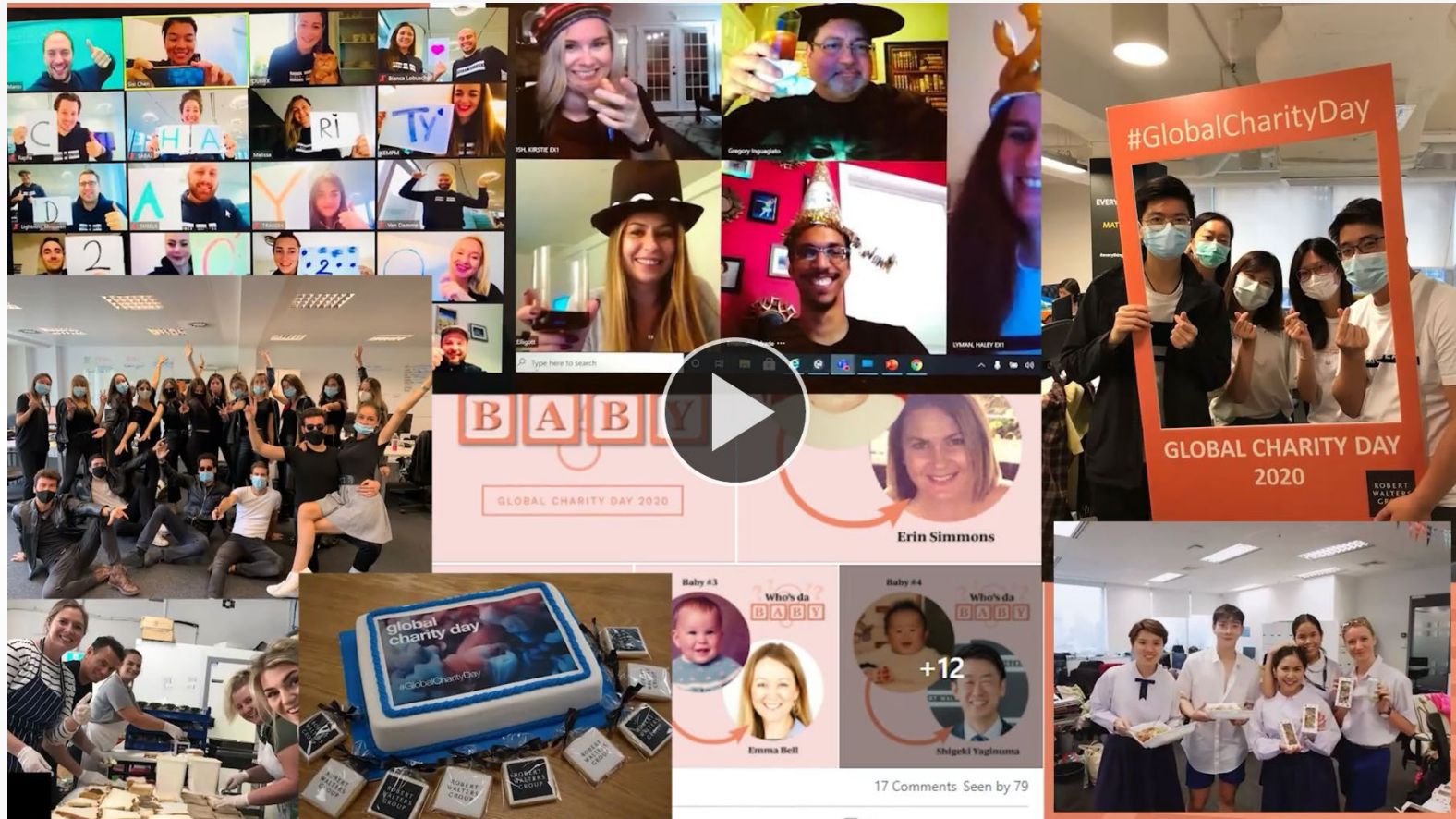




ROBERT
WALTERS
GROUP

Capital Markets event

Robert Walters plc
22 September 2021



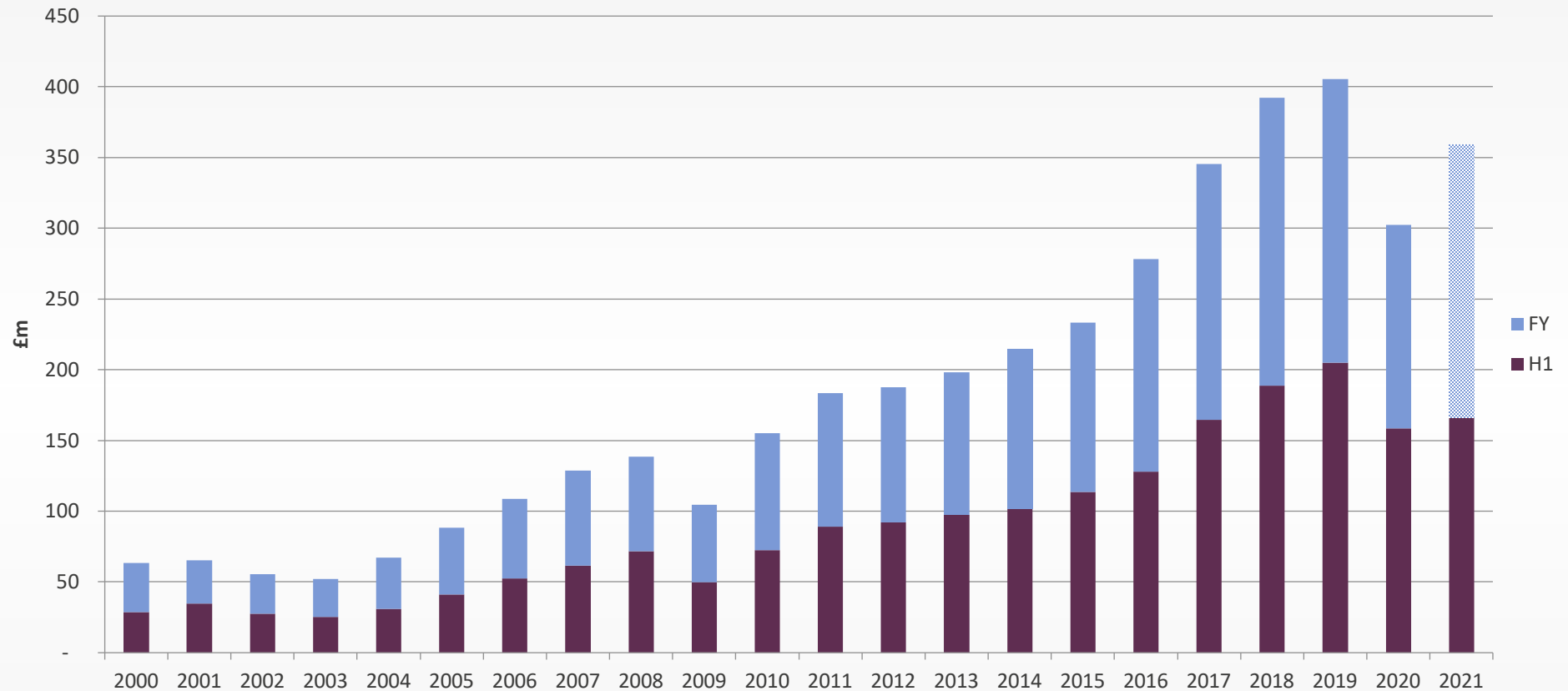


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Financial overview

Net fee income 2000 - 2021

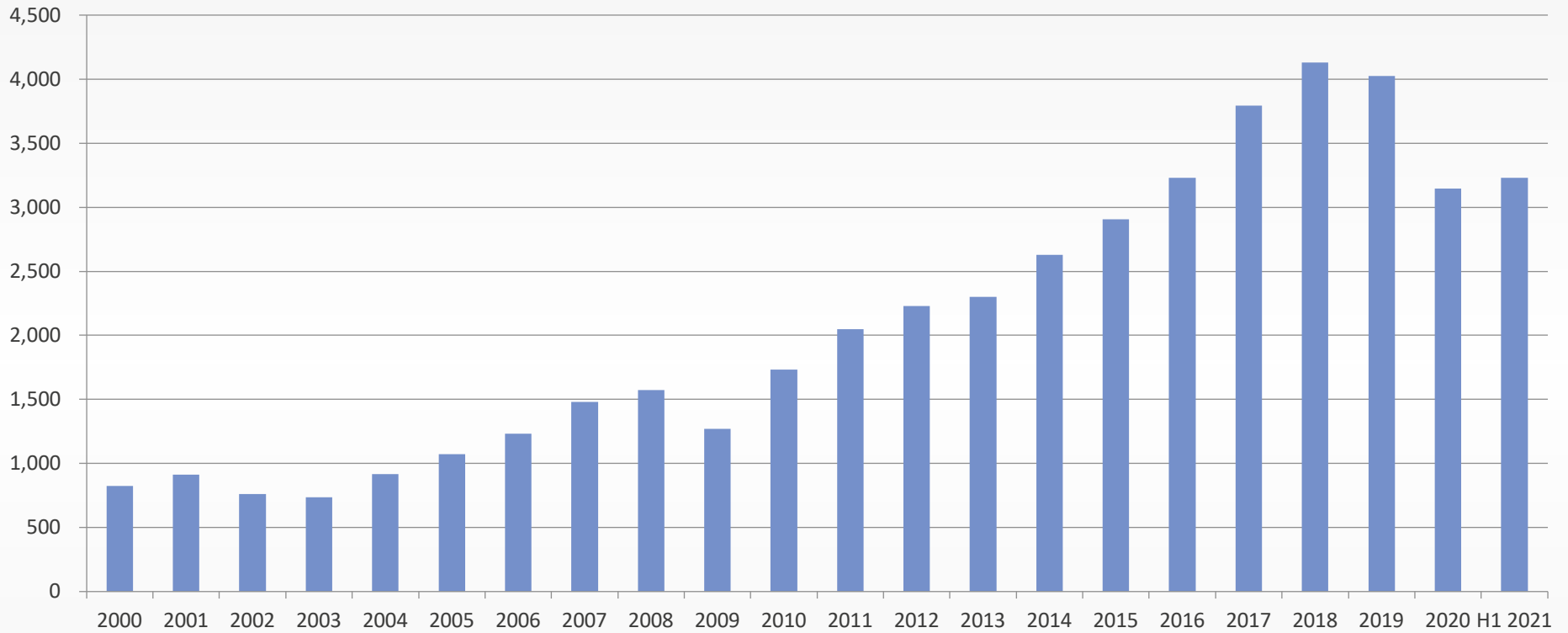
- Track record of long term secular growth



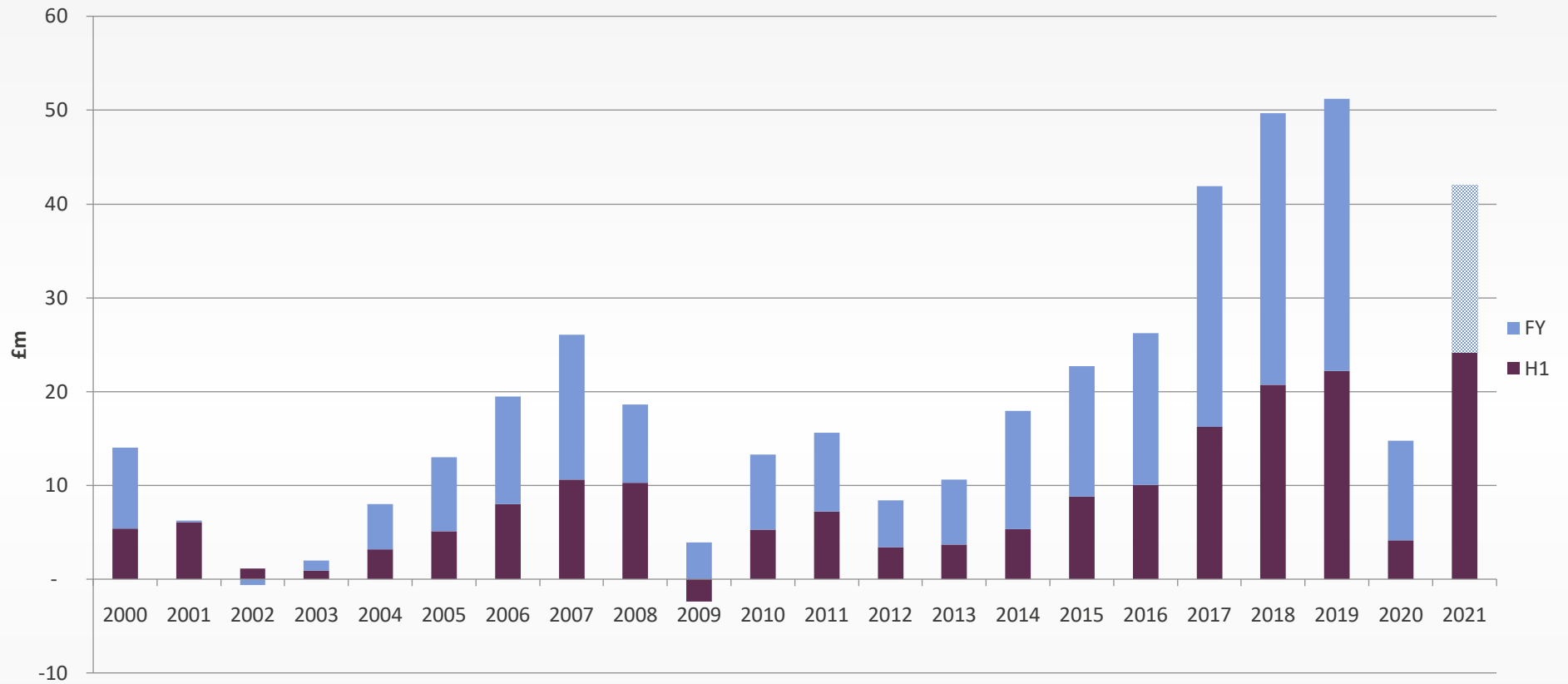
*2021 FY NFI is based on analyst consensus

Headcount 2000 – 2021

- Headcount linked to market confidence. Driver of net fee income growth

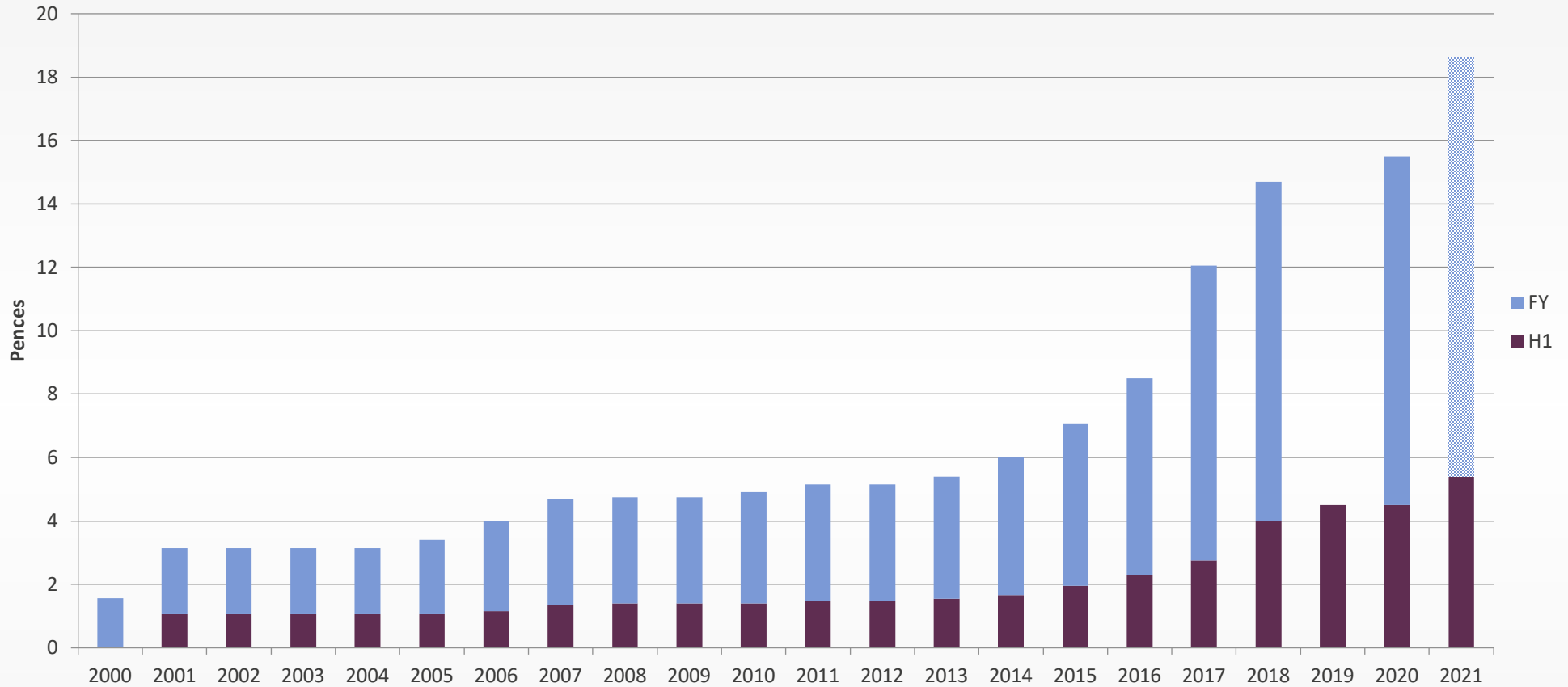


Operating profit 2000 - 2021



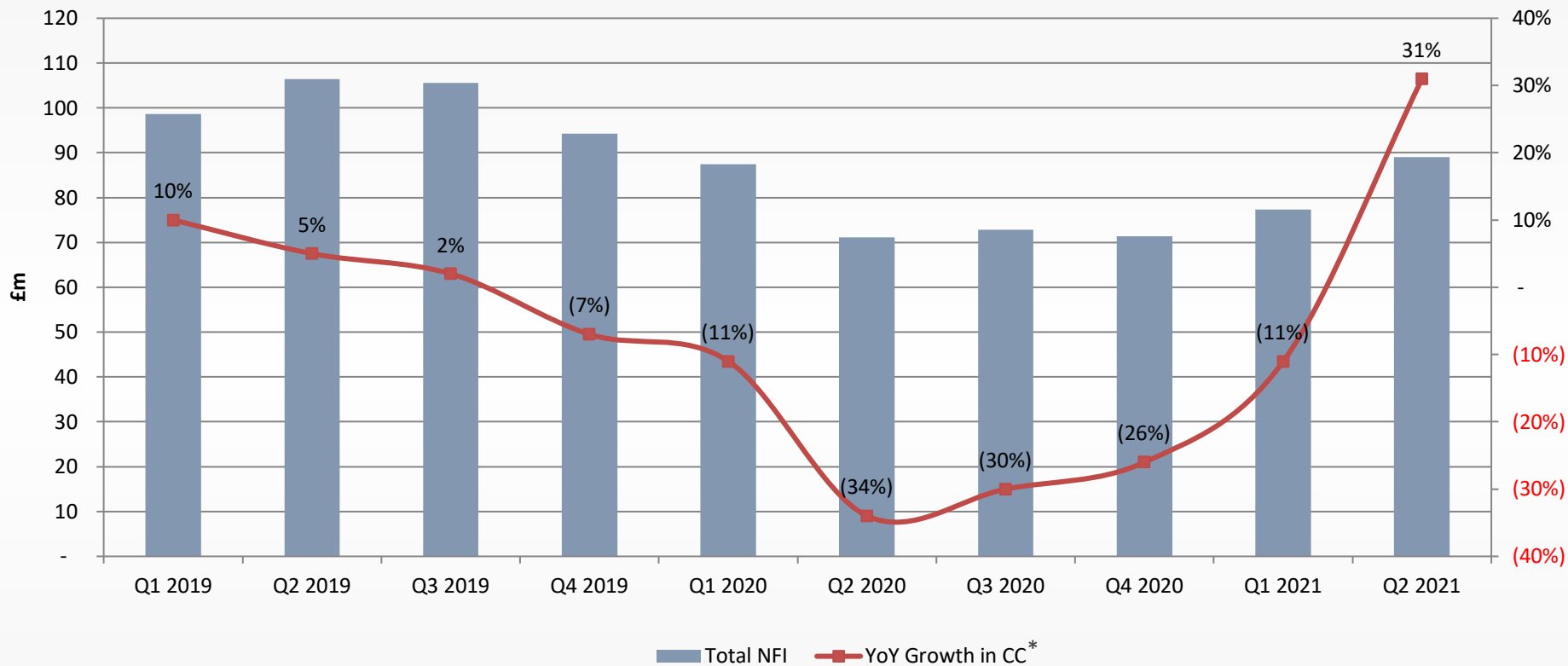
*2021 FY Operating Profit is based on analyst consensus

Dividend payments 2000 - 2021



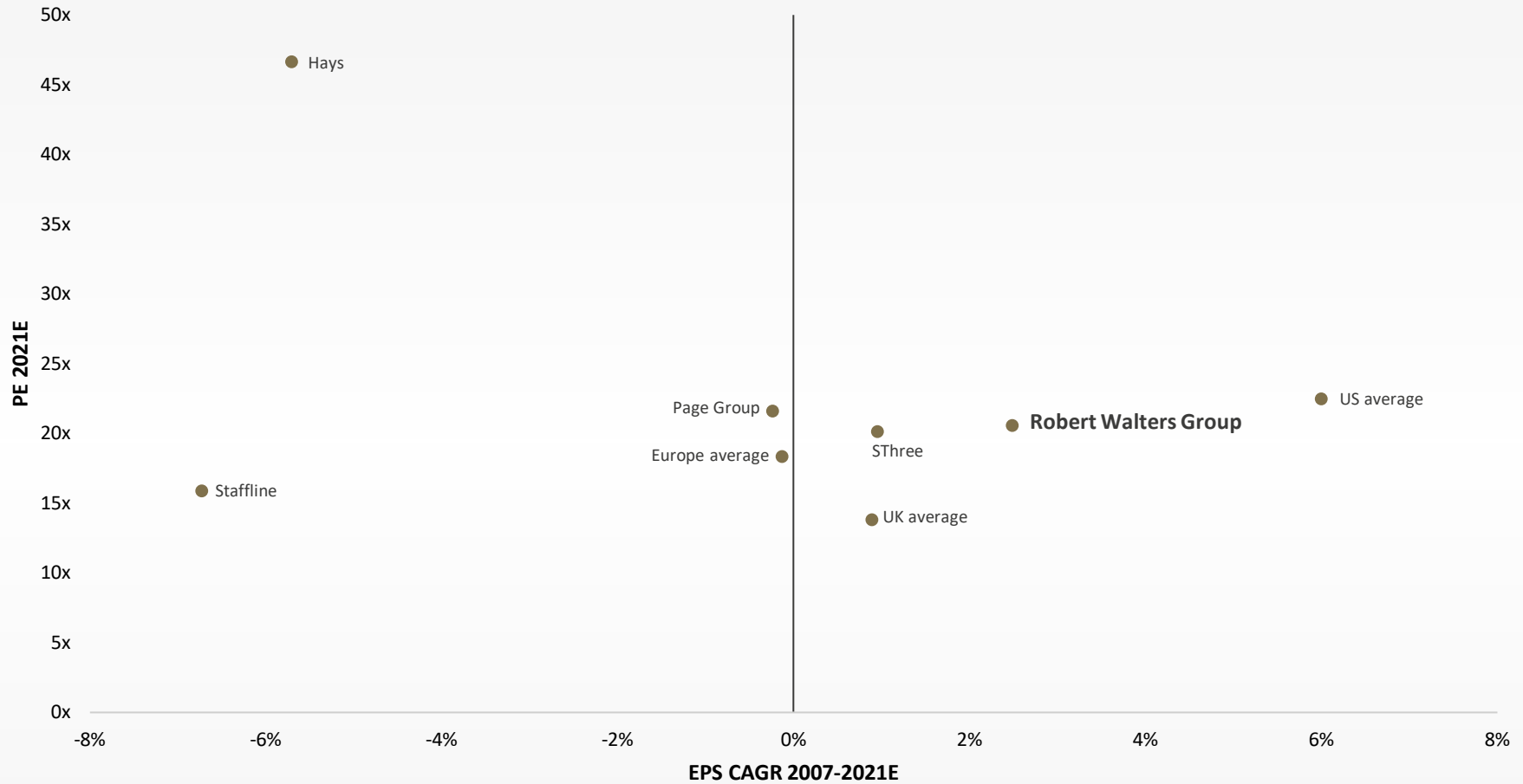
*2021 FY Dividend is based on analyst consensus

Total NFI 2019 - 2021



* Constant currency is calculated by applying prior year exchange rates to local currency results for the current and prior years.

PE and EPS CAGR





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WALTERS
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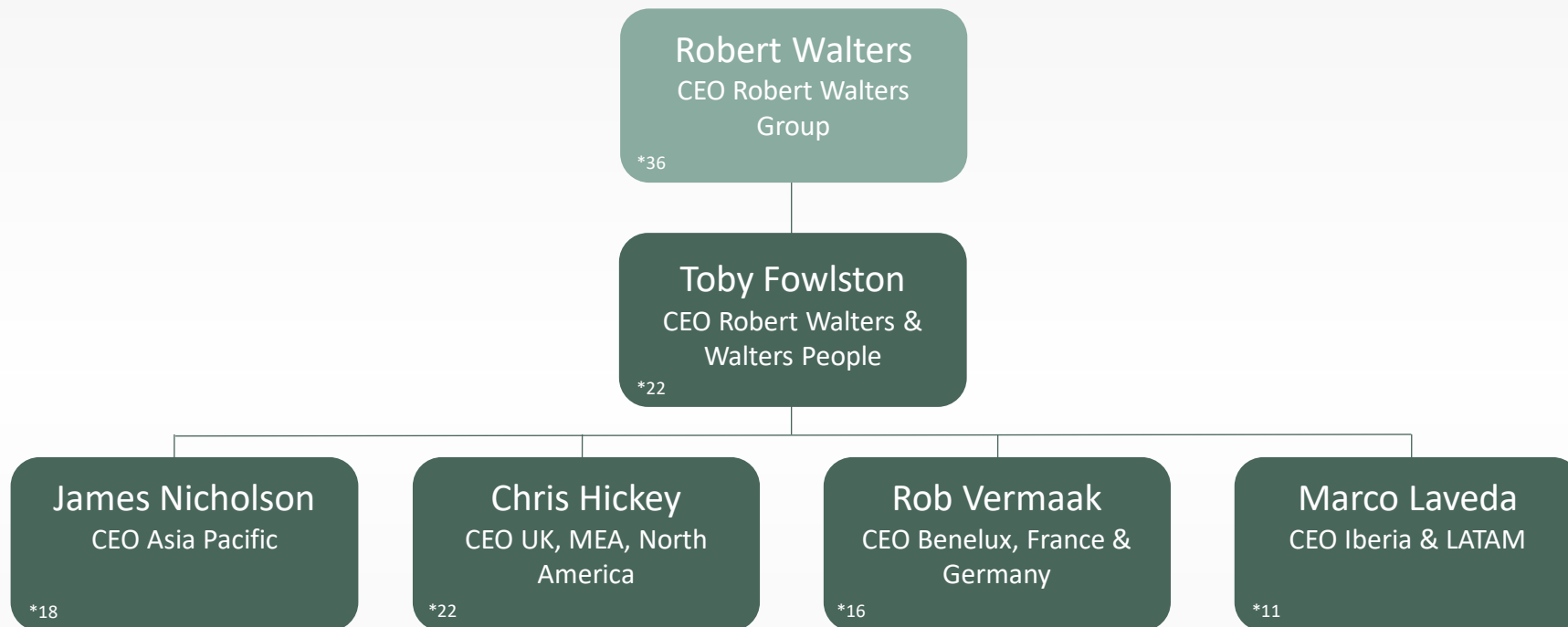
Robert Walters & Walters People

Toby Fowlston, CEO

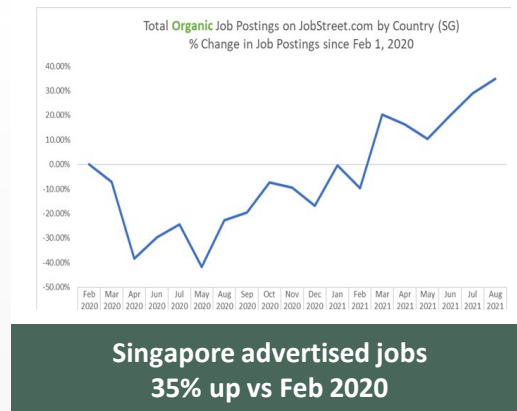
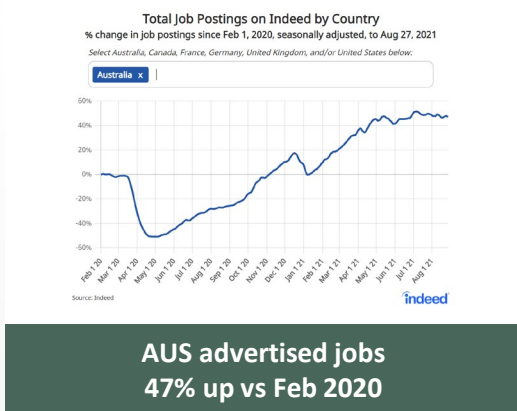
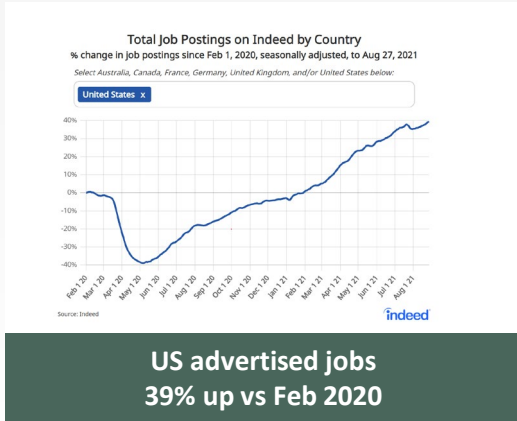
Career history



Robert Walters & Walters People operational management team



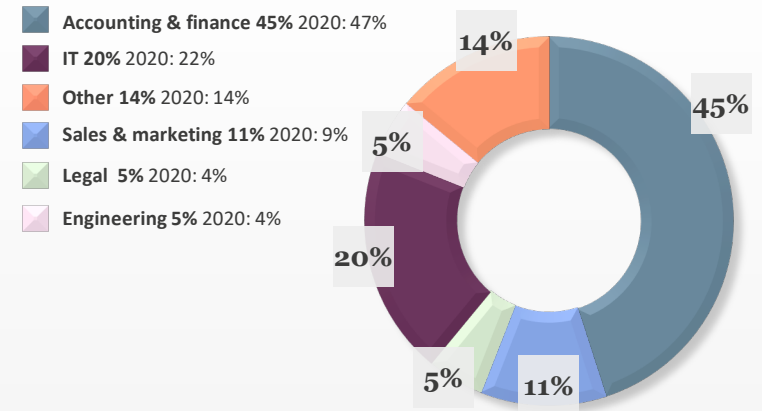
Growth in advertised jobs vs February 2020



Skills in highest demand

- Software Developer
- Data Scientist
- Finance Manager
- Business Analyst
- Project Manager

Recruitment net fee income by discipline



Multi-country recruitment for international clients



United Kingdom
Hong Kong

Philippines
Malaysia



Chile
Brazil
Spain
France
Canada
Ireland
Mexico
Belgium

Portugal
Germany
Switzerland
South Africa
United States
Netherlands
UAE
United Kingdom



UAE
Brazil
Spain
Mainland China
Japan
France
Mexico
Canada
Taiwan
Portugal
Germany
Australia

Thailand
Vietnam
Malaysia
Indonesia
Singapore
Philippines
Hong Kong
South Korea
Switzerland
South Africa
Netherlands
United Kingdom



UAE
Spain
France
Ireland
Belgium
Portugal

Germany
Switzerland
South Africa
Netherlands
United Kingdom



Belgium
Germany

Netherlands
United Kingdom



Spain
Ireland
Belgium
Germany

South Africa
Switzerland
Netherlands



France
Belgium
Malaysia

Singapore
Netherlands
United Kingdom



Canada
France
Australia

United States
Netherlands
United Kingdom



Spain
Ireland

Germany
United Kingdom



France
Germany

United Kingdom

Asia Pacific

Asia Pacific (45% of net fee income)

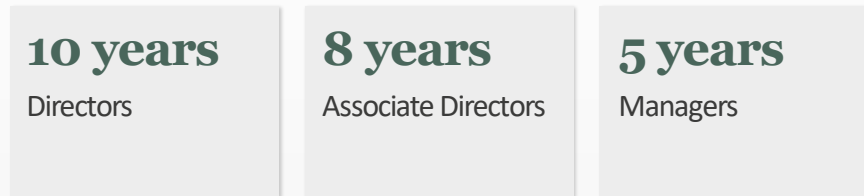
Asia Pacific



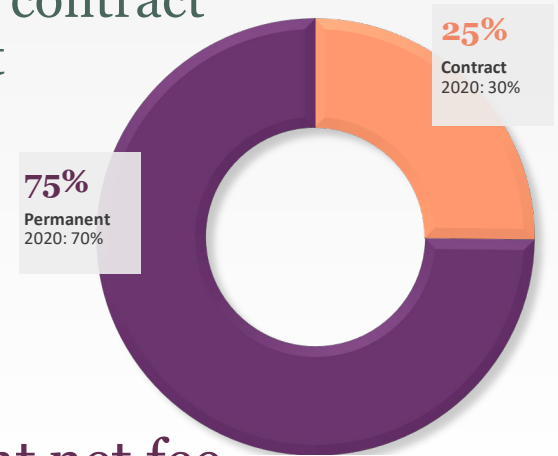
Locations:

- | | |
|----------------|-------------|
| Australia | New Zealand |
| Hong Kong | Philippines |
| India | Singapore |
| Indonesia | South Korea |
| Japan | Taiwan |
| Mainland China | Thailand |
| Malaysia | Vietnam |

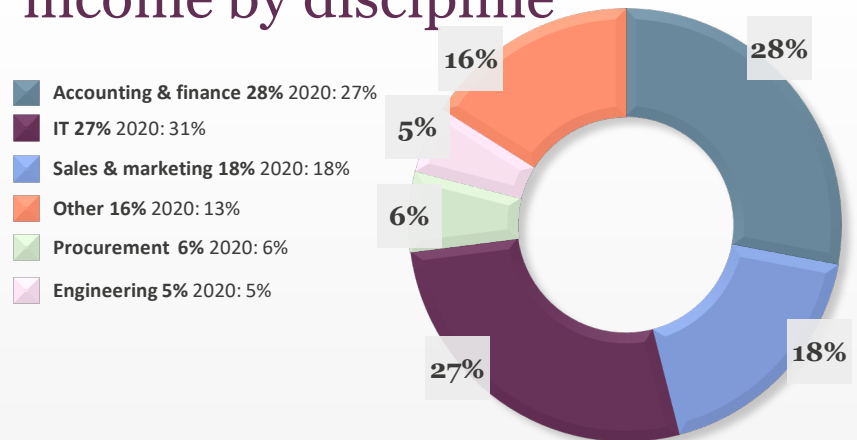
Average tenure



Permanent/contract recruitment



Recruitment net fee income by discipline



Varied conditions but same positive results



Vietnam



China

Northeast Asia

Current market trends

- Despite a 4th State of Emergency in Japan, a slow vaccination rollout and increased cases post Olympics our most profitable global business has had an outstanding year to date
- Digital transformation is the driving force – increased demand for tech talent across the region
 - Salary increases of more than 20% for job movers
- Thriving manufacturing sector as global activity recovered
 - Increasing demand in semiconductors and automotive – focus on sustainable development goals (SDGs) e.g green technology, new energy and decarbonisation

Key market strengths

- Strong brand for bilingual recruitment across both Japan and South Korea
- Renowned in the foreign business community in both Japan and South Korea
- Critical mass in specialisations and industries in Japan
- Well-established office in South Korea and very few foreign competitors

Northeast Asia

Growth opportunities

- Diversification of client base – balance of domestic companies and MNCs
- Industrial market growth – shortage of semiconductor products
- Launched Healthcare discipline and exploring contract market in South Korea



Australia & New Zealand

Current market trends

- Acute skills and candidate shortages particularly in tech, financial services and business support
 - Exacerbated by lack of immigration and professionals migrating overseas
- Salaries rose by circa 20% in H1 for in demand skills. Circa 50% of job offers were countered
- Contract lengths shortening for temps as conversions to perm happening more quickly
- Air of caution – unpredictability of snap and extended lockdowns, coupled with slow start to vaccination rollout

Key market strengths

- Global footprint and International Candidate Management (ICM) programme – pipelining expats looking to return home, and professionals looking to migrate once borders open
- Scope of service offering – permanent, contingent and payroll
- 20-year office anniversaries in Adelaide, Brisbane and Perth cementing strong market presence and credibility
- Dominant player and strength of brand in New Zealand

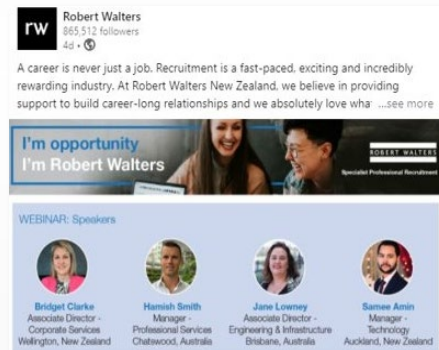
Australia & New Zealand

Growth opportunities

- Strengthening depth and expertise in existing disciplines in Australia, especially in tech and financial services, to maintain competitive advantage against growing number of boutiques
- Incubation of new specialisations within existing teams – emerge profitable and have credibility in the market from day one
- Temps out in record numbers. Fees per temp and per fee earner also at record levels
- Expect a greater uplift in H2 as perm talent shortages become more acute



She Codes sponsorship
Australia



Work for Us webinar
ANZ



EY sponsorship
New Zealand



Hybrid work, The AM Show
New Zealand

Southeast Asia

Current market trends

- Lengthy lockdowns and low vaccination rates in emerging markets, however job volumes continue to increase
- Candidate confidence has increased but due to candidate shortages counteroffers are commonplace
- Significant tech talent shortages across the region driven by digital transformation – intensified by increasing localisation in Singapore
 - Partnered with Infinity Global and launched a Tech Upskilling Programme to help increase tech candidate pools
- 20%+ wage inflation for in demand job movers

Key market strengths

- In-depth local market and regional knowledge and brand presence – milestone country launch anniversaries in Malaysia (15), Indonesia (10), Vietnam (10), Philippines (5). Shared database and collaboration on strategic accounts
- International Candidate Management (ICM) programmes and award-winning ‘return home’ campaigns continue to attract skilled expats
- Malaysia’s long-serving leadership team and reputation makes it an attractive place to work and strengthens industry expertise with clients and candidates
- Business continuity, despite Covid, provided by our tech capability and ease of switching to work from home

Southeast Asia

Growth opportunities

- The Philippines is well positioned to be a net gainer for BPO activities from higher cost countries
 - Lockdown has shown companies they are able to operate support functions remotely and at a lower cost. Possible increase in digital nomads
- Tech and digital are strong across the region – growing teams in all countries
- Many global tech firms, such as Zoom, Twitter and Facebook are setting up tech hubs or APAC headquarters in Singapore due to the advanced infrastructure and ability to operate across two time zones
 - Nationalisation can make it difficult to source talent
- Opportunities to accelerate all emerging markets, balanced against the outcome of Covid and vaccination rates



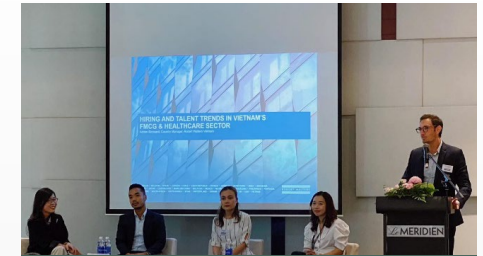
Return Home Campaign
Singapore



Tech upskilling programme
Singapore



Work for Us webinar
SEA



Face-to-face client events
Vietnam

Greater China

Current market trends

- Migration of talent out of Hong Kong due to political tensions notably to the UK, Australia, Canada and Taiwan
 - Almost 100,000 Hongkongers have already relocated. Foresee this reaching circa 150,000 when borders open next year
- Job vacancies at a record high in Mainland China – spurring increased competition for candidates. Opportunity realised for our contract business
- Significant growth in all areas of software development and strong inflow of overseas investment – R&D centres increasingly established in Taiwan e.g. Microsoft, Ubiquiti and Peloton

Key market strengths

- Market leader in financial services in Hong Kong
- Diversified client base in Mainland China – now have strong footprint with MNCs and further penetrating the domestic market
- Market leader in Taiwan – a 10-year proven track record. Competitive advantage of shared regional database

Greater China

Growth opportunities

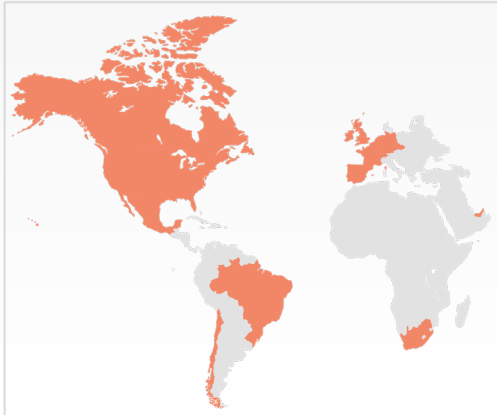
- Launch of Sales, Engineering and Property teams in Hong Kong – demand continues to grow as infrastructure projects within construction and property ramp up
- Scaling business in Southern China to capitalise on market opportunities
 - Rapid development of fintech and R&D hubs in Shenzhen e.g. Prudential, Crypto.com, BAT, Philip Morris, Shopee and Lazada
- Expanded Healthcare specialisation in Mainland China into new areas such as biotech and life sciences
- Expansion into Healthcare, Tech Sales and Semiconductors in Taiwan



EMEA

EMEAA (55% of net fee income)

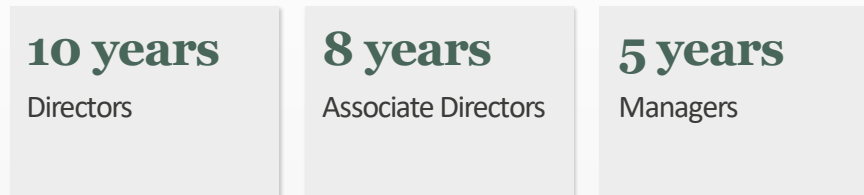
EMEAA



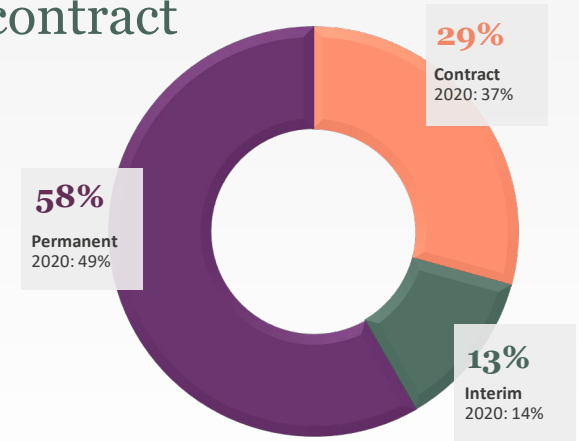
Locations:

- | | |
|----------------|--------------|
| Benelux | Middle East |
| Brazil | Mexico |
| Canada | Portugal |
| Chile | South Africa |
| Czech Republic | Spain |
| France | Switzerland |
| Germany | UK |
| Ireland | USA |

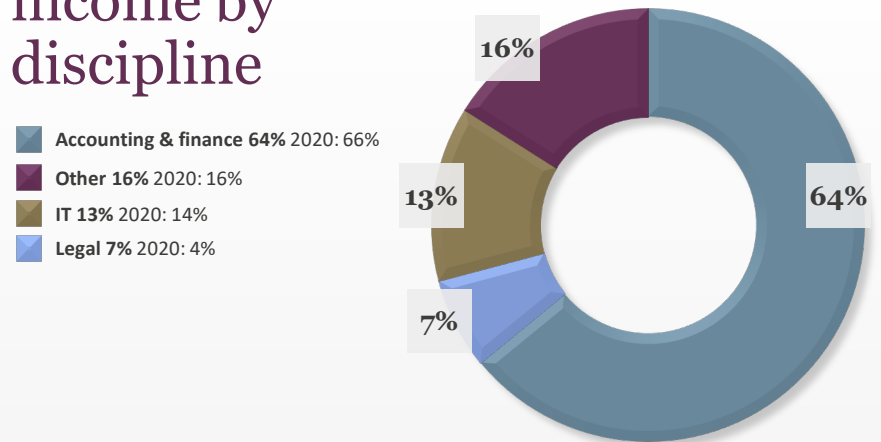
Average tenure



Permanent/contract recruitment



Recruitment net fee income by discipline



France

Current market trends

- Market has bounced back strongly although candidates still remain somewhat cautious on moving roles
- Permanent market is active – permanent hire preference rather than interim management or contract as organisations move to secure talent long-term
- Candidate expectations of an employer have changed
 - Clear hybrid working, home office and flexible working policies are an increasingly important requirement

Key market strengths

- Our blend of permanent, contract and interim recruitment solutions continues to be a strength and allows us to service any client need
- Continue to have a low dependency on large accounts – true sector specialisation recruiting for small to medium enterprises

France

Growth opportunities

- Further growth in our Real Estate, Legal, Finance, Sales and Tech & Digital recruitment divisions
- Opportunity to further service clients at mid-senior level alongside our existing interim management business
- Strong regional office network to support clients to grow businesses outside of Paris



Benelux & DACH

Current market trends

- Netherlands – broad-based increase in recruitment activity – shortage of candidates particularly in technology, finance and legal
- Germany – demand for specialist professionals has increased significantly. Candidate shortages acute across most disciplines. Competition for talent is fierce
- Belgian job market has rebounded strongly – number of advertised jobs grew 75.9% in July 2021 compared to prior year. Temp recruitment market is improving but at a slower rate
- The Swiss recruitment market rebounded strongly from May with technology particularly strong

Key market strengths

- Netherlands – our mix of temp, interim and perm recruitment ensured we responded well to both the downturn and recent upturn in recruitment activity
- Germany – laser focus on candidate and client service has meant we have built a strong reputation as a specialist consultancy
- Belgium – drive to maintain fee levels has put us in a very strong position. The retention of our 360-degree recruitment service has also further differentiated us from the competition who have reverted to a recruiter and candidate research model
- Switzerland – footprint covering both Zurich and Geneva gives us a significant advantage over many offshore recruiters

Benelux & DACH

Growth opportunities

- Netherlands – executive search portfolio is growing. Diversification of legal division into the public and semi-public sector offers huge potential
- Germany – huge growth potential across all divisions. Office footprint and capacity enables us to scale headcount quickly
- Belgium – permanent recruitment division has doubled in size. Expect to see our temp numbers return to pre 2019 levels by year-end
- FinTech a growing industry in Switzerland. Established brand in this space

FINANCE



Industry press
Belgium



The future role
of the Accountant



Webinar series
Benelux & DACH



Nieuwe werknemer mist binding werkplek

National TV coverage
Netherlands

United Kingdom

Current market trends

- Accelerated vacancy growth across the UK. More than five times the number of jobs sourced in H1 2021 VS H1 2020
- Demand for top-calibre candidates is at an all-time high with activity picking up across multiple industries, including the VC-backed technology sub-sectors (including FinTech, EdTech, InsureTech), banking and financial services, e-commerce, manufacturing & infrastructure
- Businesses continue to transfer roles to Shared Service Centres in Birmingham and Manchester. Most notable openings include Serco Global Services, Capita, Fujitsu, IBM and Cap Gemini

Key market strengths

- As with previous cycles, careful cost-management around discretionary spend and preserving headcount in 2020 has meant the business is now extremely well-positioned to benefit from positive market conditions in 2021/22
- Consistent client engagement and support offered during the pandemic has put us in an advantageous position as businesses are now re-engaging with us when they need to hire
- D&I webinar series and industry podcasts have differentiated us from the competition and enabled us to work with new clients

United Kingdom

Growth opportunities

- Technology recruitment is expected to remain particularly busy in London and the Midlands where a number of high-growth businesses are scaling their technology functions e.g. Global Relay, Copper and Causeway
- Continued focus on high-growth sectors with strong investment, such as FinTech, Gaming and EdTech has meant we have become a trusted specialist partner to many businesses including KidsLoop and C3ai
- New market intelligence and data insights function allows us to apply a data-led approach to recruitment
 - Having successfully completed remuneration, market mapping and relocation analysis for multiple clients there is a clear opportunity to further grow this revenue stream



MARKET INTELLIGENCE:
SALARY AND BENEFITS
BENCHMARKING

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REQUEST YOUR BESPOKE REPORT

Market Intelligence services



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CODING THE COUNTRY
OUT OF CRISIS

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Industry specific thought leadership



DRIVING YOUR
D&I STRATEGY
FORWARD

D&I report, webinars and podcasts

Iberia

Current market trends

- Spain has now vaccinated over 70% of the population and life is returning to 'normal'. Positive effect on the recruitment market with hiring bouncing back strongly in Q2
- Significant spike in Investment banking/M&A operations recruitment activity
 - Qualified professionals needed for business support, back office and front office
- IT, Digital transformation and E-commerce also particularly strong areas of growth
- Portugal is quickly becoming a leading tech hub with FinTechs, startups, data centres and tech competency centres increasing in prevalence across the region e.g. EasyPay and Switch

Key market strengths

- Our strong level of specialisation continues to differentiate us from local competition and allows us to recruit more senior talent (tech and digital are particular areas of strength and competitive advantage)
- Walters People now a well established brand in Spain – strong platform for further growth into new disciplines and industries

Iberia

Growth opportunities

- Energy transition (where we have achieved a leading position) is an area primed for further growth e.g. electric vehicles, solar and wind, water and waste management
- Continued growth in Pharma and BioTech – both sectors booming in response to the pandemic
- Broadening technology recruitment into the Basque country (Bilbao) – one of Iberia's richest and most technology-driven markets
- Further opportunities to grow finance, legal and HR disciplines in Portugal



The Americas (US, Canada, Chile, Brazil and Mexico)

Current market trends

- US – VC investment for tech companies continues to be as strong as ever
 - West Coast – tech companies have become more open to recruiting professionals outside of the tech hubs due to lack of talent available within state
- Canada – acute rebound in hiring activity due to pent up demand from 2020 and a significant increase in candidate and client confidence due to vaccine roll-outs and the re-opening of the Canadian economy
- Brazil – advancement of the vaccination programme and pent-up hiring demand is driving a busy recruitment market
- Chile’s vaccination programme is very advanced – almost 70% of the population now fully vaccinated. Unemployment is falling and the economy is recovering quickly
- Mexico – only 16% of the population has received two vaccinations. However, restrictions have eased, and Mexico is becoming an attractive tourist destination, which is driving up recruitment in the travel and hospitality sectors

Key market strengths

- West Coast – strength of our relationships with VC and PE firms continues to be an area of real competitive advantage
- We are unique in our ability to service high-growth technology start-ups and traditional financial services institutions
- Our ability to assist start-ups in scaling their teams outside of the US is a real differentiator
- Our specialist approach is resonating well with clients and being smaller and agile allows us to be more flexible in our response to market conditions
- Strong collaboration and cross-selling between Iberia and Latin America

The Americas (US, Canada, Chile, Brazil and Mexico)

Growth opportunities

- US – we are expanding our existing disciplines within our current locations and launching a growth plan in 2022 to focus on extending our office footprint into other high growth locations
- Now have a very established senior leadership team across Brazil, Mexico and Chile – great platform for long-term growth
- Brand presence in all three markets (Chile, Mexico and Brazil) is going from strength to strength. High volume of jobs now coming from direct client enquiries
- Latam is benefiting from greater cross-selling with Iberia and the wider Robert Walters business not something that our local competition can match



Middle East & Africa

Current market trends

- Middle East – price of crude oil, reaching a high of \$75 in July (and predictions that it could go higher) has provided the foundation of a very busy recruitment market
- 25% of the South African population have now received their first vaccine, and the President has confirmed that enough doses have now been secured to vaccinate the entire country
- In sub-Sahara both our East (Kenya, Sudan and Uganda) and West African (Ivory Coast, Nigeria and Ghana) teams have seen significant double-digit growth in job volume

Key market strengths

- Strong brand and reputation across the region
- Our geographical reach across the Middle East means we can service client's both locally and regionally
- A strong company culture ensured we retained staff through the pandemic
- South Africa – utilisation as an outsourcing centre for key roles such as legal, tech, digital and design, accounting and candidate generation has resulted in cost savings

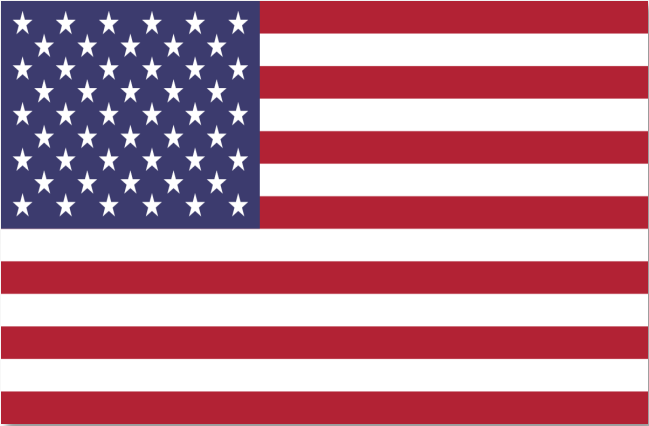
Middle East & Africa

Growth opportunities

- Organisations in the Middle East are open to relocating tech and digital talent from more “digitally” mature markets overseas
- Growing number of loyal clients across the Middle East in FinTech, Tech, E-Commerce, and FS - regular flow of repeat business including ADQ Neobank, Saudi Digital Bank and Securrency
- Key focus across Africa is the FinTech and Telco markets; African central banks continue pushing ahead with their (CBDC) Central Bank Digital Currency plans and it is believed Africa now has one of the largest volumes of bitcoin P2P trading worldwide
- Our South African business is seeing a bounce back in hiring with strong growth across the mining, FS, digital, E-commerce, healthcare and pharma sectors



Potential new markets / offices



Q&A

The logo for Robert Walters Group, consisting of the company name in a clean, sans-serif font centered within a white square. The background of the slide features a complex, layered architectural design with curved, overlapping bands of light grey, dark red, and black, creating a sense of depth and movement.

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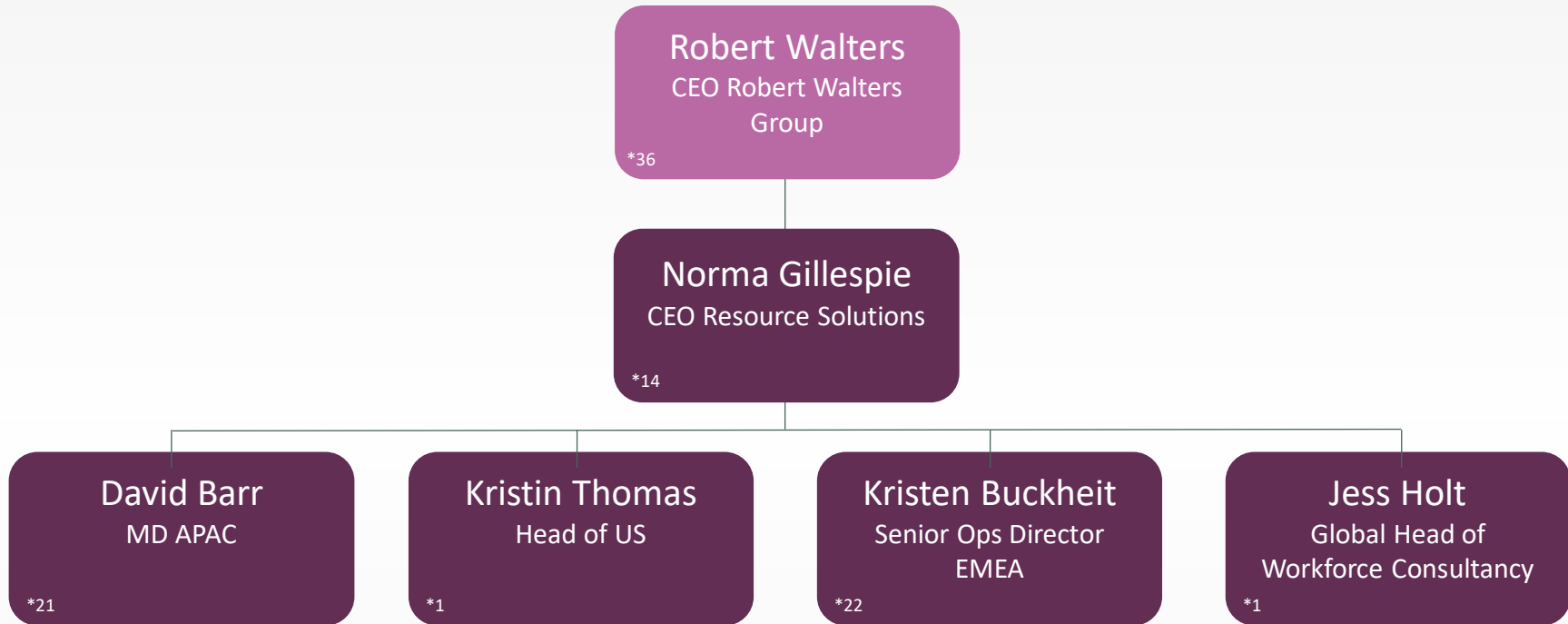
Resource Solutions

Norma Gillespie, CEO

Career history







Operational management team



Our opportunity

- Outsourcing market growth
 - Global RPO market is currently worth \$5.8bn (Nelson Hall)
- Unique products informed by market trends
- Scalable business positioned for growth
- Sustainable and responsible growth strategy

A consultative product offering to address market trends and meet client needs

 Permanent	 Contingent	 Total Talent	 Advisory
<p>End-to-end RPO</p> <p>Project</p> <p>Modular</p> <p>Resource augmentation</p>	<p>MSP</p> <p>Services Procurement management</p> <p>Direct Sourcing</p> <p>Workforce Consultancy (Accelerate)</p>	<p>RPO and MSP</p> <p>Early Careers</p> <p>Services Procurement Management</p> <p>Return to Work</p>	<p>Diverse hiring</p> <p>Assessment</p> <p>Employer brand and experience</p> <p>RSIntelligence</p> <p>Technology</p>

Partnered with some of the world's leading brands



NHS



Addressing market trends

Global trends



The Perfect Storm

- 41% of workers looking to change jobs in the next 12 months
- Record numbers of unfilled positions:
 - 10 million in the US
 - 1.7 million in the UK



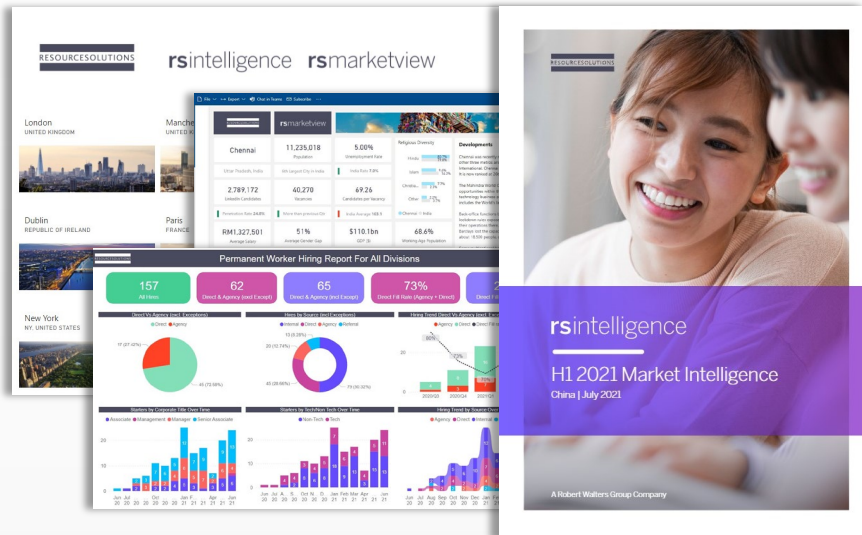
Mind the Gap

- 40% of existing workforces will need to be replaced or significantly reskilled over the next five years
- 75% of organisations are struggling with talent shortages or skill gaps in key technology positions

Unique products to meet market trends

RSIntelligence

- In the post-Big Data era, Analytics for Action is a differentiator
- Meaningful insights and data-led resource planning enable our clients to out-compete their competitors



Accelerate (Workforce Consultancy)

- Improves workplace diversity and encourages social mobility
- Gives our clients access to individuals whose potential grows as they do, training hires to fill specific future skills gaps

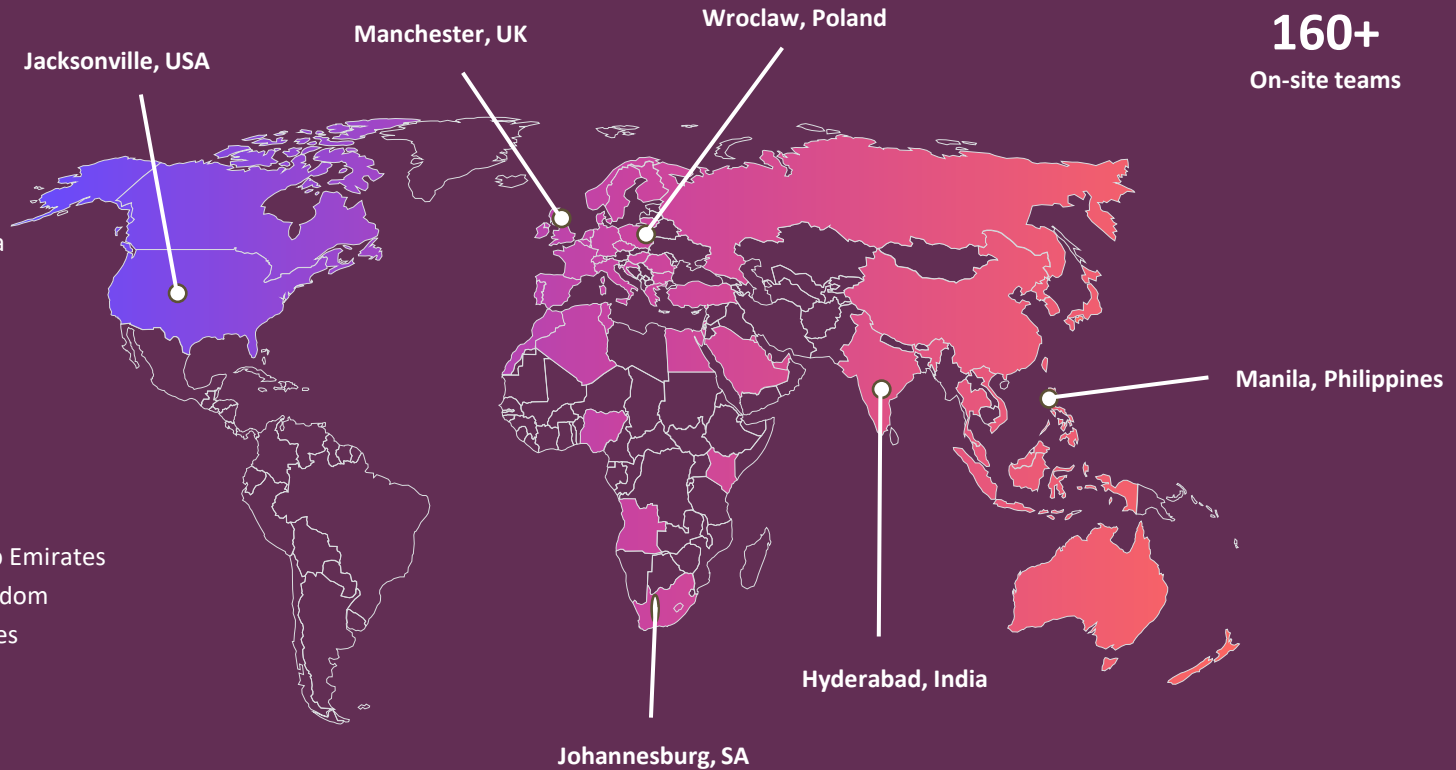
The graphic features the 'infinity global.io' logo in a dark blue circle on the left. To its right, the text reads 'introducing accelerate' in a large, white, sans-serif font, with 'Powered by infinityGlobal.io' in smaller text below it. Further down, a paragraph describes the 'Resource Solutions' Employed Consultancy Model as a pipeline for developing future-ready talent. At the bottom, a tagline states: 'We attract, assess, train, certify and employ your future-ready talent pipeline.' The background of the graphic is a photograph of a diverse group of people sitting around a table in a modern office setting, engaged in a meeting.



Sustainable strategy

Globally connected with a network of service centres to support offshore and domestic growth

- Algeria
- Angola
- Australia
- Bahrain
- Belgium
- Bulgaria
- Channel Islands
- Canada
- Mainland China
- Croatia
- Czech Republic
- Denmark
- Egypt
- Finland
- France
- Germany
- Greece
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Israel
- Italy
- Japan
- Kenya
- Korea
- Kuwait
- Lithuania
- Luxembourg
- Malaysia
- Morocco
- Netherlands
- New Zealand
- Nigeria
- Norway
- Philippines
- Poland
- Portugal
- Qatar
- Romania
- Russia
- Saudi Arabia
- Singapore
- South Africa
- Spain
- Sweden
- Switzerland
- Taiwan
- Thailand
- Tunisia
- Turkey
- United Arab Emirates
- United Kingdom
- United States
- Vietnam



Driving social change with our clients

D&I ambitions

“Our target is to have 35% of senior leadership roles filled by women by 2025”

“Our target is to at least double the number of Black employees in senior leadership by 2025”



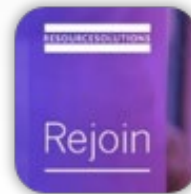
“We aim to increase female representation in VP level and above roles to at least 45% by 2025”

“Our target is at least 18% ethnically diverse leaders by the end of 2025”



Diverse Hiring Audits

The most advanced diverse hiring audit available in the market, analysing the impact of recruitment content and processes across seven different lenses (age, disability and neurodiversity, ethnicity, gender, faith, LGBTQ+ and socio-economic)



Rejoin

Returning professionals (Rejoiners) offer a wealth of experience, knowledge, maturity and fresh perspectives

Hiring Rejoiners tackles skills shortages, improves gender and age diversity and improves our clients’ attractiveness for future employees



The background of the slide features a complex, layered architectural design. It consists of multiple horizontal bands of varying colors and textures. The top bands are light grey or off-white, while the lower bands are a deep, rich purple. The layers are separated by dark, ribbed sections that create a sense of depth and movement. The overall effect is a dynamic, modern aesthetic.

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GROUP

Q&A

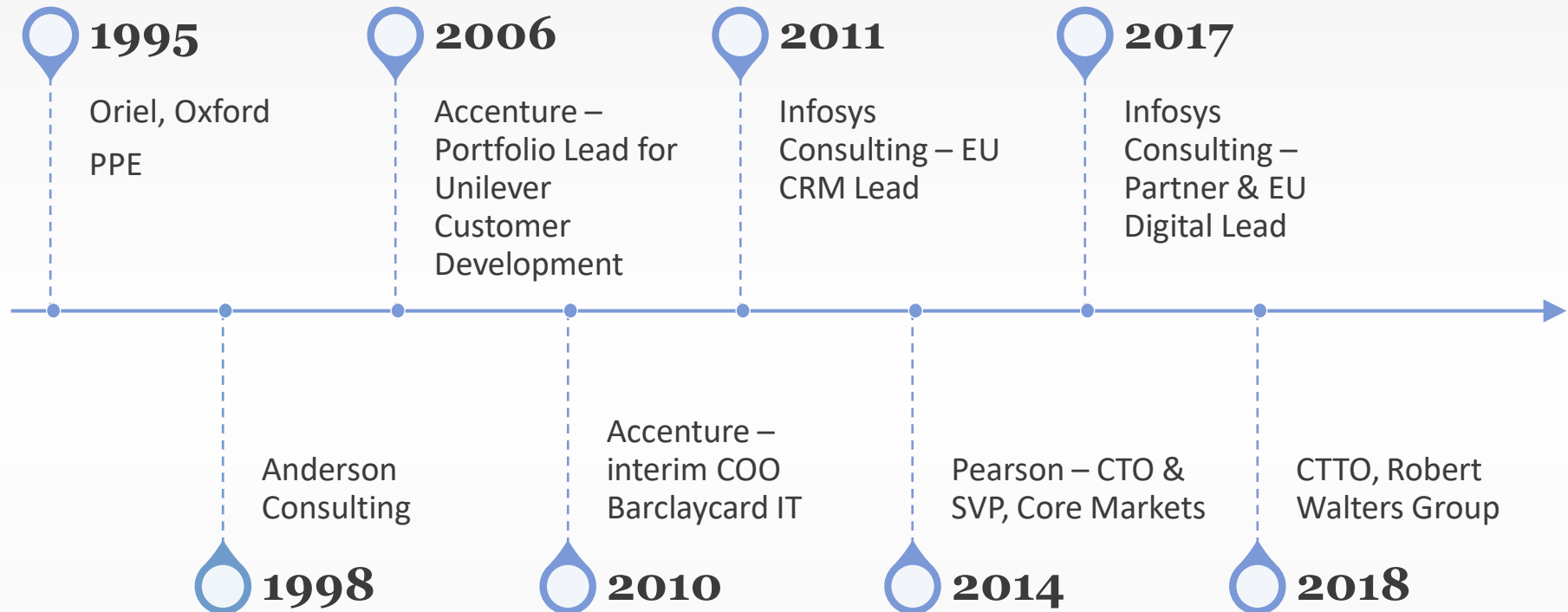


ROBERT
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Technology & transformation

Kevin Bulmer, Chief Technology & Transformation Officer

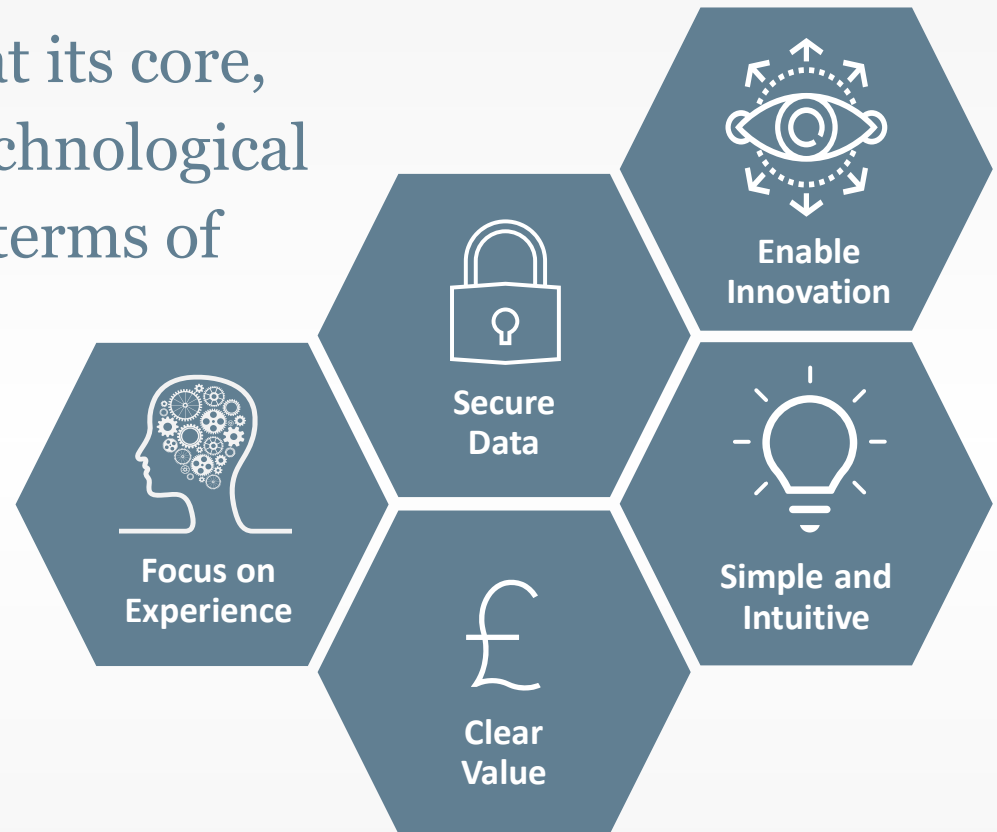
Career history



Technology

“As a business with innovation & entrepreneurship embedded at its core, being at the cutting edge of technological change has paid dividends in terms of our readiness to face the continued and unique challenges presented to us.”

Principles of Technology Transformation



Technology

The transformation of our technology estate continues at pace across 6 specific areas:



The Digital Recruiter

Creating a consumer-grade, simplified experience for our consultants, enriched by emerging technologies in our sector



Workspace Evolution

Create a highly connected, intuitive working environment for all our employees, removing all technical frustrations



Transforming Enabling Functions

Enterprise technologies to improve efficiency of our enabling functions, standardise process and increase cost-effectiveness. Increase self-service capabilities



Simply Secure

Implement a systematic approach to reducing our cyber exposure without making it hard for our people to work effectively



Informed and efficient business

Use of technology to reduce time spent on low-value tasks. Use data to inform the decision making process



1st Class IT Service

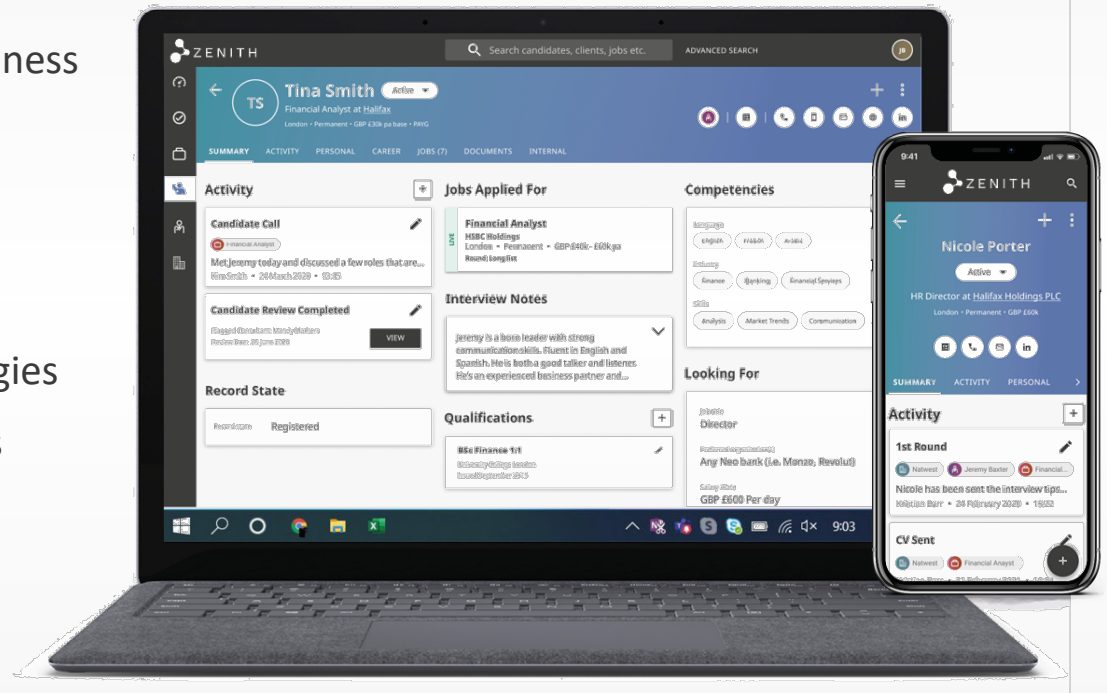
Enhance IT Service Management to best practice using a global workforce. Avoid loss of employee productivity through repeated incidents

Technology: Zenith



MADE BY THE ROBERT WALTERS GROUP,
FOR THE ROBERT WALTERS GROUP

- A new custom CRM, tailored to our business needs
- Focus on user experience and simplicity
- Intuitive and built to suit the way our consultants do business
- Ease of integration with other technologies
- Developed on Opensource technologies
- Agile delivery – led by the needs of our consultants



Technology: Zenith



MADE BY THE ROBERT WALTERS GROUP,
FOR THE ROBERT WALTERS GROUP

Why did we decide to build Zenith ourselves?



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A tailored solution, built on our business needs, which allows us to adapt our needs change over time



Mobile solution, removing dependency on Citrix



Can integrate with other technologies easily

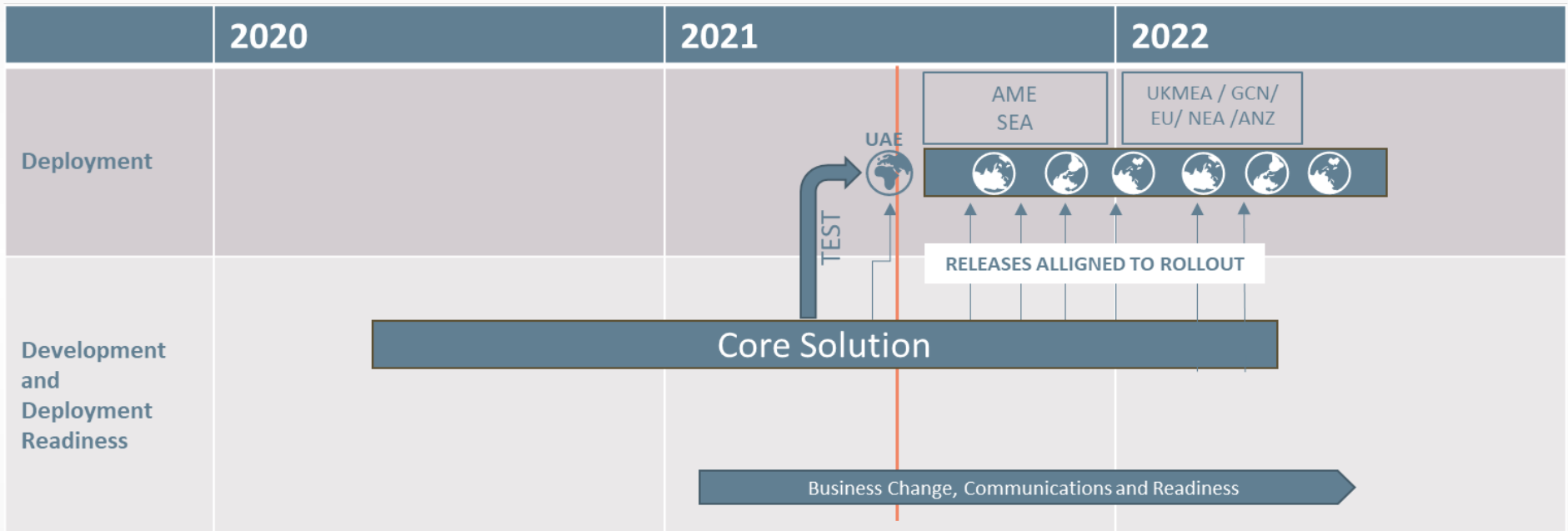


Most cost-effective solution → least impact on our bottom line

Technology: Zenith






MADE BY THE ROBERT WALTERS GROUP,
FOR THE ROBERT WALTERS GROUP



Technology: The Microsoft Story

Our goal has been to deliver a best-in-class technology stack that would enable our people to work efficiently, flexibly and securely

To achieve this, we've been working in partnership with Microsoft, leveraging their industry-leading infrastructure and product offering, while also realising significant commercial benefits for the business

	2019	2020	2021
Sunrise ERP	 Microsoft Dynamics 365 R1: IRE, NDL	 Microsoft Dynamics 365 R2: SEA, GRC	 Microsoft Dynamics 365 R3 : RoW
Infrastructure & Security Ops	Azure : UK INX Data Centre migration Defender ATP 	 NEA  Active Directory SSO integration 	 UK GS2 DC SEAC  ANZ  Smart Labelling 
End User Compute	WoW – rollout of surfaces & Office 365 complete 	 Global migration to MS Teams	Unified Comms - APAC   Unified Comms - EMEAA  
MS Applications	 RW Power BI	 Microsoft Power Platform	 RS Data Hub  RS CRM

Technology: The Microsoft Story - ERP



Microsoft
Dynamics 365

Facilitate the global growth of the business by adopting a single shared platform across Human Resources and Finance functions

TECHNOLOGY

- Dynamics our new enterprise resource planning system (ERP)
- It has introduced modern and standardised business processes across the organisation and an increased level of automation
- Improves operational efficiency and data quality

DELIVERY

- Global rollout completed December 2020 following initial pilot in 2019
- Team able to deploy and support remotely
- Identified by MS as quickest and most successful deployment they had seen
- Strong relationship and leverage with Microsoft Senior leadership continues to further enhance the product for the Group



1. Supporting Growth with Scalability



2. Providing a Modern User Experience for our people



3. Improving Insight with Reporting Capability



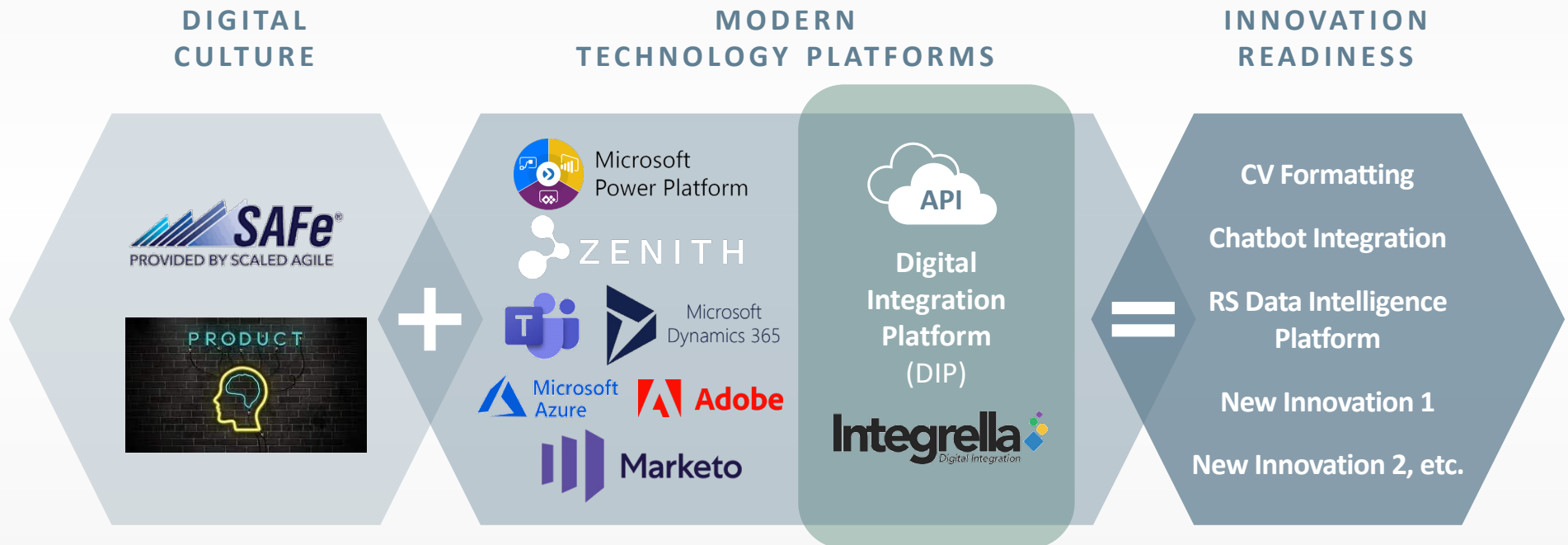
4. Integrated Applications and Security



5. Increasing Efficiency in Back Office Process

Technology: Transition into innovation

We have the building blocks, but continue to evolve our major platforms.
We'll add digital integration capabilities over the next six months to facilitate rapid deployment of innovation.





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Q&A



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Innovation

Faye Walshe, Director of Innovation

Agenda

Intro & Recap on Innovation Strategy

Pandemic Workforce Trends

- Focus on New Advisory Services

Update on Achievements since we last met

Trends

- New HR & recruitment techs making a buzz in the market and attracting VC funding

Enabling human connections

“

At the Robert Walters Group we see technology as an enabler, not a threat.

Our test & trial strategy ensures that we are evaluating innovative new technology and determining whether it delivers productivity enhancements to our recruiters before we decide to talk credibly about it to our clients.

Innovation focus

Tech Radar & Trends Landscape

- Global Webinar Programme
- eBooks
- Articles

Client Advisory

- Assessment
- Gender Data Audit
- Chatbot led automation
- Workload Management tools
- AI Assessment
- Censia AI Search
- Assessment landscape mapping

Internal Innovation

- RS Transformation
- Zenith
- Intelligent Search, Match & Rank
- Data practices to drive 'relationship recruiting'

Pandemic workforce trends

What are the factors contributing to a 'Perfect Storm'?



2.6m women left the workforce since the pandemic began

Drop in employment 26x higher for black, Asian and ethnic minorities than white workers

Progress for gender equality at work has slipped back to 2017 levels

Financial firms are paying the average man almost **25%** more than the average woman

63%

Men happy to return to the office (June 2021)

40%

Women happy to return to the office (June 2021)

People who worked from home less than half as likely to be promoted



Covid-19: The unexpected catalyst for digitalisation that was already happening



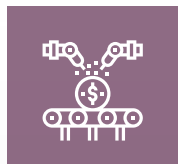
Megatrends



Technology



Digitisation



Automation



Ageing population

Economic case
for reskilling

New Advisory Services

Diverse Hiring: Recruitment Inclusivity Audit



Audit Scoring Mechanism

A scoring mechanism enables comparisons to be made and can support the prioritisation of follow up actions. Scoring is aligned to respected academic research and best practice but due to the nature of the audit, scores can be subjective so are intended to be indicative only.

Score (1 – low, 7 – high)

- 1 or 2: The current content and process has a negative impact on the user group. Little/no effort has been made to support this user group.
- 3 or 4: Some progress user group to
- 5 or 6: Proactive steps inclusive steps
- 7: Best in-class.

Performance Indicator

Key Numbers

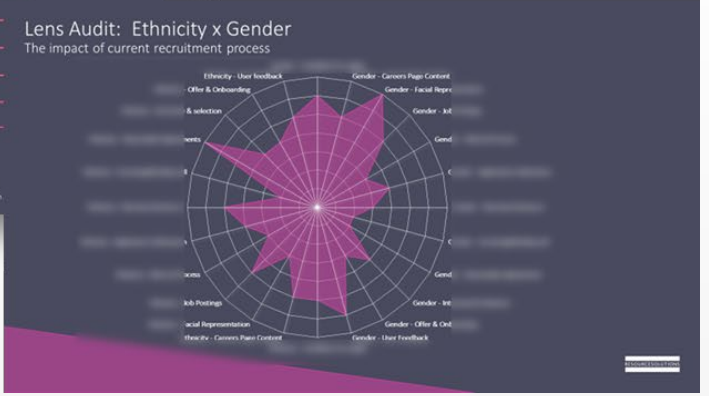
50	77
Hours of auditing	Touch points analysed throughout the recruitment process
52	0
Assumed retirement age at Client	Employees on careers pages with a visible disability

8.5% vs 13.32%

Client employees that are black* vs London's Black Population

Lens Audit

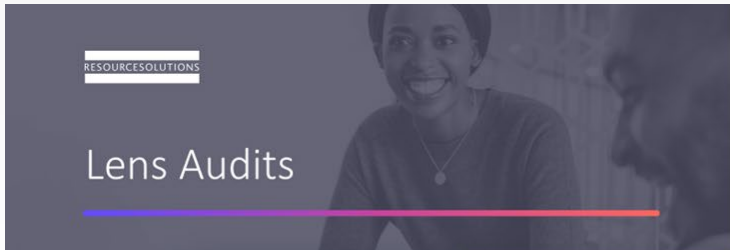
- Gender
- Ethnicity
- Disability & Neurodiversity
- LGBTIQ+
- Age
- Socio Economic
- Faith



- Deep data dive
- Audits 12 stages of the recruitment process
- Through multiple candidate impact lenses

New Advisory Services

Diverse Hiring : Recruitment Inclusivity Audit



Rich and actionable results, presented visually and with deep reasoning, backed up by extensive research



- Referral Programme Recommendations
- Recommendation: We believe that the referral programme could benefit from being re-engineered to be more inclusive and as such it would be prudent to create a working group or steering committee, including representatives from the Employee Network Groups (ENGs). There are a number of options that can be considered:
- All live roles flagged to the ENGs.** This is a fast and proactive way to ensure that groups under-represented at HSBC have greater access to live vacancies.
 - Recruiters to attend ENG events** (if 2D or virtual) to promote the referral scheme and it's benefits.
 - Explore dynamic changes to referral bonus payments.** Some companies, such as Intel (see link) pay double referral bonuses for under-represented candidates. This is a contentious approach (and the legality has been questioned) but Intel was able to increase hires from three designated under-represented groups by 44%. Specifically, female senior hires went up by 33% and minority senior hires rose by 6%.
 - Create Referral Ambassadors** to generate referrals for particular under-represented groups. Pinterest does this well (see link in notes)
 - Start tracking diversity of referrals** to ensure that bias is minimised on an ongoing basis.

Diverse Hiring Advisory

Delivering impact with clients



Audit findings presented to UK CEO of HSBC



Chief People Officer & TSB Exco – 1st 45 mins at ExCo Level



Head of UK Resourcing – presented to AXA UK CEO



HRLT EXCO Engagement – First external vendor to be invited to present at this level

d&i Leaders GLOBAL FORUM 2021
8 & 9 June | Online

WE ARE SPEAKING ABOUT...

Re-engineering your recruitment process to be more inclusive

dileaders.com/globalforum

Helen Rowell
HSBC

Tom Lakin
Resource Solutions

RESOURCESOLUTIONS | THE RECRUITMENT EVENTS CO.

REC Resourcing Leaders' Summit

Innocent Ignorance and Inclusivity
Auditing your Recruitment Process

Marcelle Foxcroft
Head of Resourcing
AXA UK

Tom Lakin
Senior Innovation Manager
Resource Solutions

Actioning meaningful change at AXA UK

14:00 GMT
24th March 2021

Diverse hiring advisory

Delivering impact with awards



CRITICALEYE
The peer to peer Board Community

HRD
SUMMIT

SPEAKER
Tom Lakin
Director of Innovation
& Diverse Hiring
Resource Solutions

#HRDFORUM



AXA

CASE STUDY



REUTERS EVENTS™

**REUTERS EVENTS: RESPONSIBLE
BUSINESS AWARDS 2021**

VIRTUAL CEREMONY: 14TH OCTOBER, 1PM BST



We're finalists for

TIARA
TALENT SOLUTIONS
AWARDS

The Diversity &
Inclusion Award
with our clients AXA UK

@talint_partners#TIARA2021 #talentsolutions

RESOURCESOLUTIONS

Innovation delivered

Some innovation highlights – 2019-2021

Microsoft

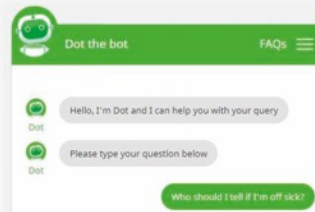


Global roll out of fully integrated mobile working solution for all front office staff worldwide



Dot the Bot

The Group has built its first Chatbot 'Dot' to manage contractor queries. Multiple other potential use cases internally and externally



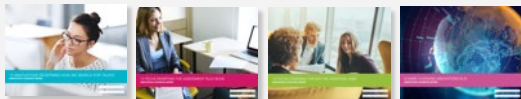
Video my Job

Utilising video to bring roles/JDs to life for candidates. Deployed across UK, Europe, Asia and ANZ



Roadshow and Thought Leadership

Roadshow of innovation trends to over 450 clients across UK, Europe and Asia. Launch of innovation lookbook series covering talent search, AI, robotics and assessment



Diversity and Adify

Thousands of jobs across both RW and RS analysed through our bespoke Adify tool, leading to more gender balanced long and short lists



Workplace by Facebook

Rolled out globally as the Group's new internal communications and best practice sharing platform.

Named Best Launch Strategy by Facebook in 2018



Some innovation highlights – 2019-2021

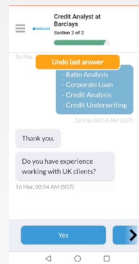
Intelligent Search & Match

The goal of this new global roll out is to capture candidates' information quickly and automatically into our database, then use AI powered algorithms to match them to our open roles



Automation & Chatbots

Building our capability to automate at scale, we launched a pioneering, chat-based application experience, where candidates could apply, assess and schedule their interview all in under 7 mins



Digital CVs @ Walters People

Integrating video interviewing & online assessment tools to bring candidate CVs to life and ensure they stand out from the competition



Great response from clients



Innovation Trends Events

Roadshow of innovation mega-trends delivered to over 450 clients across Hong Kong, Taipei, Shanghai, Frankfurt, Dusseldorf and Amsterdam



Data & Market Intel

A suite of products has been developed for RS clients to help them understand the talent market and guide recruitment decisions. RS Heatmaps & RS MarketView



Innovation Play Days

Some educational fun for our staff, 'Play Days' allowed them to get up close and personal with all of the great new tech we're rolling out



Some innovation highlights – 2019-2021

Innovation Trends Events

Innovation and creativity were at the heart of a new virtual events strategy deployed by our Global Marketers in response to the pandemic. Innovation was delighted to be able to kick off the series with audiences of 2,500



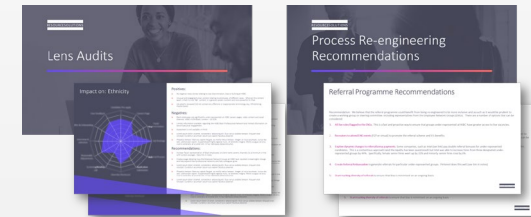
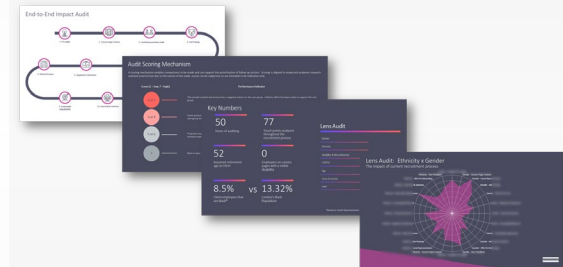
Digital Agility

Stunning digital agility displayed by our people : pivoting to home working and embracing new virtual recruiting methods at speed. By June 2020, we were hosting 20,000 meetings per month on Teams



Advisory Services Launch

Responding to client demand, we launched our Innovation Advisory Services. Catering first for the hottest topics – Diverse Hiring and Assessment Technologies – our teams are now delivering ground breaking audits which provide insight and simple steps to transformation. Clients love the immediate results delivered



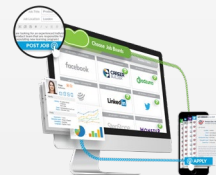
Pivoting To Virtual Hiring

We are well placed to advise our clients on the best tools to use to continue with virtual, face-to-face interviews, assessments and onboarding



Broadbean AI Matching

During 2020, we worked with Broadbean Technologies to develop and deploy a pioneering proof-of-concept trial to use AI matching & ranking to speed our response to candidate applications



Trends in Recruitment - Emerging HR & Rec Tech

HR Tech VC Funding

HR Tech VC Funding



HR Tech VC Funding

\$1.28 billion

Q4 2020 global HR tech venture capital investment. Clear signs of pandemic impact on investor calculus

\$5 billion

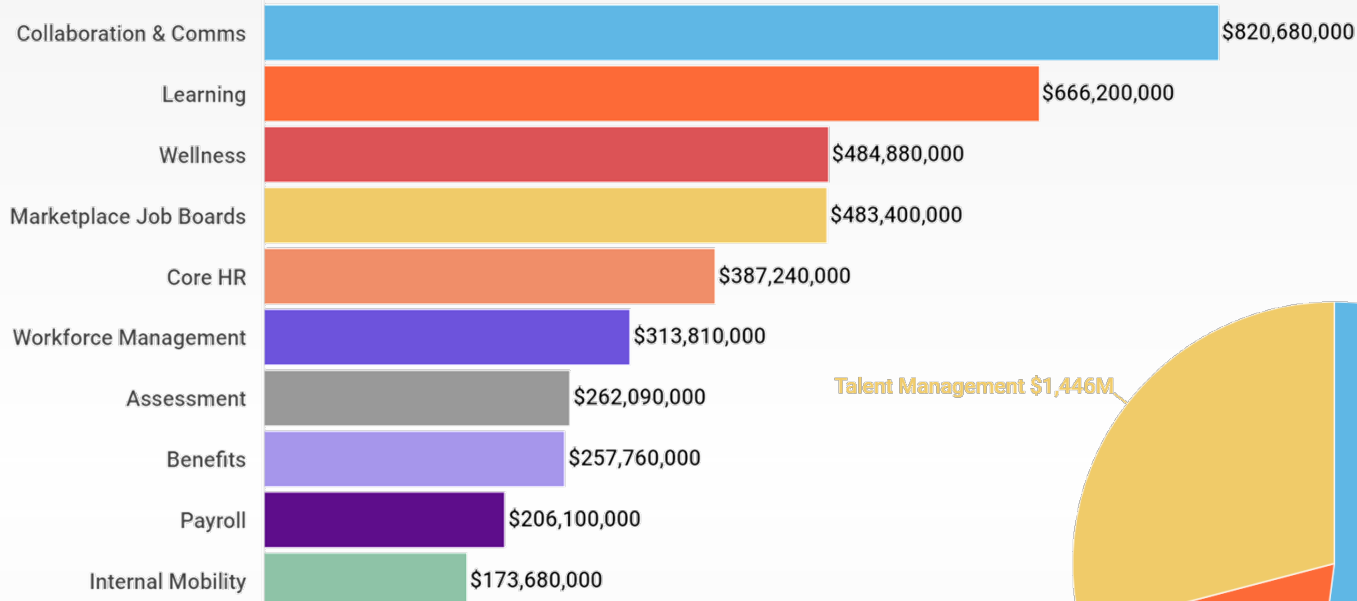
2020 global HR tech investment. Second highest annual total in the last decade, despite the pandemic

Triple

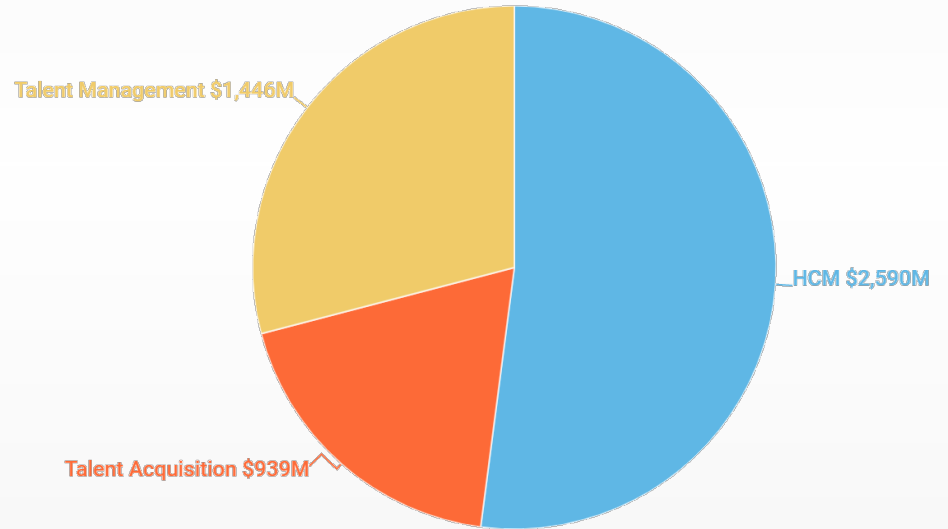
In 2020 HCM tech saw nearly triple the dollars invested in talent acquisition tech

Source: WorkTech 2020

Where is VC funding going?



2020 Global HR Tech VC by Sub-category



Examples of recent recipients of VC funding



DATA



INTERNAL MOBILITY / SKILLS GAPS



NETWORKING



SURVEILLANCE

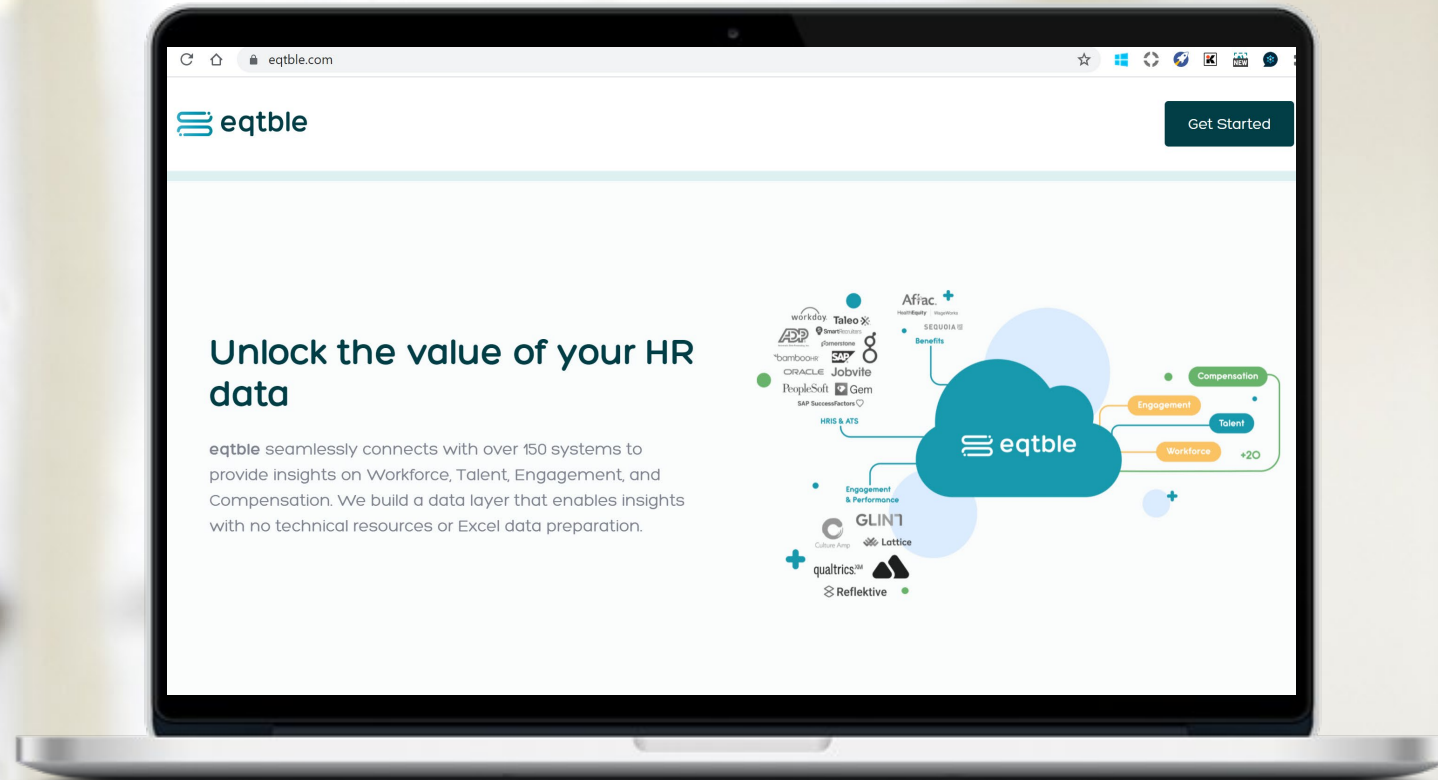


WELLNESS

Why is eqtble worth watching?

- Insights and visualisations about four main areas: talent recruitment, workforce, engagement (including attrition, or when workers quit), and compensation
- eqtble claims to deliver insights in 6 weeks by implementing a fully automated data process
- Founded by Snap's Former Head of HR Tech and WeWork's People Analytics team
- Secured \$2.7m funding in June 2021

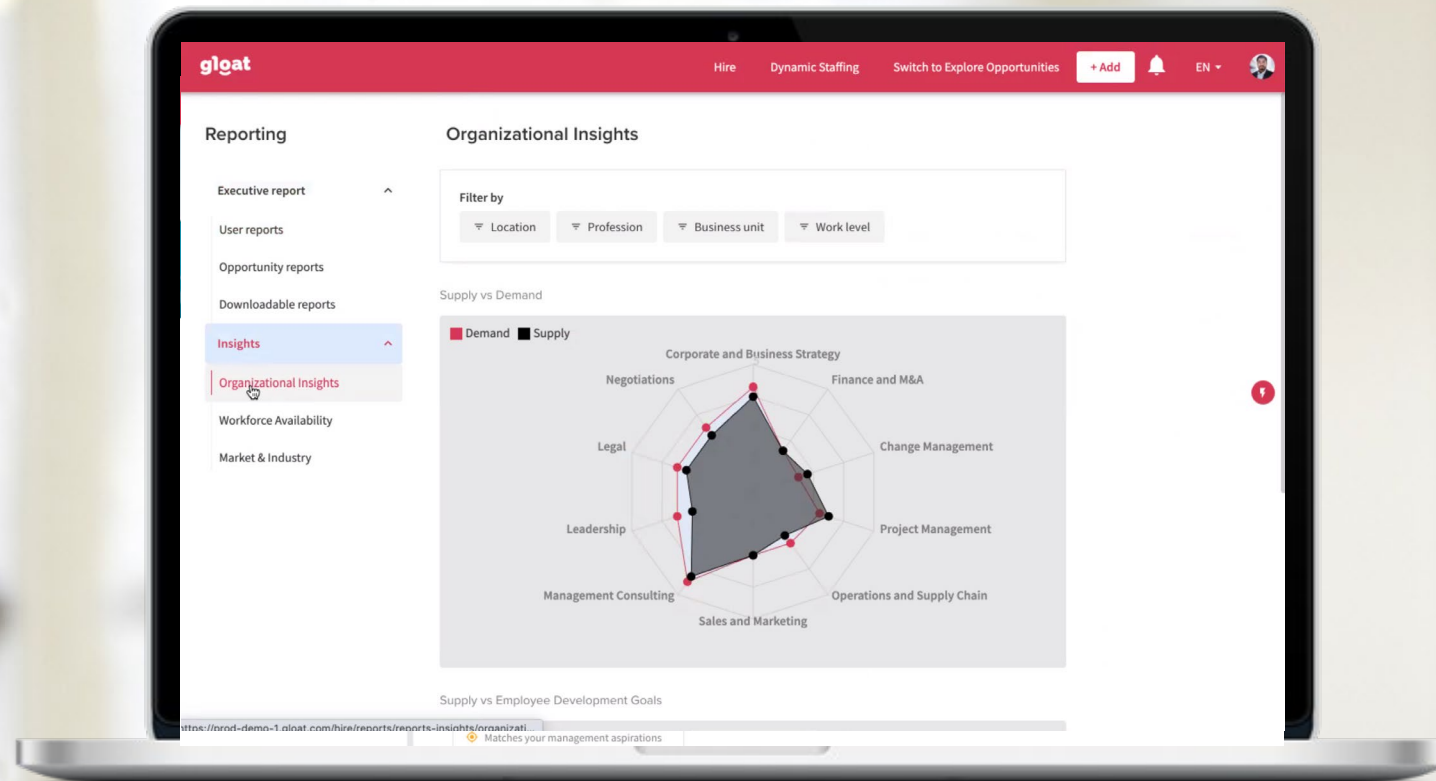
eqtble
Unlock the value
of your HR data



Why is Gloat worth watching?

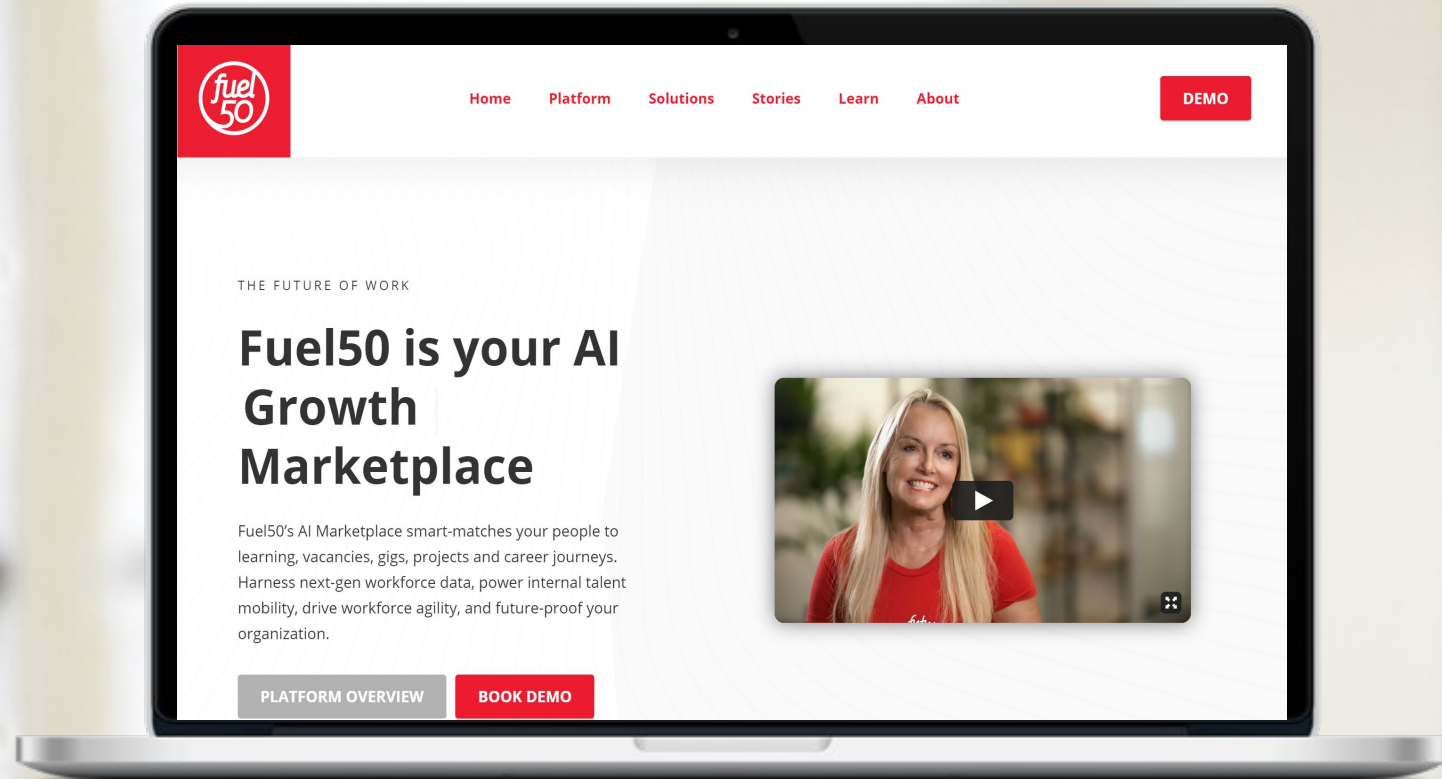
- With total funding of \$92M, the company will accelerate product innovation and market expansion
 - Talent Marketplace for internal mobility, mentorship, and projects
- Career pathways mapped based on skills and desired roles
- Potential to manage TOTAL TALENT MARKETPLACE, balancing external hiring with internal and forecasting the demand for skills.
- Digital record of skills and skills gaps within the organisation

gloat



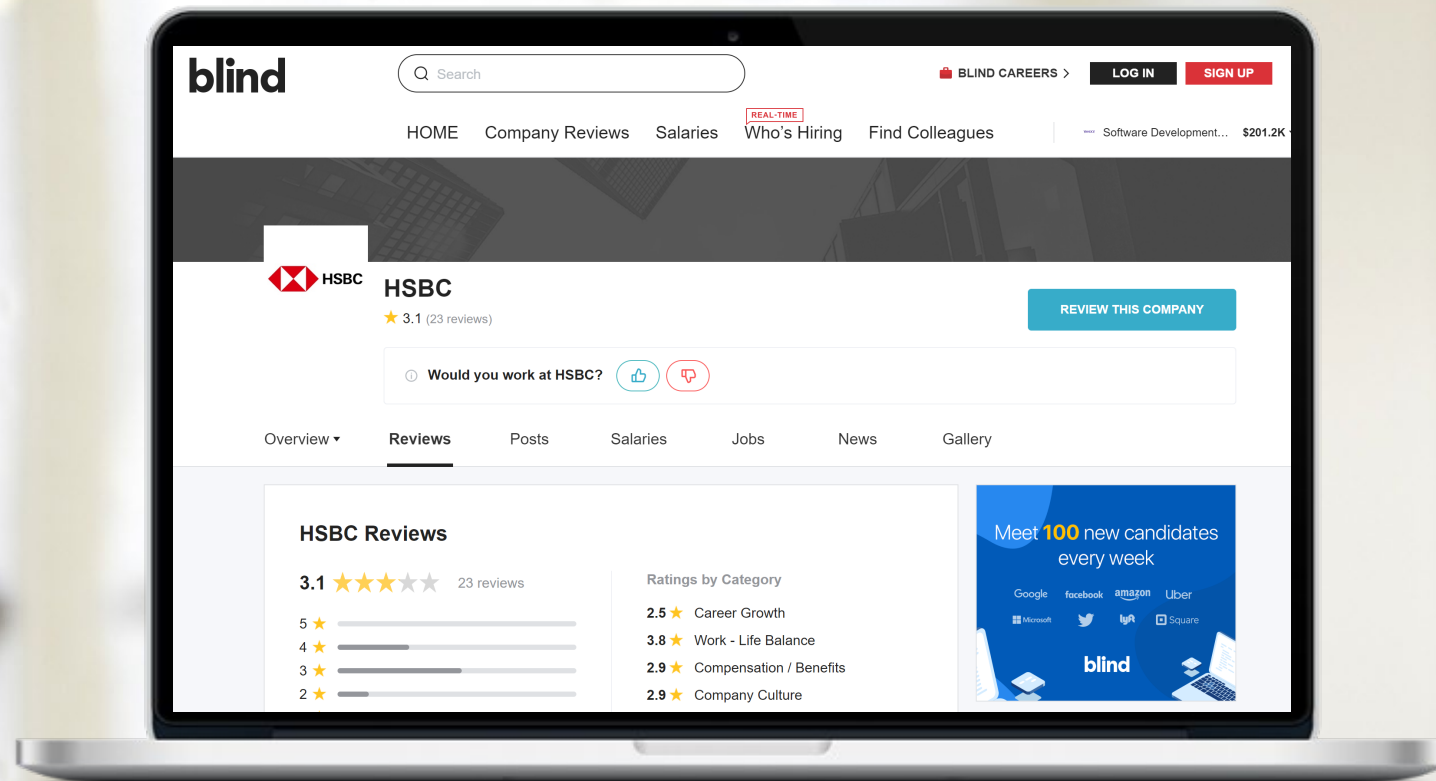
Why is Fuel 50 worth watching?

- Fuel50 Raises \$15.5 Million for Internal Mobility – despite Inner Mobility by Gloat & Phenom People, it's a category without a clear owner
- It offers AI-driven smart matching, skills gap analysis, mentoring, feedback, internal gigs and opportunities, and analytics.



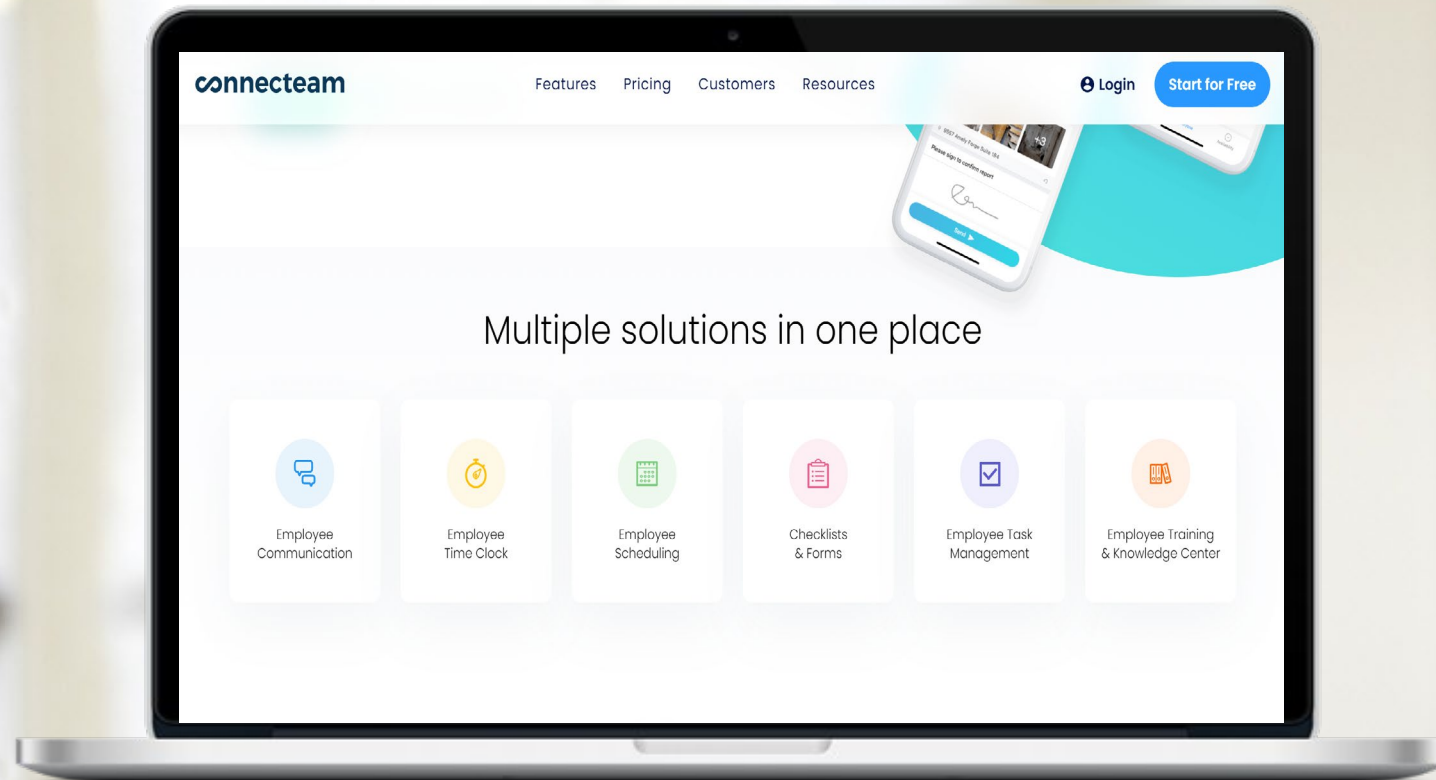
Why is Blind worth watching?

- Anonymous professional network, announced a \$37 million Series C round of venture capital to move its platform toward career advice and recruiting. This brings its total raised to \$61.8 million.
- The start up is hoping to harness what's communicated by employees anonymously to offer aggregate insights to employers
- Blind is also looking to offer employers hiring connections to users who express intent to leave



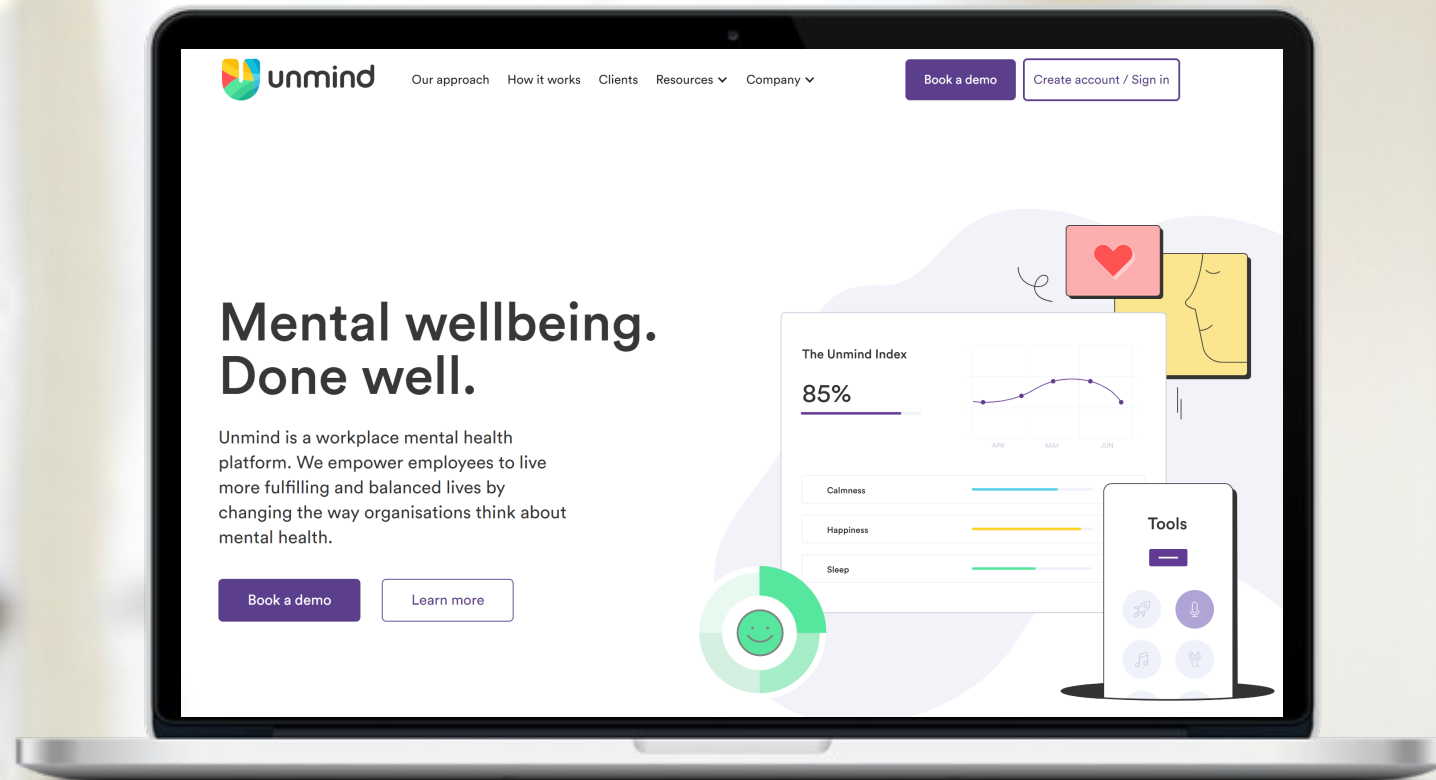
Why is connecteam worth watching?

- Israel-based Connecteam Raises USD \$37 Million for Deskless Workforce Management
- One of the emerging category of employee surveillance tech boasting features such as “Ensure employees are where they should be” and “Always know who clocked in, when, and where!”



Why is unmind worth watching?

- Recently announced a USD \$47 million Series B round of venture capital funding for its employee mental wellness app. This brings its total raised to \$63.2 million.
- Unmind has also built out analytics that correlate mental wellness to business results and ROI
- Clients include M&S, TSB, Uber, John Lewis & Partners, Centrica and British Airways



The background of the slide features a complex, layered architectural design. It consists of multiple horizontal bands of varying colors and textures. The top bands are light grey with a fine, grid-like pattern. Below these are darker, wavy bands in shades of dark red and black. The bottom portion of the slide is a solid, deep purple color. The overall effect is one of modern, dynamic architecture.

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The background of the image is a close-up, low-angle shot of a modern building's facade. It features a series of curved, overlapping architectural elements. The upper sections are light-colored, possibly white or light grey, with visible rivets or bolts. Below these are sections of dark red or maroon material with a vertical ribbed texture. The lower portion of the image is dominated by a solid, deep maroon color. In the center, a white rectangular box contains the company name.

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