



Ansell: Roadmap to a Connected Enterprise

Matt Kempler & Andy Lin

November 11, 2016



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SECTION 1
About Ansell

Introduction to Ansell

Ansell

Every day millions of people around the world depend on Ansell in their professional and personal lives.

With Ansell they always know they are protected and can perform better – because our category expertise, innovative product and advanced technology give them peace of mind and confidence that no other brand can deliver.



What We Do

- » Our mission is to provide innovative and effective solutions for safety, well-being, and peace of mind, no matter who or where you are.
- » Every day, more than 15,000 people in 55 countries design and manufacture products on which millions of consumers, workers and healthcare professionals rely.

Manufactures
10 billion+
gloves per year

Provides protection
solutions to more than
25 specific industries



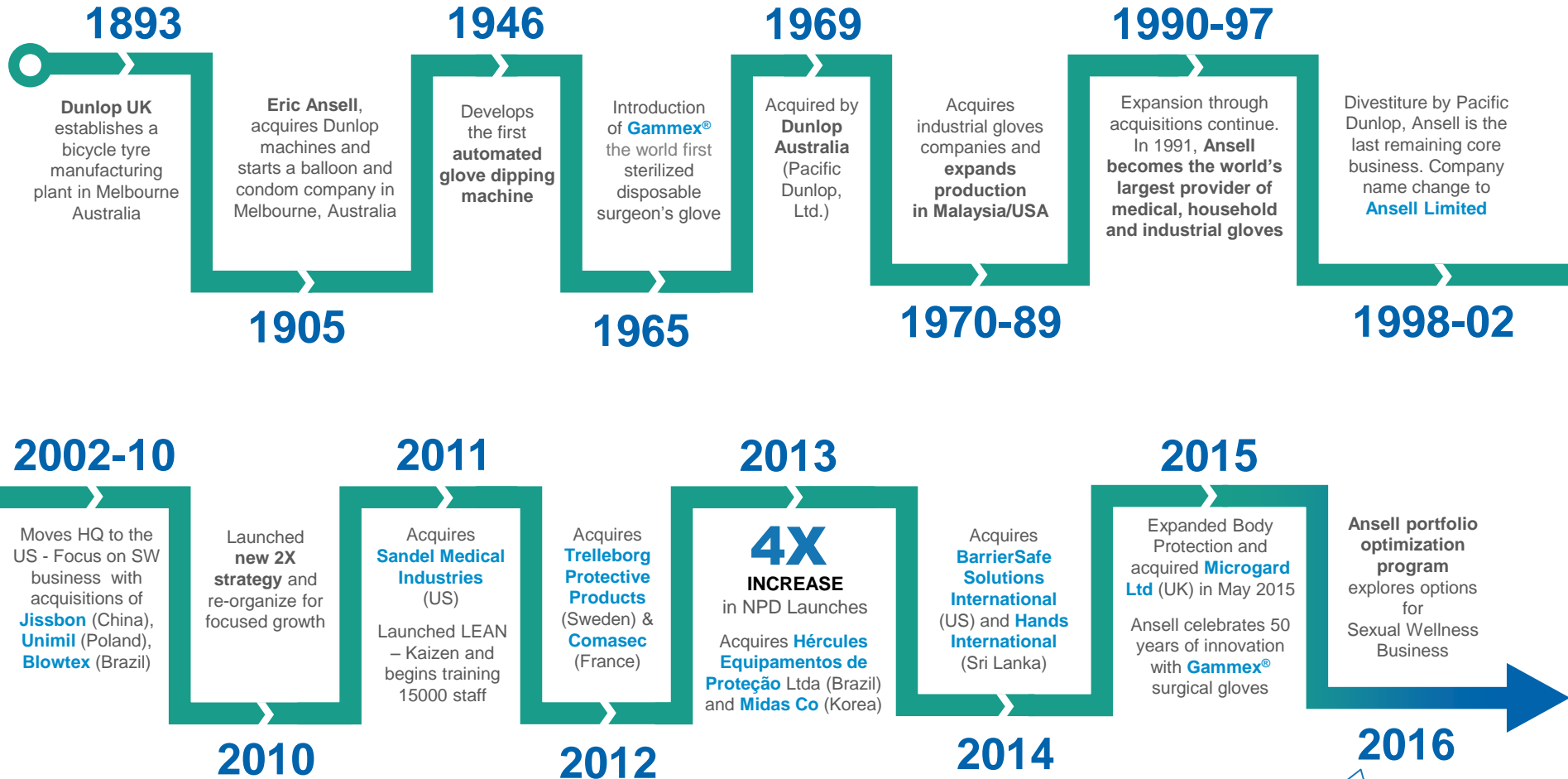
Average medical
professional personally
wears nearly **1,200**
pairs of Ansell gloves
per year



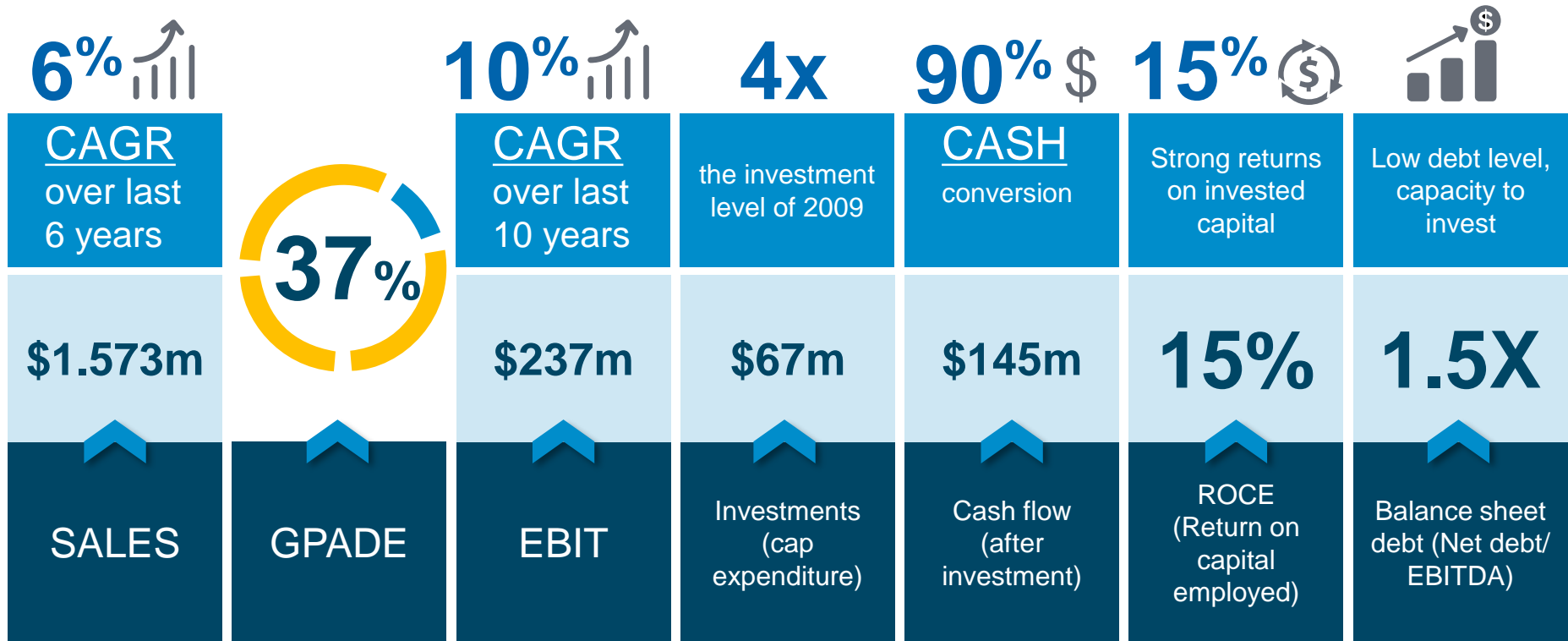
Protects more than
10 million
workers
each day

Manufactures more
than **2 billion**
condoms per year

120 Year History







A Very Profitable Company with a Strong Balance Sheet



FY16 (July-June) (000's)

Ansell Operates a Balanced Portfolio with 4 Global Businesses

	INDUSTRIAL	SINGLE USE	MEDICAL	SEXUAL WELLNESS
				
Sales \$m (% of Ansell)	\$655m (42%)	\$302m (19%)	\$396m (25%)	\$220m (14%)
EBIT Margin ¹ (EBIT % of Ansell)	13.6% 38%	21.4% 27%	13.2% 22%	14.1% 13%
Global market position vs. competitor	#1 in multi use industrial gloves >2X no.2 player	#1 in branded single use gloves 3X no.2 player	#1 in surgical 1.1x > no. 2 player	#2 in branded condoms
Top Brand Sales	HyFlex® >\$200m	Microflex® >\$170m	Gammex® >\$125m	SKYN®
Why Ansell is winning	<ul style="list-style-type: none"> • High performance • Uniquely comfortable • Broadest range • User productivity Leveraging Guardian • Global coverage 	<ul style="list-style-type: none"> • Efficient supply chain • Product performance • Products tailored to end user needs • Strong in niche markets 	<ul style="list-style-type: none"> • Clinically relevant technologies • Comfort & protection • Broadest synthetic surgical range • Global coverage 	<ul style="list-style-type: none"> • 1st to market with superior polyisoprene (PI) platform • Emerging market coverage • New product sales up 40% with lubricants, SKYN® range extension & new thin latex products

The World of Ansell

The World of Ansell

Ansell is a multicultural global company. Our historical roots are in Australia, but for many years our leadership team has been based in international markets close to our customers.

Today Ansell operates from four corporate hubs in New Jersey, USA; Brussels, Belgium; Cyberjaya, Malaysia and Melbourne, Australia. Reflective of the cultural diversity of our organisation, our leadership team comes from 10 different countries, we manufacture in 13 and have a local presence in 35.



North America

Head office:
Metro Park, New Jersey

Revenue

\$672m

Assets

\$213m



Latin America and Caribbean (LAC)

Head office:
São Paulo, Brazil

Revenue

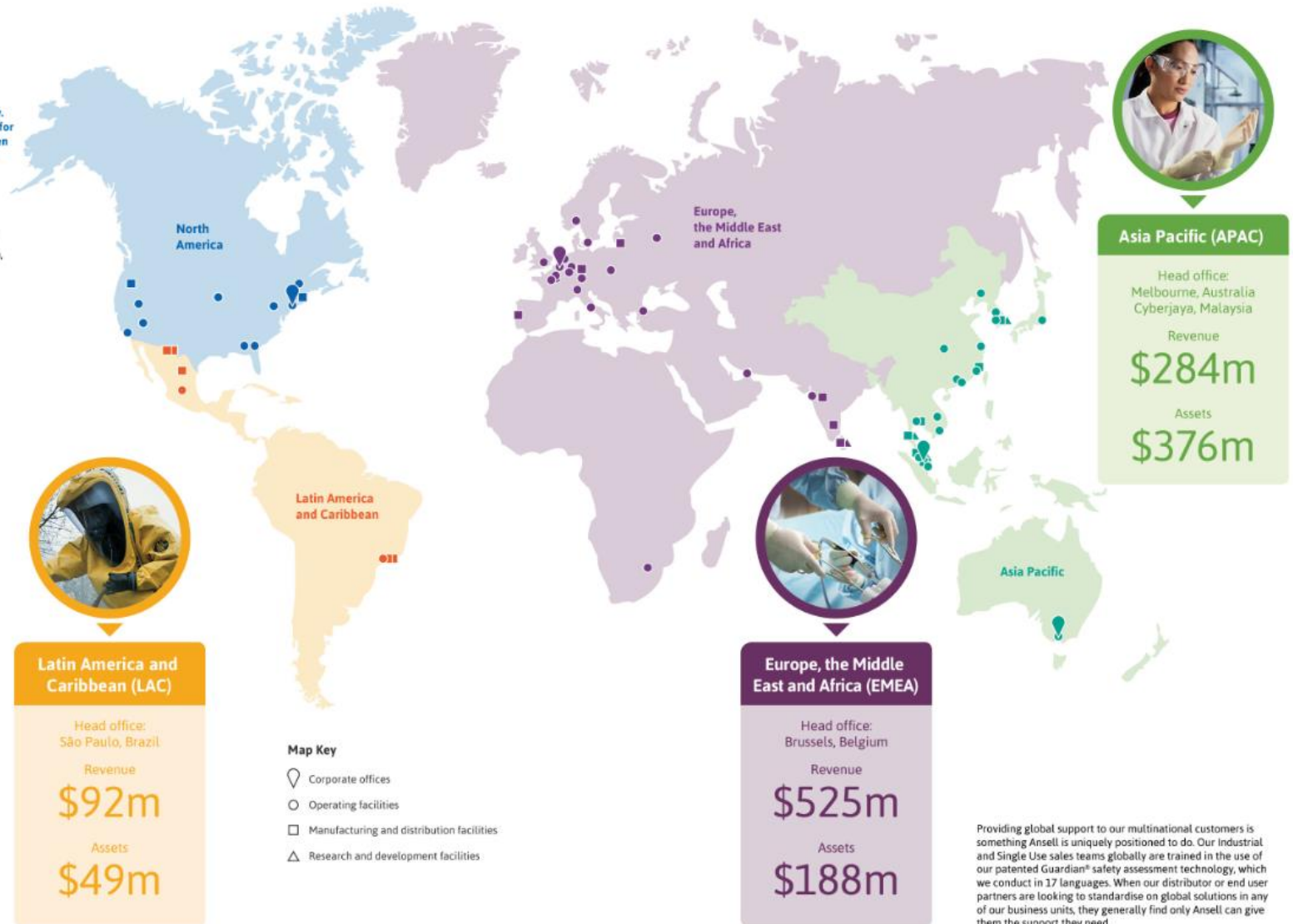
\$92m

Assets

\$49m

Map Key

-  Corporate offices
-  Operating facilities
-  Manufacturing and distribution facilities
-  Research and development facilities



Asia Pacific (APAC)

Head office:
Melbourne, Australia
Cyberjaya, Malaysia

Revenue

\$284m

Assets

\$376m



Europe, the Middle East and Africa (EMEA)

Head office:
Brussels, Belgium

Revenue

\$525m

Assets

\$188m

Providing global support to our multinational customers is something Ansell is uniquely positioned to do. Our Industrial and Single Use sales teams globally are trained in the use of our patented Guardian® safety assessment technology, which we conduct in 17 languages. When our distributor or end user partners are looking to standardise on global solutions in any of our business units, they generally find only Ansell can give them the support they need.

Partnering with Distributors to Solve End Customers Safety & Productivity Challenges

Ansell Guardian® is “a plant audit” which defines immediately actionable business performance improvements in safety, cost and productivity. Ansell Guardian is how we interact with our customers.

Ansell **GUARDIAN**®
Global Safety Services

Credentials:

- 30 years of experience implementing business improvements
- More than 10,000 Ansell Guardian assessments since 2010
- Unique portfolio of multi-disciplinary services
- Awarded patent protection by the US Patent & Trademark Office
- Full global capability (tool in 15 languages) in industrial businesses with 500 staff trained
- Sales conversions rate of close to 70% with over \$130 million in new business across 35 countries
- Ansell injury statistics across 19 global plants compares favorably to competitors and best in class industrial companies and achieve world class levels

Key Benefits:

- Increased employee safety - reduced hand/body injuries and cost as well as reduced insurance premiums
- Reduced overall cost of ownership - global solutions applied to multiple workstations and sites
- Productivity - maximize product and worker performance for each application

Customer result:

- The typical Guardian audit in a 2,000 worker location will reduce injuries by 30-50%, protection cost by 10%, number of protection SKU's carried by 30%, while improving worker satisfaction and productivity



Ansell Guardian® Success Stories

Many Ansell customers are challenged by high worker injury rates and inefficiencies due to impractical and inflexible protection solutions.

Ansell**GUARDIAN**[®]
Global Safety Services

VOLVO CAR CORPORATION

Sweden



Leading Swedish luxury vehicle manufacturer

- Implemented best-in-class chemical protection compliance fully aligned with EN374 standards
- 10% SKU reduction
- Improved worker satisfaction
- Best practice expansion to other plants in Europe and China

PROBUILD

Australia



One of Australia's largest and most successful construction experts.

- Reduced hand injuries by 100%
- Product performance cost driver savings of 55%
- Achieved industry best practice standards in mechanical protection

PCC AIRFOILS

United Kingdom



Leading producer of aerospace turbine engine applications.

- 70% SKU reduction
- Improved total cost of ownership by 50% with HyFlex® 11-840
- Increased wearer safety and control
- Increased worker motivation

IMP AEROSPACE

Canada



Leader in the field of In Service Support for military and commercial aircraft.

- Significant \$\$\$ savings in injury reduction and total cost of ownership
- 82.4% SKU reduction
- 90% worker satisfaction

Ansell's Strategy for Accelerated Growth

RESULTS

1 Operate as a fully <i>global company</i>	4GBUs, 4 regions, Effective Matrix
2 Accelerate <i>innovation</i>	3 new R&D centers, 4-fold increase in patents and product launches, Digital transformation launch
3 Integrate manufacturing with <i>commitment to LEAN</i>	450 LEAN projects, from \$8m to \$30m in annual productivity gains
4 Implement <i>best marketing practices</i>	Core brands growing high single digit p.a.
5 Accelerate development of <i>emerging markets</i>	Sales up 100% to 25% of global sales
6 Streamline and strengthen our <i>core processes, practices, and functions</i>	Oracle/SAP implemented, 10 core processes improved
7 Leverage the balance sheet and high free cash flow to <i>selectively invest</i>	Ansell rated investment grade; \$1b invested in 10 acquisitions over 5 years – cash flow increased 50%



SECTION 2 DIGITAL PERSPECTIVE

What is Digital?

Digital is the use of Business Technology to improve the Customer Experience.

Top Line Growth (Sales):

- Digitally enhanced selling
- Predictive targeted marketing
- Streamlined customer process

Customer Understanding (Marketing):

- Analytical-based segmentation
- Socially informed knowledge

Customer Touch Points (Service):

- Customer & Self service
- Multi/Cross-channel coherence

Digital Capabilities:

- Unified Data & Processes
- Analytics Capabilities
- Business & IT Integration
- Solution Delivery

WHY IS IT IMPORTANT?

- **Fastest Growing Channel in Industrial**
 - 25% CAGR
 - Glove sales via e-Commerce expected to double in next 2 years (\$1B)
- **Our distribution customers are demanding more integration**
 - Grainger, Airgas
 - 14 EMEA distributors
- **It's the future and our glove competitors are also lagging**

Be Disruptive Or Be Disrupted

2016 Digital Trends / Leader Best Practices:

1 CUSTOMER EXPERIENCE: KEY TO SMART DIGITAL INVESTMENT

2 MARKETING: CONTENT, DATA, PERSONALIZATION

3 TECHNOLOGY: FOCUS ON QUICK WINS + RIGHT FOUNDATION

4 INNOVATION: ORGANIZE TO LEVERAGE GLOBAL INNOVATION

Digital Perspective on Customer Experience

1

CUSTOMER EXPERIENCE

CX is a core belief that the customer sits at the middle of corporate decisions about digital investment. B2B customers now have choice about how and when to interact, and bring B2C experiences to their B2B roles.

2

MARKETING

CRM means more than just outreach, and matching customer insight with the right content and product information is the new goal. Valuable content, marketing automation, and advocates matter more and more in B2B.

3

TECHNOLOGY

Leaders consolidate digital projects to more effort on the most valuable ideas and most important platforms. Web services and API become more valuable ways for B2B to extend its presence with distributors and others.

4

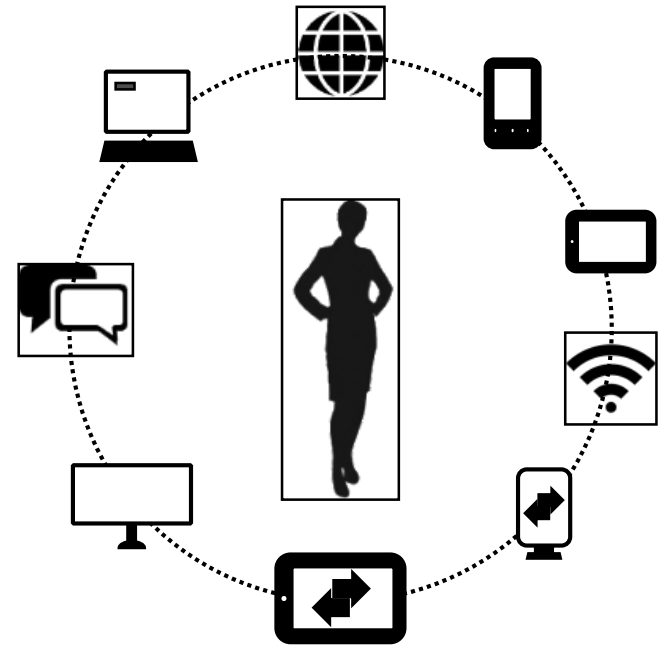
INNOVATION

The best companies organize globally around digital, and create new business capabilities and innovation with a test-and-learn model that leverages global innovation.

Knowing the Customer Sits at the Core of Customer Experience

CUSTOMER EXPERIENCE MANAGEMENT

- Customer experience = Customer Journey Management
- Enable customers to find and buy what they want when they want (and insights into what they want)
- Digital platform and infrastructure must support the experience (customer dictates engagement)



“The content owners that will thrive in this digital ecosystem are the ones that understand the need to deliver seamlessly across every possible platform.” —Noah Elkin, eMarketer

87%

Of B2B buyers believe online content has a major or moderate impact on vendor selection.

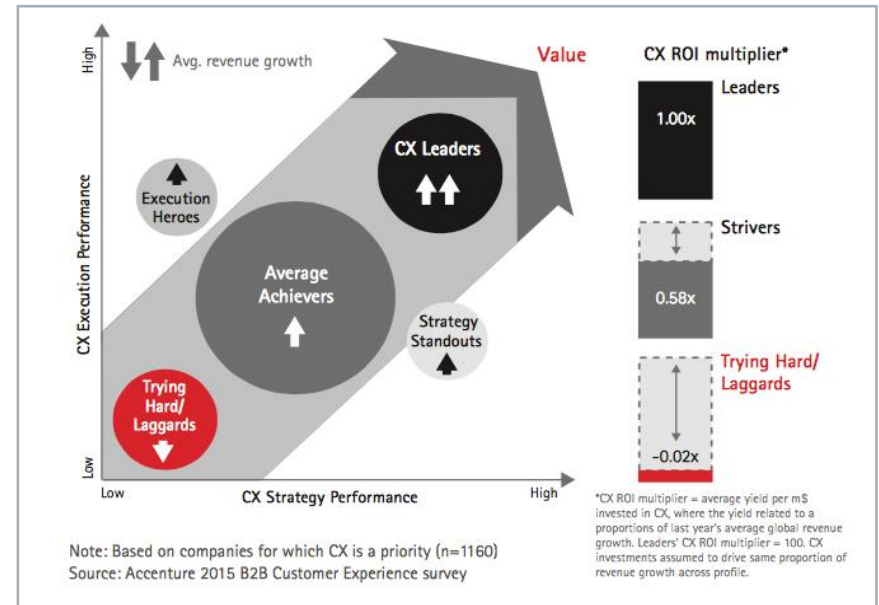
Source: <http://www.cmswire.com/cms/customer-experience/report-digital-marketers-need-a-better-b2b-strategy-021515.php>

Customer Experience Leaders Multiply ROI

A Customer Experience “Outside In” Approach is Important Because B2B Companies Who Embrace CX Outperform their Peers.

B2B CUSTOMER EXPERIENCE LEADERS

- Believe customer experience strategy and execution capabilities are important
- Use customer experience excellence to help disrupt markets
- Invest heavily in digital technology
- Value the connected ecosystem in delivering an optimal experience
- Build the skills of their team and empower them



“While customer experience Leaders are found in all sectors, they are most prevailing in two: Industrial equipment and consumers goods and services. Interestingly, those two industries also have higher-than-average numbers of Laggards.”

74%

of B2B executives believe customer experience will be more important to corporate strategy over the next 2 years

Source: https://www.accenture.com/t20151013T060823__w_/us-en/_acnmedia/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Industries_18/Accenture-Strategy-B2B-Customer-Experience-2015-Research-Report.pdf

Digital Perspective on Marketing

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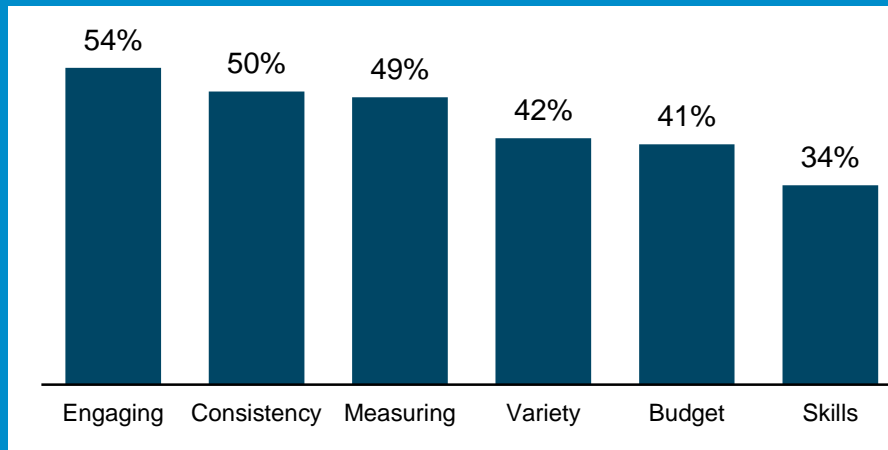
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Relevant and Contextual Marketing

Distributors and End Users want meaningful content that engages, solves problems and answers their questions

BIGGEST CHALLENGES B2B MARKETERS FACE



45% of US marketers say that personalizing marketing communications is a major challenge

54% Of B2B customers want personalized recommendations.

Source: "Mastering Omni-Channel B2B Customer Engagement," Accenture, September 2015.

"By creating and publishing remarkable content in a form that educates, informs, inspires and entertains, marketers can begin to build relationships with prospects early on in the buying cycle."

80% Companies that optimize their web content outperform those that don't in traffic increase by 80%

Source: <http://www.cmswire.com/cms/customer-experience/report-digital-marketers-need-a-better-b2b-strategy-021515.php>

Marketing needs to Evolve

TRADITIONAL

1 Sales Driven Purchase Process

2 Single Channel Tactics

3 Low Quality, High Volume Leads

4 Disconnected Customer Data

5 Field vs. Corp Marketing

6 “One & Done” Marketing

7 One World Marketing Tools

MODERN

Buyer Driven Purchase Process

Multi-channel customer journey management

High Quality Scored Leads

360° Customer Data with Connected Insights

Field & Corp Connected Marketing Systems

Long-term Customer Relationships

Modern Connected Marketing & Sales Platforms

Digital Perspective on Technology

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TECHNOLOGY

Leaders consolidate digital projects to put more effort only the most valuable opportunities and platforms. Web services and API become valuable ways for B2B to extend presence with distributors and customers.

4

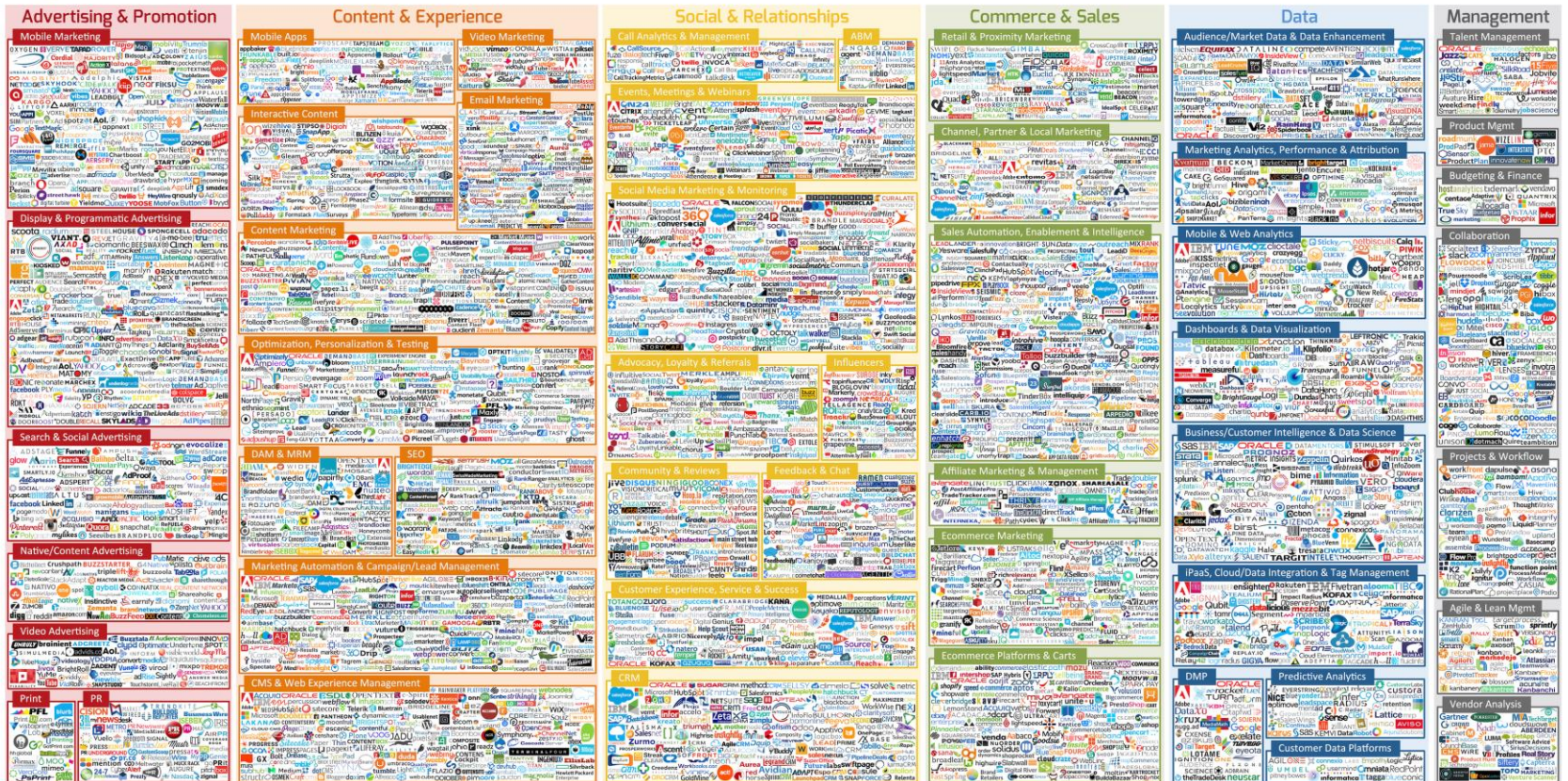
INNOVATION

The best companies organize globally around digital, and create new business capabilities and innovation with a test-and-learn model that leverages global innovation.

Best Companies Move To Consolidate Key Investments, And Focus On Reducing Complexity

 chiefmartec.com Marketing Technology Landscape

March 2016



Sources: CabinetM (<http://cabinetm.com>), Captera, G2 Crowd, Google, Growthwise, LUMA Partners, Siftify, TrustRadius, VBProfiles — see <http://chiefmartec.com/2016/03/marketing-technology-supergraphic-2016/> for details.

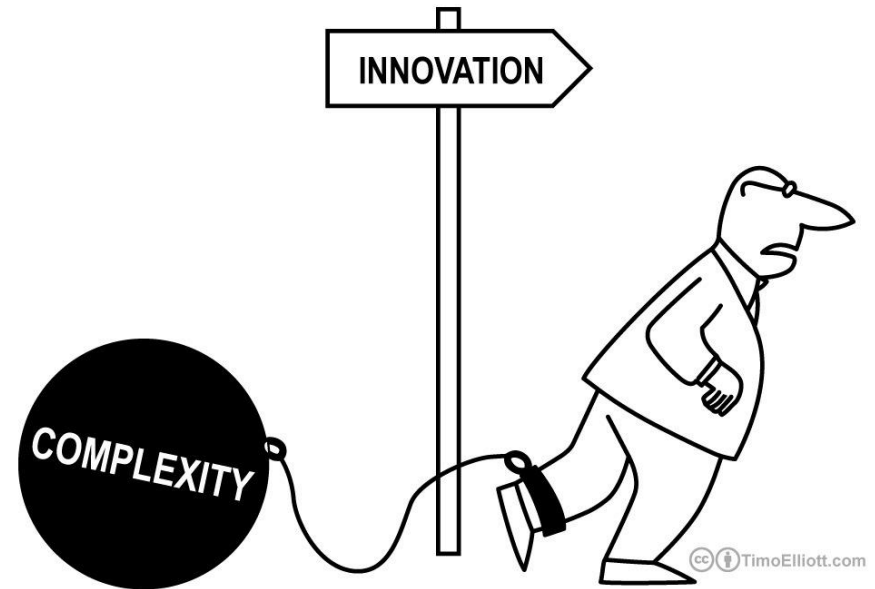
Created by Scott Brinker (@chiefmartec)

This Infographic of the 2016 Marketing technology landscape shows 3,874 organizations, compared to about 2,000 last year and only 150 for its inaugural version in 2011. Too many!

Reducing Complexity Unhinges Innovation

Best companies move to consolidate key investments, and focus on reducing complexity

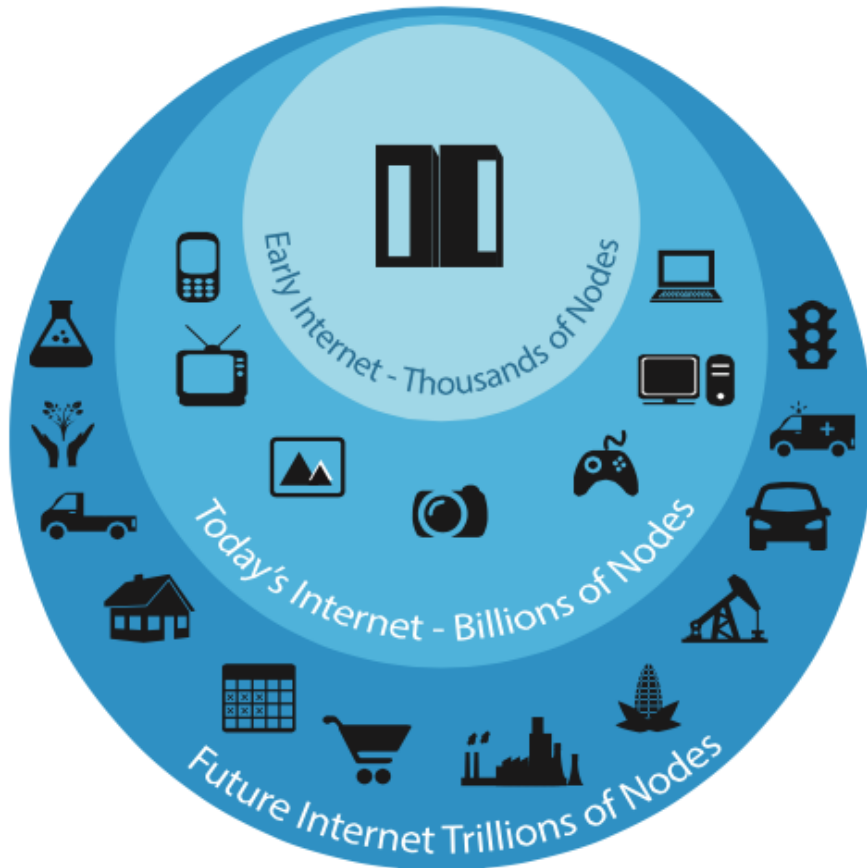
“Not everything that can be counted counts, and not everything that counts can be counted.”
Albert Einstein



Simplify Complexity to Move Forward

Integration Creates Value

APIs Are One Example Of Simplifying Complexity To Help Expand Reach and Create Value



“The API Economy is the economy where companies expose their (internal) business assets or services in the form of (Web) APIs to third parties with the goal of unlocking additional business value through the creation of new asset classes.” —Cutter Consortium

50% Of Salesforce.com revenues generated by APIs.

Source: <https://www.infosys.com/industries/insurance/industry-offerings/digital-insurer/resources/Documents/accelerate-digital-connectedness.pdf>; “The Strategic Value of APIs,” *Harvard Business Review*, January 7, 2015.

Digital Perspective on Innovation

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CUSTOMER EXPERIENCE

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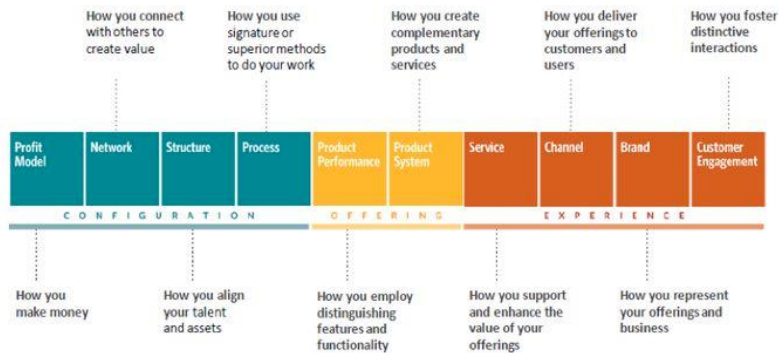
INNOVATION

The best companies organize globally around digital, and create new business capabilities and innovation with a test-and-learn model that leverages global innovation.

Innovation is at the Heart of Growth

Leaders Organize Globally and Know Digital Innovation Is A Global Opportunity

10 Types of Innovation



Source: Ten Types of Innovation, Monitor Deloitte
 © 2014 Deloitte Global Services Limited



DOBLIN

“Experiment continuously. Measure relentlessly. Learn.”
 —Dr. Werner Vogels, Amazon

5-15%

Revenue improvement among B2B companies who used test-and-learn to optimize their digital marketing.

Source: “Mastering Omni-Channel B2B Customer Engagement,” Accenture, September 2015.; <http://customerthink.com/big-data-marketing-lessons-from-top-gun/>; <http://chiefmartec.com/2013/01/the-big-data-bubble-in-marketing/>; <http://www.forbes.com/sites/mckinsey/2013/10/15/sales-disruption-eruption-b2b-sales-go-consumer/#e7241991fc8e>.

Digital Benefits Don't Come Without Challenges

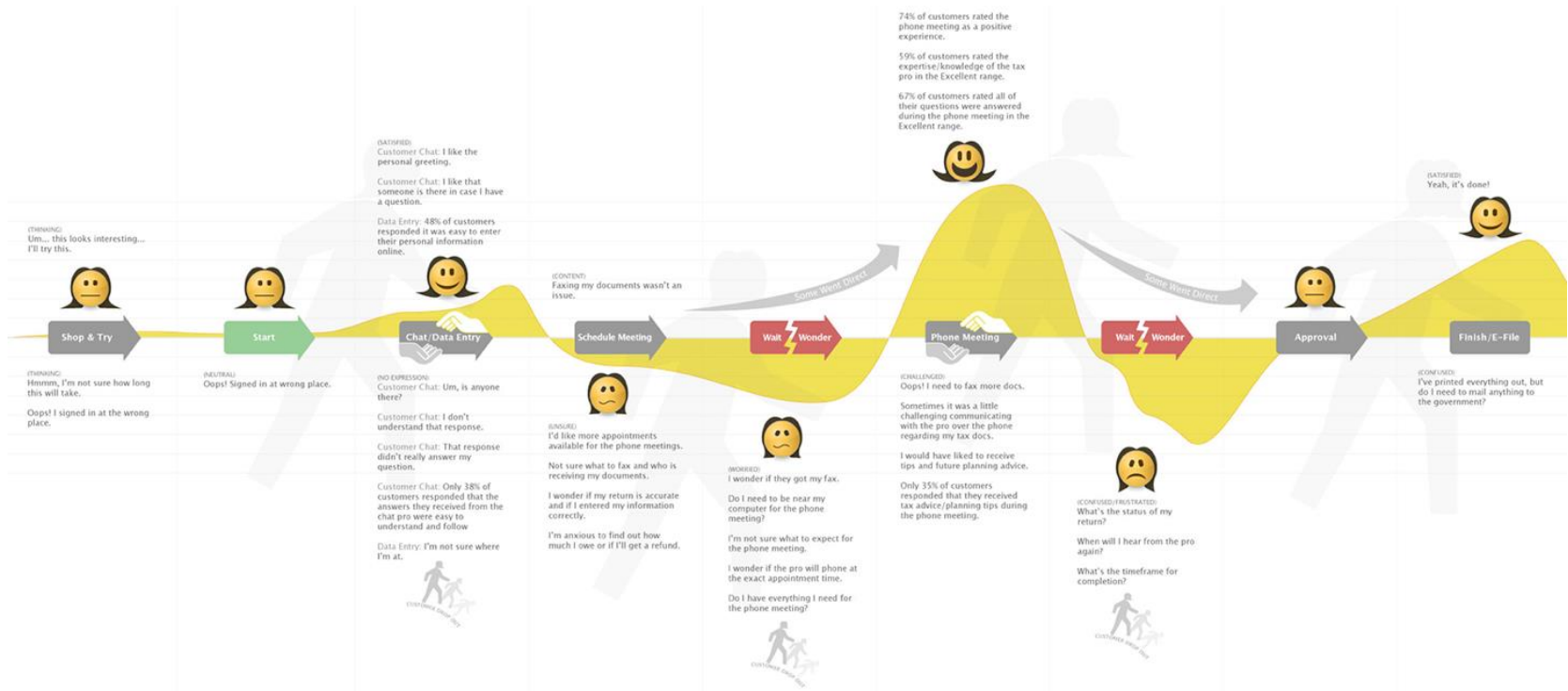




SECTION 3 Ansell's Journey

Transforming into a “Customer First” Culture

The Customer Journey can be further segmented into “micro” journeys. Customer Journey Management leads to improved Customer Experience



Persona Examples

JOHN PROCUREMENT MANAGER

“I WANT TO ACHIEVE COST DOWNS, PROTECT THE BOTTOM LINE AND I WANT THIS TO BE ACHIEVED THROUGH STRUCTURED BUYING POLICIES AND BALANCE QUALITY VS. COST. I WANT MY DECISIONS TO BE ORDERED AND MAXIMISE COST EFFICIENCIES”



JOB TITLE
PROCUREMENT MANAGER

ROLE
PURCHASING, PROCUREMENT & INVENTORY

SALARY
200K

CUSTOMER TYPE
DECISION MAKING

PURCHASING CRITERIA
BUDGETRY, COMPLIANCE

AGE
50 YEARS

MARITAL STATUS
MARRIED WITH YOUNG CHILDREN

EDUCATION
HIGH SCHOOL CERT.

SOCIAL CLASS
WHITE COLLAR MIDDLE CLASS

POLITICAL VIEWS
CONSERVATIVE

CAREER DRIVERS
HIGH FINANCIAL, RETIREMENT

TRAITS
FOCUSED, ANALYTICAL, DECISIVE

COMPUTER/INTERNET PROFICIENCY:
INTERMEDIATE

PERSONAL INTERESTS
SPORT, NEWS, INVESTMENT

VALUES
FAMILY, ORDER, KNOWLEDGE

LIFESTYLE
EARN & INVEST

GOAL
RETIREMENT

Persona Examples

BILL

SAFTEY MANAGER

MANAGES THE SAFETY TEAM.
DEVELOPS SAFETY PLANS
IN ACCORDANCE WITH
GOVERNMENT LEGISLATION,
STATUTORY REGULATION
AND OH&S BEST PRACTICE.
GENUINELY CONCERNED WITH
PEOPLE'S WELFARE AND TAKES
THE RESPONSIBILITY OF HIS JOB
SERIOUSLY. LOVES HIS WORK,
BUT HIS FAMILY IS HIS LIFE.



JOB TITLE
SAFTEY MANAGER
ROLE
OH&S, RISK MANAGEMENT
SALARY
150K

CUSTOMER TYPE
DECISION MAKING
PURCHASING CRITERIA
SAFETY, RISK MITIGATION

AGE
55 YEARS
MARITAL STATUS
MARRIED WITH ADULT CHILDREN
EDUCATION
CERT IV
SOCIAL CLASS
WHITE COLLAR MIDDLE CLASS
POLITICAL VIEWS
SOCIAL



CAREER DRIVERS
FINANCIAL, INTERPERSONAL
TRAITS
MANAGERIAL, SYSTEMATIC,
GENUINE
COMPUTER/INTERNET
PROFICIENCY:
INTERMEDIATE

PERSONAL INTERESTS
FAMILY, COMMUNITY, HOBBIES
VALUES
FAMILY, HEALTH, QUALITY
RELATIONSHIPS
LIFESTYLE
FAMILY FIRST
GOAL
RETIREMENT

Persona Examples

SCOTT

CONTRACTOR

JOB CONDITIONS CAN BE A BURDEN, BUT THE HIGH WAGES AND ROSTERS IN MINING SUPPORT RECREATIONAL INTERESTS ON ROSTERED TIME OFF, INCLUDING SOCIALISING AND TRAVEL. BEGRUDGINGLY COMPLIES WITH ON-THE-JOB SAFETY REGULATIONS AND PROCEDURE, WHICH SEEM OVERLY RESTRICTIVE AND SOMEWHAT UNNECESSARY



JOB TITLE
CONTRACTOR
ROLE
MINING OPERATIONS, LABOUR

SALARY
100K
CUSTOMER TYPE
END USER
PURCHASING CRITERIA
COMFORT, FEEL, DEXTERITY

AGE
25 YEARS
MARITAL STATUS
SINGLE

EDUCATION
HIGH SCHOOL
SOCIAL CLASS
BLUE-COLLAR WORKING/LOWER CLASS
POLITICAL VIEWS
UNDECIDED



CAREER DRIVERS
HIGH FINANCIAL, LIFESTYLE
TRAITS
SELF-CONFIDENT, BRASH, HEADSTRONG
COMPUTER/INTERNET PROFICIENCY:
INTERMEDIATE - ADVANCED

PERSONAL INTERESTS
SPORT, HEALTH/FITNESS, TRAVEL
VALUES
FRIENDS, MONEY, ADVENTURE
LIFESTYLE
FAST LIVING
GOAL
RECREATION

Persona Examples

CHRIS

PROPRIETER

MOSTLY ENJOYS HAVING OWN BUSINESS OF 15 YEARS, BUT FINDS THE UPS AND DOWNS STRESSFUL. FEELS FRUSTRATED BY THE ATTITUDES AND WORK ETHICS OF STAFF, AS WELL AS THE UPS AND DOWNS OF OWNING A SMALL BUSINESS. WORKS 6 DAYS A WEEK AND RARELY GETS A DECENT BREAK. THE WIFE IS SUPPORTIVE, BUT NAGS FOR A BIT MORE TIME NOW AND THEN. SUNDAY IS FAMILY DAY. FOCUSED MORE ON GETTING THE JOB DONE, BUT REALISES THAT SAFETY IS IMPORTANT.



JOB TITLE
PROPRIETER
ROLE
TRADE, OWNER OPERATOR
SALARY
150K
CUSTOMER TYPE
DECISION MAKER
PURCHASING CRITERIA
QUALITY AT REASONABLE PRICE

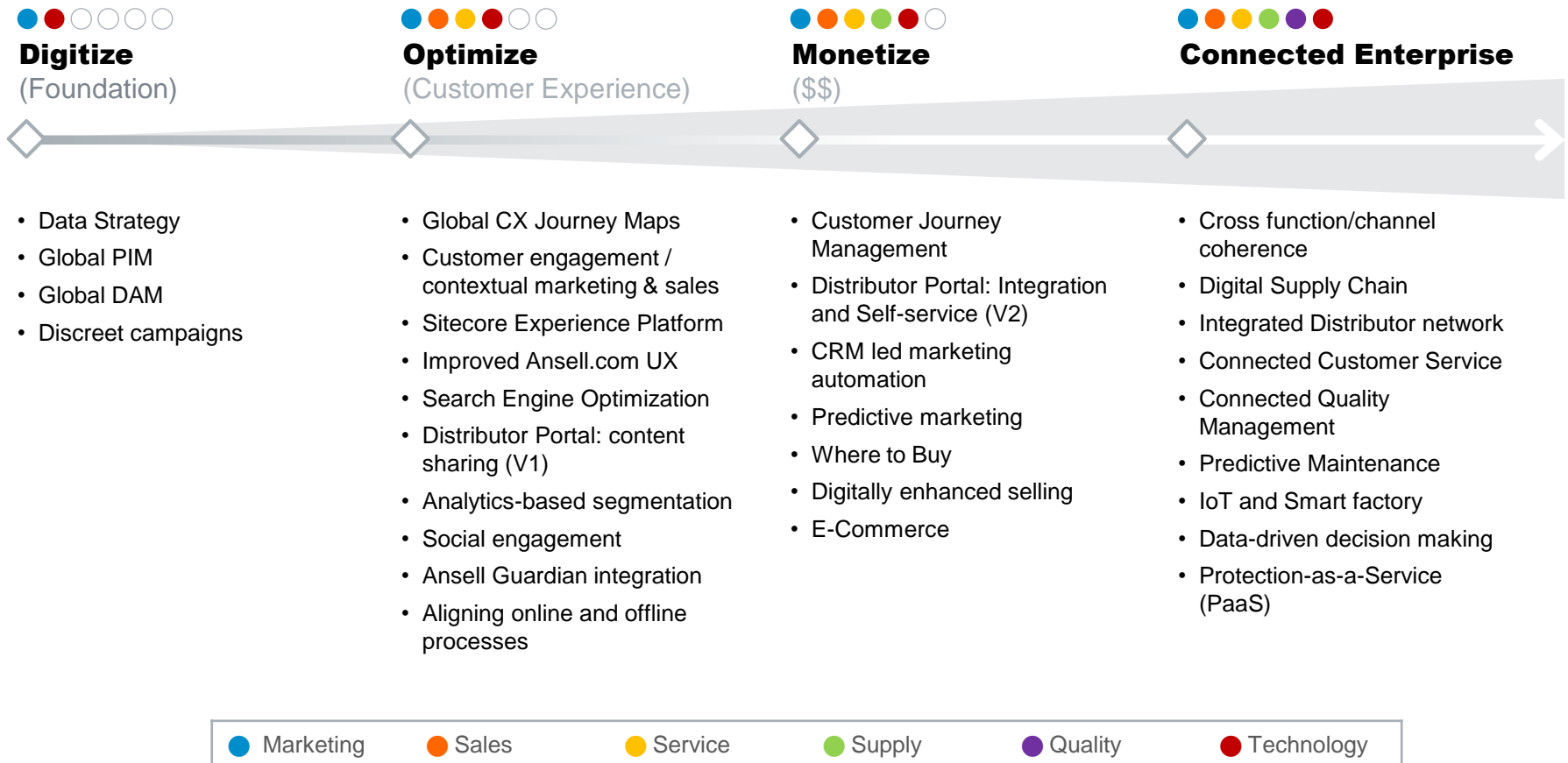
AGE
45 YEARS
MARITAL STATUS
MARRIED WITH YOUNG AND ADOLESCENT CHILDREN
EDUCATION
TRADE QUALIFICATION
SOCIAL CLASS
BLUE COLLAR LOWER-MIDDLE CLASS
POLITICAL VIEWS
LIBERAL



CAREER DRIVERS
HIGH FINANCIAL, CONTROL
TRAITS
PERSISTANT, TENACIOUS, HARD WORKING
COMPUTER/INTERNET PROFICIENCY:
BASIC-INTERMEDIATE
PERSONAL INTERESTS
SPORT, OUTDOORS, INVESTMENT
VALUES
FAMILY, SECURITY, HARD WORK
LIFESTYLE
PROVIDER
GOAL
FINANCIAL SECURITY

Ansell Digital Transformation Roadmap

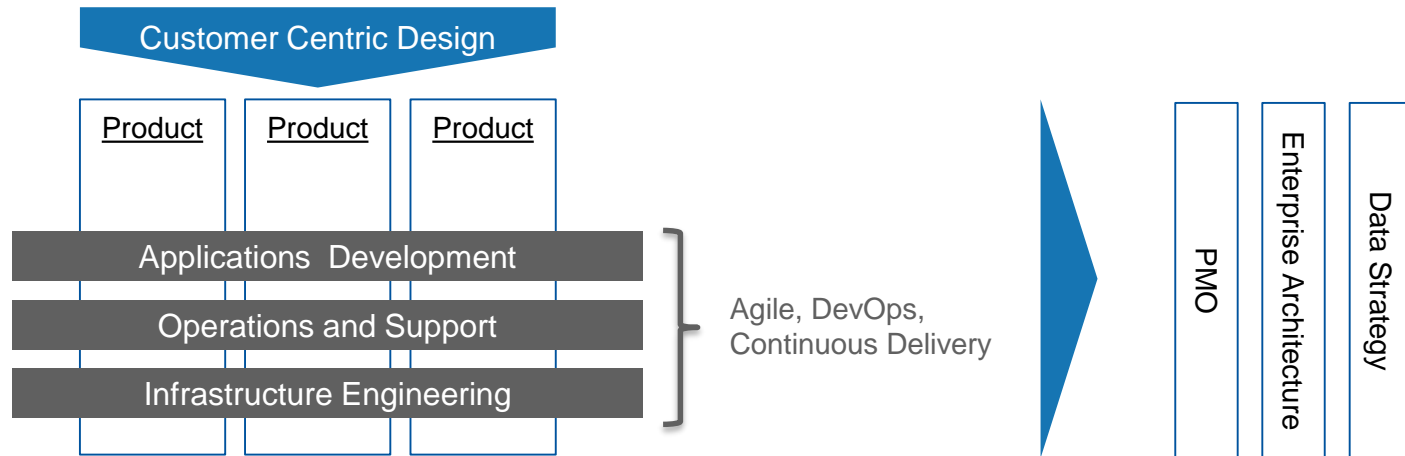
Digital transformation will lead Ansell to a cross function collaboration, high intelligent connected systems that create a fully digital value chain.



Building Ansell Digital Competency

Best practice organizations are aligning digital funding, development resources, and ongoing management support around a set of products

BEST PRACTICE DIGITAL ORGANIZATIONAL MODEL

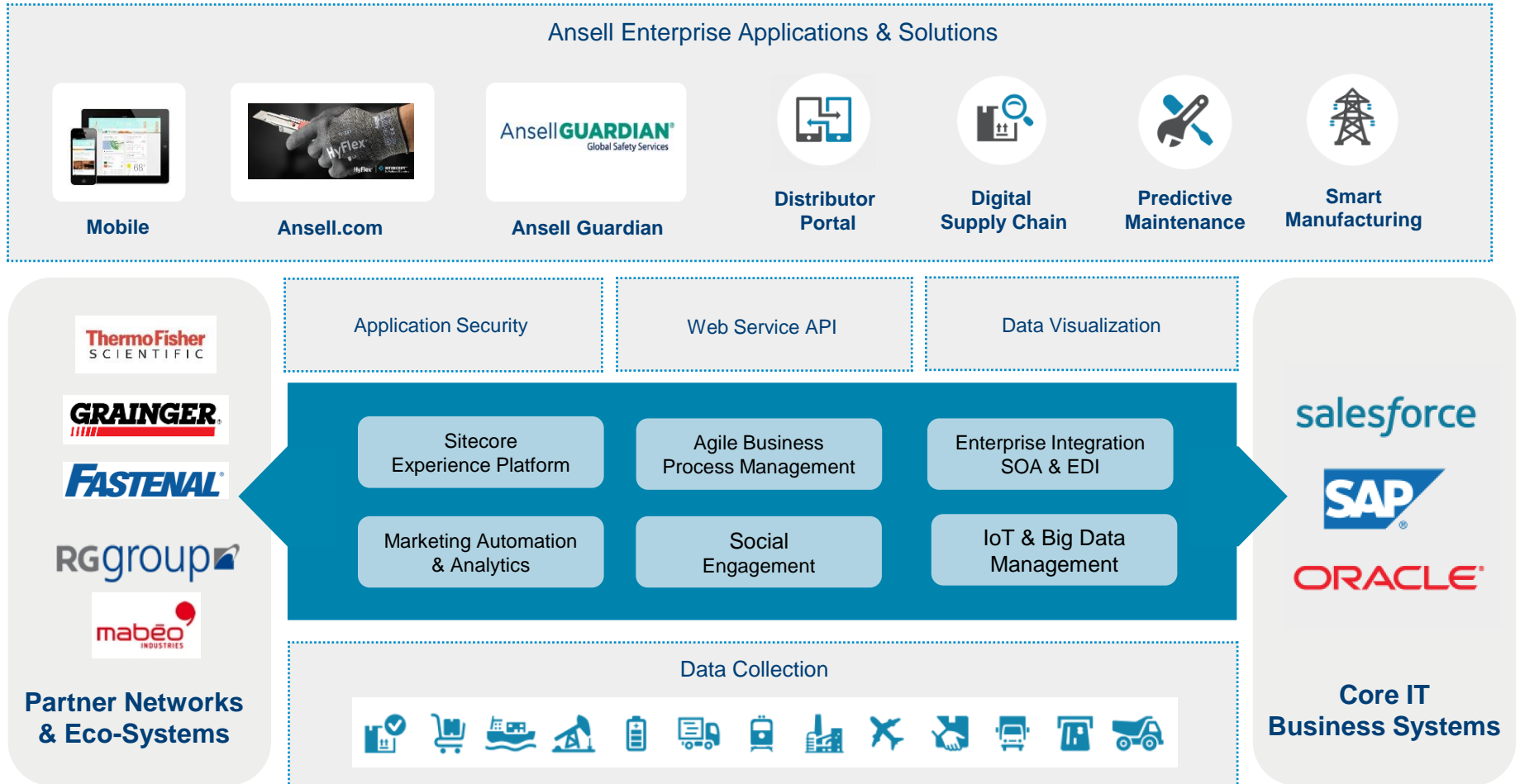


Cross Functional Stakeholders (Sales, Marketing, Cust. Service, etc.)

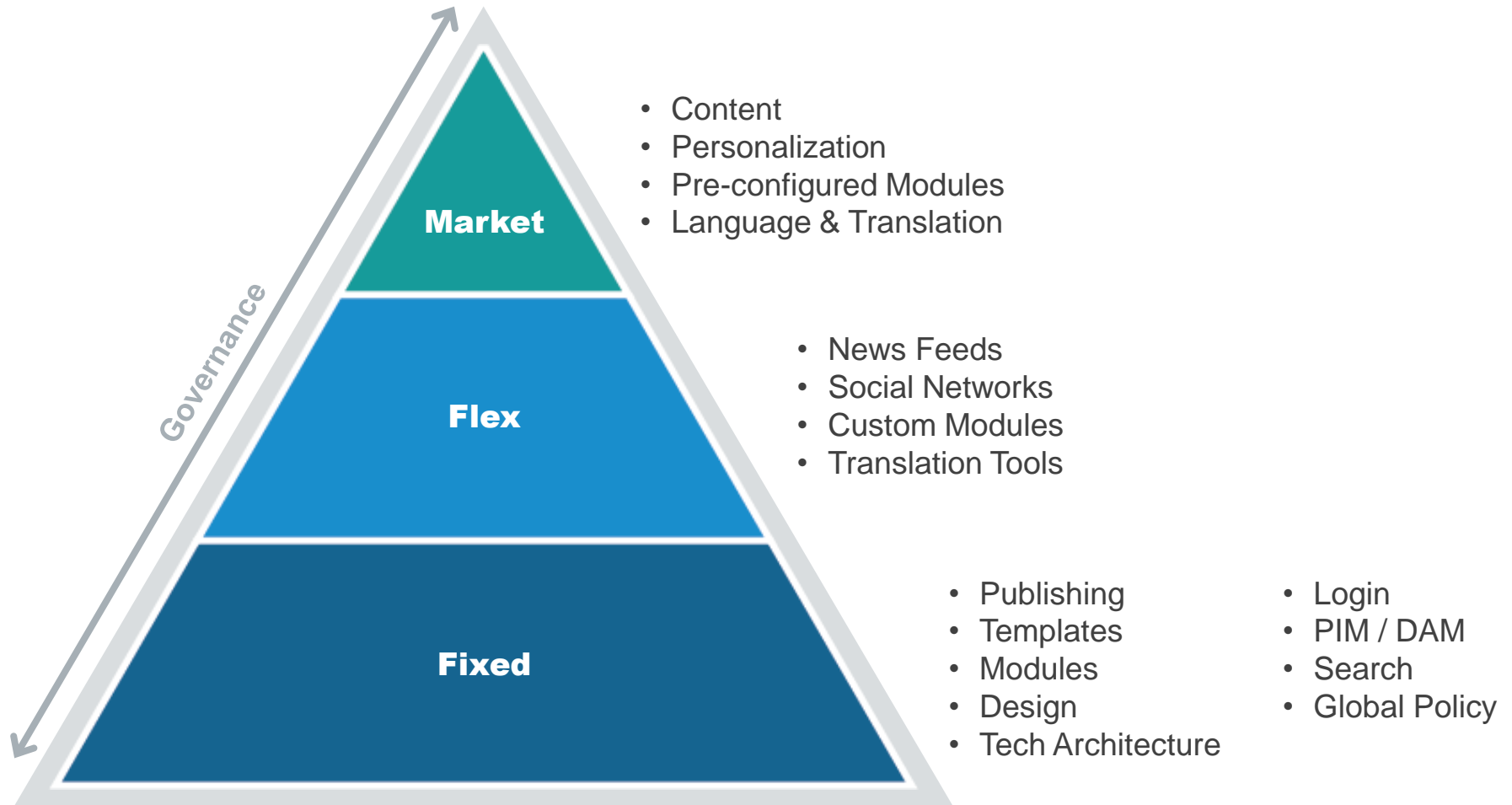
Adapted from CEB: "The New IT Operating Model for Digital", 2016

Ansell Digital Business Platform Architecture

Digital Business Platform is the technology foundation for Ansell's digital transformation journey towards a fully connected enterprise that supports better customer experience & engagement







Market Enablement – Personalized & Contextual



Near term roadmap

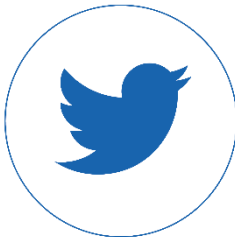
With 120 years of history, our priority is to reduce complexity by consolidating our digital business platform and content with an eye on the future...

PIM	DAM	CX	ORGANIZATION
			
GLOBAL PRODUCT CONTENT	CONSOLIDATED SINGLE VIEW OF DIGITAL ASSETS	“MICRO” JOURNEY MAPPING	ESTABLISH ORGANIZATION AND GOVERNANCE
<i>Foundation</i>	<i>Foundation</i>	<i>Innovation</i>	<i>Foundation</i>

Summary

- › Digital is disrupting the traditional B2B market
- › Embedding Embed customer experience and digital business is key to drive organic growth technologies into business technology to mitigate the risk of disruption
- › Digital leads to an integrated, customer journey-centric perspective across the entire enterprise.
- › An adaptive IT-Business engagement model is key to the success of digital transformation
- › Ansell is at its early stage of digital transformation journey, we are excited about leveraging the potential and opportunities made possible by mega trends like IoT and big data.
- › We firmly believe a fully connected enterprise will support Ansell's digital transformation towards our strategic business goals.

Join the Conversation



Ansell

