

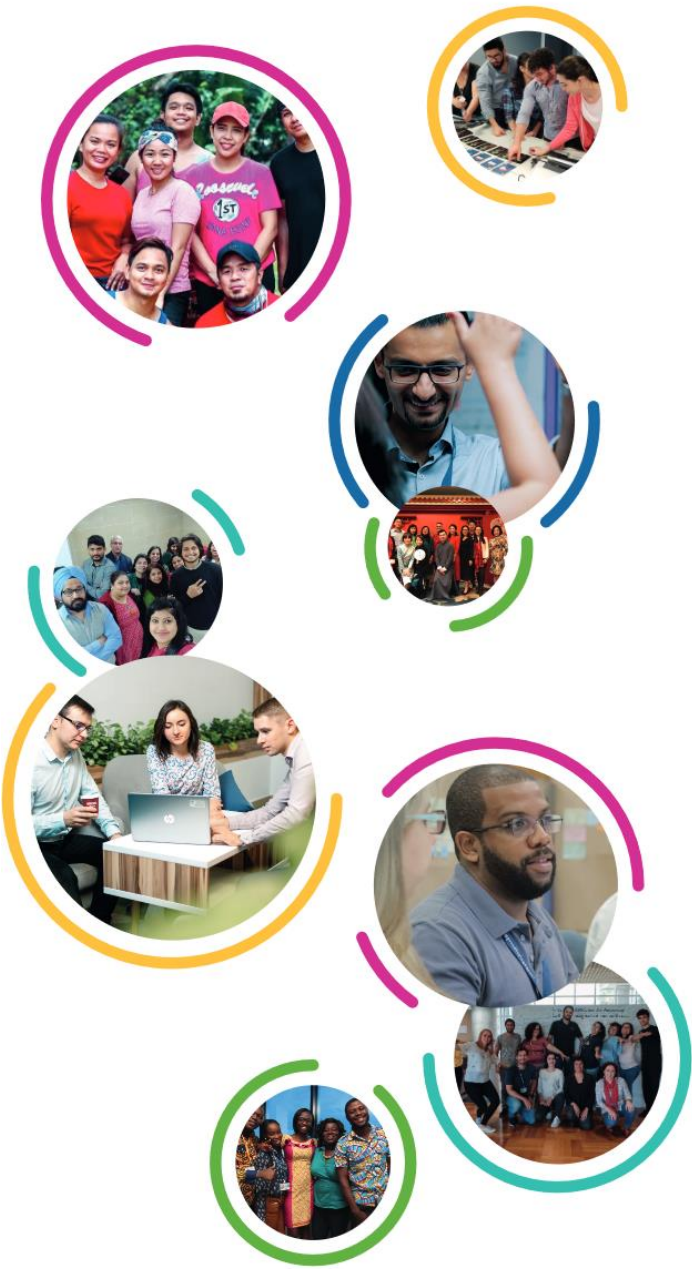


Business
Services
Manila



NBS Manila at a Glance

Manila, July 2021



OUR VISION

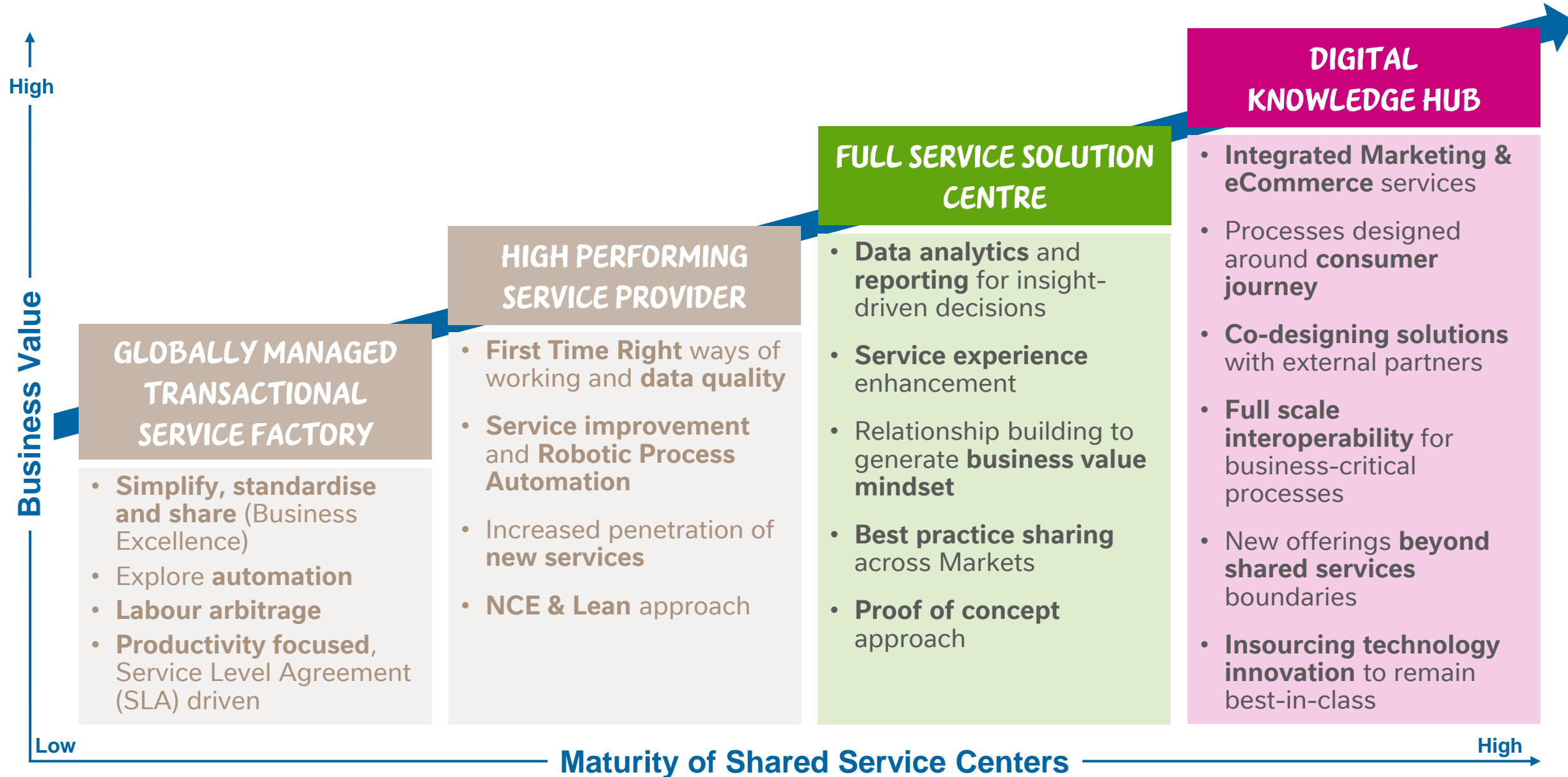
To be the *partner of choice* for services that leverage our *insights and scale* to support business *agility and digital innovation* success

Providing trusted management and operational services that are *valued by Markets and Zones*



Integrated
Business
Services

We continue our evolution towards a digital knowledge hub



NBS is global network with the agility to respond to Business needs



NBS LISBON

Services for WEUR Region

NBS CAIRO

Services for MENA Region

NBS ACCRA

Services for CWAR and ESAR

NBS LATAM

Services to LATAM
2 locations: Brazil and Paraguay (satellite)



NBS LVIV

Services for Europe and Israel

DXC POLAND

HR Services for WEUR

NBS CHINA

Services for GCR by Accenture

NBS MANILA

Services for Asia, Oceania and NA

NBS GURUGRAM

Services for South Asia Region

GLOBAL SERVICES: IN-HOUSE

Nespresso
 Indirect Tax
 Social Listening

Website Management
 Training & Learning
 User Management

Digital Asset Management
 Compensation & Benefits
 Campaign Factory

Global Mobility

DXC INDIA

Global hub for non-language dependent, highly automatable activities

IBS plays an integrator role to connect services to Business needs



● Existing IBS services

● New service in development

Integrated Business Services **LEADERSHIP TEAM**



Hans-Ulrich Mayer
Head of Integrated
Business Services



Integrated
Business
Services

MANAGEMENT SERVICES



Angela Willows
IT Portfolio
Management



André Jung
Program Management



J.M. Klopfenstein
Master Data
Management



Dennis Julio
Real Estate
Management



Connie Ho
Workplace Design

BUSINESS SERVICE OPERATIONS



Marissa Sepillo
Service Improvement
(incl. DXC, Accenture)



Arlene Azul
NBS Manila Operations



Olivier Monthoux
NBS Lviv Operations



Anfrisio Souza
NBS LATAM Operations



Barbara Barra
NBS Operations
(Global Transitions, Cairo, Accra, Lisbon, Gurugram)

END-TO-END SOLUTIONS



Jason Stalker
O2C and R2R Global
Solutions



Amit Narain
H2R Global Solutions



Mustafa Yilman
S2P Global Solutions



Pinar Öney Bilsel
Integrated Marketing
Global Solutions

SERVICE SUPPORT (dotted line)



Ariane Lussato
IBS HR



Thomas Schnyder
Finance & Control



Candy Scarfe
Communications



José Luis Di Rauso
IT Business Relationship
Manager

2020 was another successful year for IBS, despite Covid-19

OPERATIONAL SERVICES

+45.7%

Net Promoter Score
Target: +30.1%

184

Transition exits on time
Target: 184

14.5%

Cost improvement
Target: 12%

ALL IBS

91%

**Nestlé & I
response rate**

Strategy & Priorities: **93%**
Diversity & Inclusion: **91%**
Engagement: **91%**

MANAGEMENT SERVICES

70.8

**Real Estate
OP1 Cost Reduction**
Target: 70 (mio CHF)

104

**Real Estate
OP2 Gain on Sale**
Target: 100 (mio CHF)

198

**Delivery of IT Project
Portfolio**
Target: 217 (mio CHF)

Current PH BPO Facts & Forecasts

1

The Philippines has become the top destination for IT-BPO firm because of: Scalable, educated talent pool

- Cost competitiveness
- Excellent infrastructure
- A proven track record
- Adequate government support for the industry

2ND

PH is 2nd to India in overall BPO offshoring destination, **surpassed India in the voice or call center** sub sector as a global leader since 2010

60%

BPO Industry contributed to 60% of the Philippines' overall economic growth in 2018 and 2019

40B

By 2017, BPO revenue is forecasted at **\$28.9 bio** (6 year ave growth of 17%) and 2022 roadmap shows projection of **\$40 bio**

1.3M

Providing **1.3 mio jobs** by 2021. **Manila is No. 2** while **Cebu City is No. 7** for Top ranking BPO revenue generating cities



Growing new markets by targeting non English, and European markets (Current customer base: **77% from NA, 9% from Europe, Australia, NZ and 5% from Japan**)

NBS MANILA @ 13 years – Build, Optimize and Grow 2021-2024 will be a journey to RESHAPE the FUTURE

Reshape
the future



Nestlé Business Services Manila

LEADERSHIP TEAM



Arlene Azul
Head of NBS Manila

BUSINESS SERVICE OPERATIONS



Cris Llausas
Order-to-Cash



Ku Hasmadi
Source-To-Pay



Eden Sagisi
Hire-to-Retire,
Contact Center



Belinda Clutario
Record-to-Report



Mark Castillo
Integrated Marketing
Services



Jinky Tumbaga
AMIGO (Identity and
Access Mgt.)



Olha Vyslobodska
North America
Operations

SERVICE SUPPORT



Theri Domingo
Human Resources



Zanny Bibe
Finance & Control



Olha Vyslobodska
IT



Kumudu Dias
Compliance



Denmark Roxas
Total Service Quality

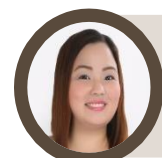


Angela Mayor
Communications

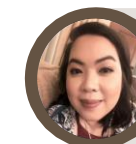
GLOBALY HOSTED FUNCTIONS (dotted line)



Kumudu Dias
Internal Controls Center
of Competence



Gale Tolentino
Global Rewards Hub



Cherry Galang
Global Mobility Hub

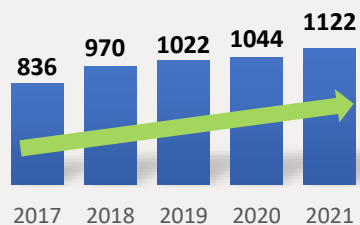
Our People continues to be the organization's best asset through the years

Our Growing Family

HEADCOUNT

1122

as of 31 March 2021



AOA: Philippines, Japan, Indonesia, Malaysia, Singapore, Thailand, Vietnam, Greater China Region, Korea, Oceania
Americas: USA, Canada

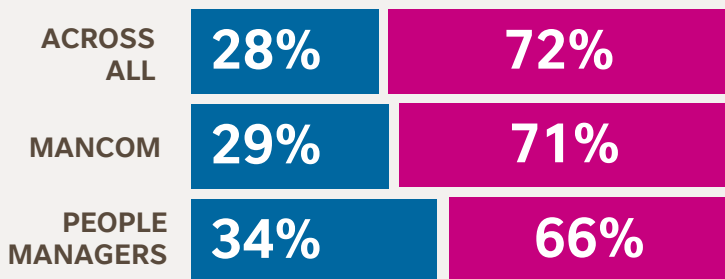
DSM: 48 Markets

Roles: 21 Markets

Rewards Hub:
All Markets

Markets in blue text - Select services only

GENDER SPLIT



AVERAGE AGE

30

Diverse and Engaged Employees

7% Bilinguals
(45% are foreign nationals)

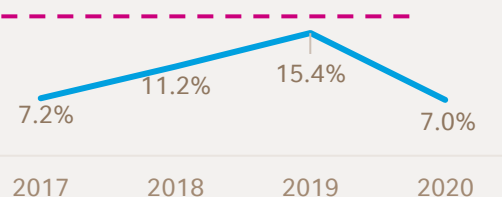
11 Languages spoken
(Filipino, English, Japanese, French, Bahasa Malaysian, Bahasa Indonesian, Thai, Spanish, Chinese, Vietnamese, Korean)

ATTRITION

Below Industry Average
Attrition year on year



ATTRITION



2021 TURNOVER YTD

1.2% Overall Attrition
1.2% High Performer Turnover
1.7% Talent Turnover
0.6% Critical Position

Enabled Organization

100%

- ✓ Succession plan realization
- ✓ Young talents dev't plans realization
- ✓ Completion of mandatory trainings
- ✓ On time Hiring for new services
- ✓ Onboarding of new hires

81

Employee Promotions
Operational promo, level adjustments

11

Market Exchanges
Missions, Market Assignments, Permanent Transfers

* 2021 YTD figures

NBS Manila provide a wide range of services to support Business

INTEGRATED MARKETING SERVICES

- Consumer Engagement
- Social media services
- Content services*
- Search services
- Website services
- Digital commerce
- Direct to consumer
- B2B services
- CRM services*
- Marketing analytics

END-TO-END SERVICES



ORDER TO CASH



RECORD TO REPORT



SOURCE TO PAY



HIRE TO RETIRE

- Reference Data
- Credit Management
- Demand Capture
- Billing
- Payment Applications
- Collections
- Claims & Deductions

- Bank Reconciliation
- Treasury and Payroll Reconciliation
- Indirect Tax Services
- Period End Closing
- Fixed Assets and Posting
- Decision Support
- Intercompany reconciliation

- Buyer Support
- Contract Management
- Transactional Procurement
- Posting Activities
- Issue Resolution
- Payments
- Freight and Backoffice

- Organization Data Administration
- Benefits Administration
- Time Administration
- Employee Data Administration
- Contact Center
- Payroll Processing

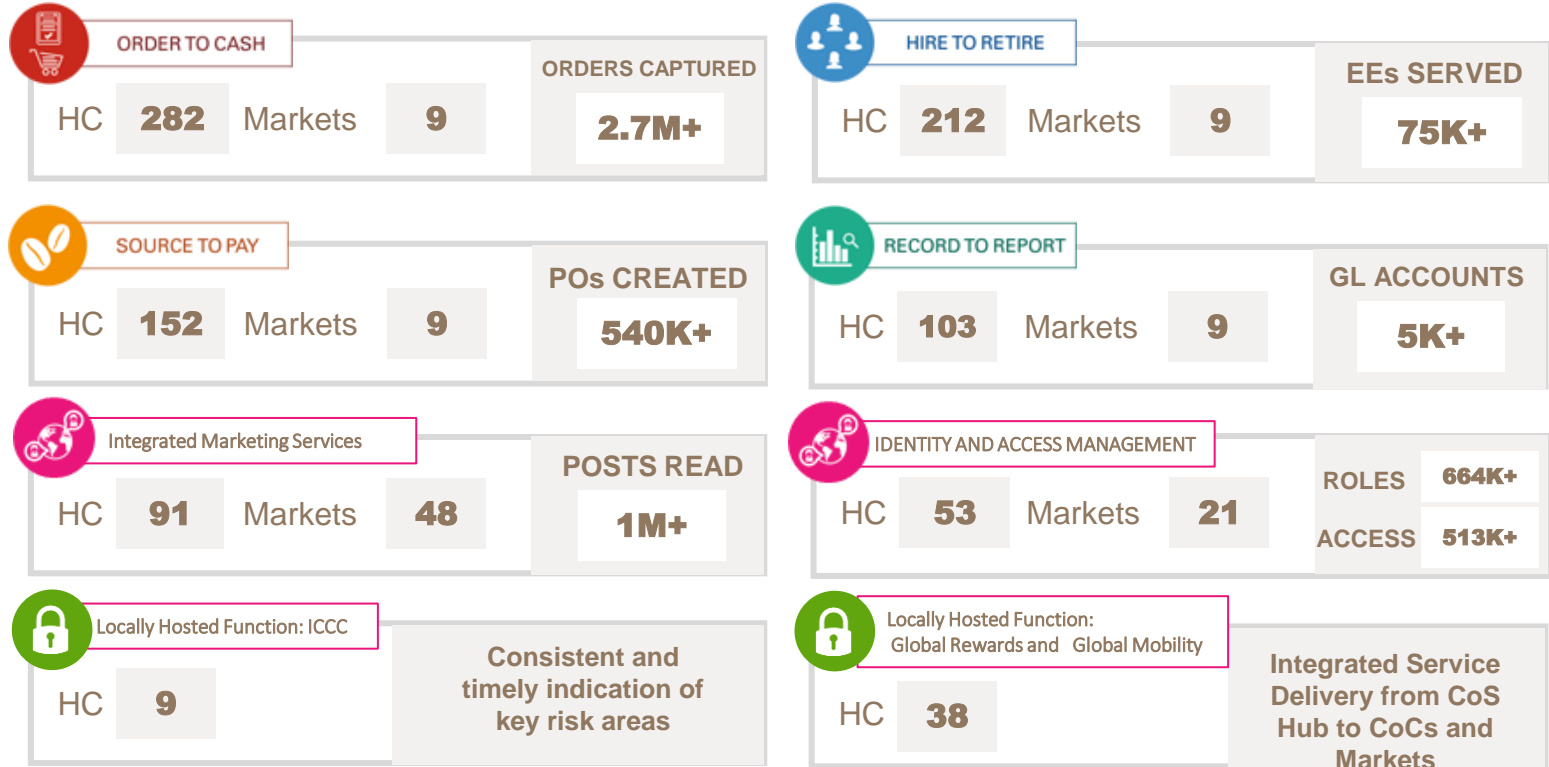
MASTER DATA SERVICES

- Customer master data
- Vendor master data
- Syndicated data management

Supported by a strong portfolio of people and services



Our Services



Employee Survey Results

Coming from a dynamic environment of transformations, organizational changes and pandemic challenges

	CONSISTENT ENGAGEMENT	ENABLEMENT	STRATEGY & ALIGNMENT	CHANGE MANAGEMENT
2020 N&I	94	84	94	85
2019 Pulse	88	81	96	81
2018 Pulse	89	84	97	82

On our way to being a Full-service Solutions Center in 2022

2020 KEY MEASURES

NPS 46% 31%
2019 18%
2018

HC 92.8 89.7
Productivity 2019 84.5
2018

COST 12.9% 14.1%
Savings 2019 10.8%
2018

OTHER MILESTONES

7 Markets with
Collaboration Rating
(PMR)

2 Markets with
Improving Rating
(PMR)

10 YouRock Wins
2 Partnership Awards: JP & CA
(2018 – 2020)

70 Local
Automations
(2018 – 2020)

5 Implemented
Analytics
(2020)

30 Recognized
2-Star Initiatives
(2020)

16 New Certified
Belters in 2020

46 Certified SMEs
as of 2020

7 Certified Coaches
as of 2020

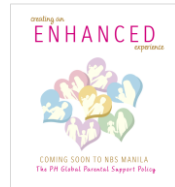
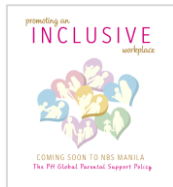
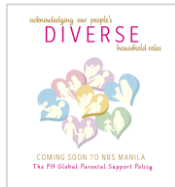
NBS Manila contributing to the Nestle Group Priorities

Taking care of our
PEOPLE

100%
Response

NESTLE & I

Highly engaged and effective teams



**GLOBAL PARENTAL POLICY
LAUNCHED**

Ensuring **SUPPLY** in
the shelves



ORDER TO CASH

13.5M

ORDERS

380K

PAYMENTS

SOURCE TO PAY

3K+

CONTRACTS

857K

INVOICES

HIRE TO RETIRE

150K

EES
SUPPORTED

613K

EE DATA

RECORD TO REPORT

5700+

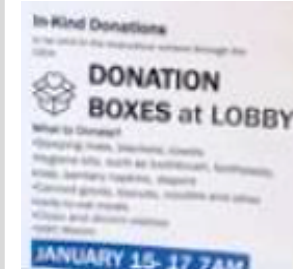
GL
ACCOUNTS

2800+

CACT
SCHEDULES

Data: Jan-Dec 2020

Supporting local
COMMUNITY



2021 NET ZERO FAIR
Our Contract with the Planet



Support Net
Zero

PET bottle
recycling

Cool Food
Pledge

School supplies
donation to
local schools

NBS MANILA KEY PRIORITIES 2021 – 2024

PRIORITY 1: SUCCEED THROUGH PEOPLE

PRIORITY 2: MAXIMIZE VALUE CONTRIBUTION

PRIORITY 3: CREATE COMPETITIVE ADVANTAGE THROUGH NEW SERVICE OFFERINGS

- Be 'The Partner of Choice'
- Strengthen Core Competencies & Evolve to Agile Teams
- Develop Inspiring Leaders

- Complete Roll out of NBE Program
- Drive Holistic Service Improvement Value
- Accelerate Technology Enabled Services
- Strengthen Business Continuity & Compliance

- Accelerate Digital & Social Media Expansion
- Build Growth Enabling Services thru Analytics & Insights
- Develop Business & User Centric Operational services, driving digitization and personalization at Scale

OUR STRATEGY TO WIN

FIT FOR THE FUTURE

REACH AND DELIVER

INTEGRATE TO INNOVATE

Reshape The Future

#MakePotentialPossible

Drivers



Business
Services
Manila



WE ARE NBS MANILA, YOUR PARTNER OF CHOICE.