aggregation, supplier rationalization, contract visibility and standardization yielded a 15% saving in procurement over the previous year – on actual spend
- Going beyond labor arbitrage - Strategic Sourcing and Category Management.

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Performance update, BPO in top gear

- **Growth**: 140% increase in TCV of deals won in 2011 and new logos added in 2011
- **People**: 2000+ FTE's in nearshore locations across Europe, APAC & NA. Drive Integration through penetration in Wipro traditional IT Accounts working.
- **Delivery**: 4 new delivery locations added this year: Ireland, UK, Canada & Mexico
- **NPS Class**: Significant increase in NPS scores

... Over $1.1 B... Value delivered
Wipro Positioned in the Leaders Quadrant of Gartner Inc.’s Magic Quadrant for Global Comprehensive Finance and Accounting BPO — Gartner Magic Quadrant 2011

Wipro has quietly gone about developing a very strong BPO competency across multiple towers, most notably F&A. Good delivery reputation and attention to process competency and price friendliness has helped Wipro develop market share quickly. – Horses for Sources
To Summarize

Wipro BPO integrated power play is geared up for tomorrows needs with focus on:

1. Technology and domain led solutions
2. Analytics intensive front office transformation
3. End to End shared Services Management Platform
4. Delivering measurable business value
Thank You

Manish Dugar
SVP and Global Head, Wipro BPO