OI Global Partners' Meeting

Brussels

April, 2015

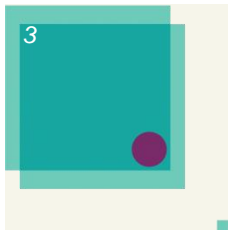*Our business today*

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Profile of our business

Service	(%) of Revenue
Outplacement	30%
Redeployment programs	48%
Coaching & assessment	8%
Change management	14%
TOTAL	100%

Profile of our business

Headcount

- 1 BD
- 3 Operations / Admin
- 1 Finance
- 60 consultants / coaches

Turnover

- € 14M FY 2014

Coverage

- France

Our clients today

Sectors

- **Banking, Insurance**: RBS, Citigroup, Barclays, UBS, Nomura, ING, Axa, Gras Savoye
- **Consulting, Law:** Bain & Co, E&Y, Freshfields
- **Communications, Media, Entertainement**: Eurosport, France TV, DDB, Universal Music, Disney, Mondadori
- **Tech-Digital-ECommerce**: Orange, Microsoft, AOL, Expedia, Amazon
- **Energy**: Total, Shell, Areva
- **Industry:** Alstom, Air Liquide
- **Retail**: Carrefour, Casino, Gal. Lafayette
- **Food**: Nestle, Coca-Cola
- **Healthcare**: Pfizer, Novartis, Roche, Amgen, Ethicon, Boston Scientific
- **Universities** - ENA
- **Government**: Defence, Army, Senate
- **International Orgs**: OECD

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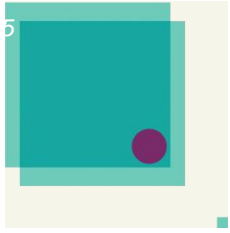
French market review

Market situation:

- The economic cycle continues to strongly favour Outplacement.
- The Digital revolution is redefining numerous sectors.
- Labour Law and Social system under scrutiny. Major changes to occur.
- Consumer and business confidence low.

Products:

- Development of Change and Talent Management services.

Clients / Candidates:

- Individual O/P and Coaching prices are holding well, pressure on large scale programs.
- Competitive shopping

Challenges / Opportunities:

- Development of new services (targeted / customized)
- Leveraging OIGP relationship
- Technology

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How do we run the business

Business model

- 90% paid Employees/10% Associates.
- Access to partnership for younger Consultants.
- Experienced senior team, juniors moving up. Generation renewal, a must.
- Strong differentiators (Training, Practice organization, Cross-activity support)

Systems

- CRM: Salesforce
- OI Solutions (candidate front end)
- OSCAR Reporting System: Salesforce
- Cloud based operations support)

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