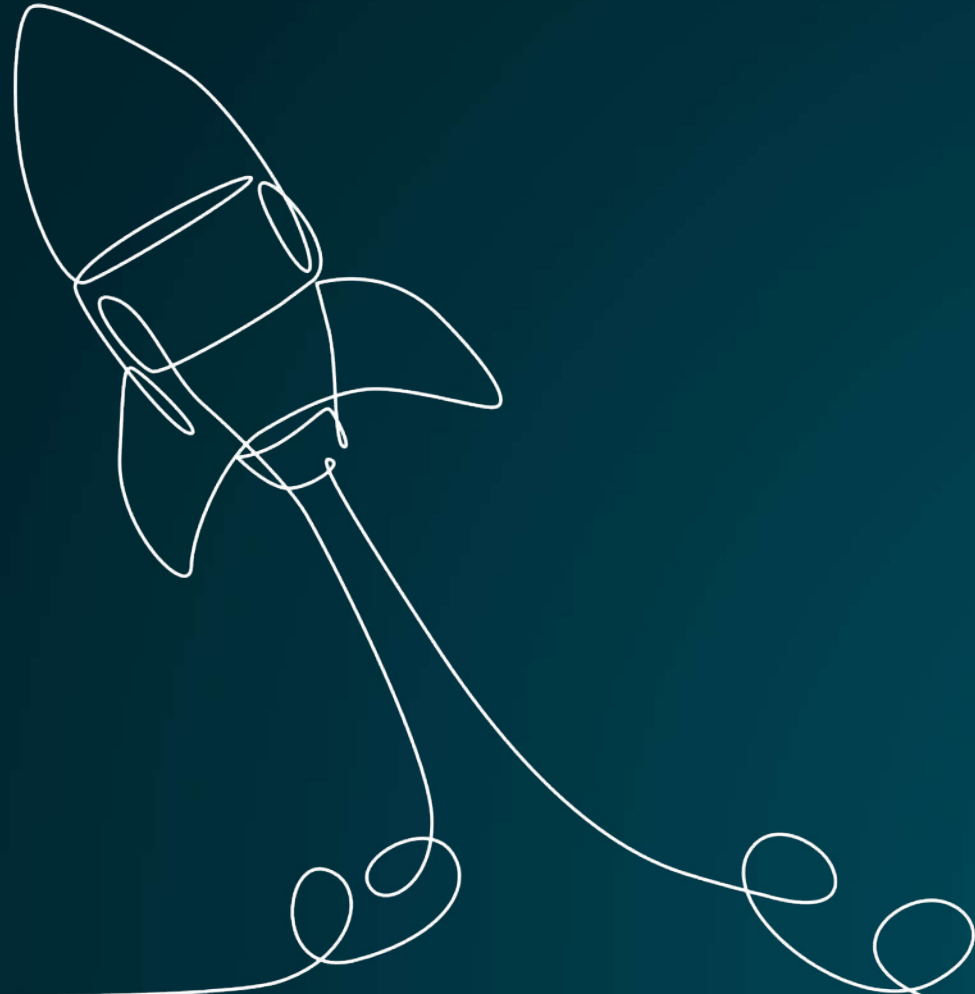




The GCC Growth Kit

How to grow and scale
global teams





What is a GCC and why you need it?

Wholly owned, integrated, strategic platform typically established in talent rich locations (such as India) for significantly enhanced value.



Integrated

Companies can **set up & operate a GCC** to access global top-talent and build differentiating business capabilities.



Enhanced Value

Enterprises that partner with **experts to successfully set up & operate** GCCs in offshore locations see significant enhancement in time to value.



Strategic Platform

GCCs have evolved into centers of excellence driving enterprise **growth, transformation** and **innovation** agenda.

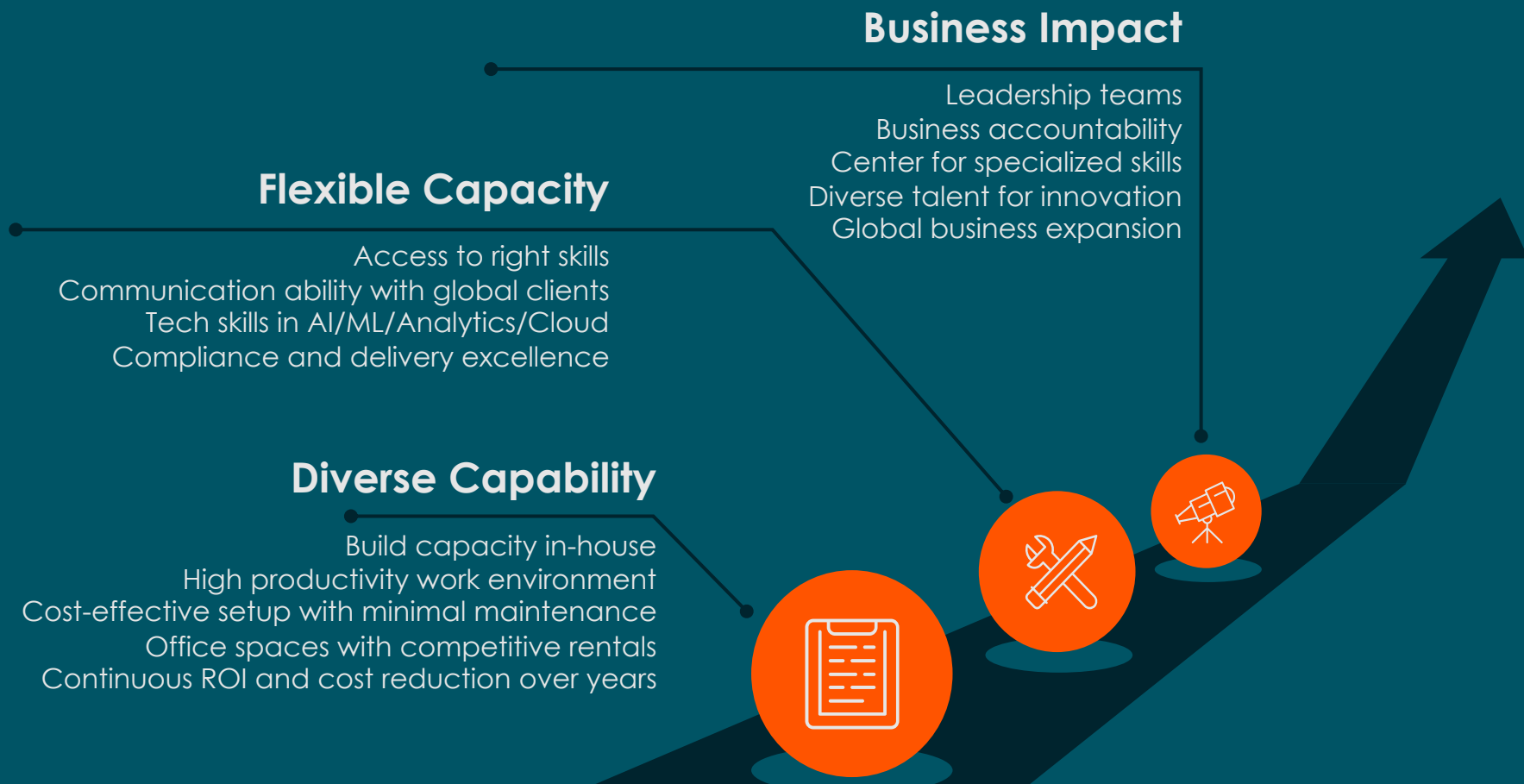


Wholly Owned

GCCs are a **mainstream strategy** to establish new business capabilities, gain efficiencies and optimize costs.



Key reasons why enterprises set up GCCs



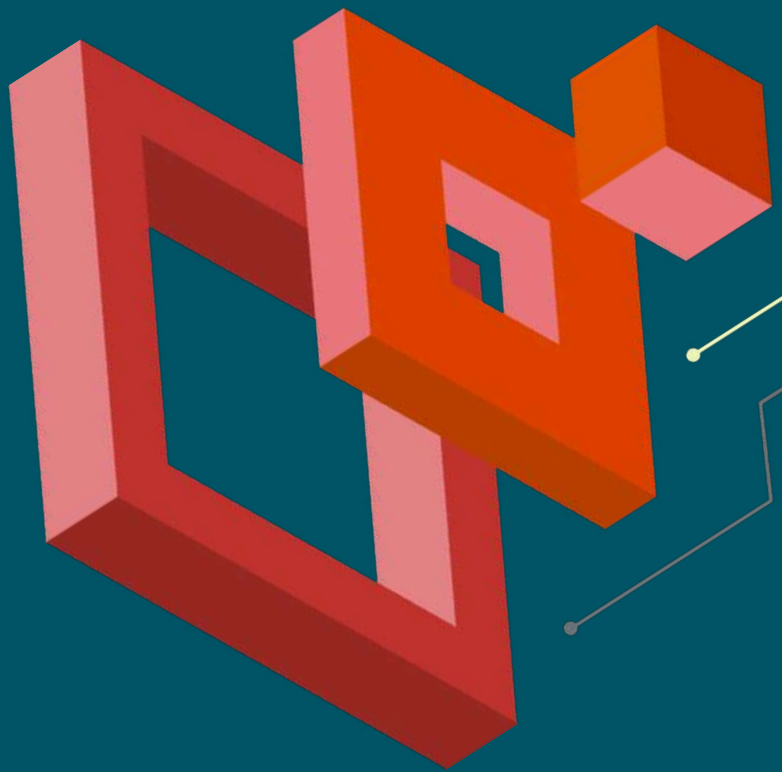
40%
of corporate headcount work out of GCCs

4 in 10
Enterprise technology & back-office operations leaders are placed at GCCs

30%
of GCCs have their KPIs linked to business outcomes

55%
of enterprise technology products are developed in GCCs

Drivers influencing the GCC growth



CX | Create meaningful business impact by delivering incredible customer experience

True digital transformation
Business impact
Customer centric

CAPABILITY | GCCs have increased focus on digital capability while building and running IT and business operations for the parent

New-age tech, such as AI/ML
Upskill and re-skill

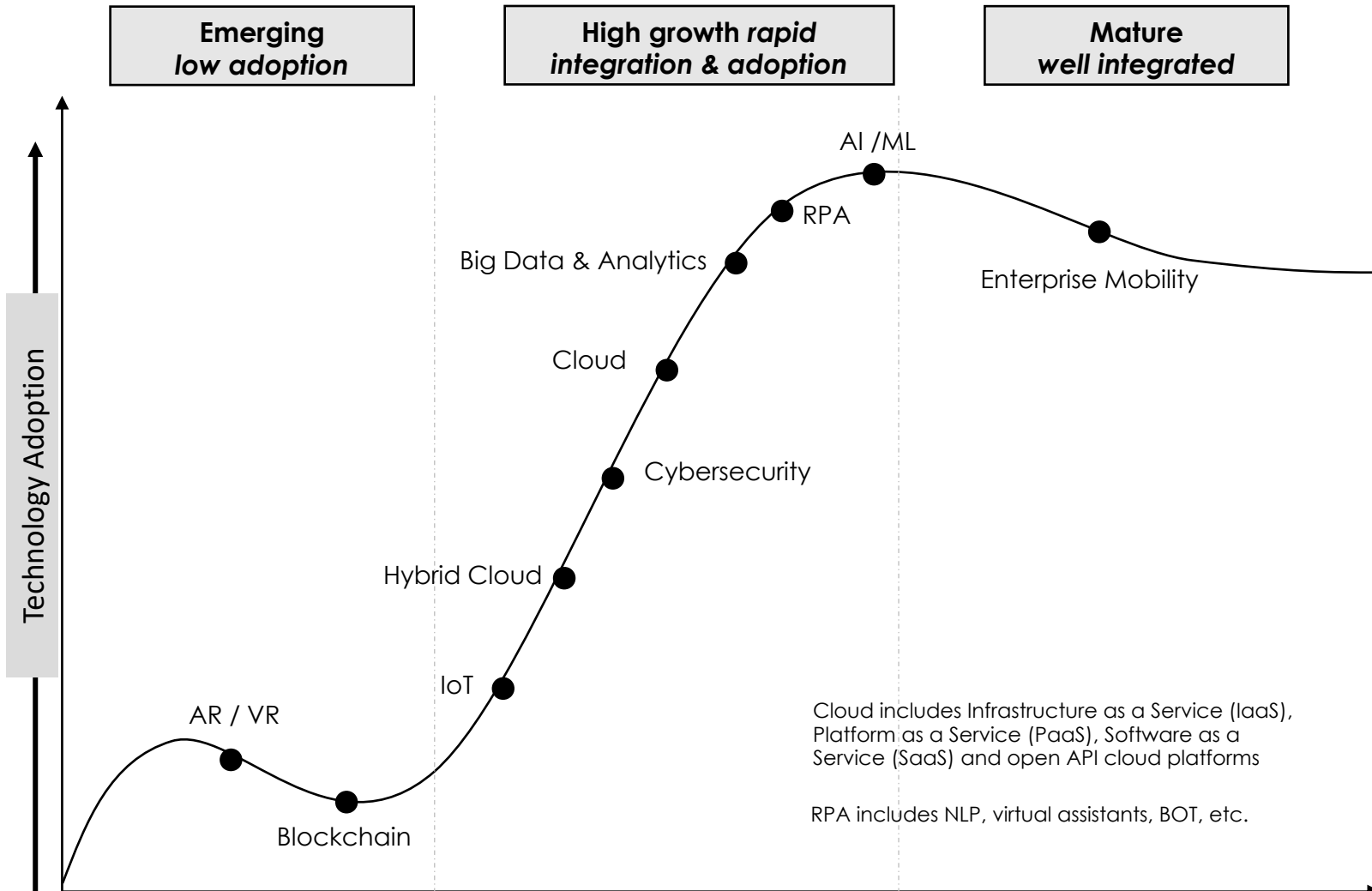
CAPACITY | Flexibility to ramp-up and scale the talent and infrastructure based on the global business demands

Competitive rentals
Engaging spaces
Delivery excellence

Cost | Competence | Compliance | Continuity



GCCs are leading next gen technology adoption



- GCCs provide companies with opportunity to invest in newer technologies at a reduction of traditional costs – creating a **competitive advantage**
- GCC strategies often focus on enhancing and/or building **Big Data & analytics, cloud, and mobile** capabilities
- Investments in **IoT** and **Hybrid cloud** are expected to grow rapidly in next 2-3 years. Increased investments in AI/ML
- **Blockchain** and **AR/VR** practical applications are emerging

How are GCCs different?



TALENT

Ability to hire and develop best talent for the global enterprise



EXPENSE SAVINGS

15%-20% additional savings over traditional outsourcing / BOTs



BUSINESS CAPABILITIES

Develop / strengthen / scale enterprise business capabilities



PRODUCTIVITY

20%-25% productivity improvements over traditional outsourcing model



STRATEGIC CAPACITY

Develop capacity / scale to accelerate execution around enterprise strategic priorities

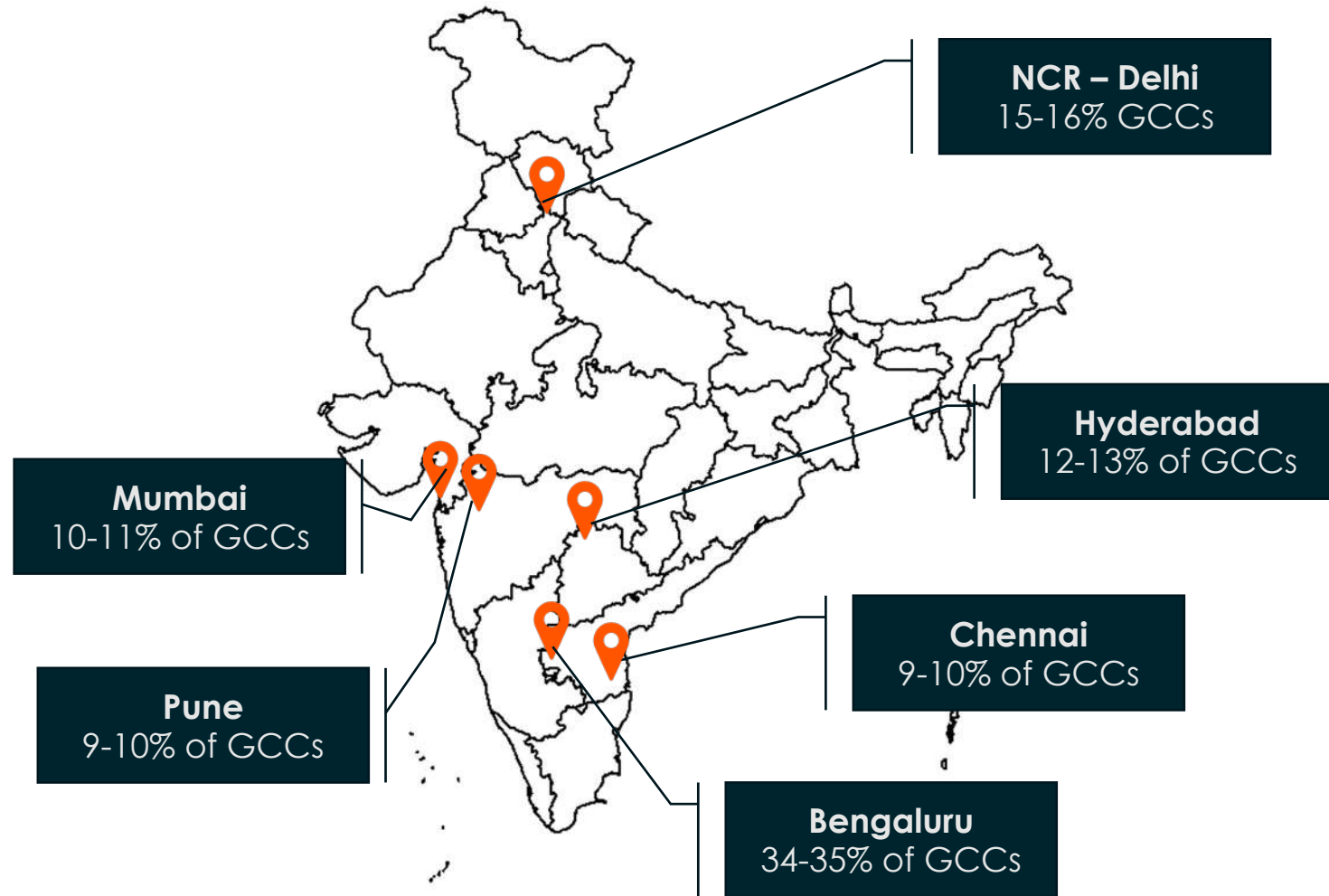


INNOVATION

Leverage ecosystem and best practices to drive open innovation programs

Why you need a GCC in India

English-speaking tech talent has made India the GCC destination of choice -- one that is unlikely to be challenged over the next 10-15 years.



Source: NASSCOM



27%

of Global 2000 firms have established GCCs, with ~ 50% of those operating in India

1300+

Global MNCs with centers in India

90%

of GCCs are in top 6 cities

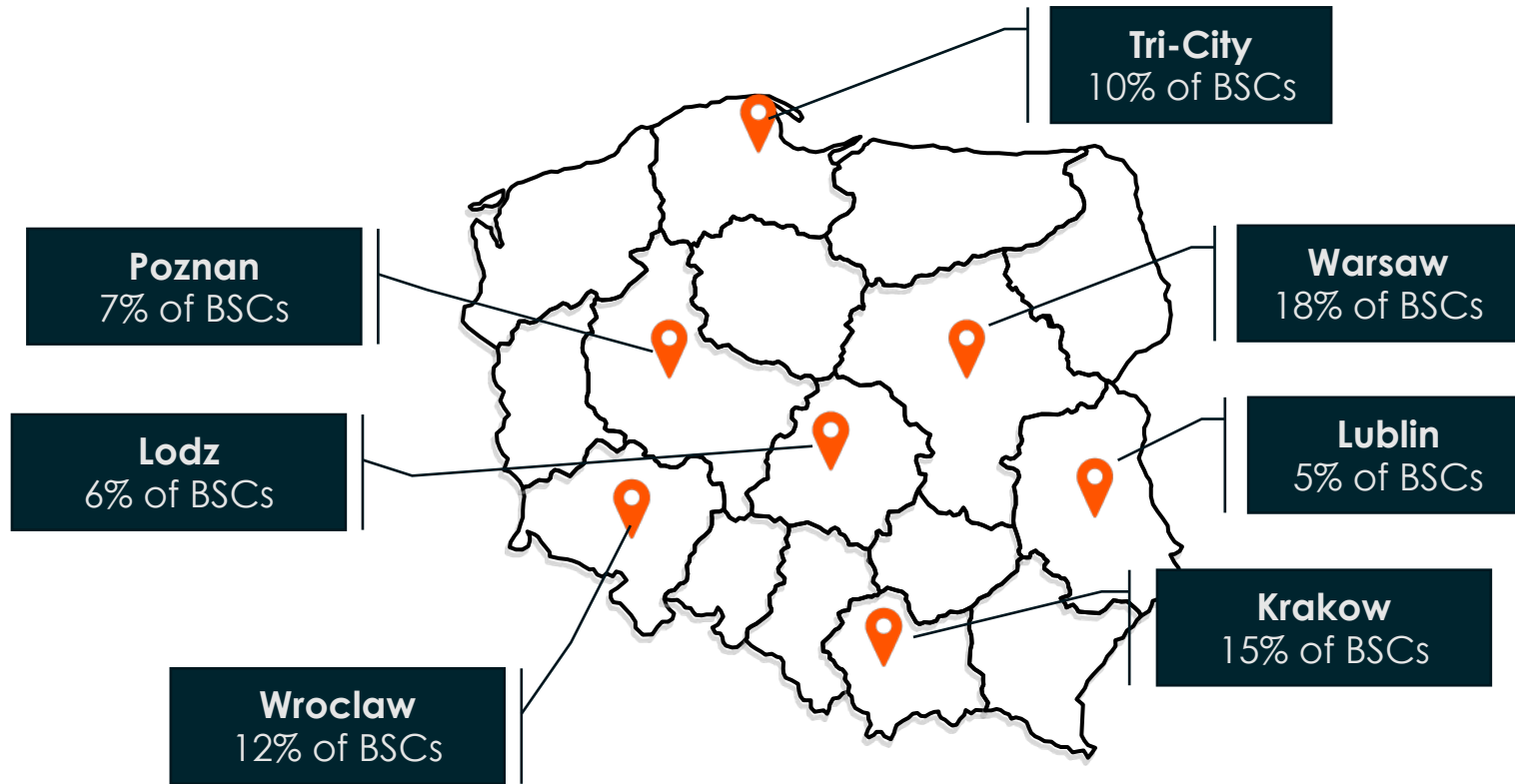
1.3M

people work at GCCs across India



Poland – An established destination for Nearshore delivery

Language-specific talent has made Poland the destination of choice for language-specific work.



Source: ABSL Poland

1513

Total number of BPO, SSC/GBS, IT, and R&D centers in Poland

24%

SSC/GBS centers in Poland

75%

of business services centers (BSCs) are in top 7 cities

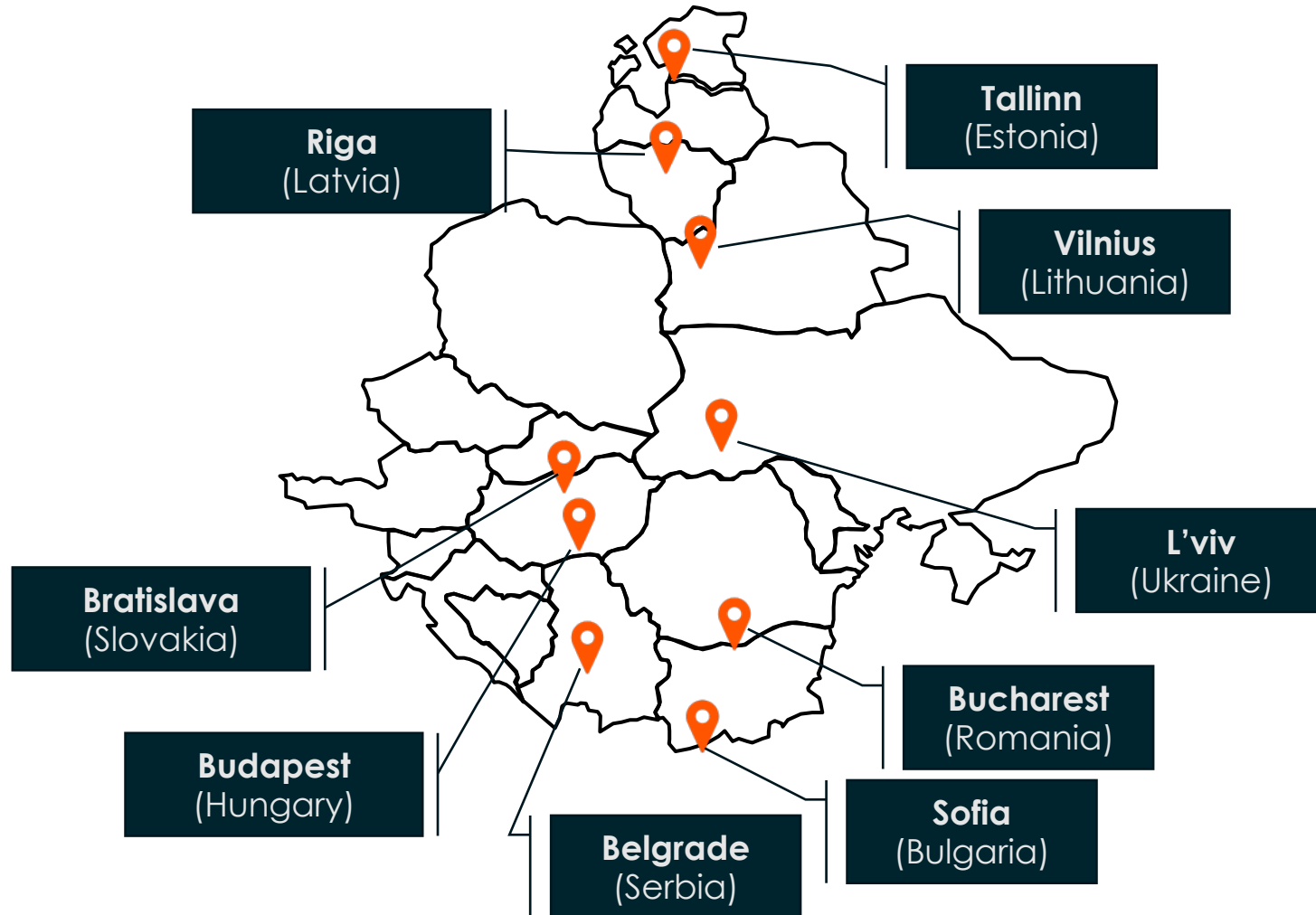
338,000

people work at business services centers across Poland



Central and Eastern Europe (CEE)

Availability of multi-lingual talent, close cultural ties with Western Europe, and favorable business environment – factors attracting Global 2000 firms to establish GCCs.



Source: NASSCOM

10%

of Global 2000 firms have established GCCs in Central and Eastern European countries (excluding Poland)

10%

of GCCs established by Global 2000 firms are in CEE countries (excluding Poland)

50-60K

people work at GCCs established by Global 2000 firms in CEE countries (excluding Poland)

Successful GCCs come in all sizes



Diverse verticals with common GCC goals

<200 FTEs	200-500 FTEs	500-1000 FTEs	1000+ FTEs
	 	 	 
	 	 	 
	 	 	 
	 	 	 



Case in Point

The **Retail / CPG** GCC landscape is flourishing in India



- India is home to the GCCs of ~ **25%** of global Retail/CPG companies* and employ **over 50,000 people** in India
- Retail/CPG is one of the fastest growing GCC segments in India
- **Over 50%** of the Retail/CPG GCCs have been set up in last **7 years**
- Retail / CPG GCCs are emerging as a strategic driver for **innovation** and building **new capabilities** in **digital and core functions**
- Retail / CPG GCCs are leveraging **strategic partnerships** to enable **niche initiatives** as well as bring scale
- **Bengaluru** is the **preferred GCC location** hosting over **70%** of Retail/CPG GCCs
- **~25** Retail/CPG enterprises are looking to establish new GCCs in 2021/22, tapping into the mature ecosystem of talent and global operating models



Case in Point

The **BFSI** GCC landscape is significantly matured in India



Source: ANSR

- India is home to the GCCs of **~15%** of Forbes 2000 BFSI companies* and employ **~360,000** people in India
- BFSI is the second-largest GCC vertical by headcount and is significantly matured GCC segment in India
- **Around 35%** of the BFSI GCCs have been set up in **last 7 years**
- BFSI GCCs have established multiple product development center of excellences to build **capabilities** in **digital and core functions**
- BFSI GCCs have built partnership ecosystem with startups and educational institutions to drive innovation
- **Bengaluru** is the **preferred GCC location** hosting over **55%** of BFSI GCCs
- So far in 2021, Goldman Sachs and TransUnion have established new centers, whereas Commonwealth Bank of Australia, Credit Suisse, Deutsche Bank, JP Morgan Chase, MassMutual, Sun Life Financial have expanded existing centers



Case in Point

India boasts of technology and domain expertise for **Travel & Transportation** industry



- India is home to the GCCs of ~ 20% of Forbes 2000 Travel & Transportation companies* and employ 20,000-25,000 people in India
- **Around 35%** of the Travel & Transportation GCCs have been set up in last **7 years**
- Technology work for the Travel & Transportation industry started with IT Services, then matured into product development (local and international markets) and subsequently evolved to high value work in eCommerce and analytics
- **Mumbai** is the **preferred GCC location** hosting **~30%** of Travel & Transportation GCCs
- Travel & Transportation GCCs experience relatively lower attrition than other industries **due to high loyalty and stickiness factors**
- **Uber and Delta Air Lines** are select examples of travel & transportation companies delivering software product development from India



Case in Point

India is the chosen location for Core functions delivery for **Healthcare & Lifesciences** GCCs

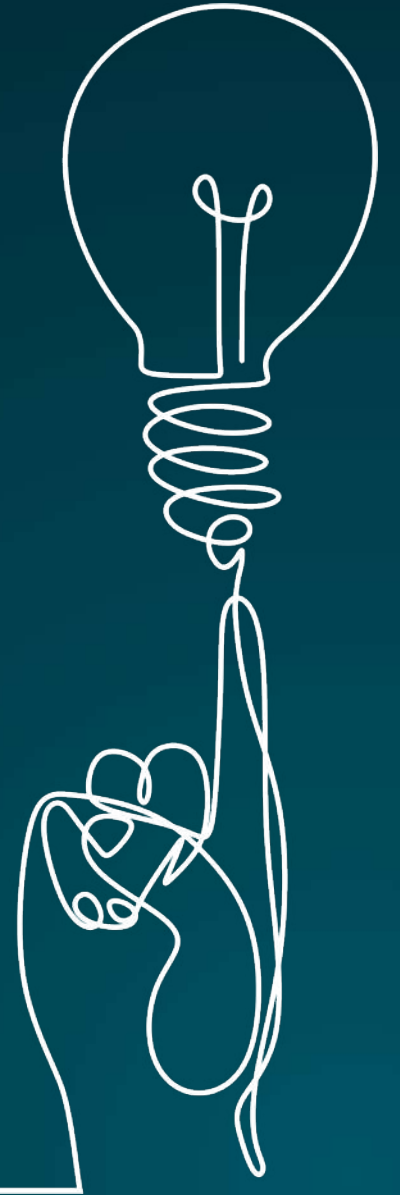


Source: ANSR

- India is home to the GCCs of ~ 35% of Forbes 2000 Healthcare & Lifesciences companies* and employ 30,000-35,000 people in India
- **Around 25%** of the Healthcare & Lifesciences GCCs have been set up in **last 7 years**
- Most Healthcare & Lifesciences GCCs have moved up the value chain to support core functions such as product R&D, clinical trial operations, statistics, data management, pharmacovigilance, bio-statistics
- **Bengaluru** is the **preferred GCC location** hosting **~40%** of Healthcare & Lifesciences GCCs
- Healthcare & Lifesciences GCCs are expecting to play significant role in driving innovation and have started to explore use cases of AI/ML within clinical trials (such as patient recruitment and site selection)
- Pandemic has become the catalyst to a future of work and talent in Healthcare & Lifesciences industry. Companies are upskilling talent in enhanced diagnostic, data analysis, and interpretation of reports & risk scores



Trends that are changing the GCC game



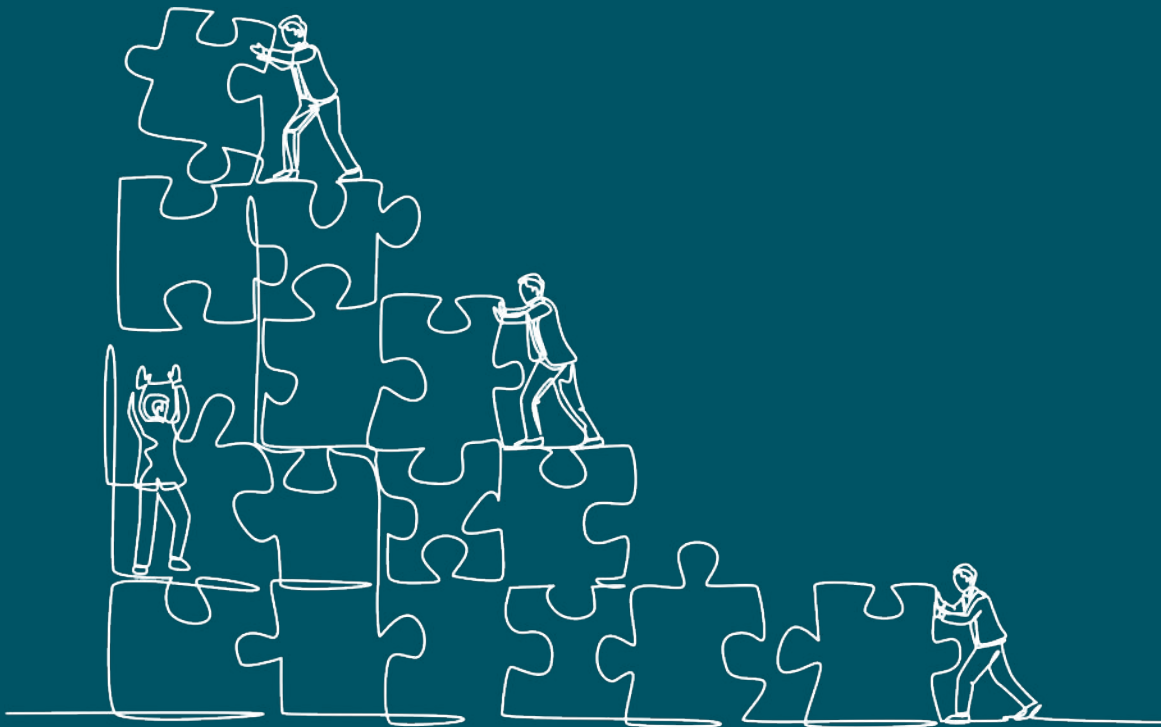


The GCC is the **Enterprise**

In the post-COVID world, Global Capability Centers (GCCs) are poised to become even more integral to the global enterprise. Swiftly and surely, we are moving towards the convergence of GCCs and the enterprise!

“Swiss Re Bangalore is referred to as a “microcosm of the Swiss Re group” because different teams working here contribute to almost the entire reinsurance value chain.”

Amit Kalra – Managing Director,
Head Swiss Re Bangalore





GCCs **scoring high** even in pandemic

Recently, McKinsey reported that “most GCCs have been able to maintain service levels even while adapting” to the disruptions of the pandemic. Their study found that best-in-class GCCs have almost fully recovered to their pre-crisis baseline across all three metrics” — resilience, continuity and efficiency.

“Lowe’s India team built new innovations to make the customers and associates feel comfortable and safe during the pandemic. Thus, while fast-tracking the existing projects, the GCC was also able to develop solutions that was not part of their original roadmap.”

Ankur Mittal – SVP Technology and Managing Director at Lowe's India



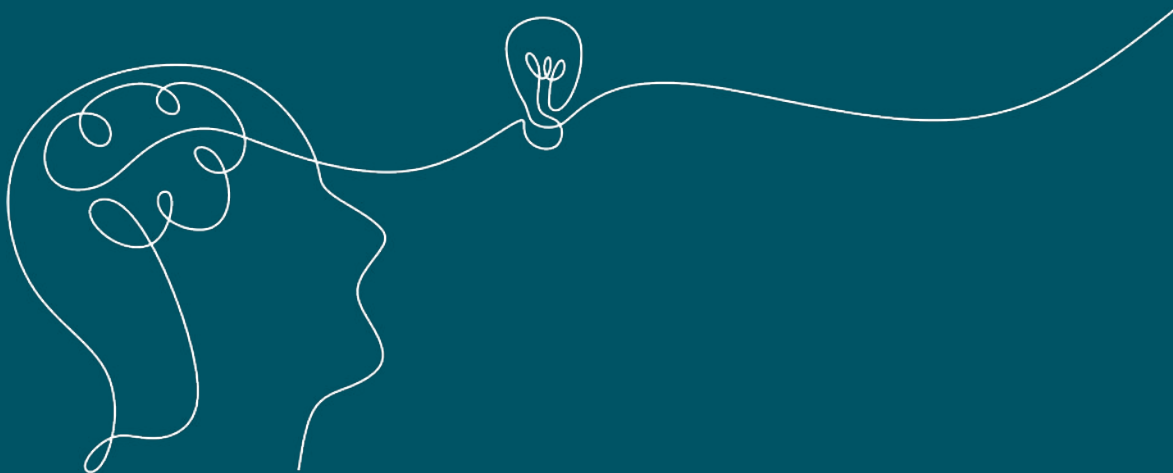


Enabling **innovation**

GCCs are emerging as innovation laboratories building product and service prototypes for global markets. They are leveraging emerging technologies and paradigms to power exponential growth.

"Innovation in IT directly supports our core businesses in R&D and customer services to healthcare professionals and patients. Lilly Capability Center will not only provide high quality, innovative pharmaceutical IT solutions and services to improve patient outcomes in the most prevalent diseases. "

Luca Visini – Managing Director, Eli Lilly, India



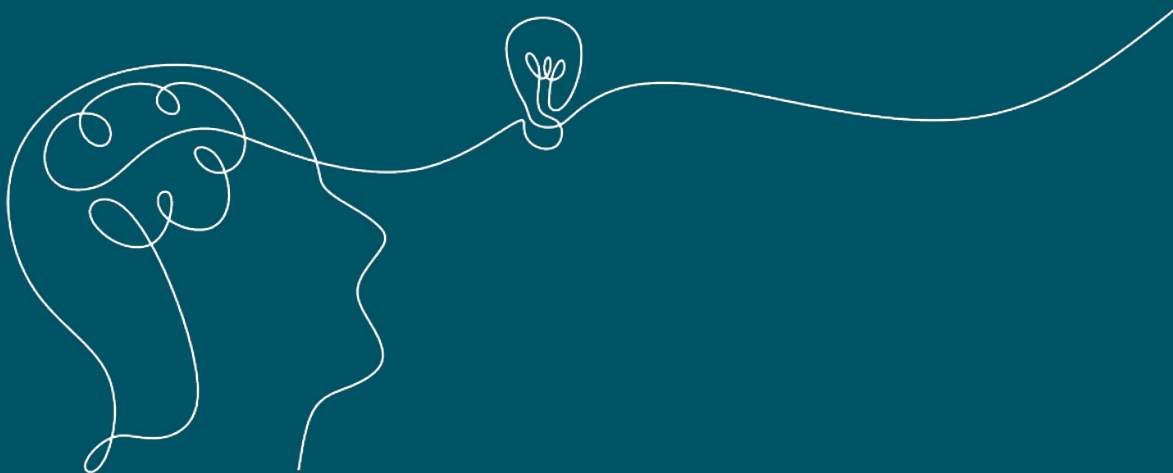


Business **accountability**

This is a key shift in the way GCCs are being operated. Today, leaders at GCCs have a seat at the table. They are managing business-critical efforts, participating in planning & strategy and are interacting with customers, signaling diminishing distance between the GCC and the enterprise.

“Walmart’s Bengaluru center is focusing on sustainable scale. The idea is that the team must grow, but in the right way. We want the next breakout idea for the company, whether it is in AR/VR or assisted shopping, we want that to come out of this center.”

Hari Vasudev – Country Head & SVP -
Technology at Walmart Global Tech India

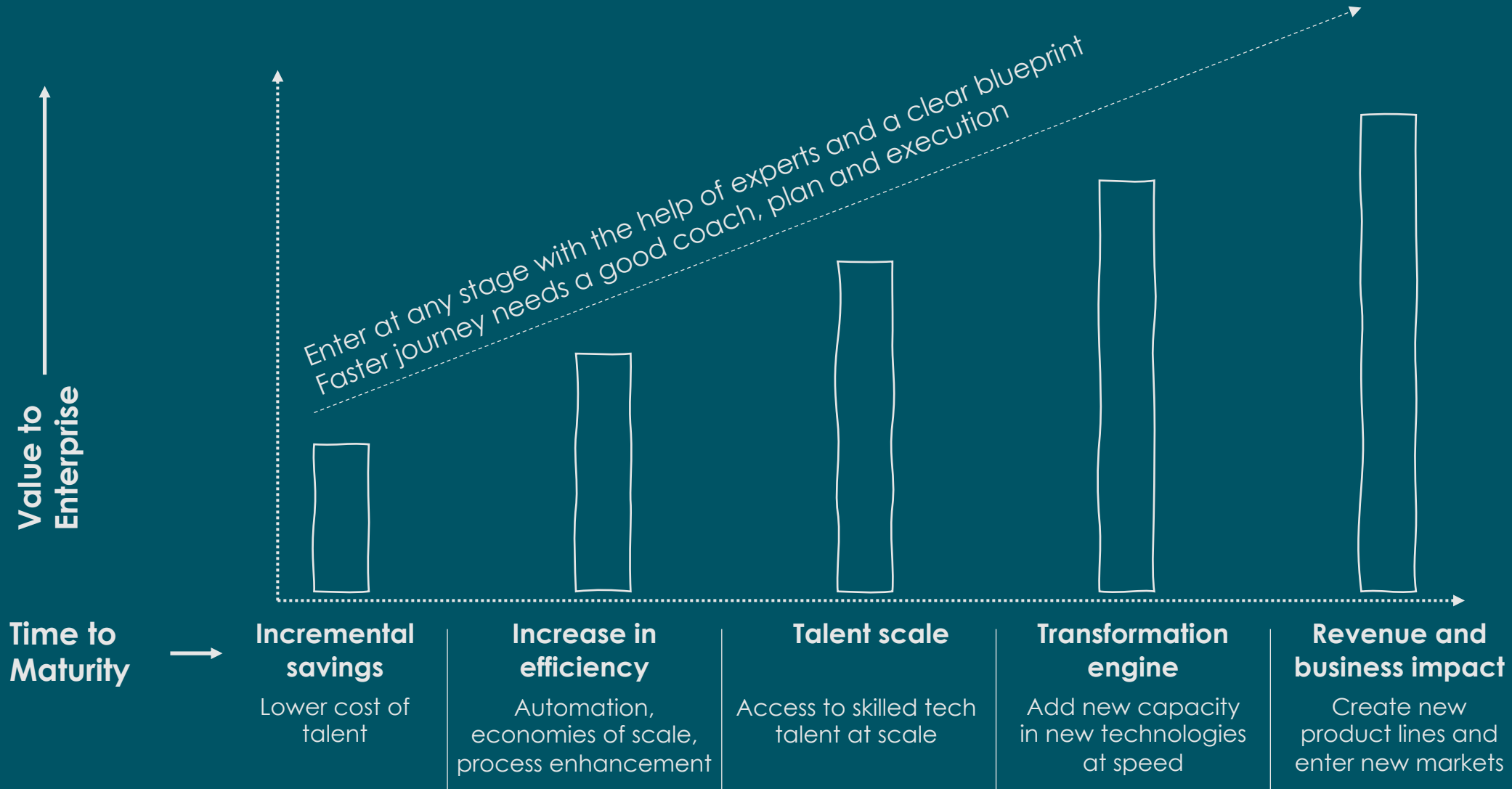




GCC Blueprint



GCC value index





A winning GCC blueprint

Evaluate
GCC Readiness
Assessment
GCC Talent
Assessment
GCC Infrastructure
Assessment

Design
Business Case
Functional Intake
Design and
Approvals
Talent
Infrastructure Plan

Setup
Legal, Risk &
Compliance
Finance & Tax
IT Infrastructure
Human Resources
Safety & wellbeing

Operate
Finance Operations
HR Operations
IT Operations
Workspace
Operations

Talent Acquisition

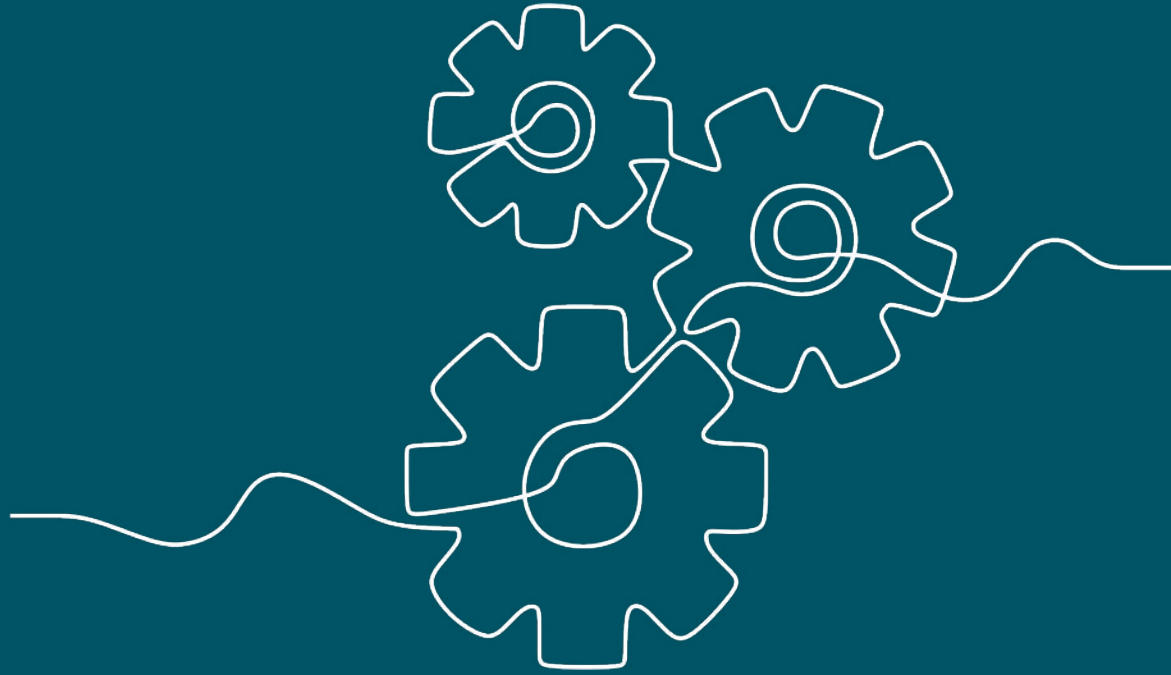
Program Governance



Evaluate

Before embarking on the journey of GCC setup, select the location of choice based on business considerations by making an informed decision on the basis of:

- Stakeholder on-boarding, including demand plan intake (number of hires, key skills, experience requirement, etc.)
- Information framework review, assigning weights and priorities to different business considerations
- Location assessment and selection based on talent landscape, market maturity, real estate availability, business & operating environment, and government incentives
- Financial modeling and estimation of service delivery costs for recommended locations



Design

An accelerated process encompassing key decisions across different functional areas to develop the blueprint for the BOT entity, which includes:

- Decision on the entity structure (PLC vs LLP), parent holding company structure
- Location selection and site finalization for the setup of office
- Operating model design with function and talent mapping
- Talent strategy with EVP, comparator companies, Compensation & Benefits
- Blueprint/Playbook for the setup of the entity
- Financial modeling and estimation of service delivery costs



Setup

An accelerated process to execute on the approved blueprint, leading to the establishment of the GCC.

- Incorporation of a legal entity
- Creation of the brand strategy and employee value proposition to attract the best-in-class talent from the industry
- Setup of the real estate infrastructure resonating the brand, design standards, culture and values
- Setup of the IT infrastructure to meet global connectivity and infrastructure requirement
- Completion of the regulatory filings and compliances



Operations

Optimized approach for efficiently managing and scaling the GCC entity, including:

- Sourcing and acquisition of the candidates that meet the cultural and technical requirements
- Management of the offer, background verification and onboarding processes for the candidates
- Managing accounting, bookkeeping & reporting, treasury & audit, financial planning & analysis, secretarial & regulatory compliances
- Facility upkeep, security services and provision of food & beverages, transportation etc.
- New capability development, COE consulting, platform consulting and innovation programs



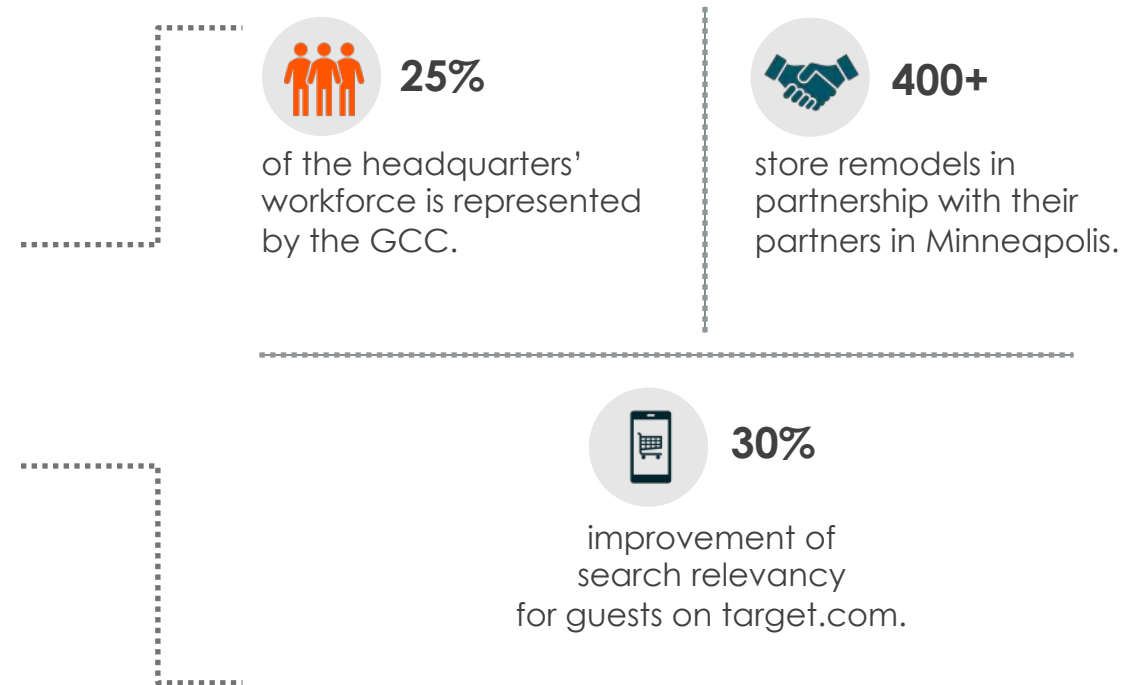
Success Stories





Redefine retail to deliver world-class outcomes

- Target has aggressively transformed end-to-end global functions using digital technologies
- Target in India team brings alive some of Target's most important strategies across diverse functions such as Marketing, Supply Chain, Product, Technology, Stores, Internal/External Branding, Data Sciences and Process Robotics & Automation (PRA). The team works on key areas of work in partnership with Minneapolis, creating significant impact on their overall business:
 - 3D Shoppable rooms on target.com, to enhance guest experience while shopping online
 - Store Remodels, for 400 stores across the US
 - Search relevancy improved by 30% for target.com
- Unified by their Culture of Learning and One Team Pride, Target in India is a high-performing ecosystem that mirrors their U.S. headquarters. It is uniquely positioned to solve important business problems for Target and the Retail industry



Building the workforce of the future

- The initial focus of the GCC was to insource work from the service providers and drive operational efficiencies
- After 2017, the GCC enhanced the tech stack to include workaround strategic technologies and undertake critical enterprise modernization projects
- As a result of this transition, the talent management function has continued to evolve, becoming more metrics and data-driven. The GCC TA dashboard was recognized at the MicroStrategy World Dossier 2019 contest
- In 2019, the GCC implemented innovative hiring practices such as open house events in microbrewery, niche technology & industry roundtables & meet-ups, diversity forums and one of a kind alumni program LAN (Lowe's Alumni Network) to attract the best talent
- The team hired aggressively to build a 60-member strong leadership from 15 in just a year. Today, the GCC boasts of a very healthy and diverse leadership group in terms of gender, background, and expertise
- In 2020, Lowe's India continued this innovative hiring strategy with a pan-India hackathon, multiple open houses for various fields for technology and beyond



**~3,000
headcount**

sharp growth from 58 members in 2014.



**Great Breadth
of Talent**

from hiring all-star talent from colleges all over India to hiring a diverse group in leadership, Lowe's India walks the talk.



**Unparalleled
candidate
experience**

using innovative practices such as pre-hiring onboarding and open houses for potential hires, Lowe's India was able to attract best talent.

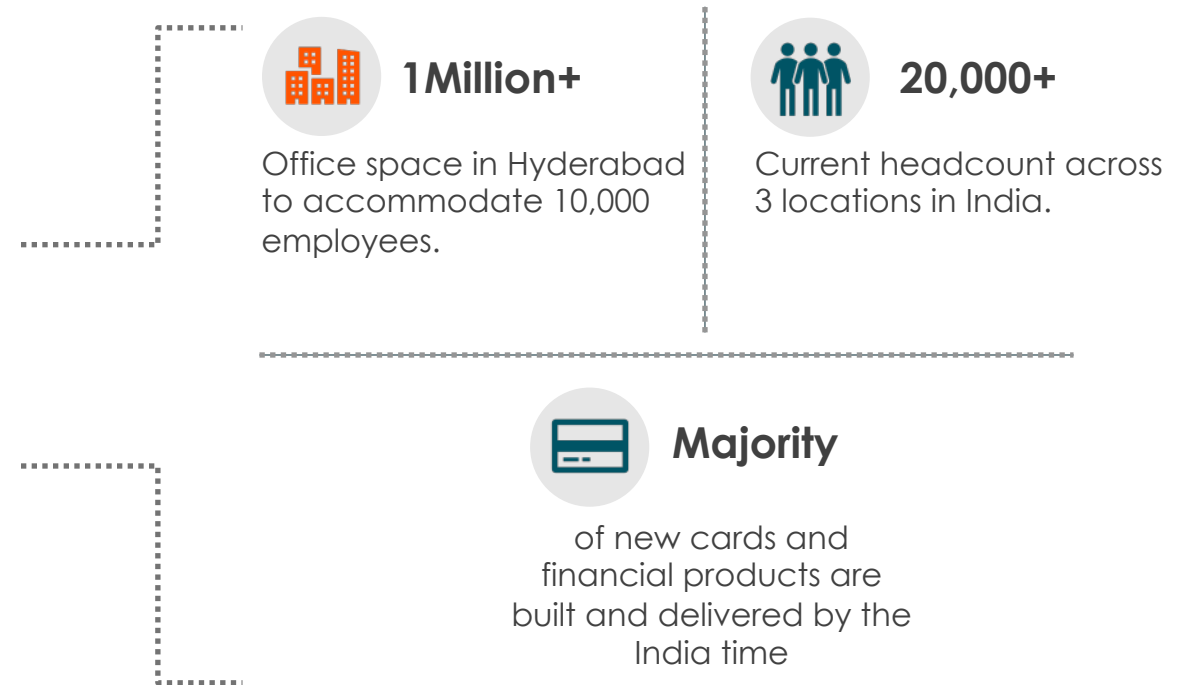


**ET BEST
Brands
2020**

ET recognized Lowe's India as one of the BEST Brands in 2020.

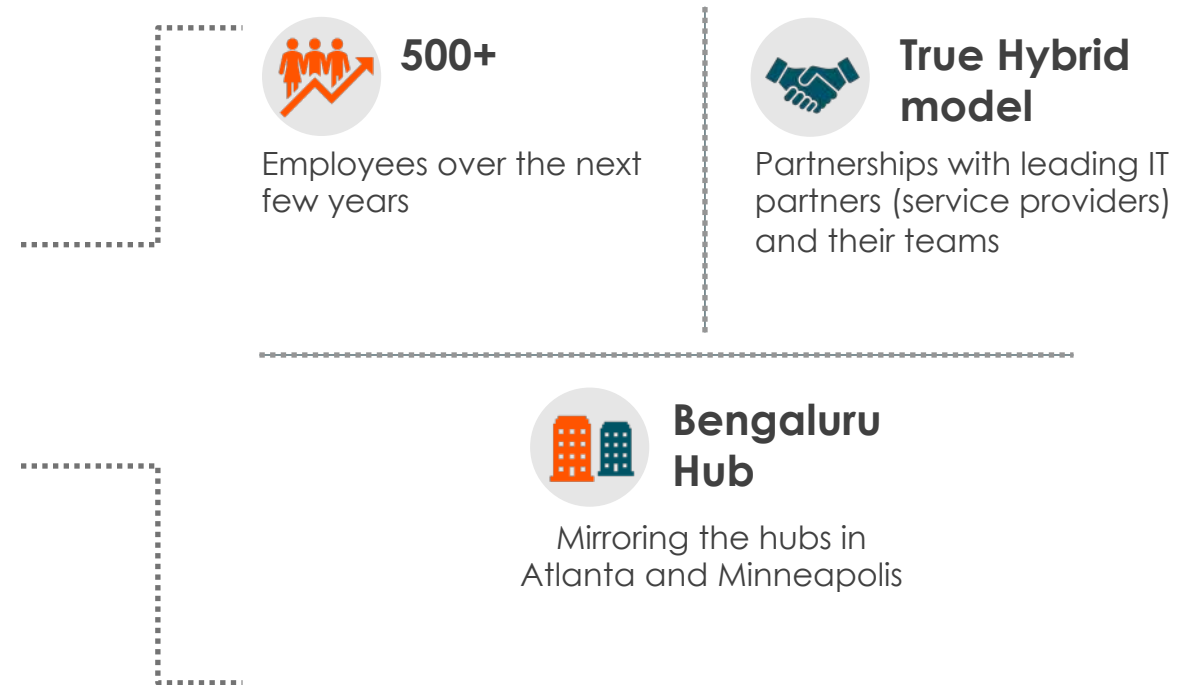
A technology-led finance transformation

- Technology helps Wells Fargo serve over 95 billion transactions annually in 49 states and 10 countries.
- Wells Fargo India was established in 2006, to support business lines and staff functions across the company.
- The capabilities supported from India, include Technology, Operations, Risk, Audit, Process Excellence, Automation and Product, Analytics and Modeling.
- Wells Fargo India operates in Hyderabad, Bengaluru, and Chennai.
- Digitization has helped Wells Fargo in working for a global delivery model. Significant investments to build advanced analytics, big data, information security, application development, cloud enablement, project management and more.
- Wells Fargo is focused on building on the following pillars: ensuring digital literacy of all stakeholders, improving agile skills, creating citizen data scientists and driving higher-order collaboration for their employees across India
- Wells Fargo truly practices a hybrid model of engagement , which means, “Use employees where you should use employees and use partners where you need to use partners”.



Creating a strong hybrid workforce strategy

- Delta Technology Hub Bangalore is the new addition to two other tech hubs, in Atlanta and Minneapolis in 2020.
- Delta looks to make investments in areas of areas including data science/analytics, cyber security, enterprise architecture, AI/ML and digital channels including Delta.com and the FlyDelta app.
- The airline is working with multiple service providers like Cognizant, IBM and TCS. Their hybrid workforce strategy is to have an optimal mix of partners and employees. However, certain types of work which deliver a competitive advantage or those that generate significant intellectual property will generally be supported inside Delta.



Delta Technology Hub

Year established: 2020 | Location: Bengaluru | Headcount: less than 100

About ANSR



ANSR is a global market leader

in enabling **enterprise transformation** through Global Capability Centers (GCCs)

ANSR enables companies accelerate transformation and product innovation through collaborative and distributed global teams focused on core / strategic capabilities such as digital, advanced analytics, cloud, info security, automation and AI.

ANSR HQ: Dallas, TX; GCC locations: India, Poland, Canada (Early 2020)

95+

Clients

95K+

FTEs

9M+ sqft

Workspace

\$1.6B

Investment

Key features and benefits



Time to Value

We offer a turnkey solution for establishing and operationalizing our clients' GCCs in order to minimize the time to productivity and maximize upfront investment in resources, time, and partners.

No Capex

We minimize the risk in setting up the physical infrastructure for the GCC by providing a Capex to Opex model for all IT and Real Estate investments.

Simplified Economics

An all-inclusive pricing structure under 'As-a-Service' simplifies administration of the offshore operations and offers predictability in expenses.

One-stop Shop

Design & setup, Talent Acquisition, workspace, strategic consulting, service operations, governance and more.

Strategic Partnership

Our 'As-a-Service' model provides a one-stop, cross-functional advisory, solutioning & execution partner for creating a highly productive GCC and a stronger, faster ROI.

Flexibility

The 'As-a-service' model provides flexibility in ramping up / down resources and physical infrastructure on an as-needed basis, thereby optimizing the GCC operational costs.

Thought Leadership

ANSR's ecosystem connections, backed by the experience of establishing 80+ GCCs, provide our clients with unparalleled access to market best practices, enabling companies to chart truer paths and learn from others' missteps (or lessons learned).

Top Talent

Ability to source the best talent using ANSR's proprietary Talent500 platform. ANSR has successfully led the hiring of over 85,000 employees for over 80 GCCs



GCC Readiness Assessment

ANSR offers you a complimentary assessment to check your business readiness to set up a remote team. Outcomes of this assessment will be:

- Readiness to move to a global remote model
- Exclusive consulting engagement for a meeting or a free 2-hour consulting session
- Action plan

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