

WELCOME AT THE ALSO CAPITAL MARKETS DAY

03.12.2020



THE
TECHNOLOGY
PROVIDER



AGENDA

- ▶ **New and Next: from a pandemic to a post-pandemic world**
- ▶ **No future without substance: 10 years of groundwork**
 - ▶ **Steering a virtual organization**
 - ▶ **Leading remote teams**
 - ▶ **Involving people**

Q&A

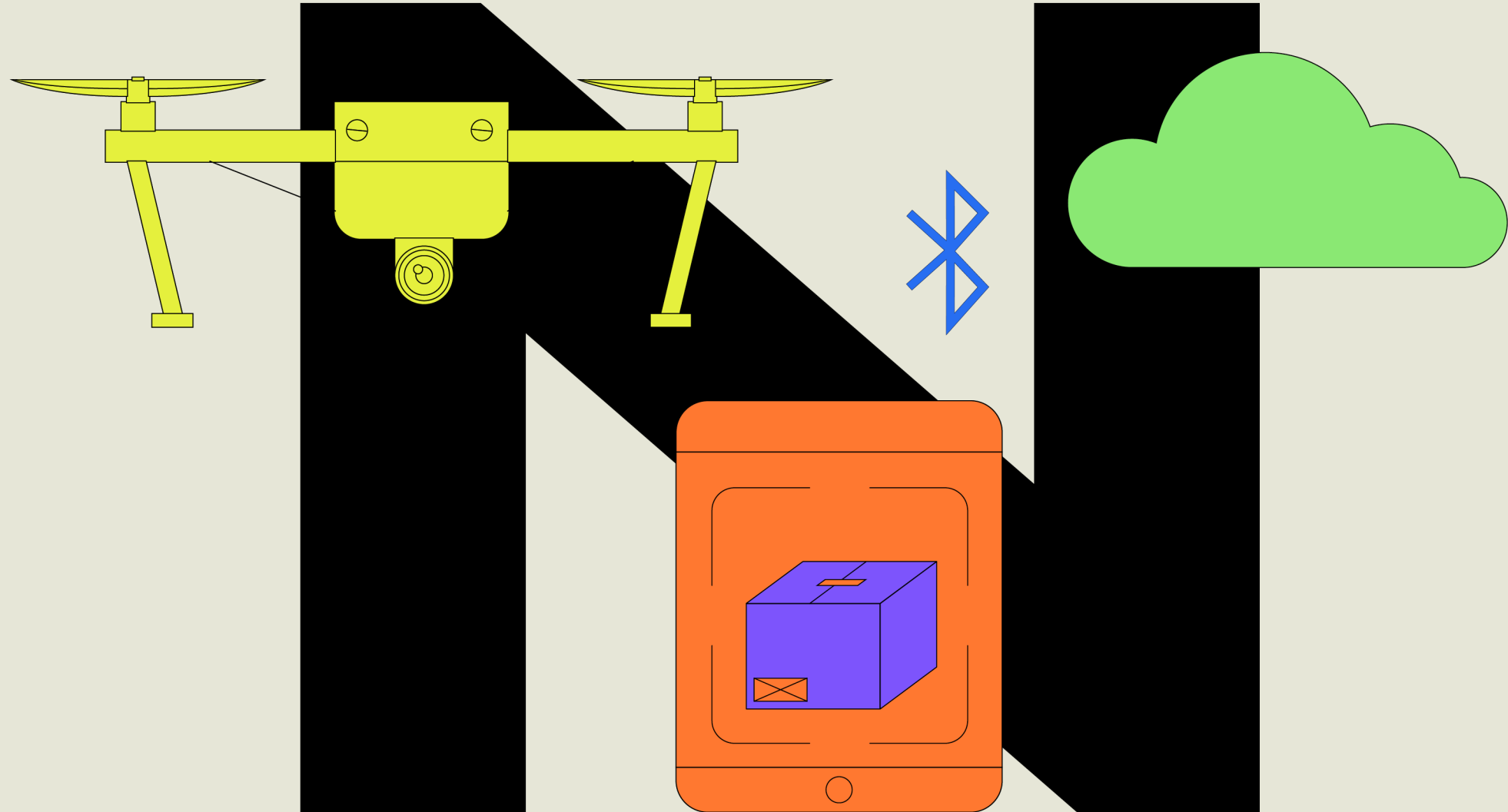
BREAK

- ▶ **Supply: growth base ecosystem**
- ▶ **Solutions: growth drivers digitization and new technologies**
- ▶ **Service: growth engines as-a-Service and new platforms**

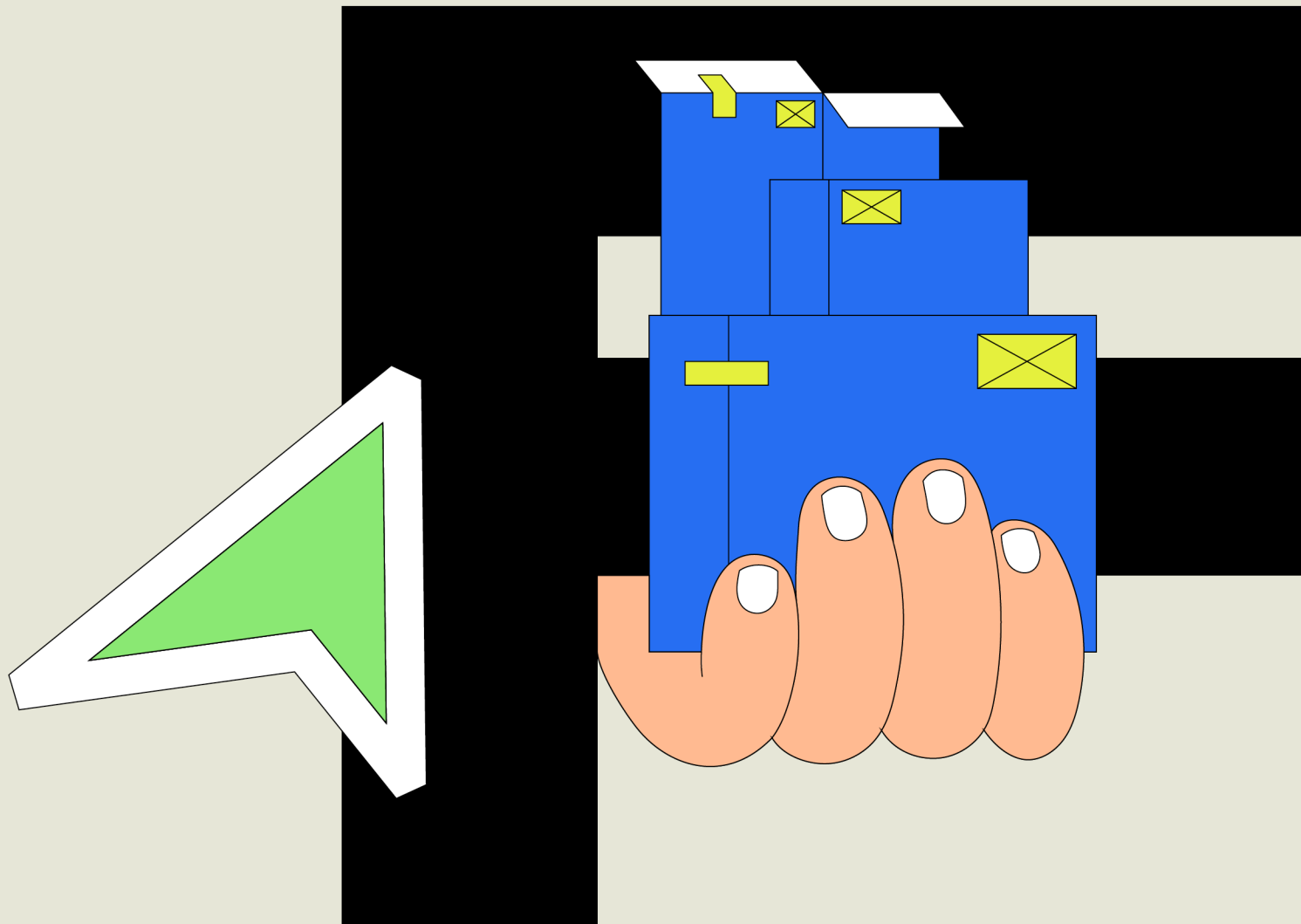
Q&A

END

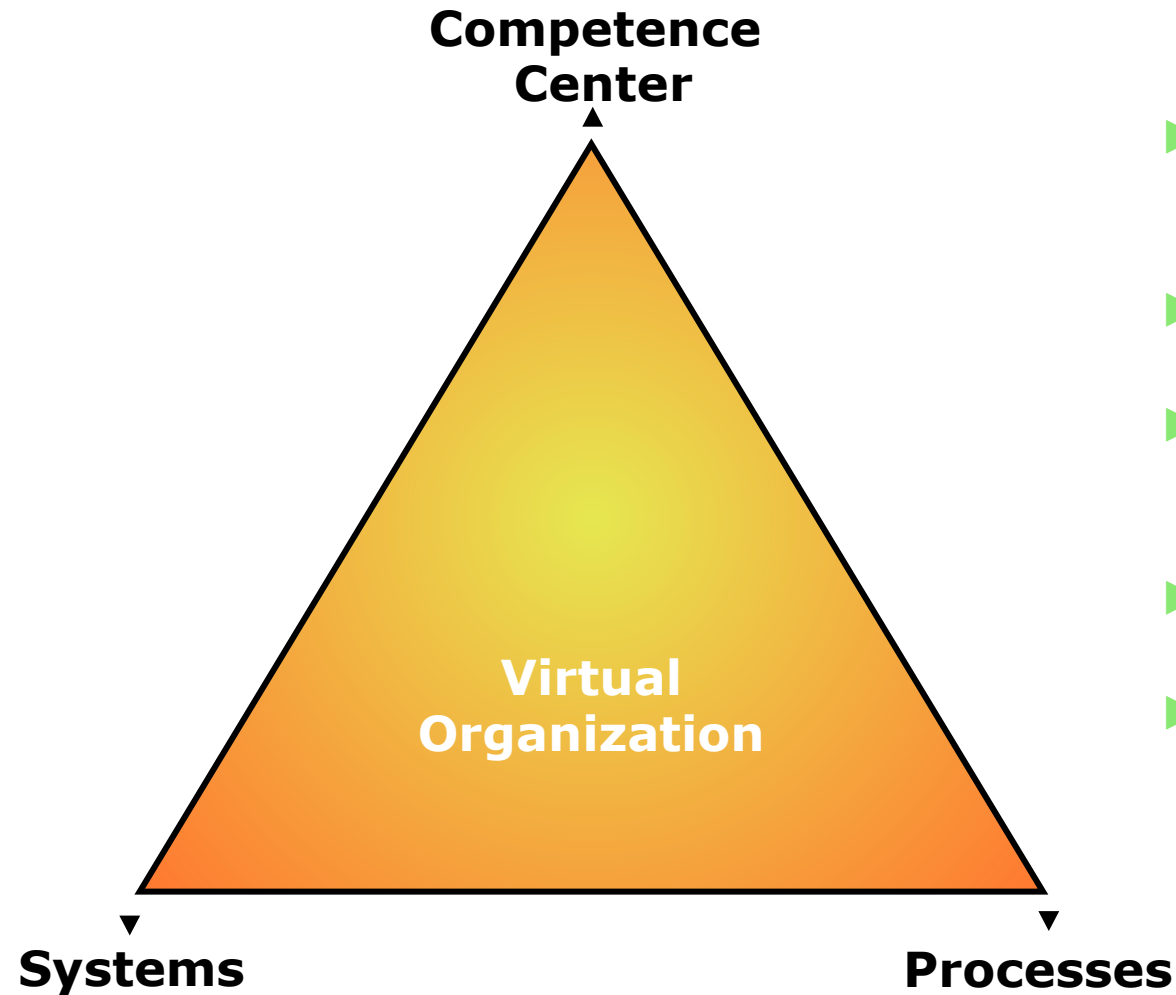
KEYNOTE: NEW AND NEXT



FOUNDATIONS

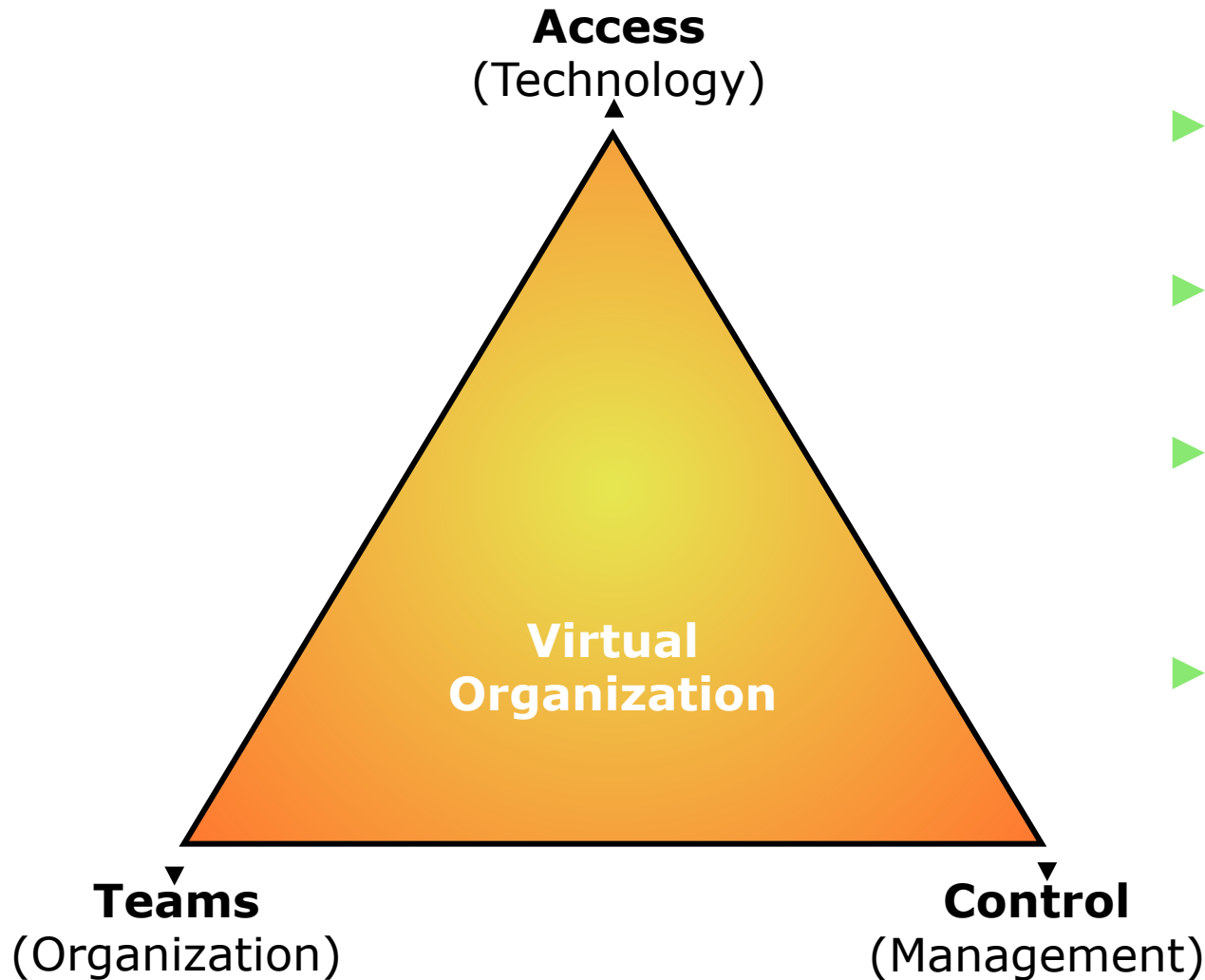


STEERING A VIRTUAL ORGANIZATION



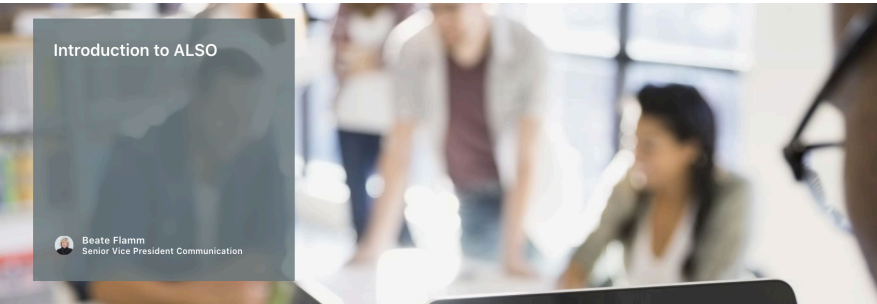
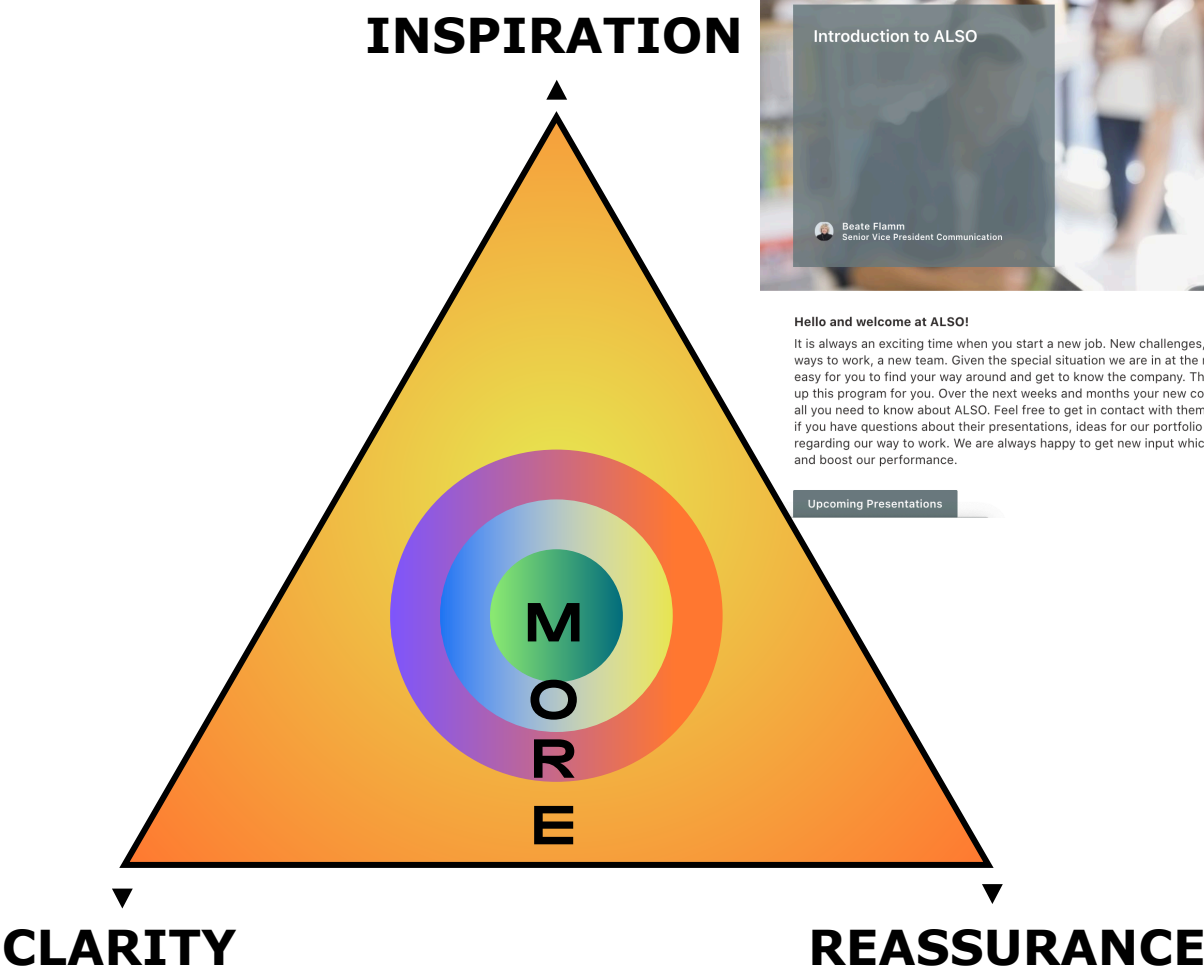
- ▶ **Investment** in IT **Systems** for **10 years**: ERP, BI, CRM, WEBSHOP
- ▶ **Harmonization** of **Processes**
- ▶ **Transparency** and **Analytics** for **Monitoring** and **Decision** taking
- ▶ **Transformation** of **Organization**
- ▶ Optimized **Integration** competencies for **Acquisitions**

LEADING REMOTE TEAMS



- ▶ **Strong IT landscape as prerequisite**
(ERP, CRM, BI, Infrastructure etc.)
- ▶ **Clear organizational setup**
Management in Virtual Teams
- ▶ **Clear rules of engagement**
Rules for meetings, emails, dashboards, hiring, hunting
- ▶ **Manage psychological impact**
Relieve typical stress of remote working

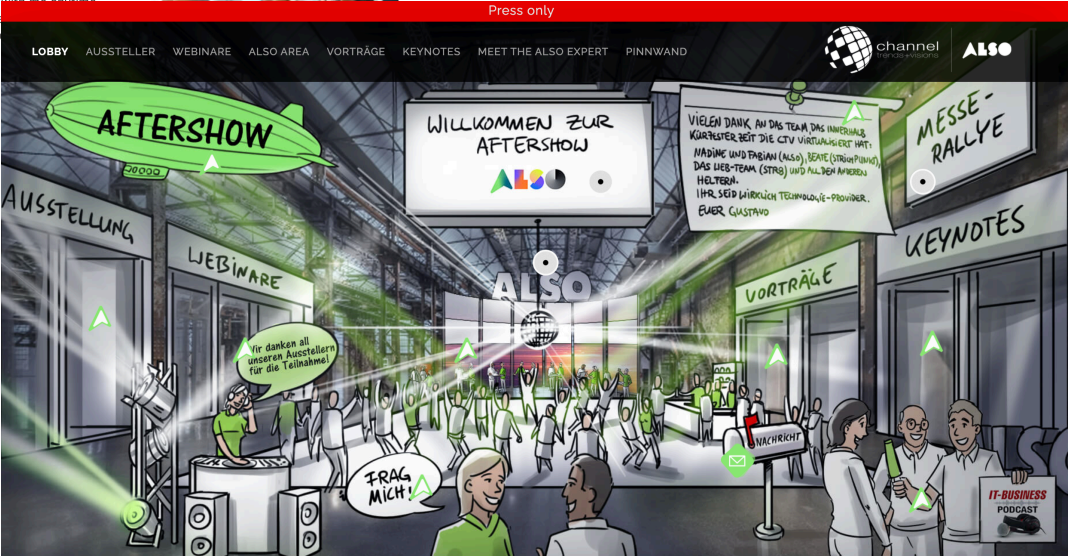
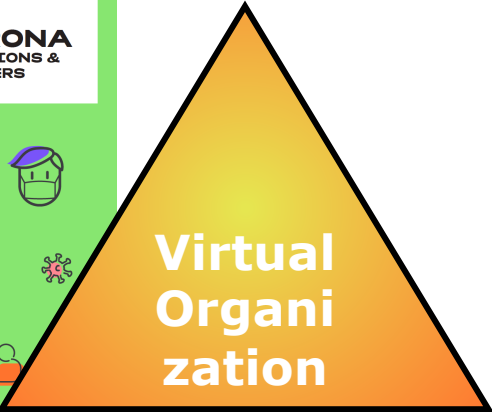
COMMUNICATION



Hello and welcome at ALSO!

It is always an exciting time when you start a new job. New challenges, new processes, new ways to work, a new team. Given the special situation we are in at the moment, it is not easy for you to find your way around and get to know the company. This is why we have set up this program for you. Over the next weeks and months your new colleagues will explain all you need to know about ALSO. Feel free to get in contact with them or with me if you have questions about their presentations, ideas for our portfolio or regarding our way to work. We are always happy to get new input which helps us to and boost our performance.

Upcoming Presentations





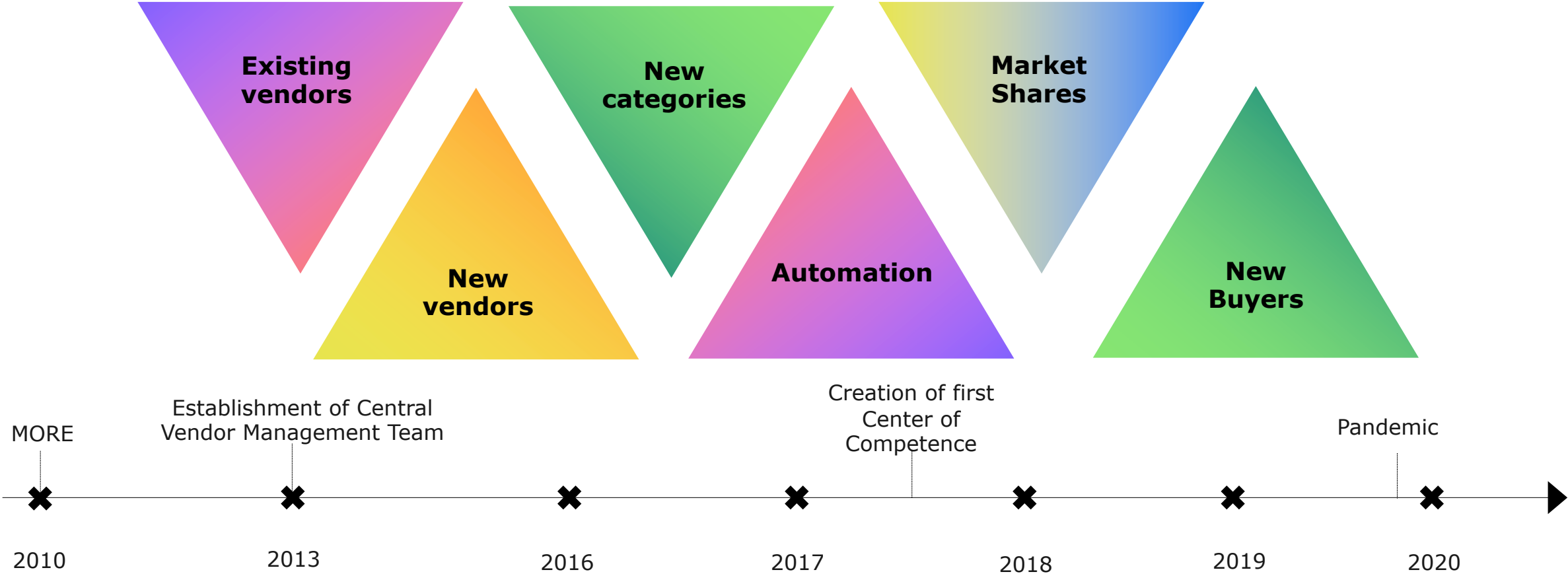
Your Questions

OPPORTUNITIES #1: SUPPLY



Volkan Weissenberg, SVP E-Commerce

LONGTERM DEVELOPMENT OF THE SUPPLY ECOSYSTEM



STRENGTH OF THE ALSO ECOSYSTEM



- ▶ **ALSO managed market challenges extremely well**
- ▶ **ALSO ecosystem proves to be resilient & enables growth in challenging times**

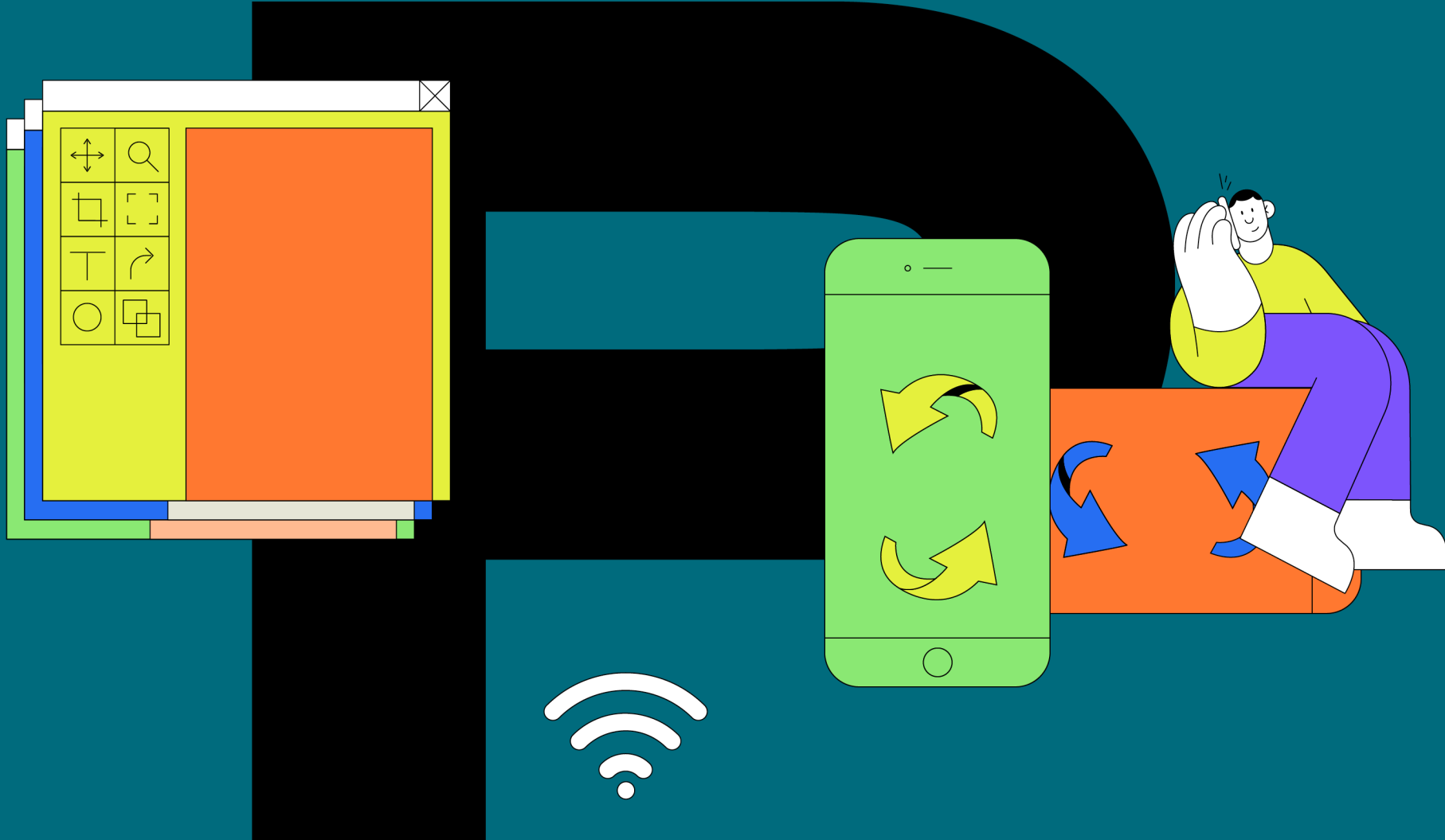
GROWTH OPPORTUNITIES IN THE NEXT NORMAL

EXAMPLES

- ▶ **Product category mix**
 - ▶ Notebook, Peripherals, Gaming, Networking
 - ▶ Education / Home Schooling
- ▶ **Vendor mix**
 - ▶ Xiaomi, Anker
 - ▶ HP Inc / Hungary, Lenovo / Romania
- ▶ **Buyer mix**
 - ▶ Search Engine Optimization (SEO)
 - ▶ Marketing & Sales Automation
- ▶ **Platforms**
 - ▶ ALSO Webshop
 - ▶ Whitelabel Webshop Solutions for Vendors & Resellers

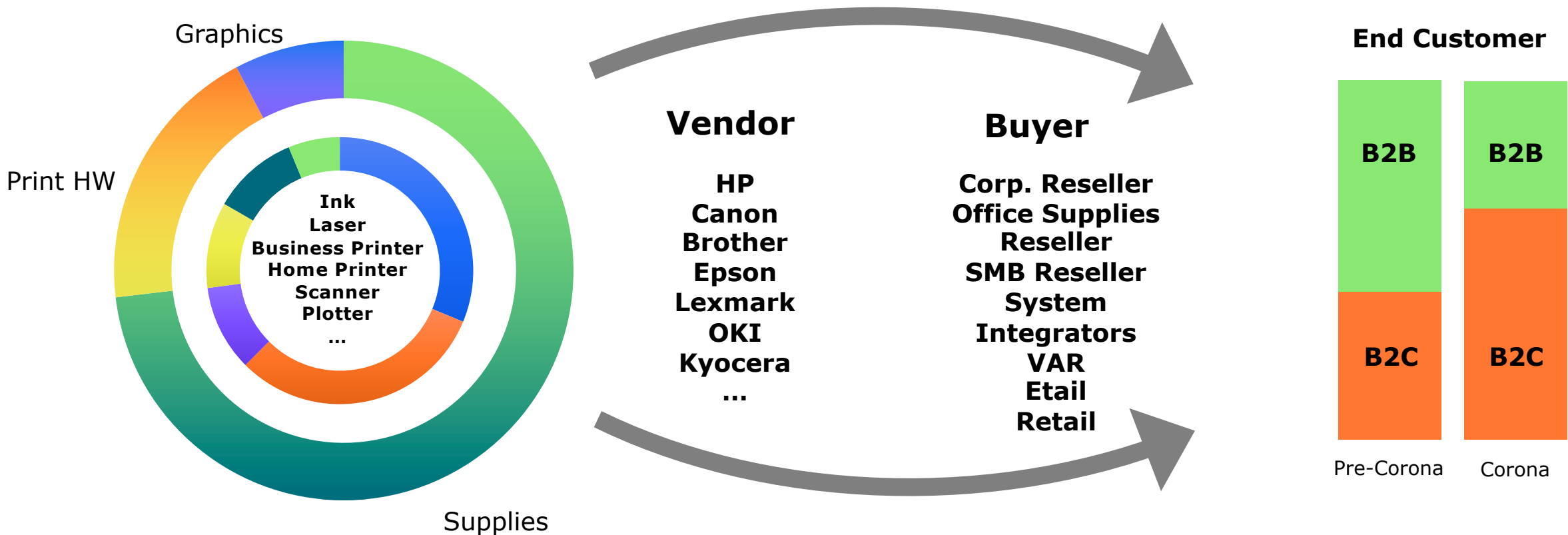


PRINTING ECOSYSTEM & GROWTH AREAS TO SUPPORT THE NEXT NORMAL



Michael Mueller, SVP Printing

PRINTING ECOSYSTEM: SOLID FOUNDATION



PRINTING ECOSYSTEM – NEXT NORMAL



Relevance for Customer

Customer Centricity

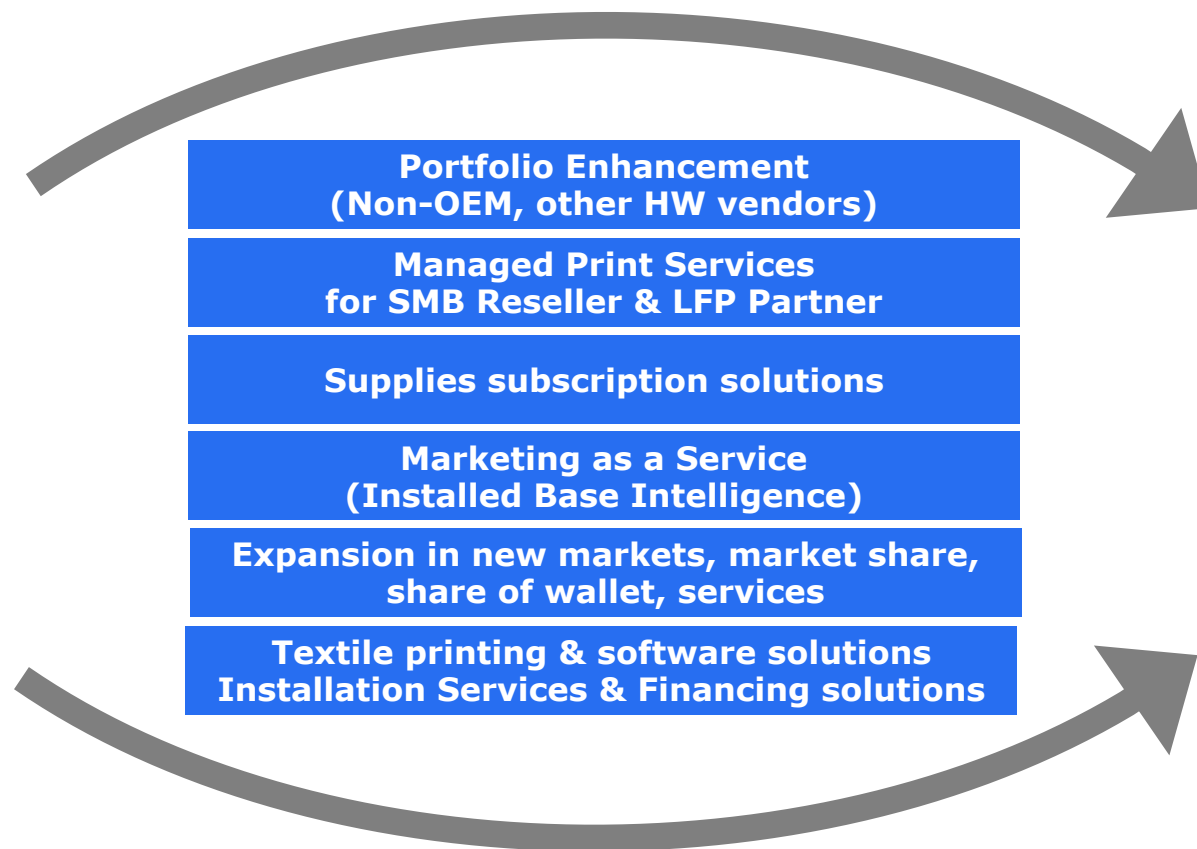
Speed to Market

Convenience

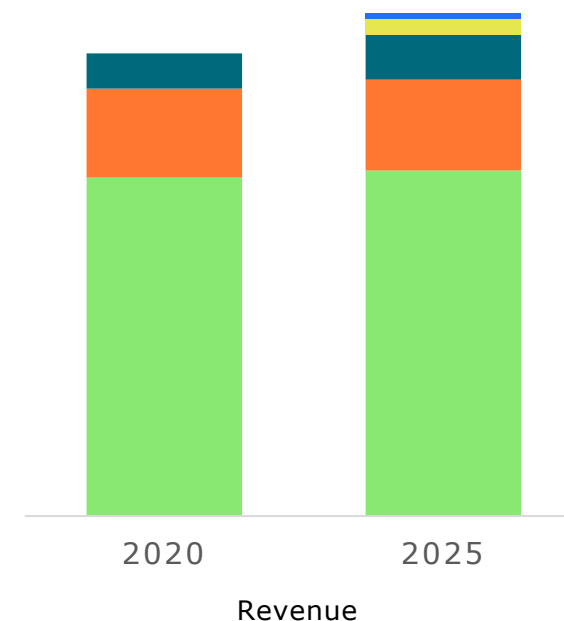
Payment models

Anywhere

B2P
Business to
people



Supplies HW Graphics
Services 3D

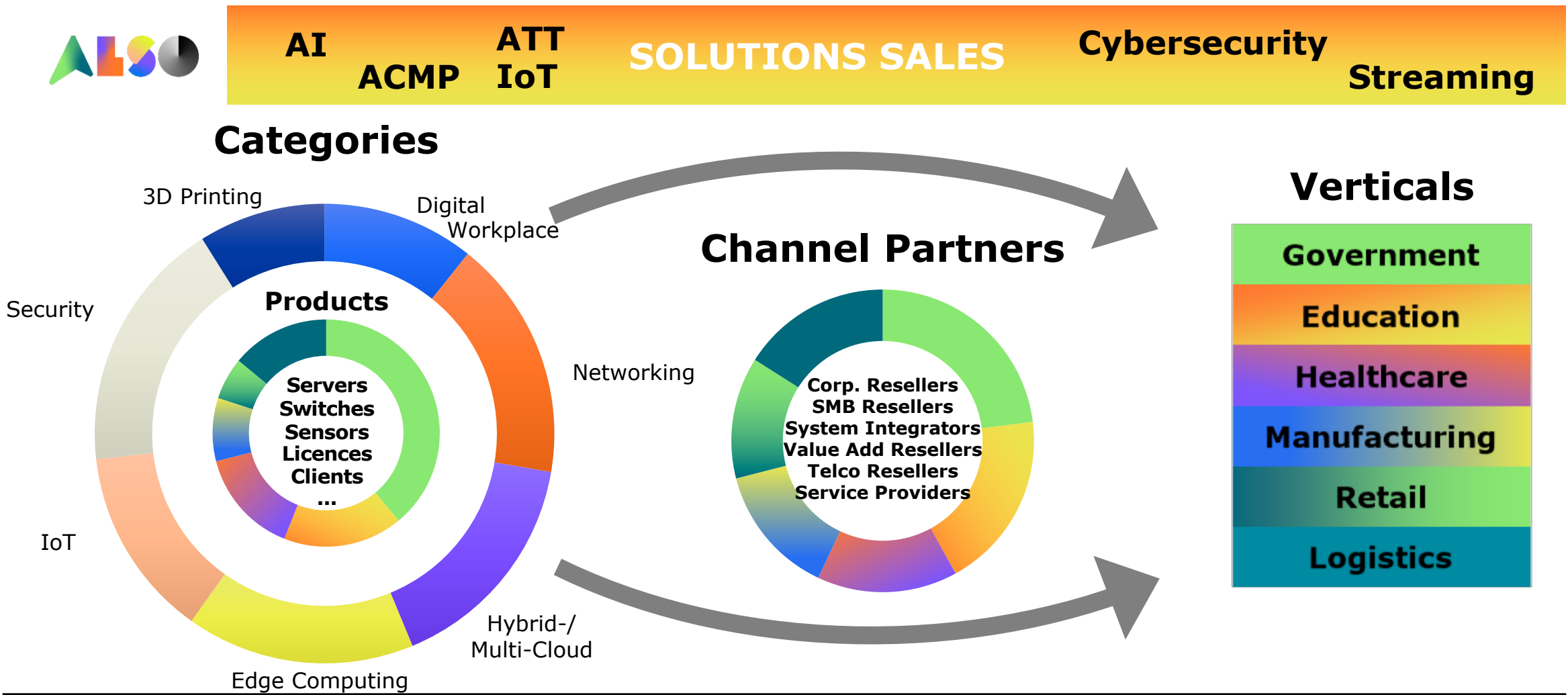


OPPORTUNITIES #2: SOLUTIONS

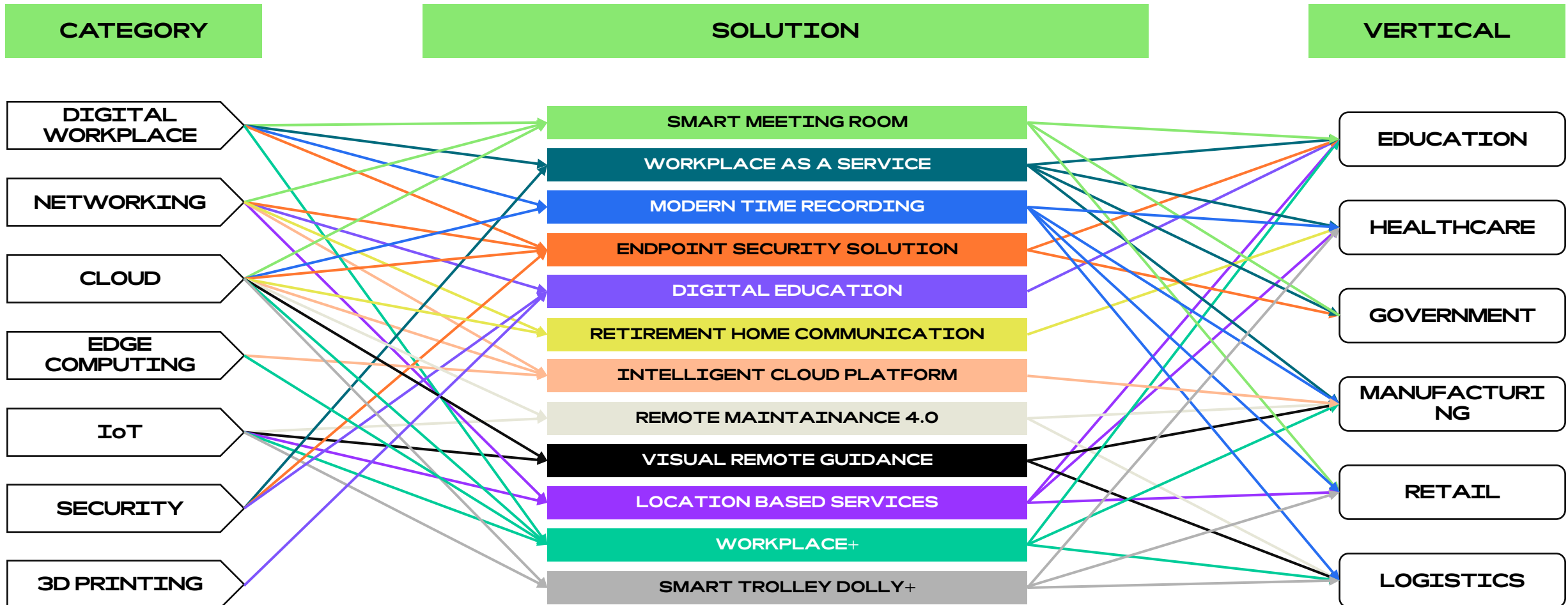


Simone Blome-Schwitzki, SVP Solutions

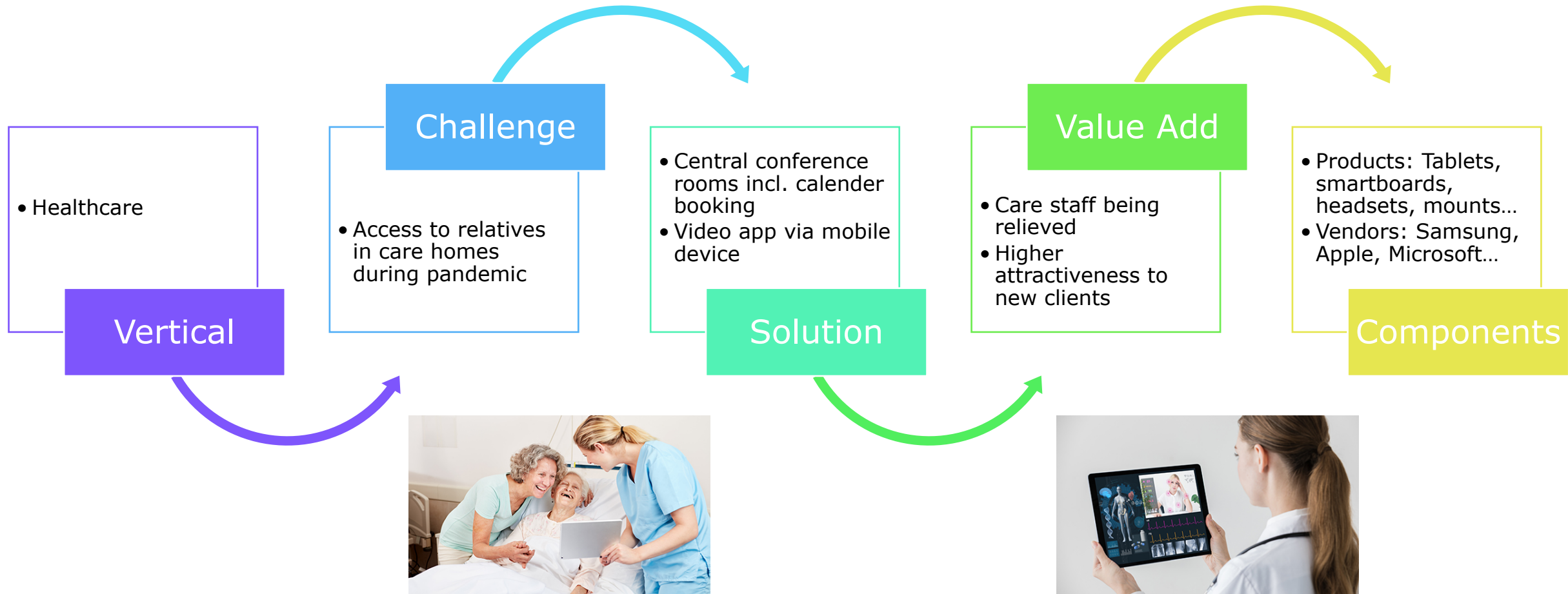
SOLUTIONS ECOSYSTEM - NEXT NORMAL



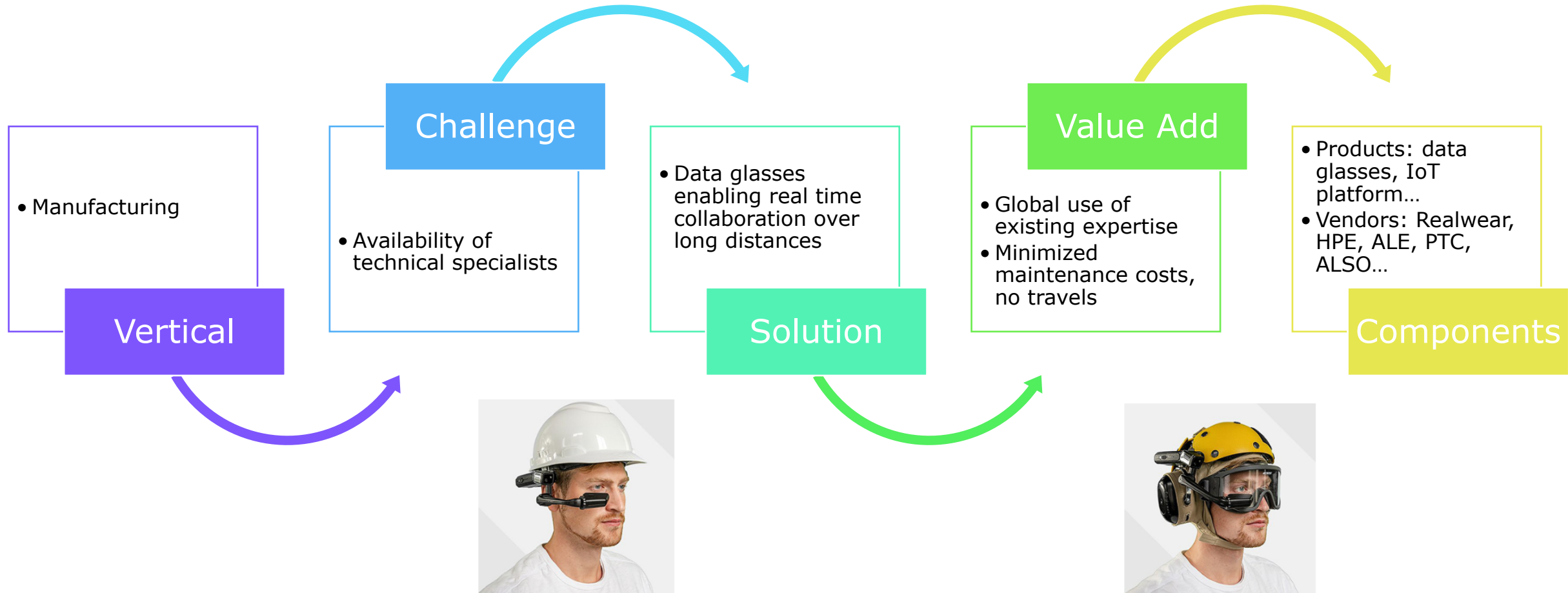
NEW & NEXT NORMAL SOLUTIONS



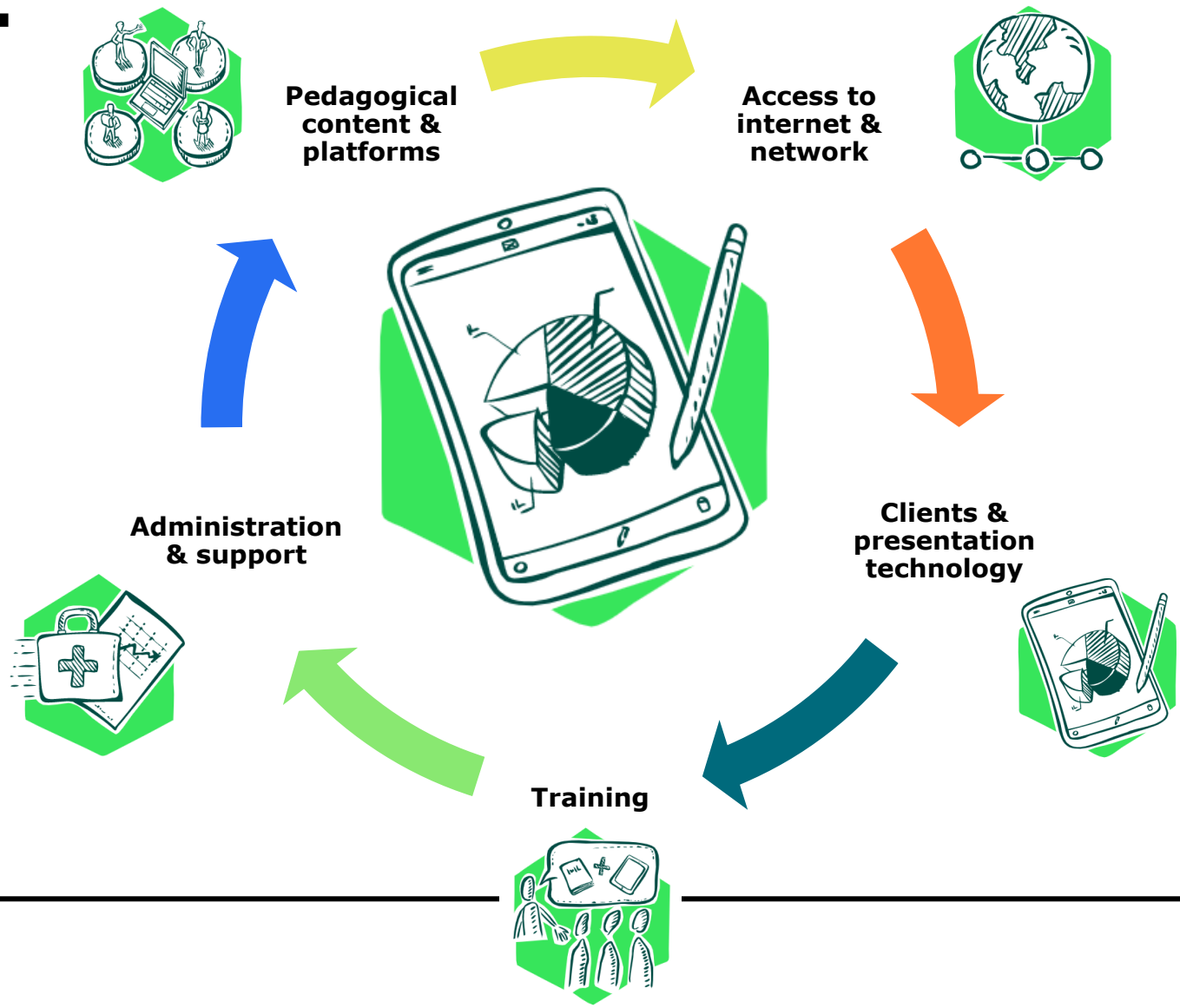
RETIREMENT HOME COMMUNICATION – NEW NORMAL



VISUAL REMOTE GUIDANCE – NEXT NORMAL



DIGITAL EDUCATION – NEW & NEXT NORMAL



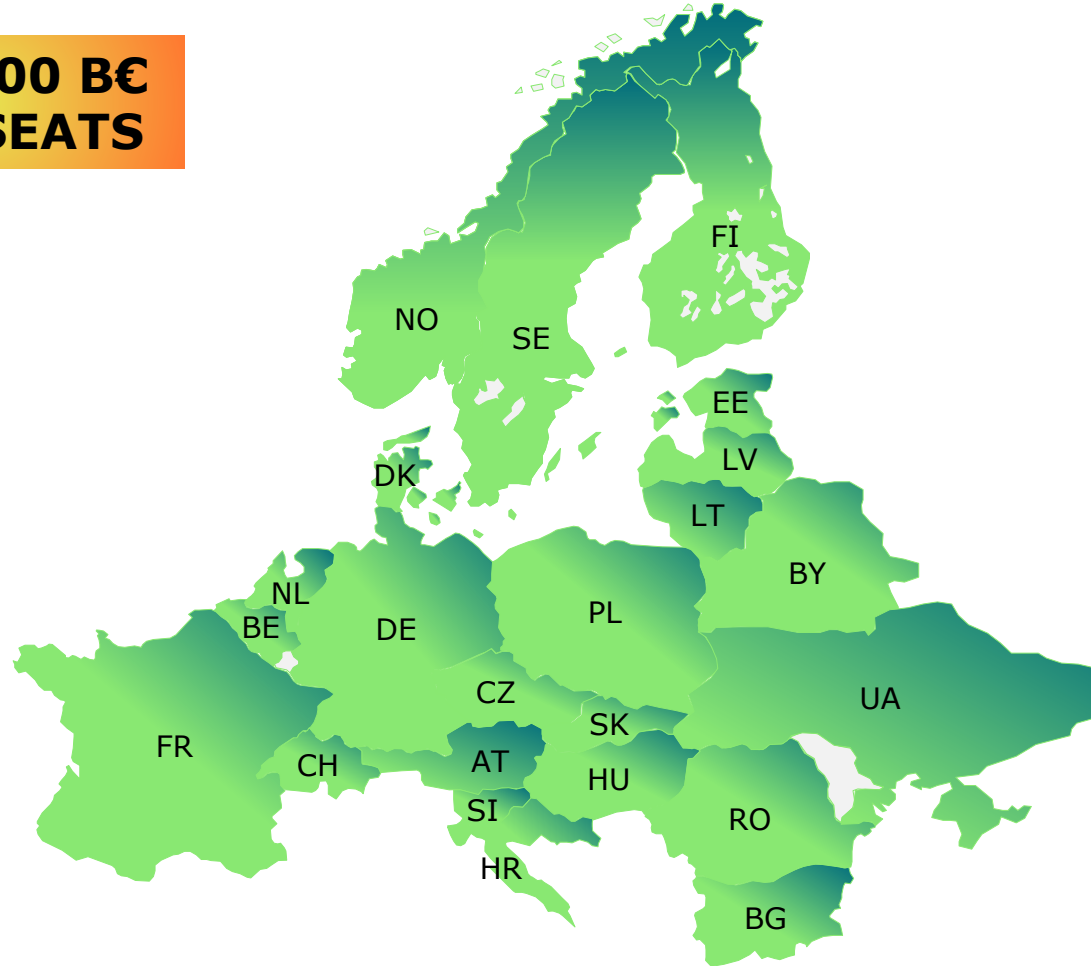
OPPORTUNITIES #3: SERVICE



Jan Bogdanovich, SVP Consumptional Business

IT SEAT MONETIZATION OPPORTUNITY - EUROPE

**TAM¹ 300 B€
150M SEATS**



IT Seat Structure²

HW
(27%)

- ▶ Devices
- ▶ Infrastructure

SW
(28%)

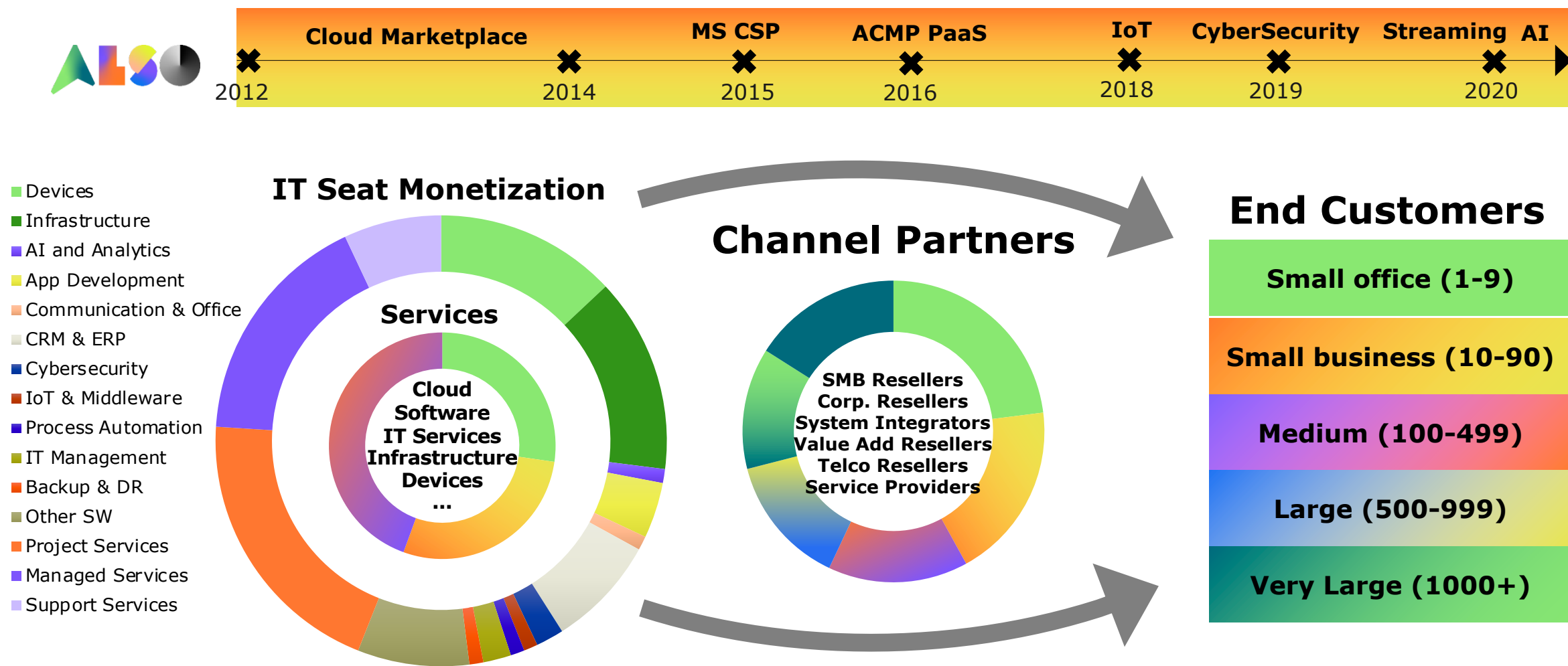
- ▶ AI and Analytics
- ▶ App Development
- ▶ Communication & Office
- ▶ CRM & ERP
- ▶ Cybersecurity
- ▶ IoT & Middleware
- ▶ Process Automation
- ▶ IT Management
- ▶ Backup & DR

IT Service
(44%)

- ▶ Project Services
- ▶ Managed Services
- ▶ Support Services

¹ ALSO Capital Markets Day

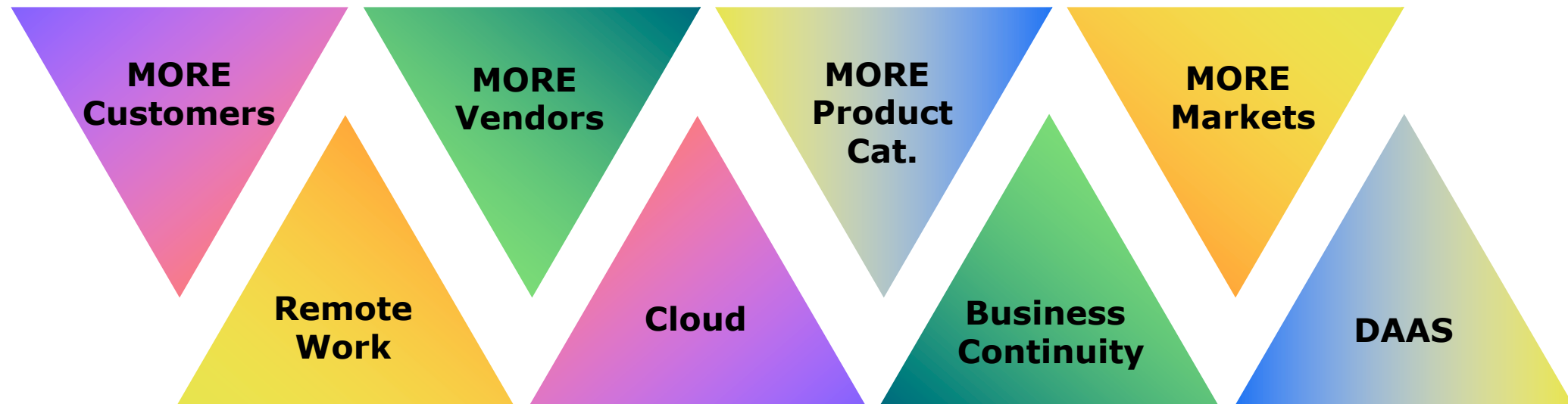
AS-A-SERVICE ECOSYSTEM & PLATFORMS



GROWTH DRIVER AS-A-SERVICE – NEW NORMAL

Increase # Seats

Increase Seat Monetization



- ▶ Corona drives digital transformation, workforce mobility and cloud migrations
- ▶ High customer loyalty, platform drives upsell through analytics

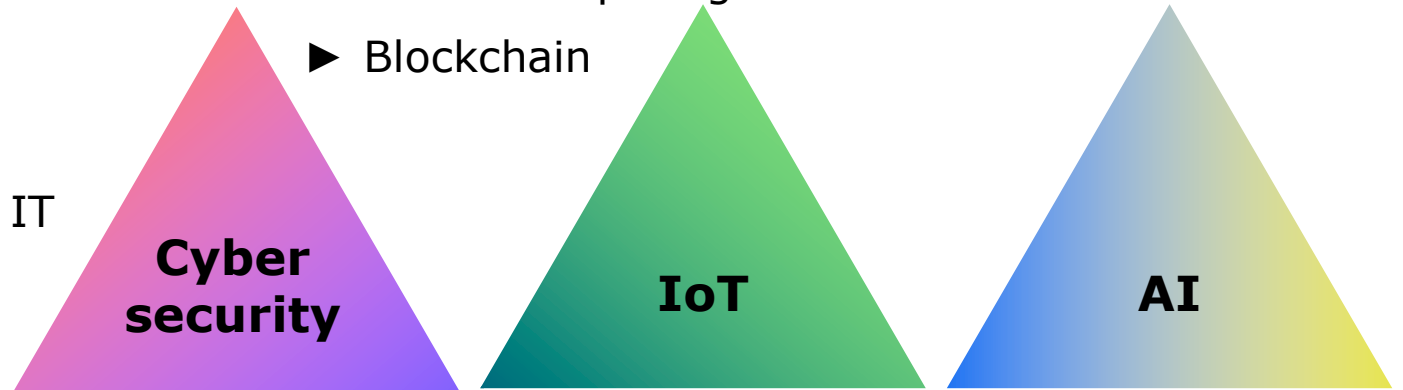
GROWTH DRIVER AS-A-SERVICE – NEXT NORMAL

► Growth drivers in customer demand

- ▶ Establish business resilience and supply chain resilience
- ▶ Technologies for new work model – distributed global work force
- ▶ Sense of urgency for automation and implementation of autonomous systems
- ▶ Technologies for customer digital interactions and digital channels
- ▶ Shift towards autonomous self-service IT
- ▶ Supply and Solutions as a Service

► Technology Platforms

- ▶ Artificial Intelligence
- ▶ Internet of Things
- ▶ Cybersecurity
- ▶ Extended Reality
- ▶ 5G Networks
- ▶ Cloud Computing
- ▶ Blockchain





Your Questions



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