

CWID 2022

Future@Work digital strategy and innovations

London | 29 March 2022

Digital is an enabler of the Future@Work strategy

Digital is a key vehicle for differentiation and drives benefits of scale

Ventures drive dual-track innovation that can be leveraged Group-wide

True acceleration in digital adoption over 2021



Digital

Amplified by Technology & Data

Market-leading product innovation deployed at scale with 24x7 accessibility and superior UX

Integrated processes, systems and technologies to streamline & simplify

World class data science delivers unique insights

Approaching Talent Services like a Tech Company



Customer obsession on future needs, unlocking deep engagements



Hiring top tech talent, expanding our tech centre in Berlin



Partnering with best-in-class tech; owning the experience & leveraging our data

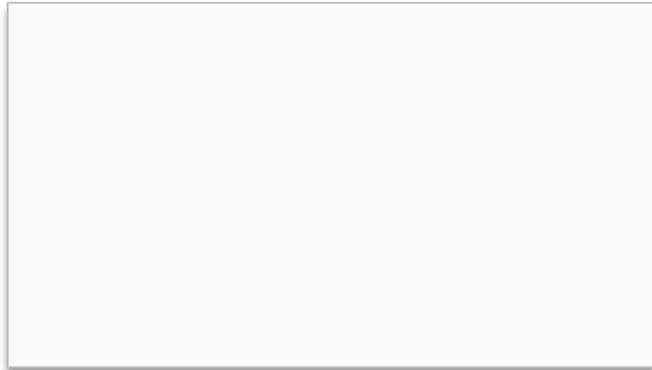


Digital ventures as new sources of revenue & innovation to the core

Transforming our culture and performance

Partnering with best-in-class technologies

Owning the experience and leveraging our data



Agile, user-centric design increases growth and product adoption



Technology Platform (InFO)

A common sales and recruitment platform for colleagues

Global, harmonised processes and data

Common best-in-class integrated technology

Scaled to 26 markets with 11 k monthly active users



AI-enabled products

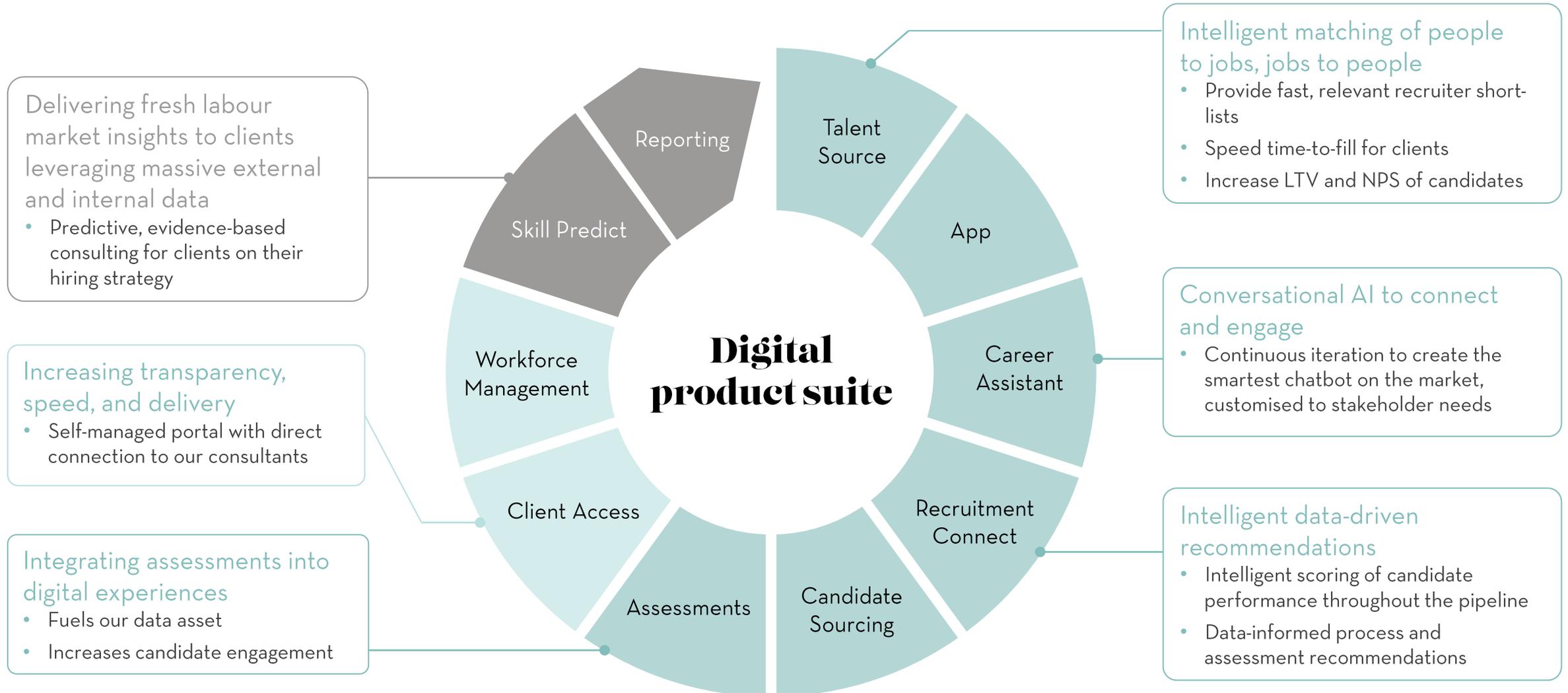
6 core end-to-end products for clients, candidates & associates

Current reach 32 markets

AI innovations based on our proprietary data include conversational AI, smart candidate shortlisting, reverse matching, job recommendations, job order prioritisation, predicting demand,...

Step-change in colleagues' productivity, speed and growth

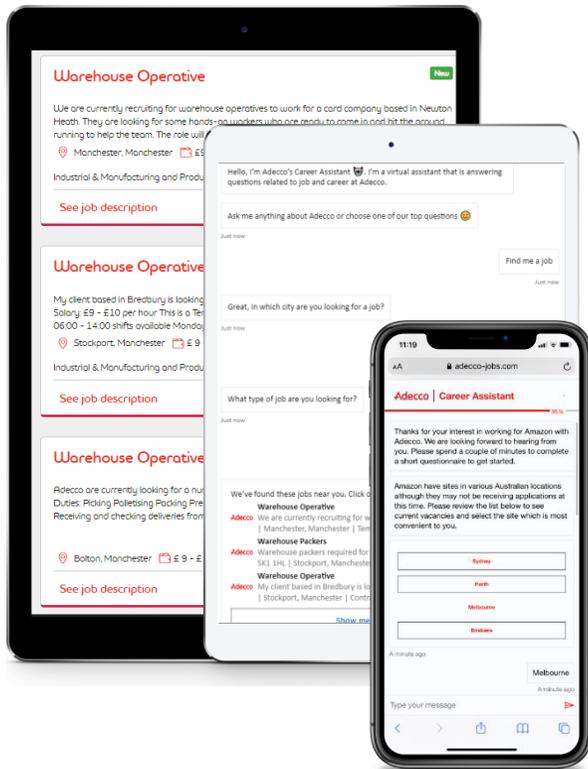
6 core end-to-end AI-enabled products



AI-enabled, personalised career advice, at scale

Guiding next best actions for candidates & associates

Career Assistant



Case study: Global e-commerce leader

86%

of candidates self-scheduled an interview

Scaled sites from **12** to **32**



Recruiters' time is spent on value-add, like answering candidates' questions / building relationships vs scheduling interviews

= consulting vs scheduling

↑ 10x

Campaign growth on profiling, scheduling and screening between Q1 to Q4 2021

↑ 10x

Growth opportunity

Q4 2021 outbound run-rate

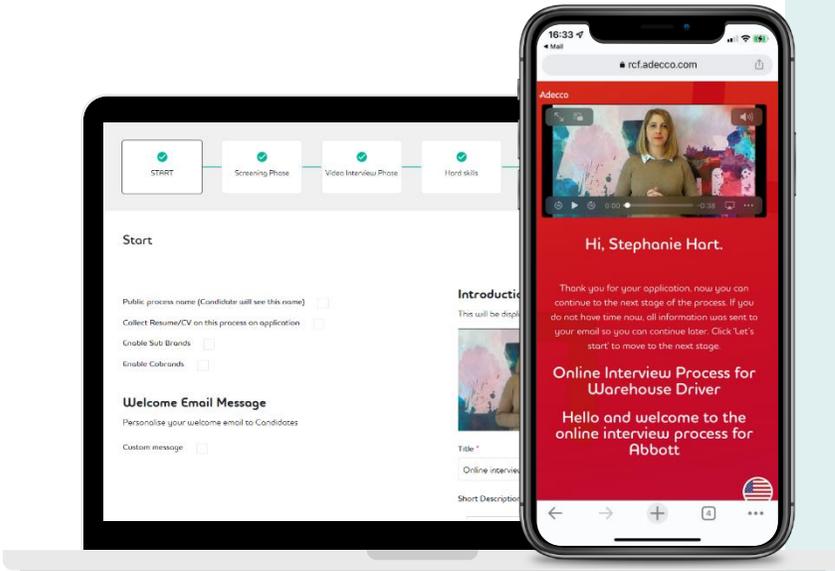
10 mn candidates reached p.a.
~850 k successful engagements p.a.

AI-enabled digital recruitment, at scale

From candidate sourcing to short-lists

Recruitment Connect

Case study: Tour de France



10 k
Applicants

44
NPS



**From
days to
hours**
Candidates
processed

50%
Time saved vs
traditional
methods

↑ 6x

Growth on candidates reached and qualified, Q1 to Q4 2021

↑ 20x

Growth opportunity

Q4 2021 run-rate

1 mn candidates reached p.a.
~60 k candidate qualifications completed

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Transforming our culture and performance

ezra.

CMD
2022



At a glance: The virtual coaching platform-of-choice for dozens of Fortune Global 1,000 companies

from launch to ARR ~€30 mn in 3 years



Ezra makes coaching available at all organisational levels through a user-friendly app designed to drive tangible outcomes for individuals and organisations



Top 3



+100 k coaching sessions in 2021



500+ certified coaches

250+ clients already love Ezra

- Zero cancelled contracts, strong upsell opportunities

Value of the **ecosystem**

- Access to 100,000+ Adecco Group clients
- Expedited procurement benefit

Engineered for scale

- Easy alignment with customers' Learning & Development agendas

Truly **global coaching** infrastructure

- Full network of over 2,000 coaches
- Reach into 83 countries, 25 languages

Uniquely positioned to win

Ezra has made coaching more affordable, accessible and scalable to a higher % of employees

Strong retention, upsell & renewals



New **client opportunities** from access to Adecco Group's **ecosystem of 100,000+ clients**



83% expansion rate, as pilot programs have grown into expansive, long-term relationships

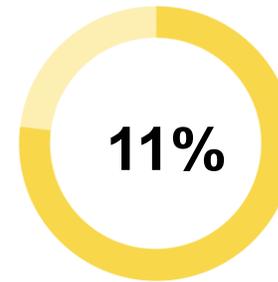


Multi-year contracts, to a **diversified, blue-chip client base**



Terms ensure **payment upfront and in full**, providing strong cash flow and visibility

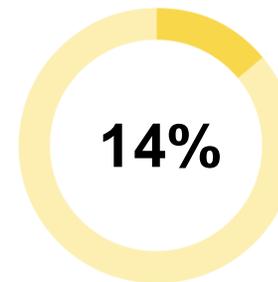
Proven efficacy and customer ROI



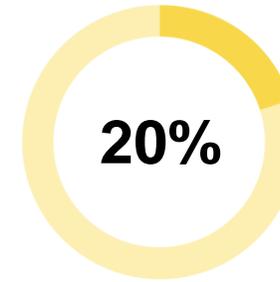
Participants more likely to be promoted



Average coach rating across 100 k sessions (out of 5)



Improvement in retention rates versus those with no Ezra coaching



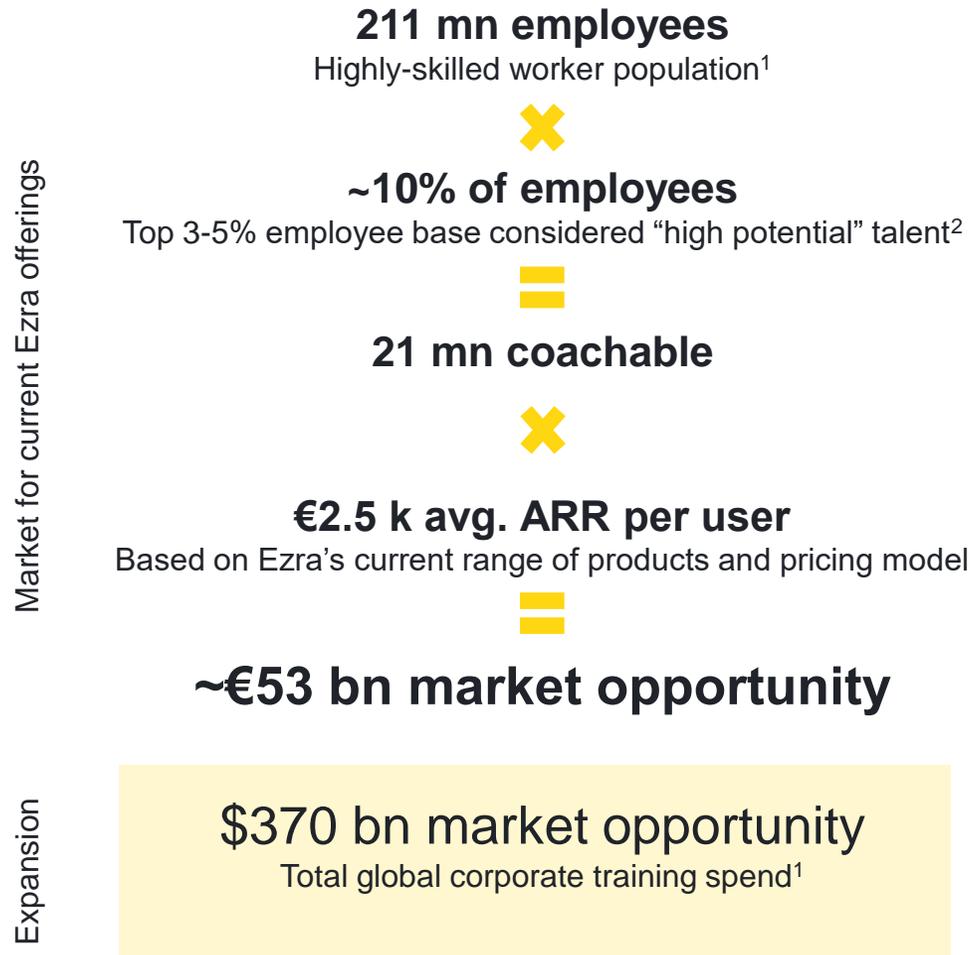
Up to 20% behavioral change against key leadership behaviours

250+ marquee client wins

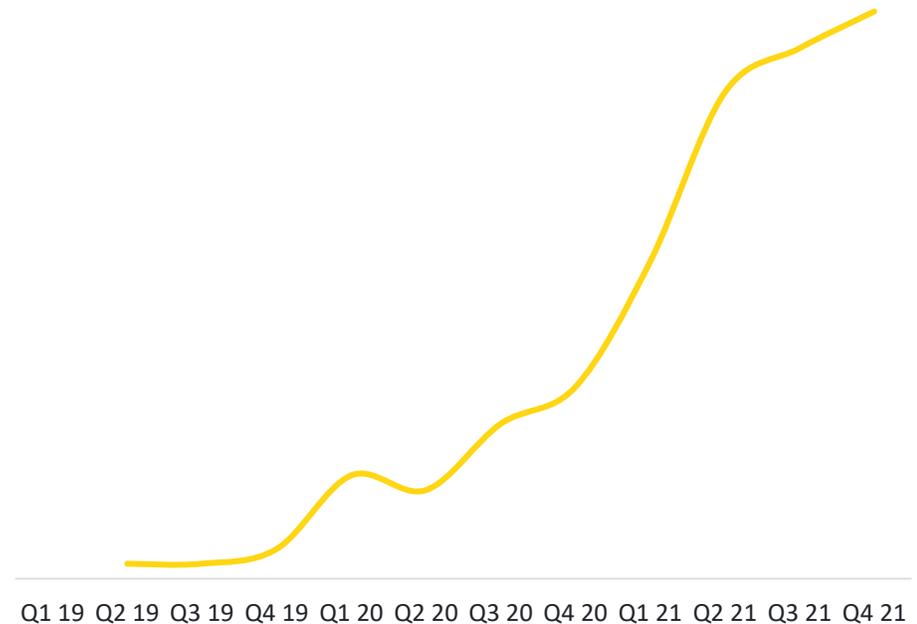


A substantial addressable market in which Ezra is thriving

Addressable virtual coaching market ~€53 bn



Ezra revenue development



+480% revenue CAGR
since launch in 2019

ezra.

This is just
the beginning





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Hired_

Recruitment technology has never focused on the intersection between quality, intent, and candidate experience ... until Hired

Inbound recruiting/job boards

- High intent, low quality
- Skills are not easily discoverable or verifiable

LinkedIn

indeed

AngelList

Dice

glassdoor

ZipRecruiter

Passive outbound recruiting

- Low intent, mixed quality
- Public profile data limits insights into salary, preferences

LinkedIn

entelo

seekout

Beamery

hireEZ

Gem

Avature

ideal.

eightfold.ai

AI-driven talent marketplace

- High intent, high quality
- Private profiles including salary and wish-list preferences
- Skill-based search including assessments
- +90% response rates and 88% savings in sourcing time

Hired

Trusted as the leading platform to find a job and hire top tech talent

4.6 stars based on >1800 talent reviews

 Invited 5 days ago

One interview request, one job offer!

One interview request, one job offer! Despite not having a typical background for the tech industry Hired.com put me in front of the right people that ultimately led me to a new position.

 Invited Feb 9, 2022

Really intuitive.

Really intuitive.
Setting availability is effective.
The interface and user experience of interviews and conversations is clean and easy to manage.
Excellent for starting a conversation with multiple employers/recruiters

 Invited Feb 16, 2022

Love it

Love it, Got an interview with two tech giants within a few days

4.3 stars based on >270 employer reviews



Top 50
Enterprise Products
BEST SOFTWARE AWARDS
2022



Easiest Setup
WINTER
2022



Users Love Us

G2 Top 10 Leader:
Recruiting Automation Software
Diversity Software

1,500+ clients across multiple sectors













































Hired_

Expertise and tech create barriers to entry



- >60% of job seekers are repeat Hired users
- Average of 4.5 interviews per job seeker

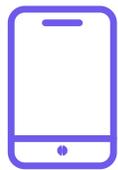
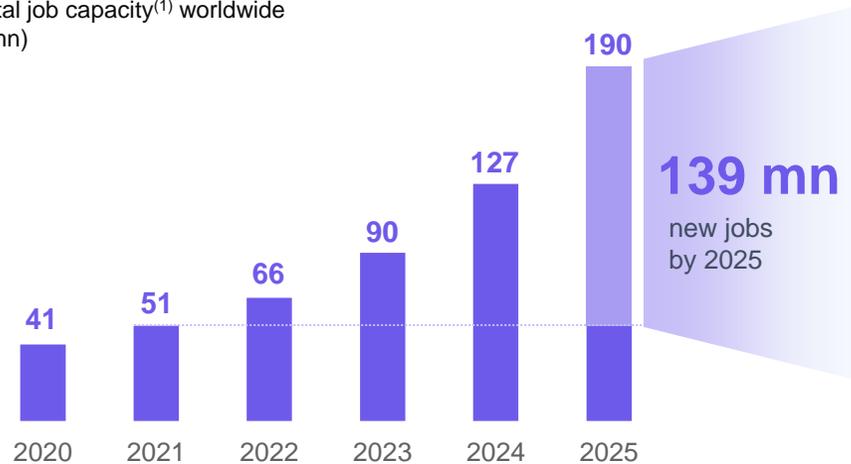
- 9,000+ connections made weekly
- Leveraging Adecco Group ecosystem

- +50% average cost per hire subscriber savings
- 4x improvement in talent sourcing hours saved

Significant market opportunity; excellent growth post-COVID

Addressable market ~€63 bn

Digital job capacity⁽¹⁾ worldwide
(in mn)



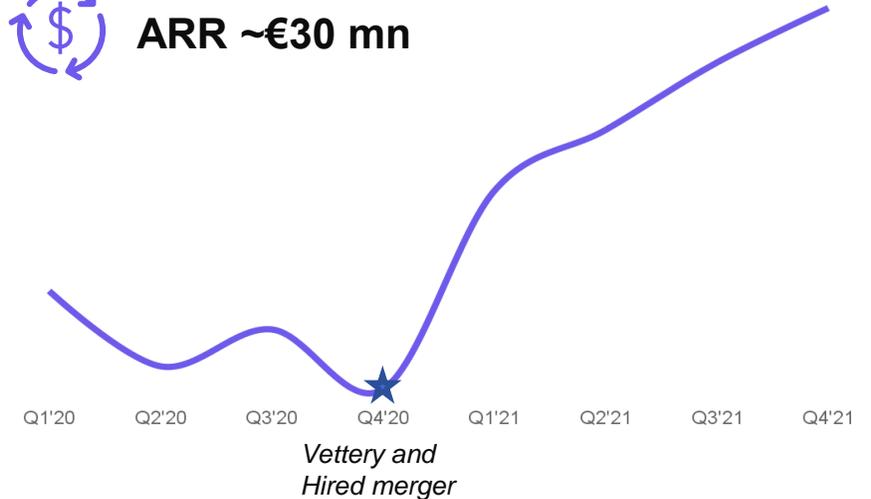
Market drivers

- Remote workforce
- Tech talent shortage
- The Great Resignation

Hired revenue development



ARR ~€30 mn



+400% Bookings growth in 2021

88% Subscription bookings

QAPA

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QAPA la solution digitale **Adecco**

Vous connaissez votre intérimaire,
nous gérons son contrat de A à Z

Créer un contrat

Demander une démo

✔ Ouverture rapide en ligne ✔ Vous ne payez que les heures travaillées



Gestion administrative
100% digitalisée
du contrat de travail jusqu'à
la paie avec déclaration
à tous les organismes sociaux



Coefficient à partir de 1,30
pour un SMIC



Une équipe pour vous
aider dans la gestion de
vos intérimaires
joignable par téléphone, chat, email



Service dispo 24/7
en 1 clic



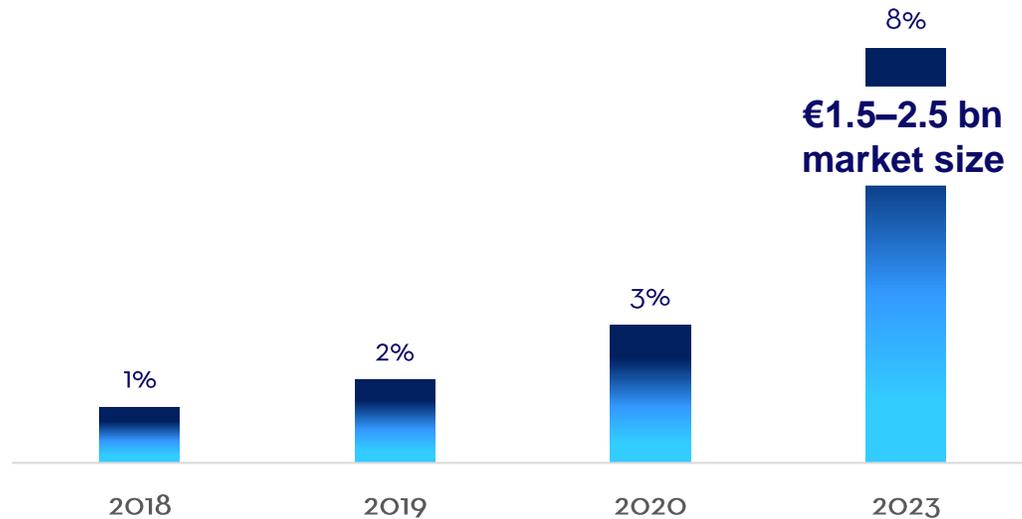
De 1 gestion à plusieurs milliers
QAPA Gestion est disponible
pour toutes les entreprises



Le meilleur service pour
vos intérimaires
Acompte en 1 clic, CE,
un service dédié pour répondre
à toutes leurs questions

A strong, dynamic market

Share of zero-touch digital services in France's flexible placement market



Candidates and clients moving to new usages and standards:

- 79% of recruiters entrust AI with contract signing
- 77% to connect with candidates, and
- 65% to source candidates



QAPA is a leading digital workforce solutions provider

End-to-end, zero-touch digital flexible placement:

- ✓ **Reactivity and 24/7 availability**
- ✓ **Simplicity**
- ✓ **Cost-efficiency**

For candidates



- Registration
- Job offers selection
- Qualification history

For our recruiters



- Monitoring
- Dashboards
- Efficiency

For clients



- Job offer submission
- Candidate selection
- Contract & payroll history



+70%
revenue growth
in 2021



4.5 mn
registered
candidates



80 k
monthly candidate
registrations



1,000
client sites

An attractive offer to accelerate Adecco France's profitable growth



Dual-brand strategy

- QAPA: Adecco's separate **zero-touch digital brand**
- Separate organisation securing **operational agility**
- **Expanded offering**, from Adecco services (high proximity, safety training, personal protective equipment, etc.) to QAPA's solution (focus on lesser-skilled roles)
- **Fair pricing** due to lower cost-to-serve



Strong commercial push

- QAPA as Adecco France's zero-touch digital solution in **all major RFPs**
- **Largest candidate database** in the French market
- Access to Adecco France's extensive **client base**

With clear growth ambitions



QAPA's ambitions



2x revenues p.a.



Increase value proposition as part of Adecco Group's ecosystem



2022 key priorities



Roll-out of lowest-cost payroll offer

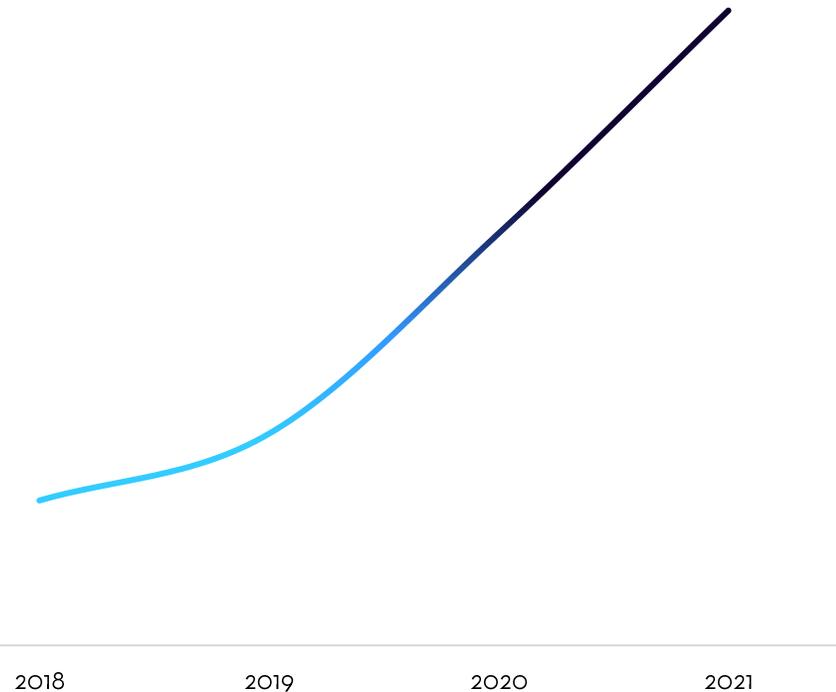


Seasonal workers offer

QAPA revenue development



2021 revenue ~€60 mn



Approaching Talent Services like a Tech Company



**Customer
obsession**



**Hiring top
tech talent**



**Leveraging
our data**



**Digital
ventures
expansion &
innovation**



Thank

you