



HEXAWARE



Infrastructure Management Services

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Discontinuity # 1: Run the Business Revenues under siege

Cost of Bandwidth



Over the past 10 years

40X

Cost of Processing



Over the past 10 years

60X

Cost of Storage



Over the past 10 years

80X

Cost of Operations



Over the
next 5 years

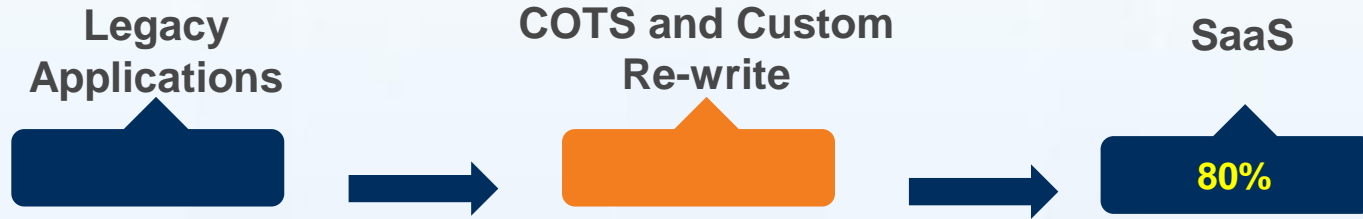
10X

* Goldman Sachs Data

Discontinuity # 2:

Cloud & Technology disrupting need for Run the Business Workload in 3 Years

APPLICATION



Proprietary Platforms : Mainframe/ iSeries/ Unix

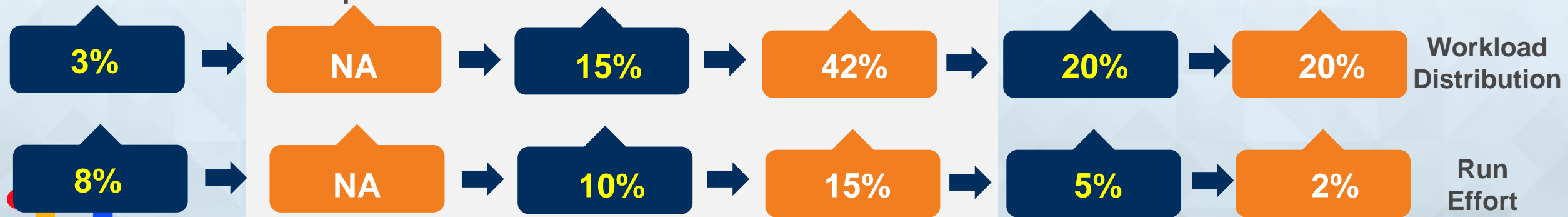
Virtualized x 86 delivered via discrete Infra components

Converged Infrastructure

Hyper-converged Infrastructure

IaaS/PaaS

SaaS



Private Cloud/SDX

Discontinuity # 3:

Shift from a people to automation centric delivery model

IT OPERATIONS WILL MIMIC THE AUTO INDUSTRY

MANUAL CARS



AUTONOMOUS CARS



SEMI-AUTONOMOUS CARS

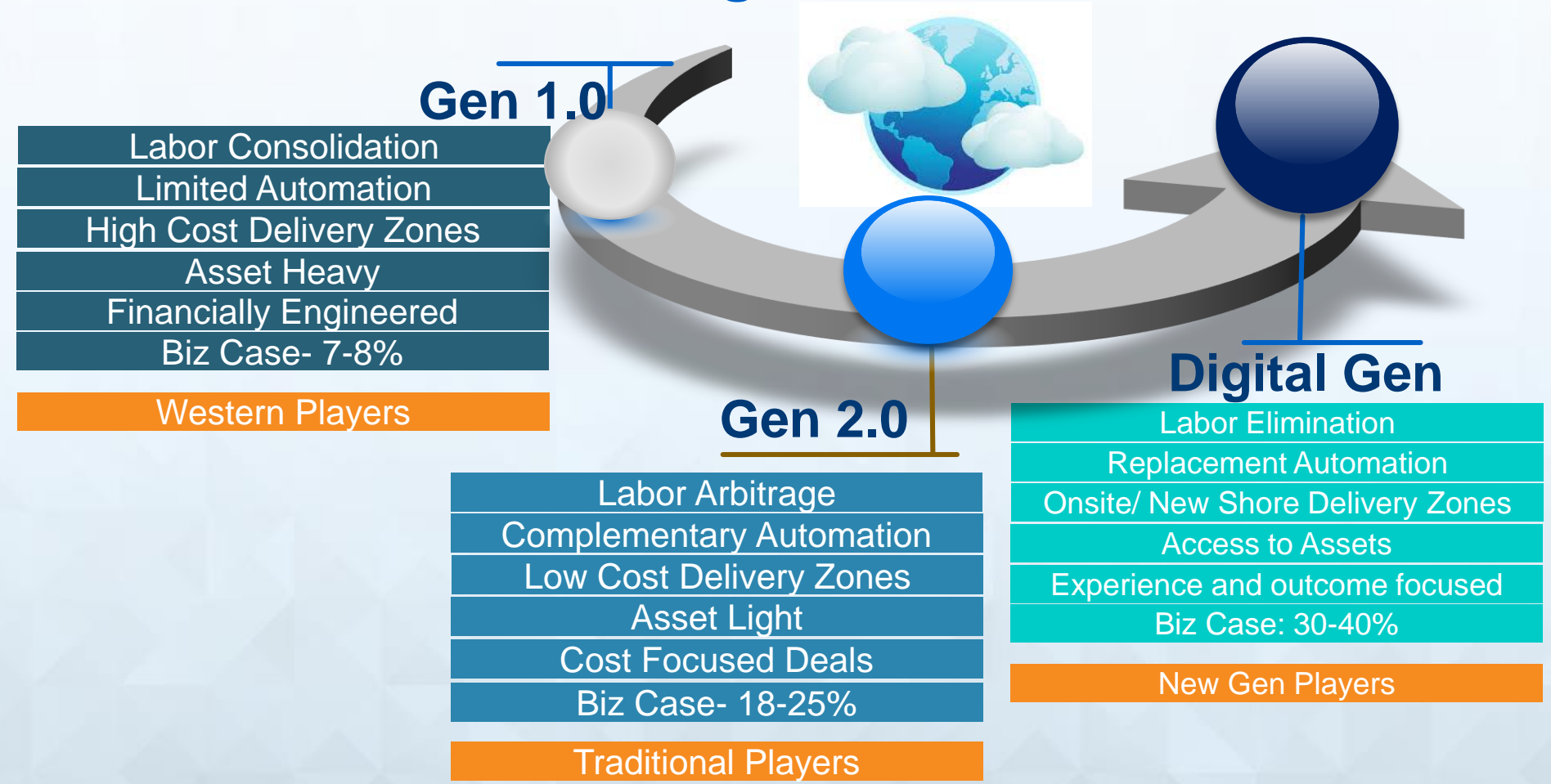


HEXAWARE

Shrink IT | Grow Digital

Infrastructure Management: The next shift

We are going to see a new wave of “land grab” – new set of winners



● Fundamentals of the business significantly change every 10 years or so...

IMS Focus on Go to Market

Next Gen Managed Services



**Target Segment : Sub \$ 10 Bn
Global Enterprises**

Deal Size : \$ 10 - \$25 Mn TCV

**Type of Account : Mostly Gen 2.0
deal renewals but in some cases
First Time outsourcers**

**Focus on clients experiencing the
“watermelon” effect or create
awareness of the watermelon
effect.**

**Driven by RAISE IT , greater
acceptance relative to proprietary
platforms**

Cloud Adoption and Migration



**Target Segment : Global 1000
Enterprises**

Average Deal Size : \$ 100k - \$ 2 Mn

**Type of Account : Born in the
Cloud customers, Customers that
are already in the cloud and are
facing adoption challenges , First
Time Cloud users.**

**Focus on the cloud lifecycle
journey and leveraging extreme
automation in all phases of the
journey.**

Driven by CLOUDSWIFT

Automation as a Service



**Target Segment : Global 250
Enterprises**

**Average Deal Size : Pay as u go
(fully outcome/consumption driven)**

**Type of Account : Insourced
Operations or customers dealing
with Gen 2.0 contracts that are not at
renewal but are keen to get on the
automation bandwagon in a de-
risked fashion.**

**Very POC driven sales process, the
risk is on the service provider to
drive adoption.**

Some key numbers

10.4%

Revenue CQGR
(10 Quarters from Q1 15)

Incremental Revenue
Contribution (CY 16 v/s
CY 15)

70%

1.2X

Average ACV on
Annuity Deals
increased by

Demand Pipeline at
the same time last
year up by

2X

90%

TCV Booking increased
(CY 16 VS CY 15)

Some key numbers

45%

Material IMS Penetration
in
Category A accounts

5

Full fledged
automation proof points
by **Q3 '17**

60%

Of the incremental revenue
contribution from **Next-
Gen** Services

65%

Of the incremental
contribution from Annuity
and Fixed price

Customer Proof Points

Global 1000 Auction Services

Nature of Services : End to End
Managed Services
Customer Characteristic: Gen 2.0 ,
discovered Watermelon
Location/Coverage : Global
Industry : Professional Services
Deal Size (TCV): >\$10 Mn - < \$30 Mn
Incumbent: Traditional IoP
Competition: Mid Tier IoP

Leading General Insurance Payer in UK&I

Nature of Services : **Cloud Lifecycle
Management**
Customer Characteristic: Born Digital, Cloud First
Location/Coverage : UK
Industry : Insurance Services
Deal Size (TCV): >\$5 Mn - < \$10 Mn
Competition: Western Service Provider

Top 10 Global Airline

Nature of Services : Hybrid Cloud
Migration
Customer Characteristic: Gen 2.0,
Watermelon
Location/Coverage : Asia Pac
Industry : Airline
Deal Size (TCV): >\$10 Mn - < \$25 Mn
Incumbent : Western Service Provider
Competition: Western Service Providers

Leading Fitness Provider in the US

Nature of Services : **End to End
Managed Services**
Customer Characteristic: First Time
Outsourcer
Location/Coverage : North America
Industry : Healthcare
Deal Size (TCV): >\$5 Mn - < \$12 Mn
Competition: Traditional IoP

Top 5 Global Insurance Firm

Nature of Services : **Automation as a Service.**
Customer Characteristic: Gen 2.0 but seeking a new
automation partner.
Location/Coverage : Global
Industry : Insurance Services
Deal Size (TCV): Pay as u go
Incumbent: Western Service Provider
Competition: Sole Source

Investing in sustaining growth – key focus areas



Deeper Investment in key **competencies**

- Cloud
- Automation



Grow and nurture the **A+ Team** that we have created



Continue to Invest in **Next Gen offerings** so as to maintain relevance in the marketplace



Deepen the **culture** of Automation First



Innovative Services

Passionate Employees

Delighted Customers

Thank you

www.hexaware.com