

Progress is

change + diversification



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STARHUB INVESTOR DAY 2020

Differentiated Customer Experience

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FORWARD-LOOKING STATEMENTS



The following presentation may contain forward-looking statements by StarHub Ltd (“StarHub”) relating to financial trends for future periods.

Some of the statements in this presentation which are not historical facts are statements of future expectations with respect to the financial conditions, results of operations and businesses, and related plans and objectives. These forward-looking statements are based on StarHub’s current views, intentions, plans, expectations, assumptions and beliefs about future events and are subject to risks, uncertainties and other factors, many of which are outside StarHub’s control. Important factors that could cause actual results to differ materially from the expectations expressed or implied in the forward-looking statements include known and unknown risks and uncertainties. Because actual results could differ materially from StarHub’s current views, intentions, plans, expectations, assumptions and beliefs about the future, such forward-looking statements are not and should not be construed as a representation, forecast or projection of future performance of StarHub. It should be noted that the actual performance of StarHub may vary significantly from such statements.

PRESENTATION THEMES

- 01 **The Value of CX**
- 02 **CX Transformation & Results**
3 Year Plan
- 03 **Market Recognition**
- 04 **The Future of CX**





CX AS A DIFFERENTIATOR



Focusing On Service Quality Attributes Remain Key For Infocomm

(Infocomm Sector: Top 5 Attributes with Impact on Quality & Loyalty)

↑
Increasing
Positive
Impact

Mobile Telecom		Broadband		PayTV	
Quality	Loyalty	Quality	Loyalty	Quality	Loyalty
Provides prompt service	Provides prompt service	Has your best interest at heart	Products and services are clear and easy to understand	Makes the effort to understand your needs	Makes the effort to understand your needs
Has your best interest at heart	Makes you feel assured that your needs will be taken care of	Makes you feel assured that your needs will be taken care of	Good reputation	Provides prompt service	Provides efficient service
Makes you feel assured that your needs will be taken care of	Proactively helps you when needed	Products and services are clear and easy to understand	Makes you feel assured that your needs will be taken care of	Provides efficient service	Makes you feel assured that your needs will be taken care of
Loyalty & rewards program	Products and services are clear and easy to understand	Provides efficient service	Has your best interest at heart	Good reputation	Has your best interest at heart
Innovative and forward-looking	Makes the effort to understand your needs	Provides prompt service	Proactively helps you when needed	Loyalty & rewards program	Range of channel packages to meet my needs

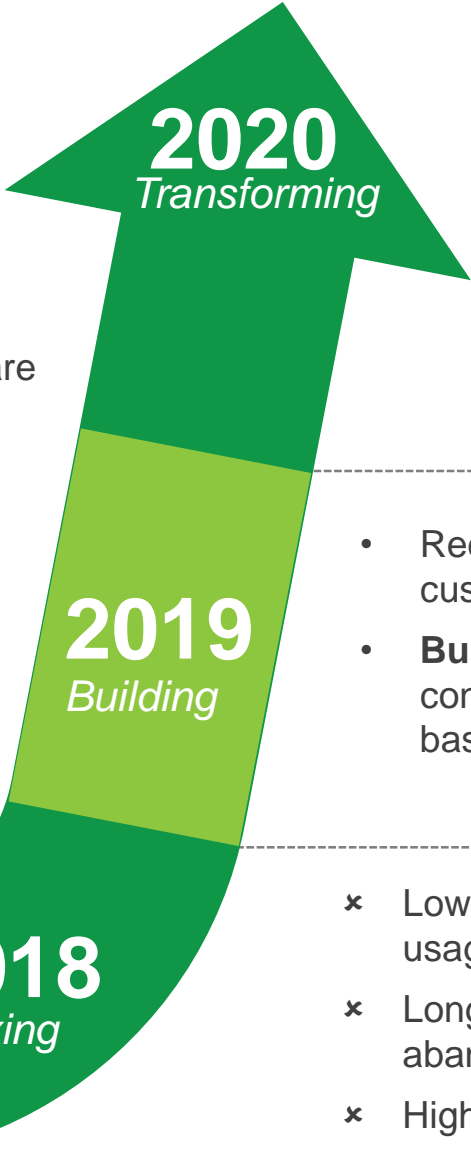
Legend: Service Quality Brand Product Loyalty Program

- Customer Experience over Product or Pricing determines which provider a consumer decides on
- Impacts perception on brand quality & reputation



KEY CONSIDERATIONS:

- Increased use of digital self care
- Improve call wait time
- Efficient service
- Faster provisioning of service and reduced missed appointment
- Personalised service for customers

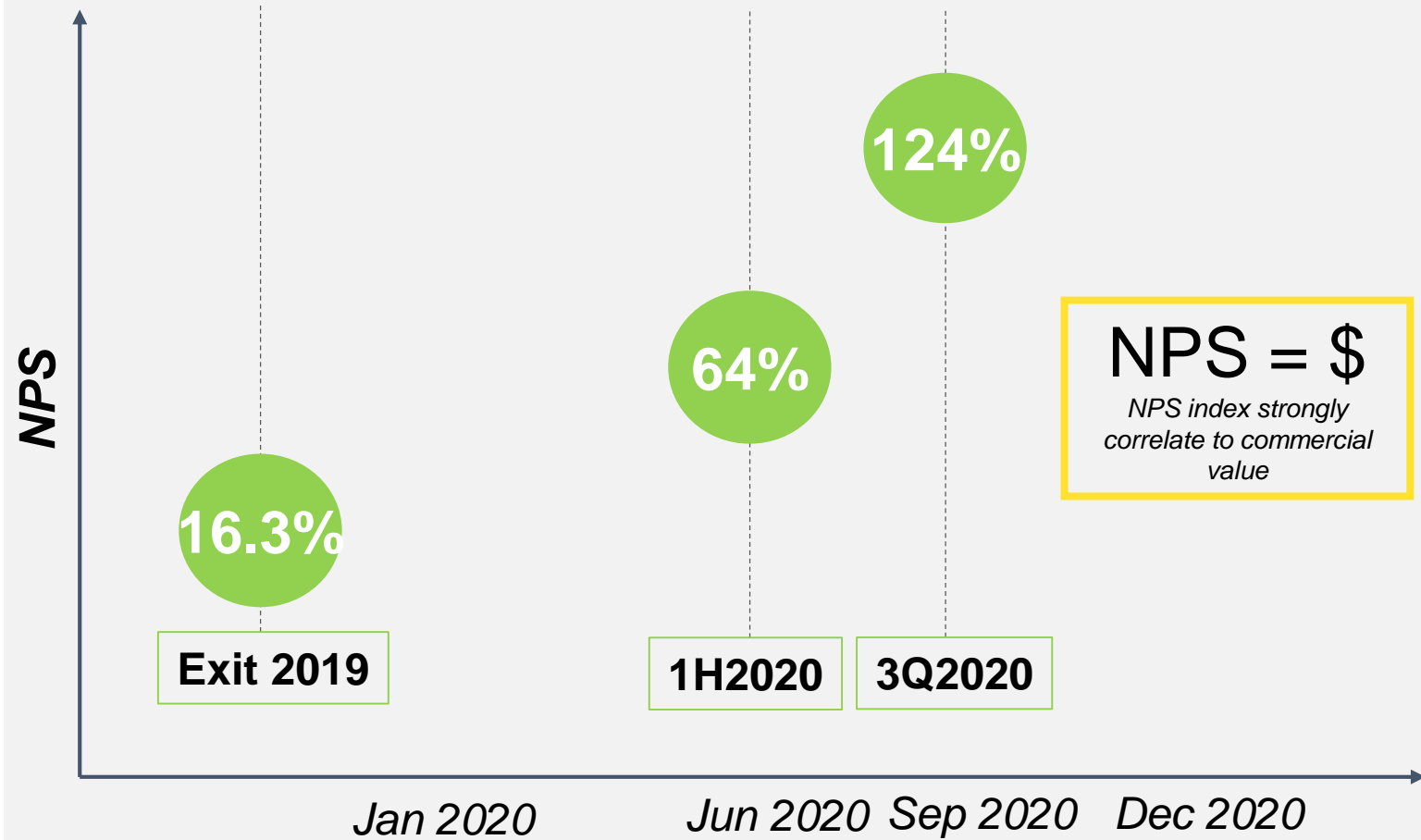


Transforming to Best in Class Experience Hub

- | | |
|---|---|
| <ul style="list-style-type: none"> • Real Time service provisioning • Digital Channels for Sales & After-Sales • High First Call Resolution (FCR) | <ul style="list-style-type: none"> • High Digital & Self-Service Adoption • Efficient Customer Service Model • Personalised service Interactive Voice Response (IVR) |
| <ul style="list-style-type: none"> • Redesign NPS to reflect customer experience • Build foundations (quality control, training, knowledge base) | <ul style="list-style-type: none"> • Commence digitalisation and automation of call centre transactions • Enhance self serve capability through Chat / virtual agent • Simplify & enhance app for customer support |
| <ul style="list-style-type: none"> ✗ Low levels of functionality & usage of digital apps ✗ Long hold time and high abandonment rate ✗ High Degree of manual work | <ul style="list-style-type: none"> ✗ Multiple truck-rolls and engineer visit for same issues ✗ Inconsistent Net Promoter Score (“NPS”) ✗ No process audit / reengineering ✗ Customer insights limited & not used |



In 2019 we exceeded our NPS targets 16.3%, and are on-track for better performance in 2020:

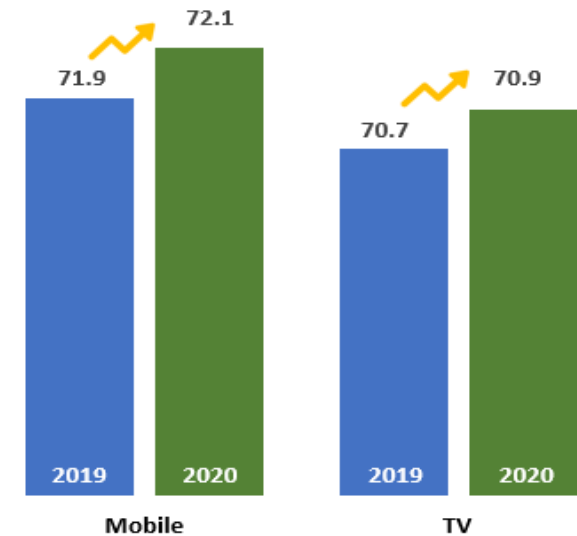


Institute of Service Excellence

CSISG 2020 Q1 Results

Topped the industry in Mobile for the first time since 2011!

- Continued to lead in Pay TV for 7th consecutive year





CX TRANSFORMATION ROADMAP

Tangible Results



As at 1H 2020, our strategic imperative to fix the basics have paid off with best-in-class operational performance:



Call Centre

Total call volume¹
reduced **38%** vs
FY2019 and **50%** vs
FY2018

~**90%** of calls
answered
within 40s

↑ **37.5%**
YoY Hotline NPS



HubTroopers

99.3% On-Time
HubTrooper YTD
Arrival Rate

~**90%** ↑
FTRR

↑ **26.6%**
YoY Technician NPS



Chatbot

~**80%** in scope accuracy rate

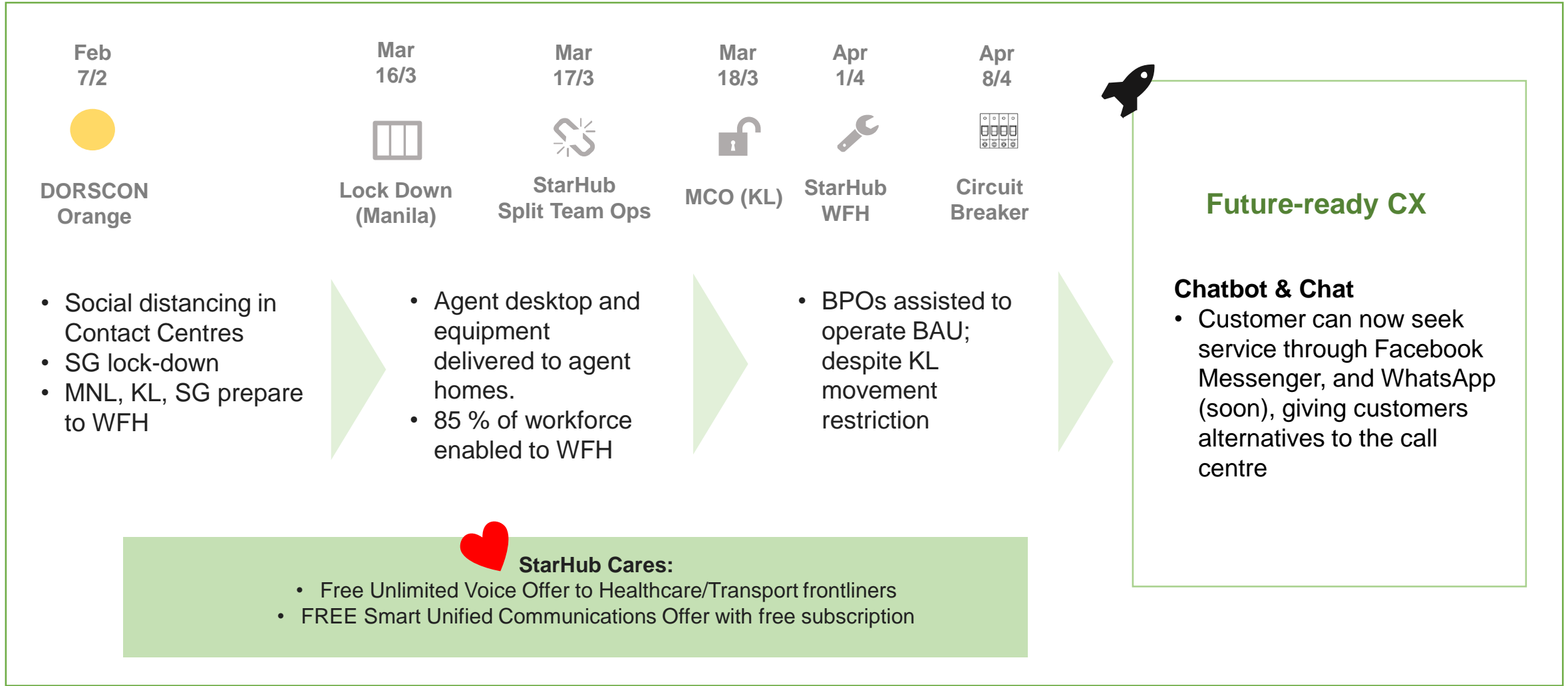
*statistics as of 1H 2020, vs. (PY) previous year of the same period

¹Forecasted 2020



COVID-19: Seamless WFH Transition

Uninterrupted Customer Excellence



 CX Wins 10 in 10 in 2020!

CSISG 2020 Results

- Tops the industry in Mobile for the first time since 2011!
- Continues to lead in TV for 7th consecutive year



2020 CCW Asia Excellence Awards – March 2020

Gold - Best Customer Service Award



2020 Stevie Awards for Sales & Customer Service – March 2020

Gold: Contact Centre of the Year (Over 100 Seats) - All Other Industries

Silver: Award for Innovation in Customer Service - Telecommunications

Silver: Customer Service Department of the Year - Telecommunications

Silver: Front-Line Customer Service Team of the Year - Technology



2020 Asia Pacific Stevie Awards – July 2020

Gold: Award for Innovation in Customer Service Management, - Telecommunications

Bronze: Award for the Innovative Use of Technology in Customer Service - Telecommunications



CX Asia Excellence Awards – Sept 2020

Silver: Best Contact Centre 2020

Bronze: Best Customer Experience Award



Our building blocks for the future are geared towards re-imagining customer experience in a **sustainable** and **digital** way:



01

STRATEGIC

Evolve NPS
Realise returns from NPS
Call Center-Free*
Zero Touch Products

02

DIGITAL

Chatbot FMO
Customer-Centric Zero-Touch Product Journey

03

OPERATIONAL EFFICIENCY

Optimise Service Channels
Re-Imagined Processes

* For mass market

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