

# Solving for the Great Restructuring

- **Sanjay Jalona, CEO & Managing Director**  
9<sup>th</sup> December 2021



Six degrees of separation

Six sigma

Six pack

Sixth sense

Sixth Analyst Day of LTI, and...

Six reasons that make us positive  
about the post-pandemic world



# Evolving

## Expectations from LTI

2016

Can LTI reduce dependence on the top client?

2017

How is LTI differentiated vis-à-vis competition?

2018

Can LTI remain #1 challenger in the market?

2019

How is LTI getting ready for the future?

2020

Can LTI sustain growth after the pandemic?

2016-2021

# Wining

by Design



Run rate of

\$2 Bn

Market cap of over

₹1 Tn

Acquisitions

Seven

ESG rating by MSCI

AA

## Purpose



Let's Solve

## Vision

Pioneering  
Solutions in  
a Converging  
World

## Mission

O2T

D2O

Powering the  
**Breakaway**  
Enterprise

DTC

EX

## Core Beliefs

Be agile

Push the frontiers  
of innovation

Keep learning

Go the extra mile

Solve for society

## Culture

Shoshin

Ubuntu

ESG  
leadership

A robust framework to institutionalize  
success for the next 25 years



# Questions on Your **Mind** Today...

What's really driving this  
demand for the industry?

How long will it last?

How will LTI win a larger share?



# 6 Reasons

We are confident of  
emerging stronger in  
the post-pandemic world

# 1. Demand

Secular demand, in line with our expertise

The Great Restructuring

New Spend Areas

The Great Resignation



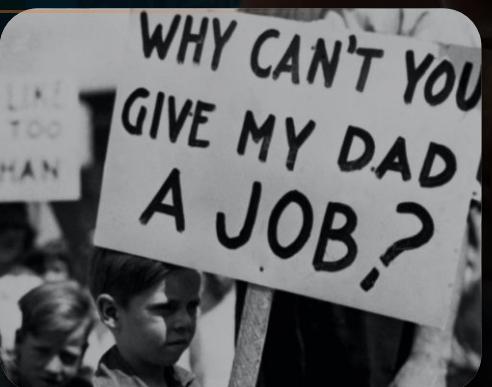
# 1. Demand

Secular demand, in line with our expertise

## The Great Restructuring

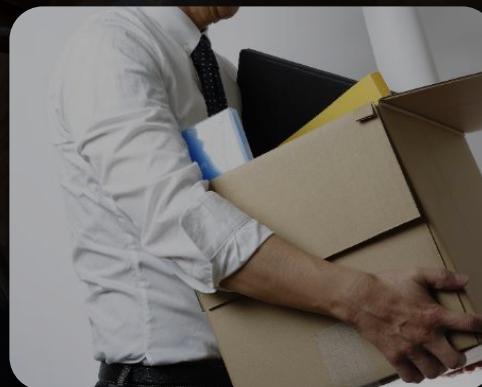
New Spend Areas

The Great Resignation



The Great Depression

Aug 1929 – Mar 1933



The Great Recession

Dec 2007 – Jun 2009



The Great Restructuring

Nov 2019 onwards

# 1. Demand

Secular demand, in line with our expertise

The Great Restructuring

## New Spend Areas

The Great Resignation

ESG

Cybersecurity

Digital, Data, Cloud

# 1. Demand

Secular demand, in line with our expertise

The Great Restructuring

New Spend Areas

## The Great Resignation

Annualized wages are rising at **4.5-5.0%**, highest in last 20 years

**10.5 Mn** job openings, as against **7.4 Mn** unemployed workers

According to Gallup, **48%** of employees are actively searching for new opportunities

# 2. Capabilities

We have been investing  
in relevant capabilities

Mature **vertical capabilities** across chosen domains

Scaled up, ecosystem driven **cloud and data services**

Innovative & Agile **productized IT organizations**

Design-led end-to-end **reimagination & transformation**

# 3. Talent

We are well-prepared to  
win the war on talent

## Headcount



### Yin-Yang Model

- Expanded ecosystem with Day 0/1 preference
- Highly effective referral & green channel programs
- Satellite offices in India
- Glocalization focus – USA delivery team
- Rapidly growing employer brand
- Next generation talent platform

# 4. Sales & Marketing

A robust blueprint for continued growth

CHIP framework

Next-gen marketing and branding

Strong alliances and partnerships

# 4. Sales & Marketing

A robust blueprint for continued growth

## CHIP framework

Next gen marketing and branding

Strong alliances and partnerships



Consolidate and grow existing areas of strength



Harvest existing growth engines



Incubate new growth engines



Strategic Programs for next gen sales transformation

# 4. Sales & Marketing

A robust blueprint for continued growth

CHIP framework

**Next gen marketing  
and branding**

Strong alliances  
and partnerships



Data Products



Cloud



NWoW

# 4. Sales & Marketing

A robust blueprint for continued growth

CHIP framework

Next gen marketing  
and branding

**Strong alliances  
and partnerships**



Snowflake Global Innovation  
Partner of the Year

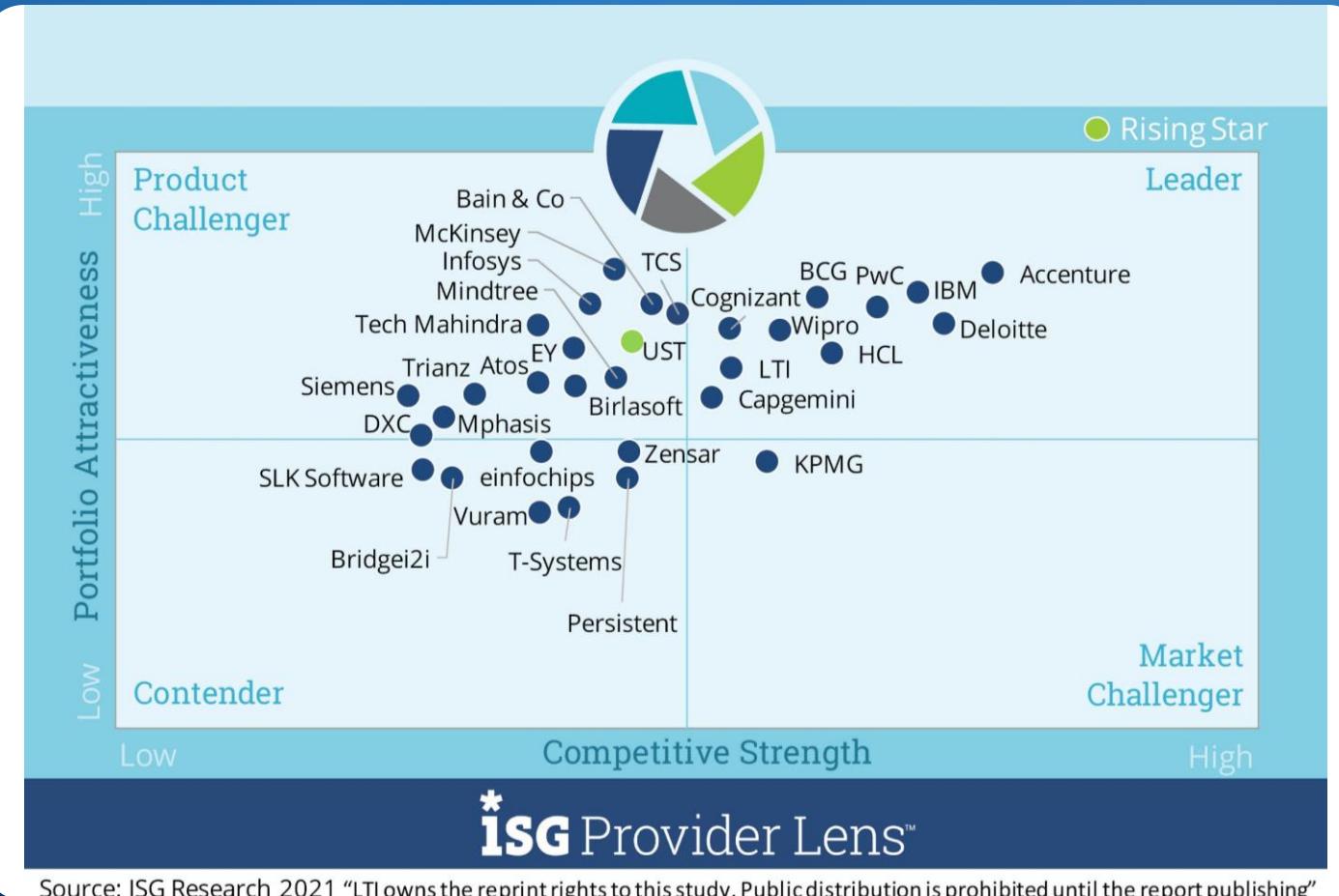


TEMENOS

Temenos Service  
Partner of the Year



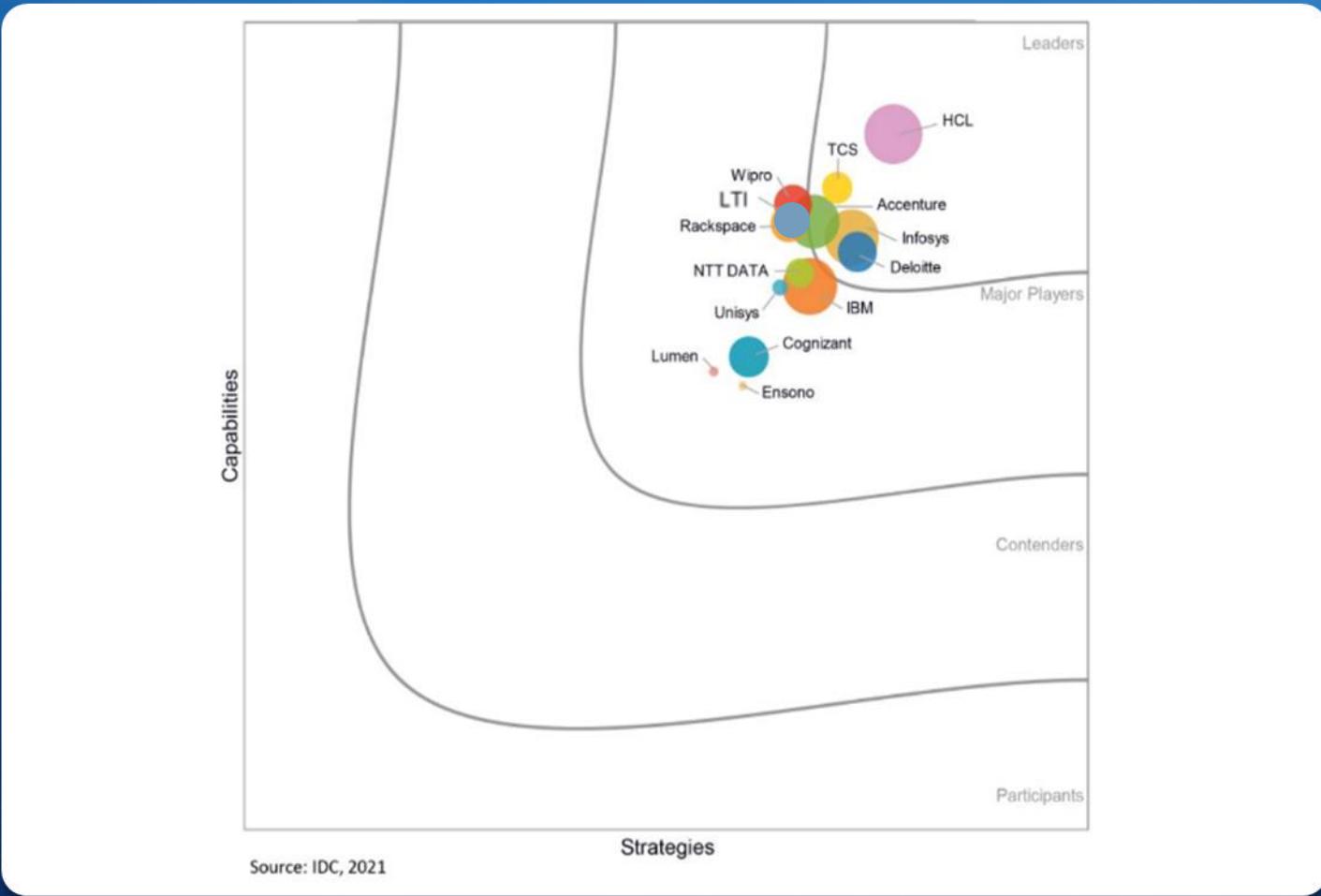
Highest level of partnership  
with all hyper scalers



Source: ISG Research 2021 "LTI owns the reprint rights to this study. Public distribution is prohibited until the report publishing"



ISG Provider Lens™ Digital Business Solutions and Services 2021



IDC MarketScape: Worldwide Managed Multicloud Services 2021 Vendor Assessment



# aLT|us

# FOSFOR

# 5. Team

An enviable management team



Expanded sales leadership

Stronger country leadership

Global delivery units

# 6. Operational Resilience

High-quality growth with predictable margin

Our heritage

Enviable client base

Balanced portfolio

ESG roadmap 2030

# 6. Operational Resilience

High-quality growth with predictable margin

Our heritage

Enviable client base

Balanced portfolio

ESG roadmap 2030

\$21 Bn  
Turnover

Problem  
solving  
DNA

Unmatched  
corporate  
governance  
standards

Active role  
in client  
acquisition  
& expansion

# 6. Operational Resilience

High-quality growth with predictable margin

Our heritage

Envious client base

Balanced portfolio

ESG roadmap 2030

Fortune 500  
clients

71

\$1 Mn  
clients

180

Top 20 YoY  
growth in Q2

19.8%

New clients  
added in Q2

25

# 6. Operational Resilience

High-quality growth with predictable margin

Our heritage

Enviable client base

Balanced portfolio

ESG roadmap 2030

Global

Diversified

Client-Centric

# 6. Operational Resilience

High-quality growth with predictable margin

Our heritage

Enviable client base

Balanced portfolio

ESG roadmap 2030

Carbon  
neutral

Increase share  
of renewable  
energy by 50%

Increase  
diversity by  
30%

Plantation  
drive  
2 Mn+ trees

# LTI Edge

First principles thinking

Second order effects

Deep belief in the Red Queen Effect

Ability to seize the middle



Let's Solve

