Highlights

- Ranked amongst India’s top 15 software companies by NASSCOM - 2012

- Exclusive Harvard Case Studies on The Future of Vision Communities and Leading Innovation and Organizational Change at Zensar

- Named by leading global research organizations for robust capabilities and strong practices across verticals
Revenue Spread

Revenue by Geography:
- USA: 72%
- Europe: 10%
- Africa: 9%
- Rest of the World: 9%

Revenue by Vertical:
- Manufacturing, Retail & Distribution: 54%
- Insurance, Banking & Finance: 15%
- Govt, healthcare & Utilities: 20%
- Alliance & Others: 11%
The current state: The Good and The Bad

Wins
- H1 = $7M / Q3 = $20M

Under Pursuit
- Total value of large opportunities = $105M

Sales opportunities
- Total Infrastructure Outsourcing (TIO)
- Multi-Vendor support - a unique positioning amongst Indian IT companies
- Migration to hybrid cloud infrastructure
- Global integrated multi-lingual service desk capability

Go-to-market
- Moving work offshore
- Exit from non-growth accounts
- Long lead times for large deal closures

Change in Revenue Mix
Zensar’s Unique Differentiator: Multi-Vendor Support

- Single point of contact for all infrastructure support
- Unified and integrated processes for all systems
- Global 24x7x365 multi-lingual help desk and local field support
- One contract and one bill
Global Integrated Framework

Infrastructure as a Service
- Enterprise Cloud Computing
- Virtual and Physical Servers

Service Desk
- VoIP Network across:
  - Westborough
  - Veenendaal
  - Shanghai
  - Pune and Hyderabad

Contact Center
- Contact Center
- Intelligent Call Routing
- Hosted / Premise ACD
- IVR and Speech

Data Center Solutions
- MVS
- Consolidation
- Migration
- Hybrid Cloud
- Cloud Switch

On Demand Services
- Messaging Service
- Server Monitoring
- Network Monitoring
- Database Monitoring
- Storage Management

Unified Communication
- Unified Messaging
- Managed Reporting
- Web Conferencing

Security
- Vulnerability Management
- Firewall
- Security Devices
- Risk Management
- Compliance Management

Secure Gateway
- Westborough
- Veenendaal
- China
- Pune and Hyderabad

11/18/2015
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Outlook for FY14

- Healthy opening large deal pipeline
- TIO & MVS to be main arrowheads
- Verticalization of IM offerings
- Single brand & logo globally
VERTICALIZATION

FOCUS AREAS FOR FY14
Verticalization: The journey so far

<table>
<thead>
<tr>
<th>Focus Areas</th>
<th>2011-12</th>
<th>2012-13</th>
<th>2013-14</th>
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</thead>
<tbody>
<tr>
<td>Deliveries Aligned to Verticals</td>
<td>30% Strong growth in Strategic Customers</td>
<td>80% of new customers aligned to key verticals</td>
<td>Sales Alignment and Strengthening of propositions</td>
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<td></td>
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<td>Big deals in Focus Verticals</td>
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<td>45% growth in Manufacturing and Insurance</td>
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<tr>
<td>Achievements/Target</td>
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<td>Accelerated growth through Strong Arrowheads</td>
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<td>End-to-End Vertical Capabilities</td>
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- 30% Strong growth in Strategic Customers
- 80% of new customers aligned to key verticals
- Big deals in Focus Verticals
- 45% growth in Manufacturing and Insurance
- Accelerated growth through Strong Arrowheads
- F1000 Account acquisition
- End-to-End Vertical Capabilities
### Way Forward: Focus on Business Outcomes

#### Traditional Deliverables
- Domain led Solutions
- Custom Application development
- Service SLAs

#### Additional Deliverables
- IT Strategy and Process Consulting
- IT driving Business Outcomes
- Total Infrastructure Outsourcing

#### Today vs. Tomorrow & Benefits

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<thead>
<tr>
<th>Today</th>
<th>Tomorrow</th>
<th>Benefits</th>
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<tr>
<td>Process Standardization</td>
<td>Process Differentiation</td>
<td>Improved Return on Capital Employed</td>
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<tr>
<td>System Integration</td>
<td>Process Integration</td>
<td>Configurable &amp; Agile Systems</td>
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<tr>
<td>Stability</td>
<td>Continuous Improvement</td>
<td>Building efficiencies everywhere</td>
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<tr>
<td>Data Capture</td>
<td>Data Insight</td>
<td>Real-time Decision Advantage</td>
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Driving Agility for Organizations

Agility will set the leaders apart

<table>
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<tr>
<th>Manufacturing</th>
<th>Retail</th>
<th>Insurance</th>
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<tr>
<td>▪ Supply Chain Efficiency</td>
<td>▪ Source To Store Supply Chain Optimization</td>
<td>▪ Policy Administration Efficiency</td>
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<tr>
<td>▪ Shop Floor Efficiency</td>
<td>▪ Accelerate ROI in Omni-Channel</td>
<td>▪ Insurance SME led Managed Services</td>
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<tr>
<td>▪ Shop floor to Top floor decision advantage</td>
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<td>▪ Customer Integration through mobility</td>
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<td>▪ Claims Management Efficiency</td>
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<td>▪ Customer behaviour driven revenue growth</td>
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Zensar’s Growth Enablers

▪ Achieve Accelerated Growth
  - Investment in a large team focusing on Big Deals
  - Majority of business from F1000
  - Shift from “Single Channel” to “Multi Channel” business acquisition
  - Meaningful M&A

▪ Accelerate Service Delivery Excellence
  - Onsite Services Organization to engage with customers
  - IT-IM-BPO Integrated Solutions
  - Transformation from SLA to SLO Management

▪ Attain ‘Partner of Choice’ status in chosen Vertical/Solutions/ Technologies
  - Number 1 Mid-Tier Strategic IT Partner
  - Top 3 Oracle ecosystem partner for Manufacturing Company
  - Number 1 Mid Tier Partner for Analytics and Big Data (MRD)
  - Digital Economics (Social Media, Cloud, Mobility)

Attain ‘Best in class’ in chosen Business Metrics
Multi-Layered approach to IT Needs

Run the business
- Total IT Outsourcing
- Total IM Outsourcing
- Managed Services
- End-to-end Business Process Management
- Cloud Computing

Grow the business
- X-as-a-Service
- Improving Financial & Operational KPI’s
- Systems Integration

Transform the business
- Enabling new business models through technology solutions
- Consulting
- BI and Predictive analytics
Zensar’s Solutions Portfolio

**Enhance** process specific consulting capabilities

**Continue evolving** end to end solutions for business

**Further Strengthen** through
- Acquisitions in white spaces
  - SAP, Cloud, PES, IM
- Focus on Business Outcomes

Consulting

- Manufacturing
- Retail
- Banking and Financial Services
- Insurance
- Healthcare

Further Strengthen through
- Acquisitions in white spaces
  - SAP, Cloud, PES, IM
- Focus on Business Outcomes

Managed Sourcing

Business Process Management

Application Management
THANK YOU
Zensar & RPG Enterprises