HCLTech | Supercharging Progress™

Digital Business

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Value chains in every industry are being reimagined

	BFSI	Manufacturing	Retail & Consumer Goods	Life Sciences & Health Care	Telecom
Business Drivers	• Payments anytime, anywhere • Open banking • KYC modernization • Sustainable lending • Cryptocurrency	• Industry 4.0 • Operational and supply chain resilience • Advanced sustainability	• Supply chain resilience • Dynamic pricing • B2B, B2C, D2C ecommerce • Hyper-personalization	• Patient care • Claims and processing • NextGen HIS • Preventive care	• 5G adoption, services and products • Omni-channel (digital growth) • Billing and core business modernization • Dynamic pricing • "Servitization"
Common Imperatives	• CX (Customer, Partner and Employee) Engagement Transformation • Leveraging Data Insights & AI • Cloud adoption				

Digital Transformation creating new deal motions

Operating Model Transformation

- From project to agile, product-oriented organizations
- Consolidation of Application Support vs. Digital Transformation vendors
- Boutique vendor consolidation

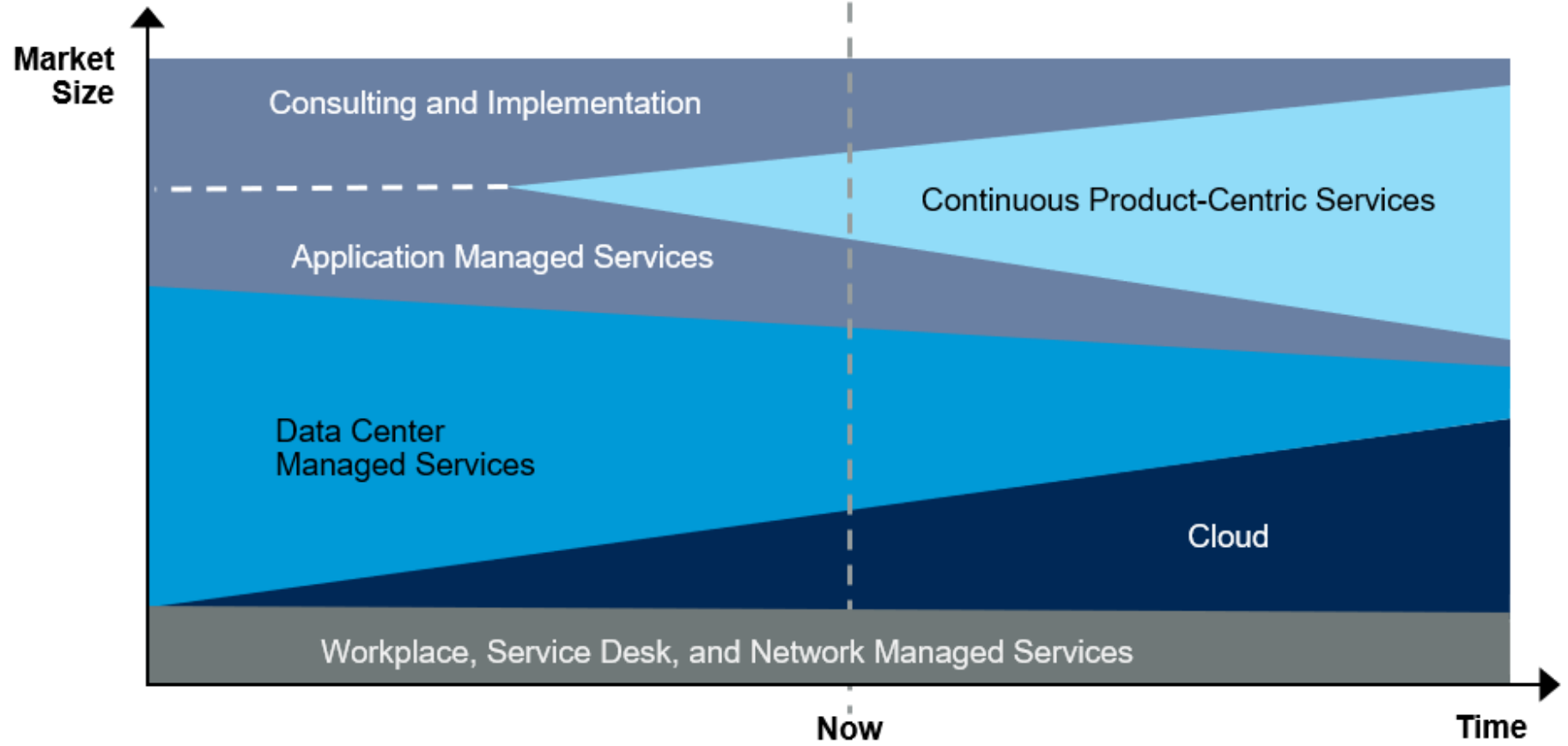
Cloud & SaaS Adoption

- Enterprise Application and business platform modernization through Cloud native composable architectures
- Data modernization leveraging Cloud for enterprise data platforms and advanced analytics

Industry-specific Value Chain Transformation

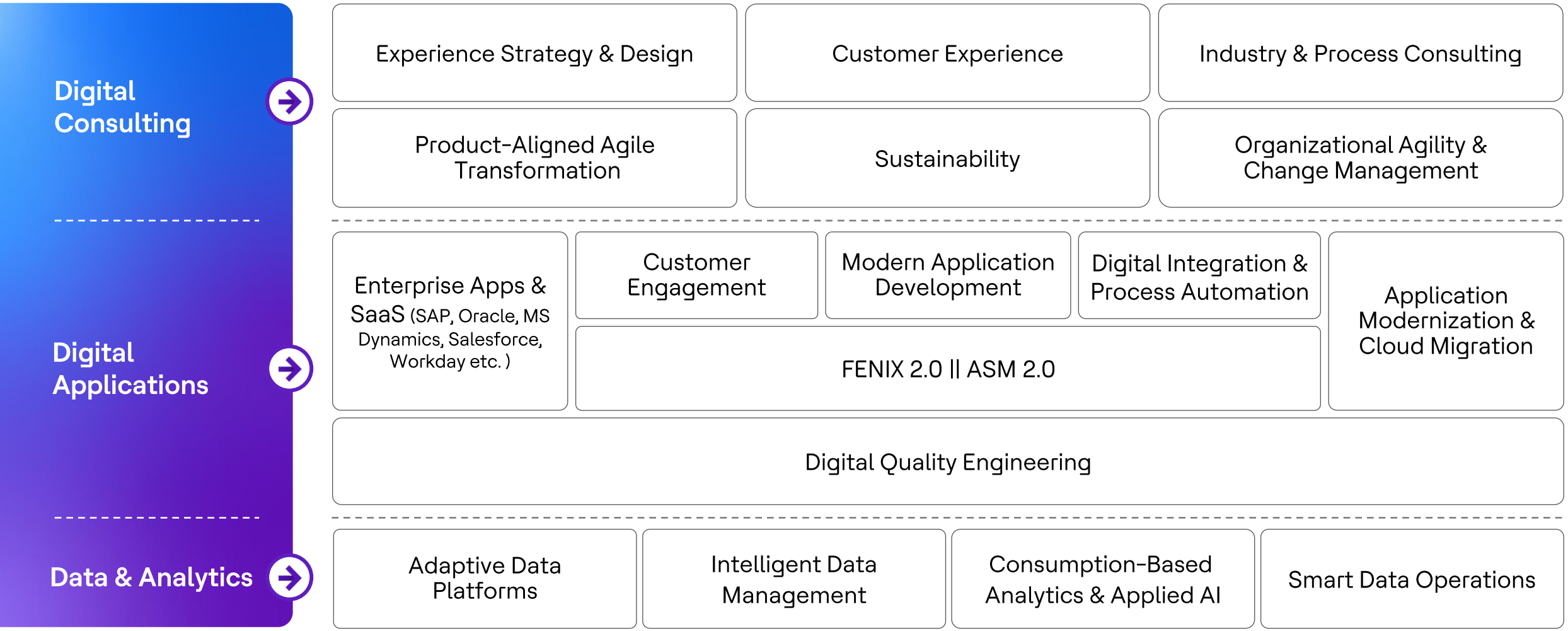
- CX Transformation across B2B, B2C, B2B2C
- Omnichannel commerce modernization
- Supply chain transformation
- Pricing modernization
- Core business platform modernization
- "Servitization"

Enterprises are adopting new IT operating model



Source: Gartner
ID: 407462

Digital Business Services: strategy to execution



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Digital Business: a differentiated challenger

Experience in complex journeys of Business & IT Operating Model change through scaling Agile Delivery, Organizational Change Management

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Unique strength in integrating and transforming Application and Infrastructure Services

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Value Chain transformations through Application & Data modernization, Cloud Adoption, Analytical Insights and AI

Strong 360° relationship with our extensive Partner Ecosystem such as Salesforce, Snowflake, SAP, Microsoft, AWS, Google (GCP) & others

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Global scaling capability of digital talent

Digital Business: strong growth since 2020



62+

Notable customer renewals

98.4% customer renewals with enhanced scope for Digital Transformation



78+

Notable customer wins

New customer wins across industries as digital challenger

Select case studies: supercharging growth as a digital challenger across industries and regions

Large G500 Banking Provider

Scope: Operating Model Transformation from Legacy to Distributed Agile & modernization of Technology Stack

>300% revenue growth over 3 years (from **0 to >$100M/year**)

F500 American Tools Manufacturer

Scope: Digital Marketing Modernization, Omnichannel Platform Transformation; replaced 8 vendors

0 to **over $50M** in revenues in 3 years

G100 Food & Drink Conglomerate

Scope: Cloud-enabled Data & Application Modernization & Advanced Analytics across business units

On track to exceed **$50M** run-rate

Large G100 US Mobile Telecom Provider

Scope: Operating Model Transformation, Omni Channel Commerce & legacy Modernization; executing an Agile-driven, Product-centric Delivery Model

85% revenue growth over 3 years (**>$100M/year**)

Large G500 European Automobile Manufacturer

Scope: DataOps, Digital Data Delivery Operating Model, Support Coverage

62% revenue growth over 2 years

F50 US Bank

Scope: Cloud, DevSecOps Adoption & Agile Delivery

0 to **$35M** in 2 years

Partnership accolades

salesforce	Summit Partner (only Indian SI to achieve this distinction without any M&A)
Adobe	Platinum Partner and member of Partnership Advisory Board
snowflake	Elite (Highest Level) Partner
SAP	Global Strategic Partner; 100% of SAP Customers willing to recommend HCLTech for SAP S/4 Hana; highest rating for S/4 Hana per Dec '21 Gartner Peer Insights
PEGA	Elite (Highest Level) Partner

Strong Analyst recognitions in digital capabilities

A Leader in 2022 Gartner® Magic Quadrant™ for Public Cloud IT Transformation Services, **Gartner**

A Leader in 2022 Gartner® Magic Quadrant™ for Custom software development services, **Gartner**

A Leader in 2022 IDC Marketscape™ for Adobe Experience Cloud Professional services, **IDC**

A Leader in 2022 IDC Marketscape™ for SAP Implementation Services, **IDC**

A Leader in The Forrester Wave™: Application Modernization And Migration Services, Q3 2021, **Forrester**

A Leader in 2022 ISG Provider Lens™ for Salesforce Ecosystem Partners - USA, Germany, **ISG**

A Leader in 2022 Everest PEAK Matrix™ for Life Sciences Digital Services, **Everest**

A Leader in 2022 Everest PEAK Matrix® for Enterprise Quality assurance services, **Everest**

A Leader in 2022 Avasant RadarView™ for Digital Talent capability, Digital CX services and Digital Masters, **Avasant**

A Leader in 2022 Avasant RadarView™ for Applied AI & Advanced Analytics Services, **Avasant**

In summary

Digital Business (Consulting, Application Services & Data Analytics) was the largest growth contributor in the last 2 years

SaaS, Cloud-enabled Data and Analytics, Enterprise & Industry Platform Modernization services now comprise nearly 55% of our revenues

We've renewed 98.4% of our customers and added 72 new Global 1000 customers across industries in the last 3 years

IT Operating Model change is disrupting the Enterprise IT & digital vendor consolidation; we have been the strongest challenger in the space

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