



WIPRO
Applying Thought



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



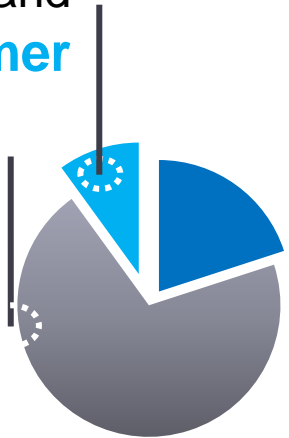
- ▶ **Disruptive/Emerging technology leadership**
Cloud :Analytics: Mobility:

Differentiation at the Front

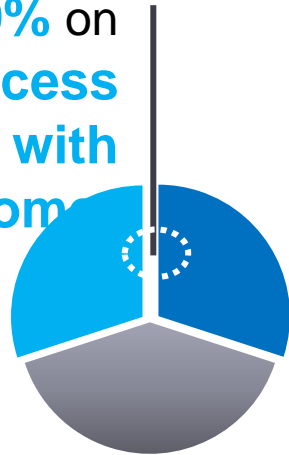
Changing Conversations: Sell Process

10% is Roadmap and
20% Customer

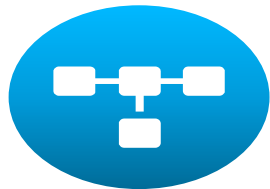
70% is Us
What we could do



Increase to 60% on
Joint Success
Roadmap with
Customer



Standardization at the back



Process



Assets build



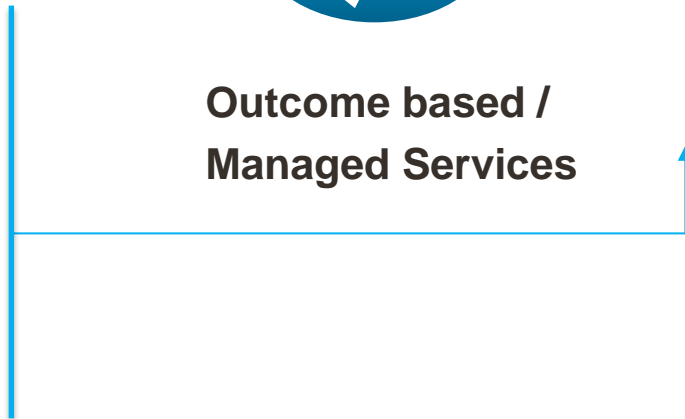
Capability for high volume /multi tenant



Outcome based /
Managed Services



Industrialized
Services



In Summary

Shift in Technology Buyers beyond CIO Organization

Strategy addressing shift in customer approach to Technology

Organization Structure aligned to the Strategy

1

Run Organization

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

2

Change Organization

- ▶ Front End Transformation
- ▶ Development and Deployment Process

Driving new customer requirements

Adapting to new customer paradigms : case view

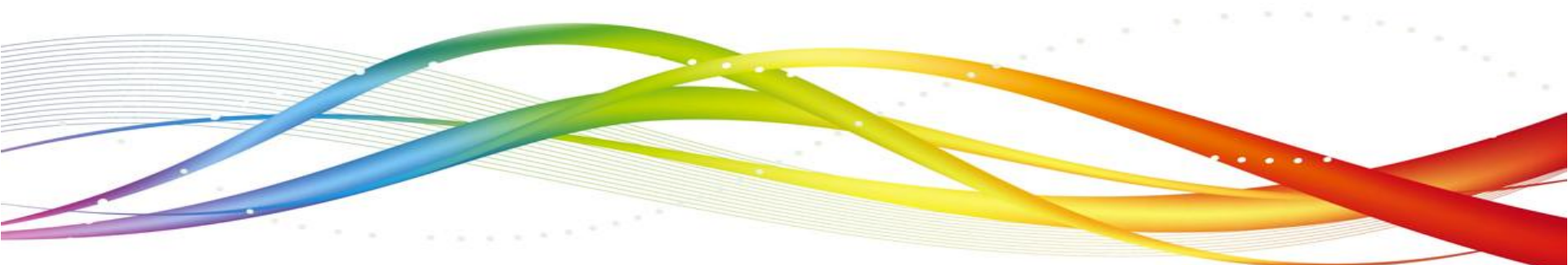


OUR EXPERIENCE RETAIL GIANT

- 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



Thank You



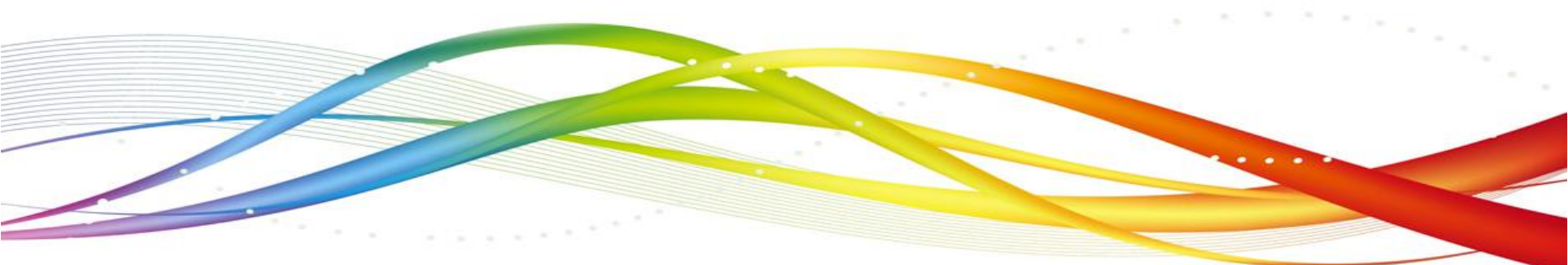


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Energy, Natural Resources and Utilities

Anand Padmanabhan
SVP and Global Head, ENU



Agenda

1 Overview

2 Trends transforming the industry

3 Domain solutions

4 Design Principle

Integrating Value Chain

Geography Expansion

54.7% Revenue Growth

12 years

15+ large Utility

transformation programs

YoY

Fast Growing Business Unit in the Industry

Analytics

Customer experience

Domain Solutions

40.25 % Growth in Top

Over 6600 dedicated people

5 accounts

Cross Industry Collaboration

Among the top 10 IT

6 of the world's top 10 oil

Services provider to the energy and utilities industries

companies

75 clients globally

Acquired SAIC's oil and gas business

31.6% CAGR Over Last 3 Years

Digital Oilfields

Key transformational changes in the industry

- ▶ Markets shifting east
- ▶ Environment, Health and Safety
- ▶ Digital Oilfields
- ▶ Integrated Value Chain for Downstream Oil and Gas

Oil & Gas



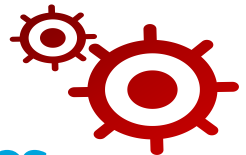
- ▶ Smart Grids
- ▶ Changing competition environment
- ▶ Complex Regulations

Utilities



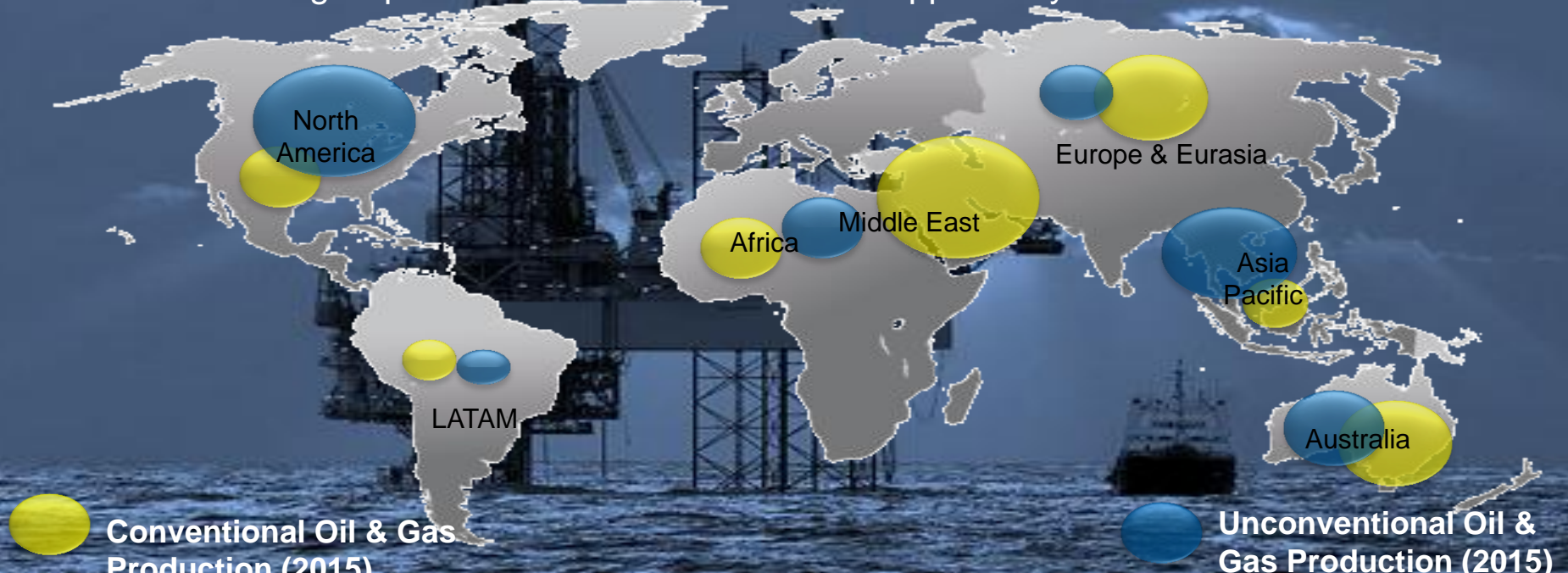
- ▶ Joystick Mining

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

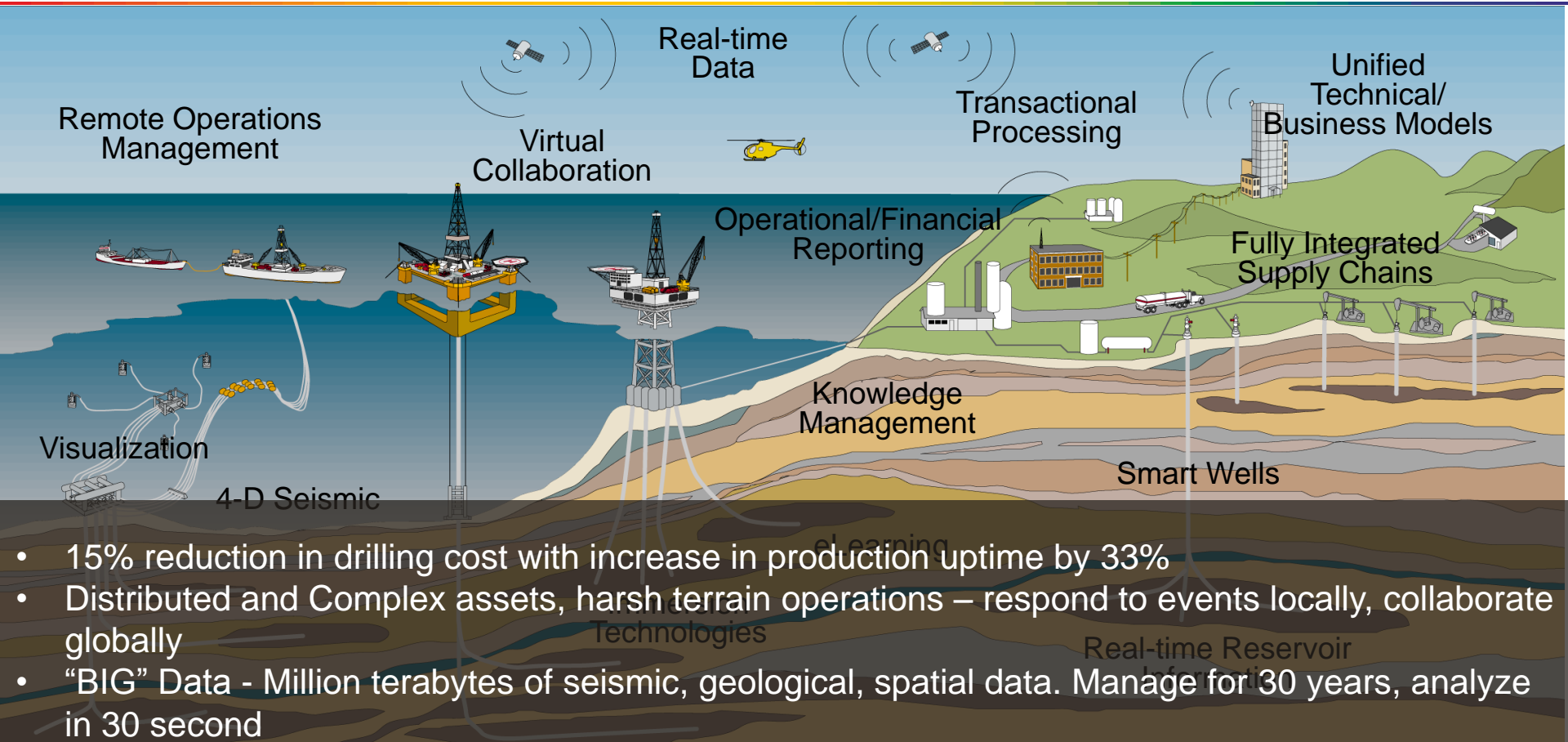


This is the New REALITY



- 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

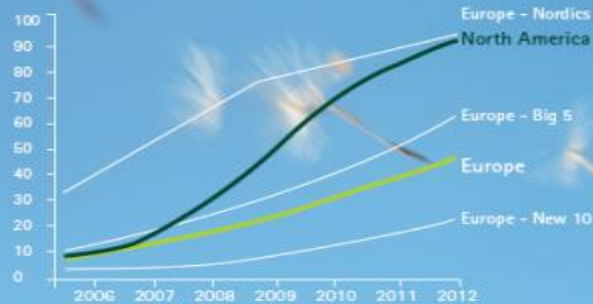
Digital oilfields



- 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

Major economies investing in Smart Grid

Smart Metering Implementation Growth Europe & US 2006-2012



Source: "Smart metering in the Energy and Utilities sector", Darawonator 2007; Factiva 2007, Accenture Research analysis

Parkes 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.."

Parkes Associates (2009).

- 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)



Source: Zpryme

Joystick mining



- 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

Generation and Renewable

Environment, Health
and Safety

Upstream

Utility Retail



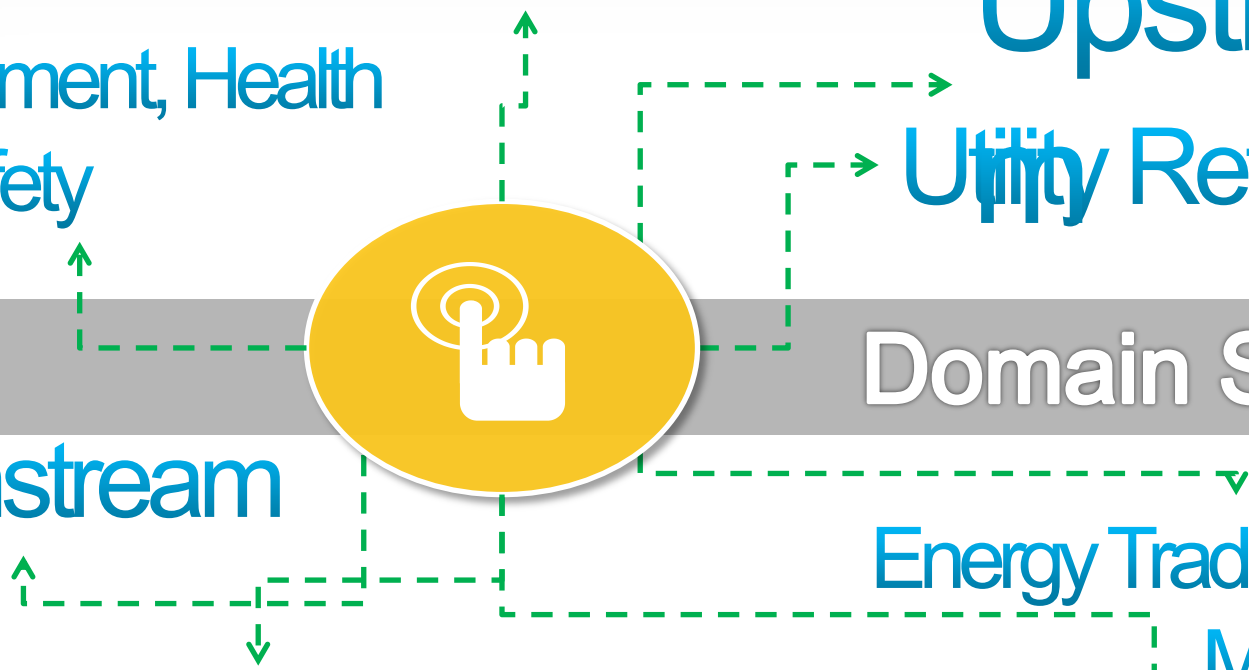
Domain Solutions

Downstream

Energy Trading and Risk
Management

Transmission & Distribution

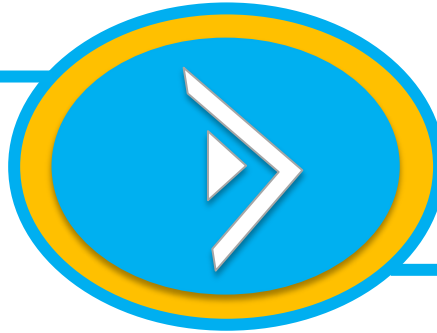
Pit-2-Port
(Mining)



Design Principle

STANDARDIZATION AT THE BACK

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



- Domain led consulting
- Differentiated solutions
- Rapid geography expansion
- Customer and Asset Analytics
- Creating cross industry collaboration

DIFFERENTIATION AT THE FRONT



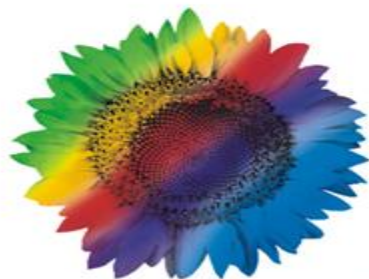
Thank You

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Designed By

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



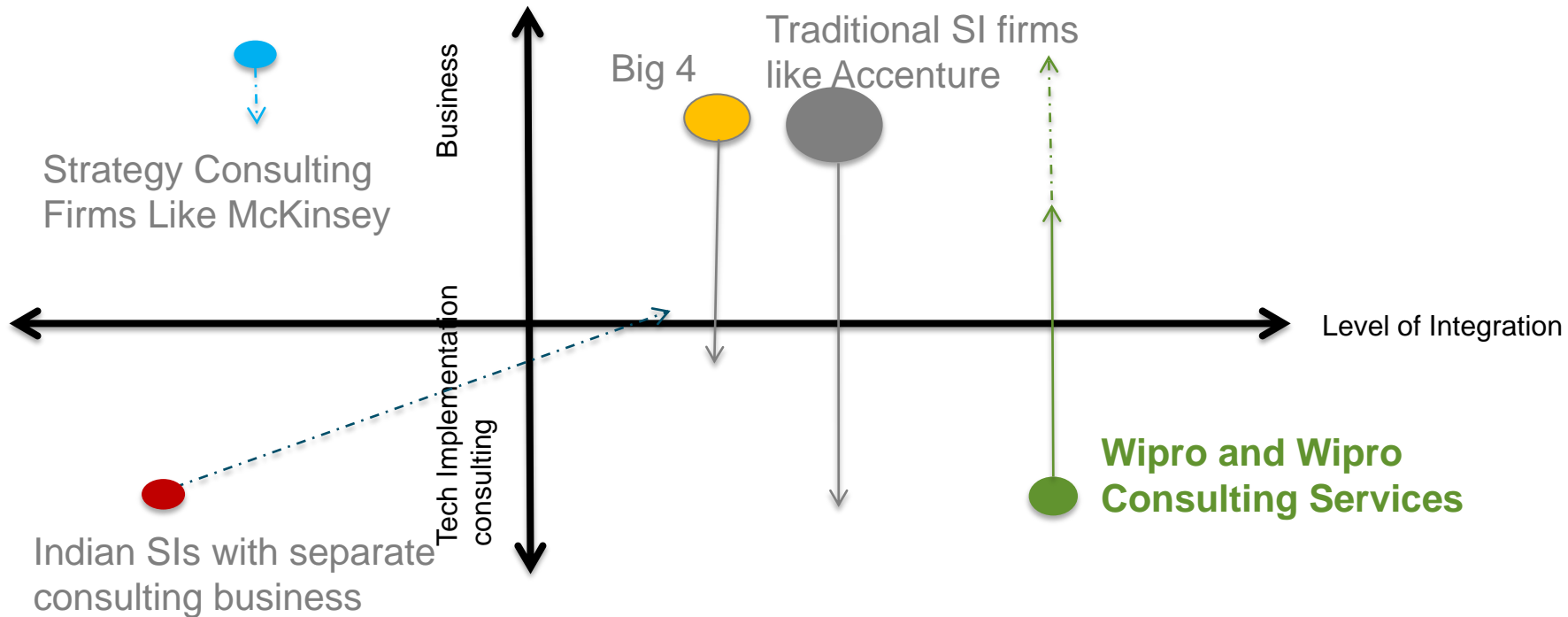
1600 Consultants
80 Partners



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

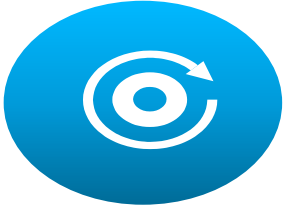
Understand Business side Capital Project Priorities (Line of Business Heads)

- 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

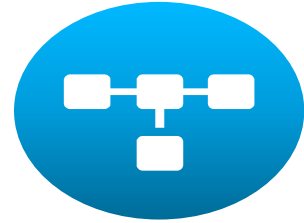
Our capabilities are organized around three transformational agendas



Enterprise
Transformation



Technology
Innovation



Process
Optimization

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**

CASE IN POINT

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





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Manufacturing & Hi-Tech

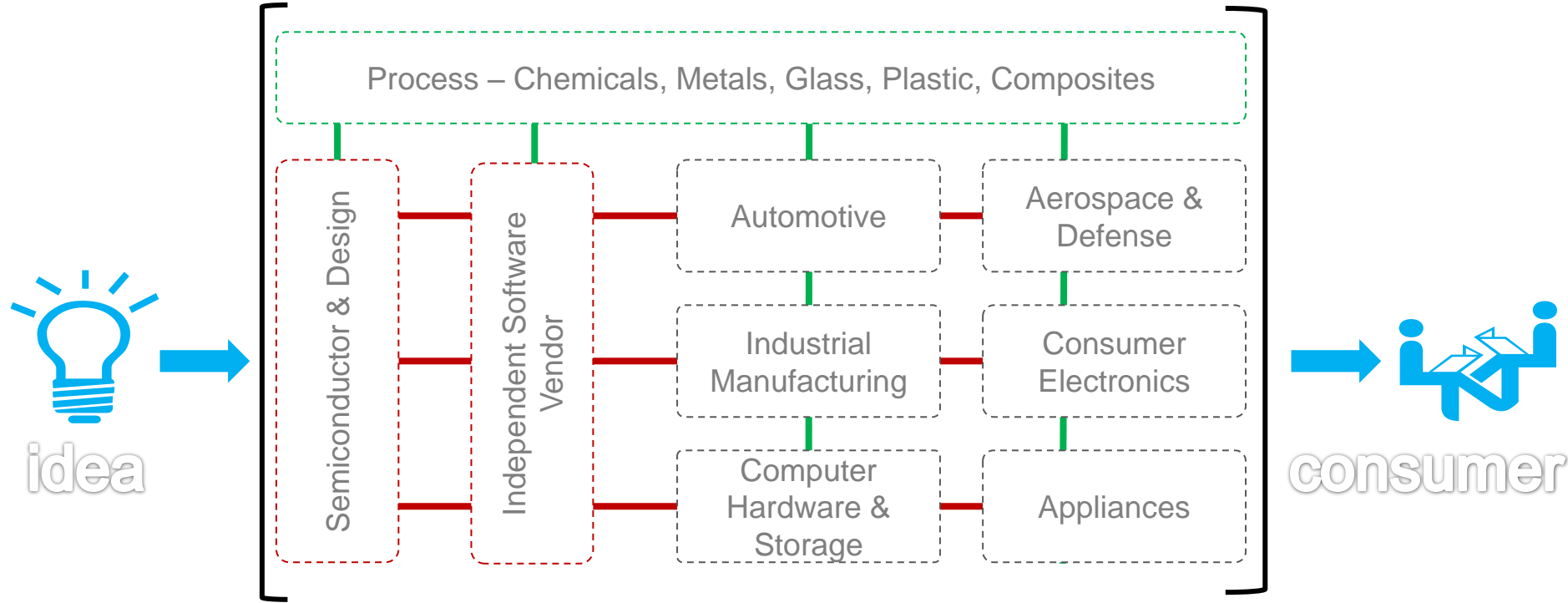
NS Bala

SVP and Global Head, Manufacturing & Hi-Tech

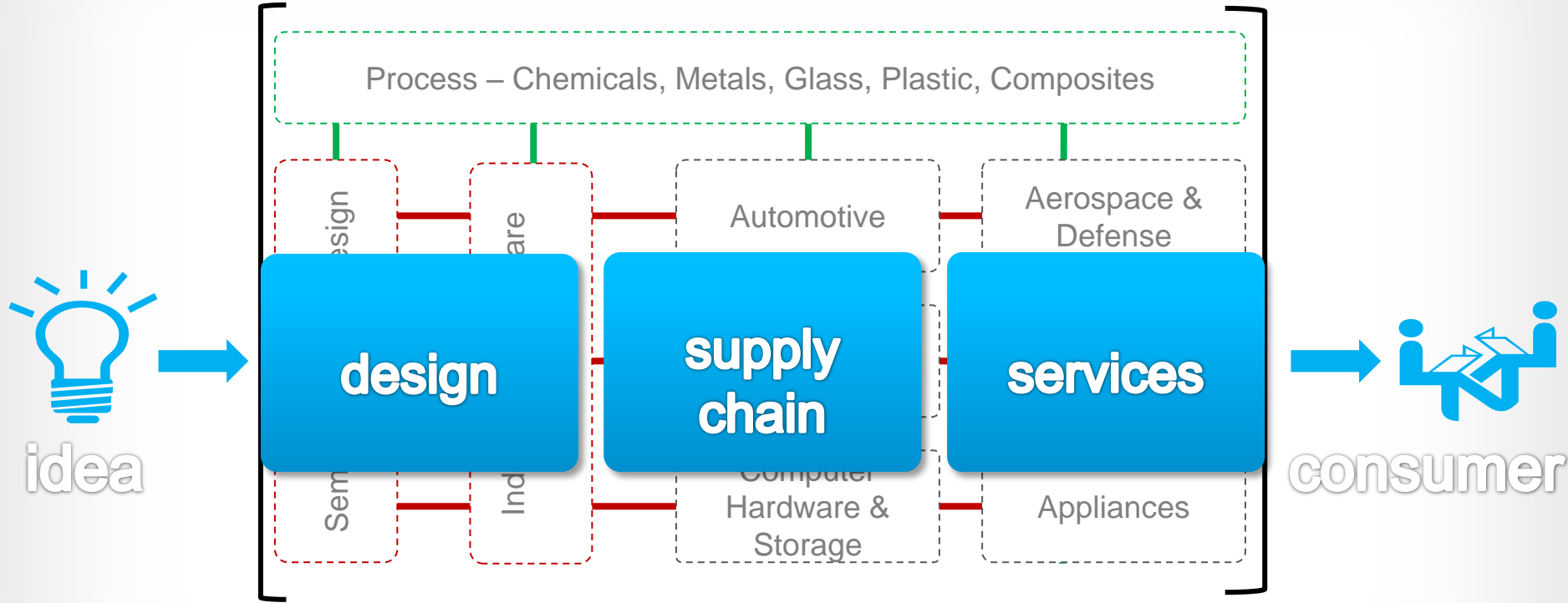
Agenda

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

Manufacturing & Hi-Tech



Manufacturing & Hi-Tech



Manufacturing & Hi-Tech

Differentiation in the front



design

driven
manufacturing
frugal
engineering

**supply
chain**

services

platforms

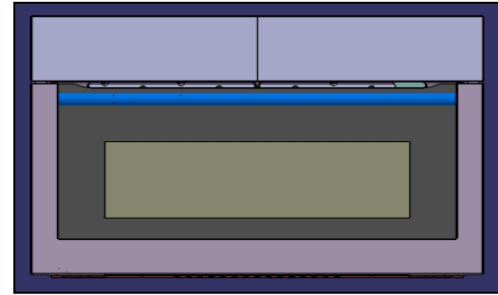
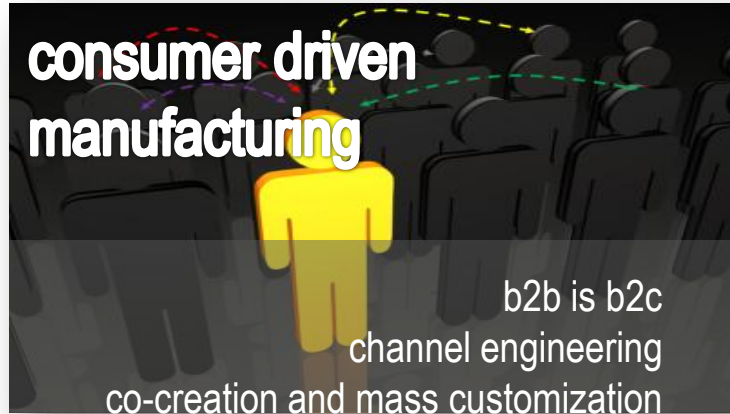


consumer

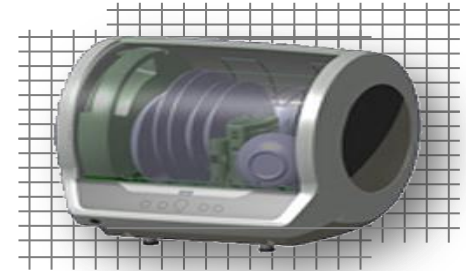
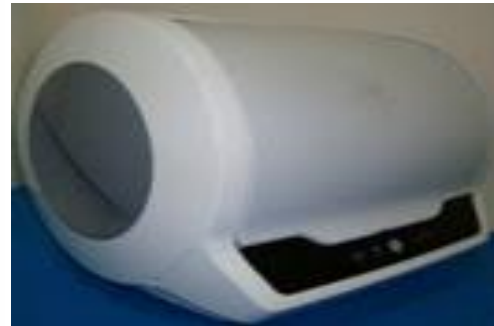
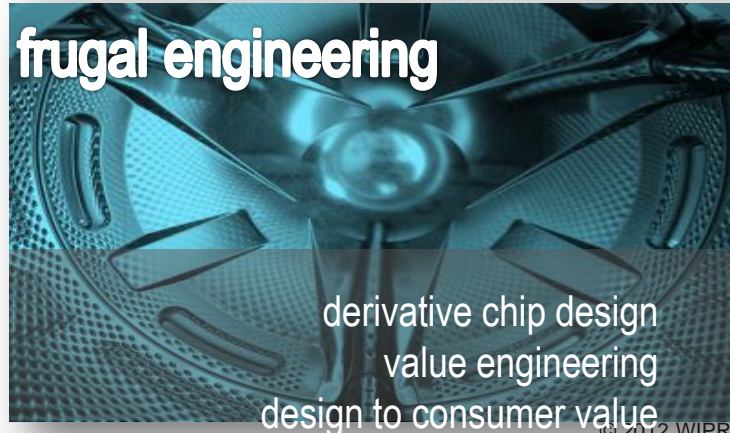
“Asset-light” organizations

Standardization at the back

Design



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

intelligent products

device ecosystem
augmented reality
autonomic services

examples

analytics
frameworks
platforms

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



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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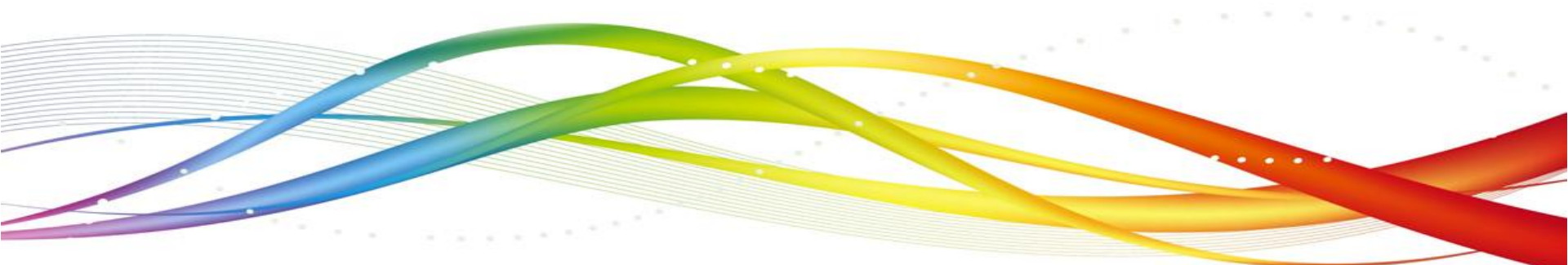
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Wipro BPO - Business Process Outcome

Manish Dugar

SVP and Global Head, Wipro BPO



Agenda

1

Changes influencing business

2

Design Principle: Integrated power play

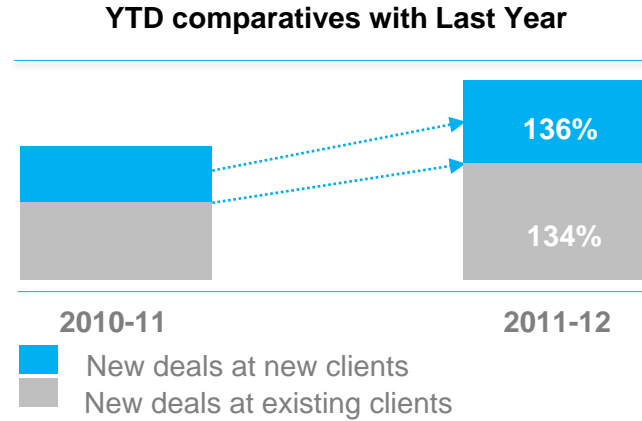
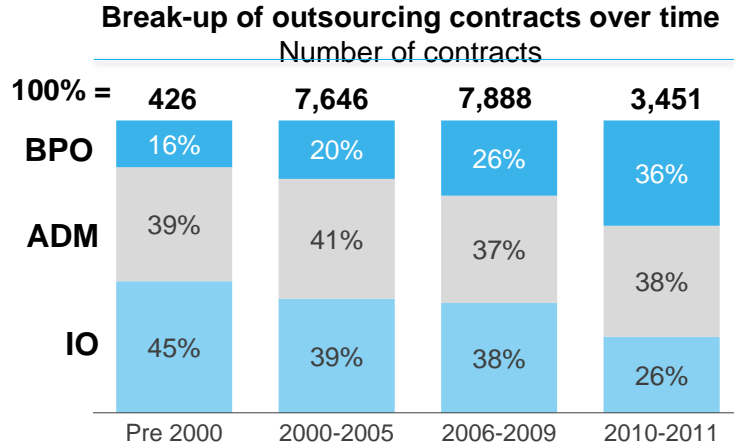
3

Case Study: Business Value Delivered

4

BPO, shifting in top gear

Changes influencing business



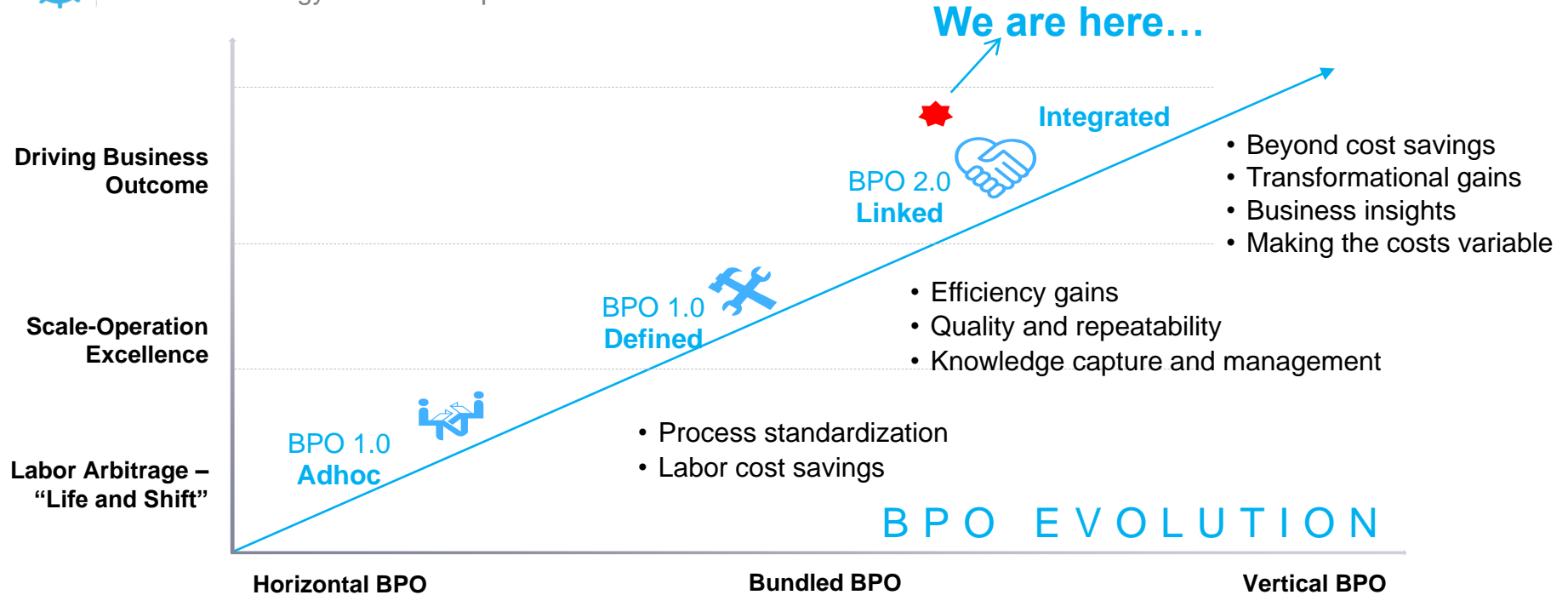
- Share of BPO in outsourcing spend is increasing
- BPO customers shifting from functional, siloed approach to end-to-end process driven approach
- Cost reduction and operational excellence are table stakes, Access to technology and expertise to drive competitive advantage is the key driver

Differentiation through: Integrated Power Play

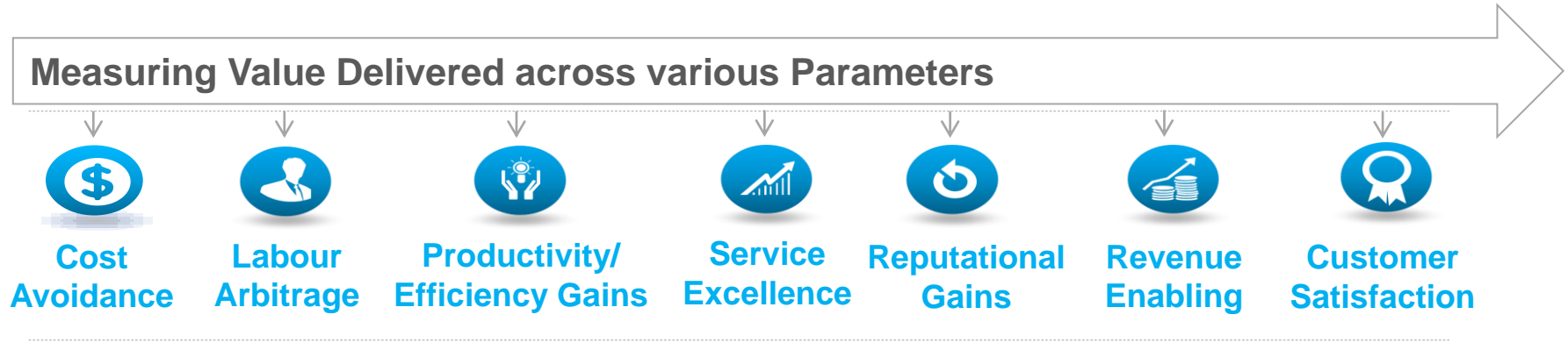


Integrated Power Play

BPO | Technology | Domain Expertise



Scaling up the value chain



- 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**

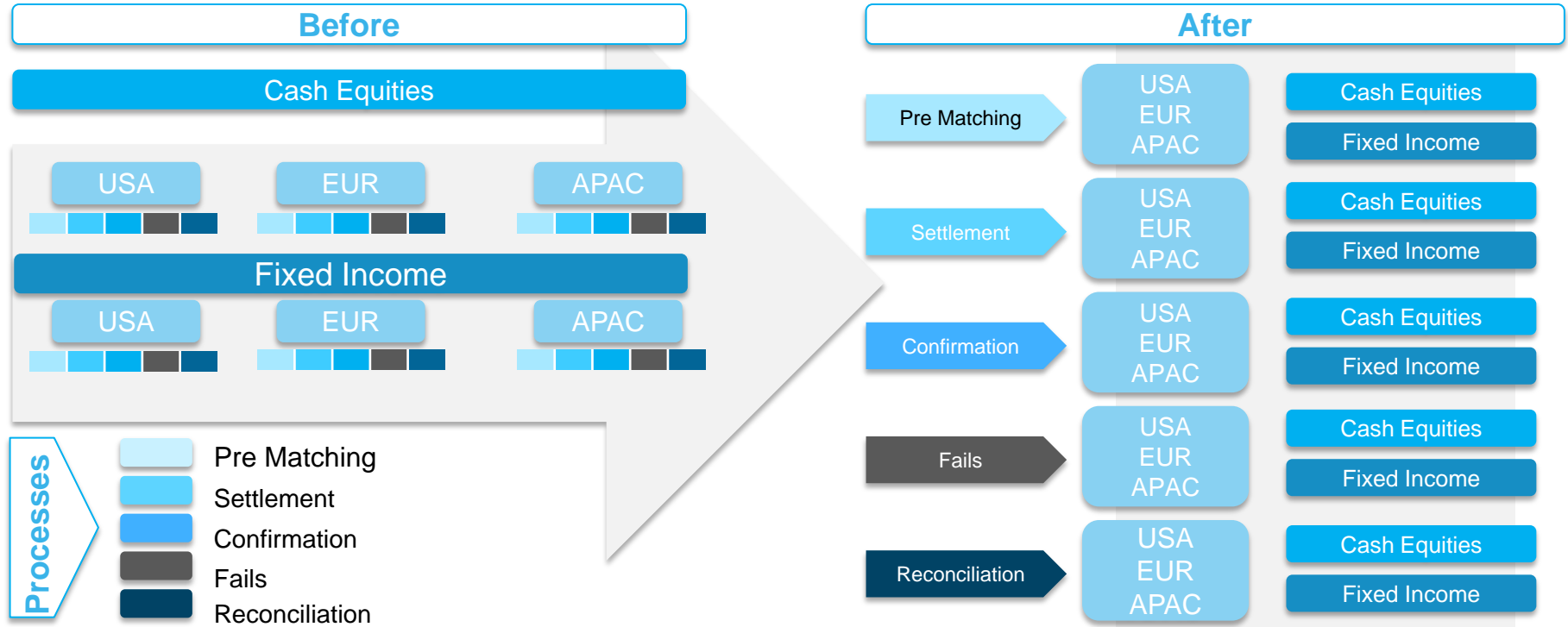
Fragmented Processes and
multiplicity of application platforms –
No standardization

Rapid capacity creation

Up-to 50% reduction of fails volume

Going beyond labor arbitrage

Value Delivered – Transformation



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



Disparate local markets

UK		Europe	
M1	M2	M3	M4
M5	M6	M7	M8



Need for:

- Pan-European model and centralization
- Standardization of process across markets
- Consolidation into 2 Wipro Delivery Centre's

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.

Performance update, BPO in top gear

140%

increase

TCV of deals won in 2011
Growth

new logos added in 2011

Major Investments in Platforms
and Solutions

2000+

FTE's in nearshore locations
across Europe, APAC & NA

People

Drive Integration through
penetration in Wipro
traditional IT Accounts
working

4

New delivery locations added this
year; Ireland, UK, Canada &
Mexico

Delivery

Class

Significant increase in NPS
scores

.... Over \$ 1.1 B... Value delivered

Analyst SPEAK



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 tomorrow's 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



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