

June 15, 2021

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**Scrip ID:** ZENSARTECH

**Scrip Code:** 504067

**The National Stock Exchange of India Ltd.**

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**Symbol:** ZENSARTECH

**Series:** EQ

**Sub: Disclosure under Regulation 30(6) of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015**

Dear Sir/Madam,

In continuation to our letter dated June 9, 2021, please find enclosed herewith the Investor's Presentation which will be made during RPG Annual Investor Conference 2021.

Kindly take the same on record.

Thanking you,

Yours faithfully,

For **Zensar Technologies Limited**



Gaurav Tongia  
Company Secretary





Zensar Technologies

**RPG Annual Investor Conference  
Presentation**

# Who we are

**We are a young digital native firm on the path to being a cloud-native, experience-led engineering organization.**

## Strong Company Culture

Solid foundation of capabilities and rich ethos

## Living Digital

Early adopter of digital. Key processes and functions are mobile-first and cloud-first

## Integrated Digital Experience

Evolved service line supported by targeted mergers and acquisitions

## Strong War Chest

EBITDA (29.9%YoY ↑), strong cash position (\$160M+), zero debt

# How the market ecosystem is evolving

1

## Digital-led acceleration

Accelerated adoption of cloud, big data, and digital platforms

Focus on security and data protection

Digital transformation focusing on enterprise core

2

## Disrupt to stay relevant

New-age digital-native competition with high speed-to-market

Redefining business models

3

## Follow the money

Tech spend driven across CIO/CDO/CMO organizations

4

## Future of work

High demand leading to a shortage of digital and engineering skills

Hybrid model of working

# How we are aligning to the future

## How the market is evolving

Digital-led acceleration

Disrupt to stay relevant

Follow the money

Future of work

## Imperatives for Zensar

Experience-led engineering services

Drive speed and efficiency for clients

High-resolution services in experience-to-engineering-to-infrastructure

Strengthen capabilities with hyper-scalers

Expand talent pool, skills transformation

## Strategic Growth Opportunities

We will organize company resources, investments and alliances around these focus areas of market opportunity:

Experience Services

Advanced Engineering Services

Data Engineering and Analytics

Application Services

Foundation Services

# Our Strategic Growth Opportunities (SGOs)

1

## Experience Services

Seamless delivery of strategy, design, prototype and production of customer experience (CX) platforms and products

2

## Advanced Engineering Services

Cloud-native and full-stack, high-velocity advanced engineering services to address business-critical digital needs

3

## Data Engineering and Analytics

Expert services addressing full gamut of increasingly cloud-based big data needs for customers, advanced analytics, and AI/ML services

4

## Application Services

Full-lifecycle services addressing application management needs of larger organizations

5

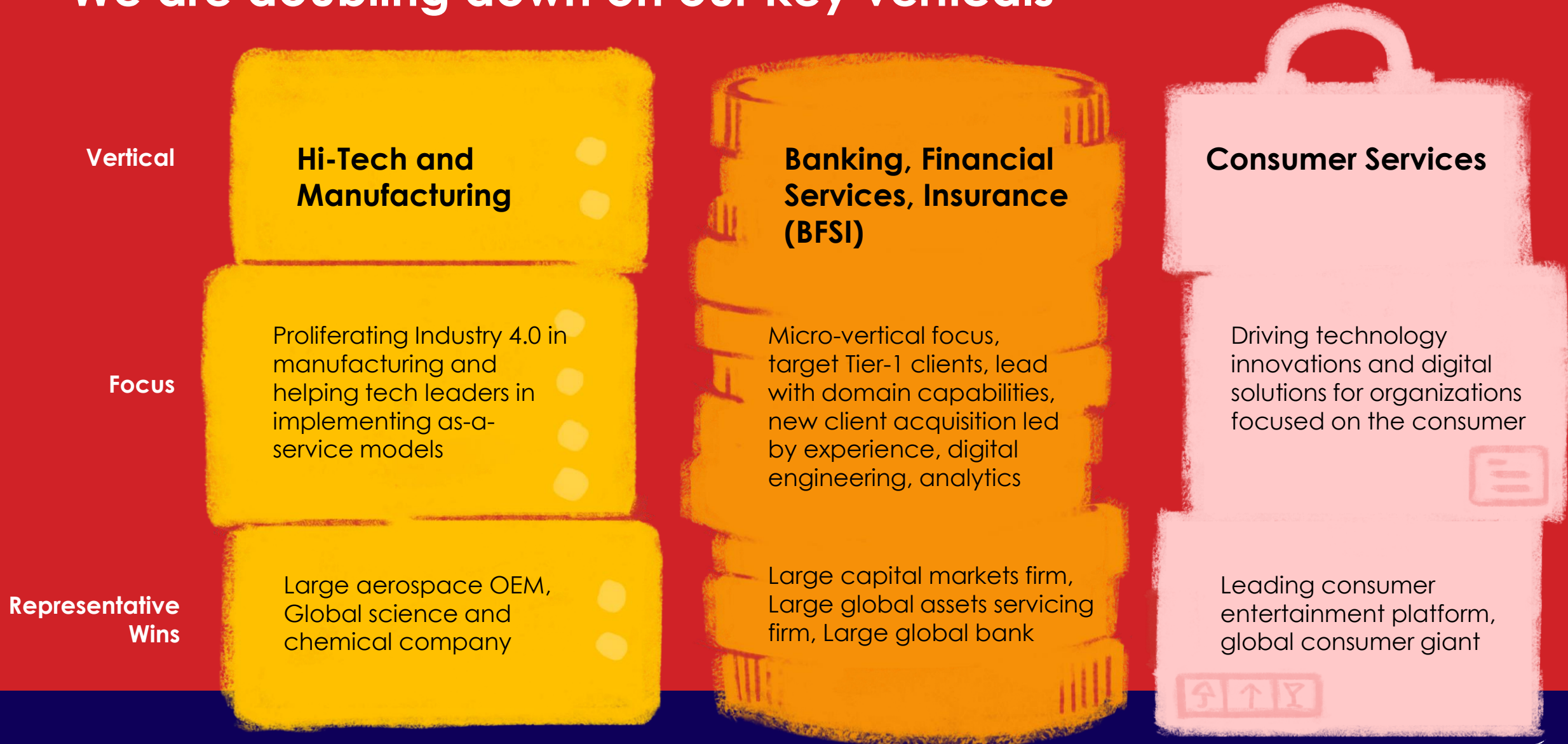
## Foundation Services

Help enterprises design, create, and maintain their infrastructure. Provide an interconnected foundation for digital transformation



**Within each SGO**, we will have multiple **playbooks** which act as service propositions and solutions targeted towards specific customer needs and market opportunities

# We are doubling down on our key verticals



# ...and continuing to grow our primary markets.

## US

- 69.6% of revenue\*
- Verticalized go-to-market
  - Roster of large-cap customers
  - Strong field teams
  - Nearshore delivery in Mexico

## UK & EU

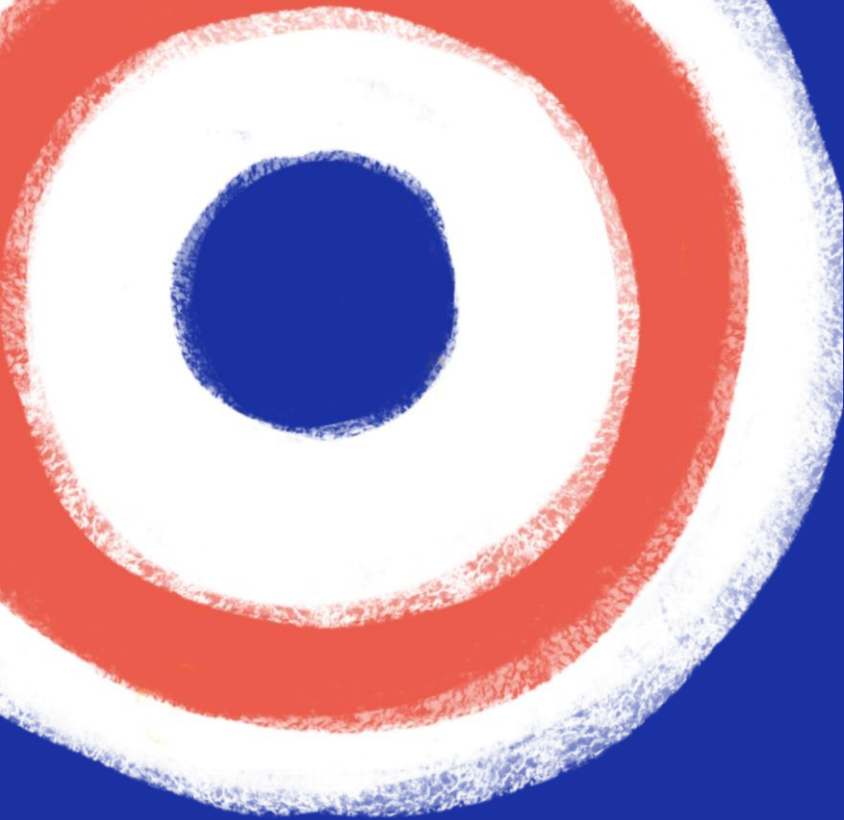
- 18.6% of revenue
- Experience & Engineering led new logo wins
- Select expansion into EU for customer acquisition and nearshore delivery

## South Africa

- 11.8% of revenue
- Leading market presence with top-tier customers across verticals
- Track-record of digital innovation and engineering

\* Revenue contribution based on Q4FY21 results





**We are sharpening our focus**  
**With this approach we are delivering**  
**real customer impact and our**  
**market traction is positive\***

\* While we continue to build upon our current momentum in **Application Services** and **Digital Foundation Services**

## Experience Services

We continue to combine design, strategy, experience, marketing and engineering

Impact: Rapid digital product delivery and launch, CX transformation



## Advanced Engineering Services

We continue to build high velocity cloud-native engineering teams

Impact: Transformed enterprise agility



## Data Engineering and Analytics

We continue to integrate data capability, and connect engineering with experience

Impact: Integrated data capability to drive transformation

## Customer Story: Experience Services

### Re-engineering customer experience for leading media conglomerate

Our client's vision was to create the most immersive and engaging digital experience in the UK. Deeply embedded within their product, technology and brand teams, our role was to define the customer strategy and bring a brand-new digital experience to life in a customer-centric way to drive increased experiences and conversion



**Strategic alignment**  
across all lines of business



**Uplift**  
in key product journeys



## Customer Story: Experience Services

### The first virtual, global auction of its kind

We created an auction experience—from show flow, technology, and communications to on-air and in-room design. In the end, the event not only achieved a financially successful auction of unprecedented proportions but also established this historic art institution as innovators in a centuries old marketplace

**\$46 million**

in sales with seven artist records

**Four global locations**

bidding simultaneously, coordinated across three channels





**40%**  
increase in  
order  
allocations  
with optimized  
algorithms

Enhanced  
picking  
productivity  
by **15%**

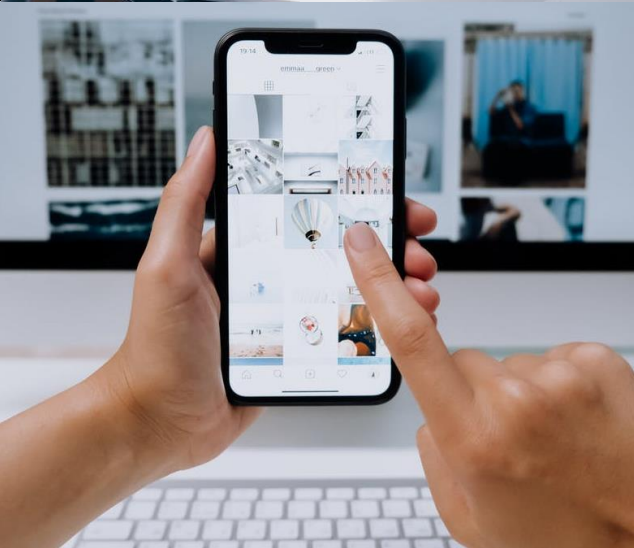
**1.5M**  
orders in  
a single  
peak day



## Customer Story: Advanced Engineering Services

### Department store supply chain transformation

We helped convert a major retailer's legacy system to a cloud warehouse management system using a combination of existing and customized IPs. The result created significant improvements to their operations at scale and gave them a new business model and a platform that is ready for the future



## Customer Story: Advanced Engineering Services

### Experience-led digital transformation at scale

We partnered with a multinational financial services corporation to implement a single, global CXP platform. The product, technology and business teams along with partners were able to leverage the implemented low code solutions and reusable components to improve their go-to-market speed

**25%**  
increase in efficiency

**30%**  
increase in savings

**25%**  
reduction in drop-off rates

## Reimagining the web experience for a leading South African bank

We improved our client's customer experience. Working alongside the client and leading with our multi-disciplinary teams, we upskilled and improved ways of working, which enabled the creation of a modern agile digital product engineering organization, adopting an approach to rapidly launch features and maximize business value

**25%**  
**increase** in  
returning  
customers

**70%**  
**Customers**  
digitally onboarded  
and serviced



## Customer Story: Experience Design & Engineering

### Designed an immersive world of gaming experience

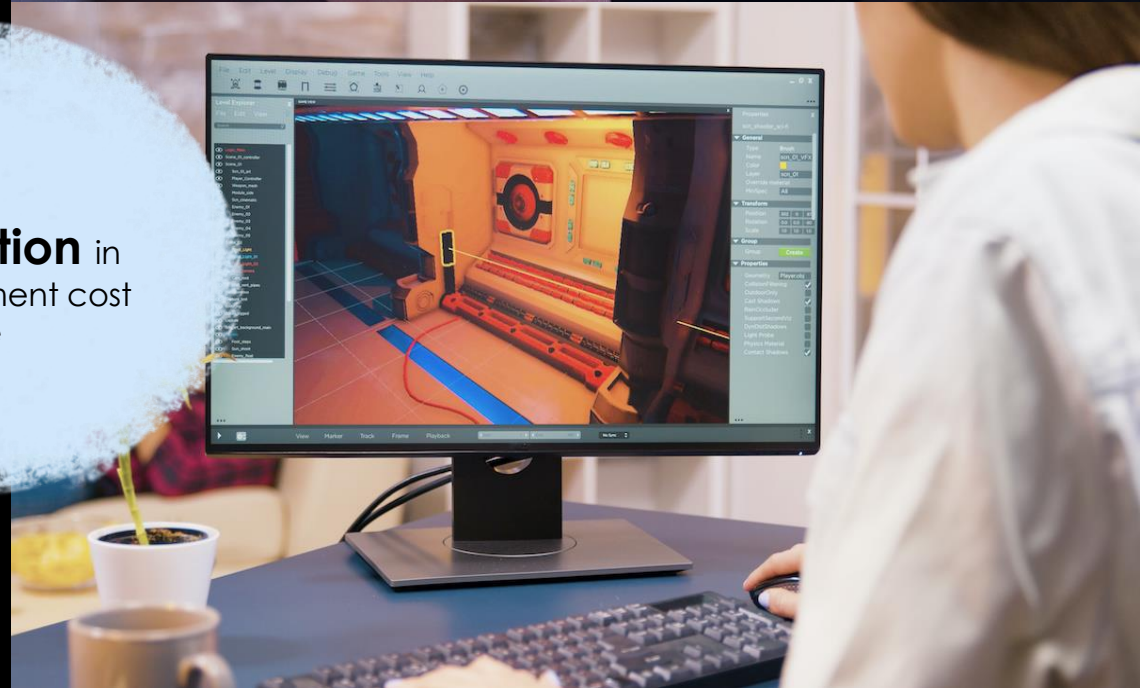
We built one of the largest client specific Gaming studios for an online gaming software development leader and re-engineered the gaming engine through AI/ML technologies to rapidly launch enhanced features and augment player experience

**50+ games**

developed and supported 100+ games across geographies

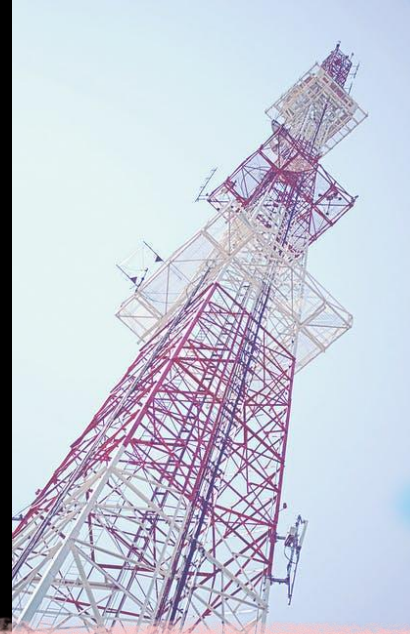
**30%**

**Reduction** in development cost per game



## Mobile network service provider

Sentiment Analytics and ML algorithms enabling faster customer service and improved experience, resulting in significant cost savings



## Data Engineering and Analytics Case Studies



## Global intergovernmental organization

Conversational analytics for grants management and reporting resulted in 99% award utilization with 30% faster deployment for field positions



# Our operationalizing strategy

We will execute our strategy by focusing on four key areas that provide operational thrust.

## 1 Sales transformation for growth

Invest in a demand generation engine, build strong sales muscle, revamp hunting function to drive new customers

## 2 Partnerships with leading product and platform companies

Drive 360° relationships with leading product and platform companies, continue to invest in partnerships with hyperscalers

## 3 Talent transformation (cloud, data, engineering)

Modernize company competency with a focus to enhance internal talent skills, expand talent pool and transform hiring

## 4 Mergers and acquisitions

SGO driven M&A – Tuck-in acquisitions to augment specific growth areas

## **Leadership augmentation**

Onboarded Global Head of Consumer Services  
and Global Head of Salesforce practice

## **Talent transformation**

Infusing talent and building capability in  
Advanced Engineering Services  
Strengthening talent pool by future skilling

## **Mergers and acquisitions**

Recent acquisition of M3bi augments Zensar's  
momentum in data engineering, analytics and  
advanced engineering services

**Building on our strategy**  
**We are sharpening our**  
**capabilities and investments**  
**around our SGOs.**

# Our path forward

We will realize our growth and value for an expanded customer base by crystallizing our services and offerings and transforming how we target opportunities.



**Crystallize** and rewire core capabilities and services



**Transform** sales enablement to accelerate deal wins



**Expand** and enable new customer acquisitions

Thank you

