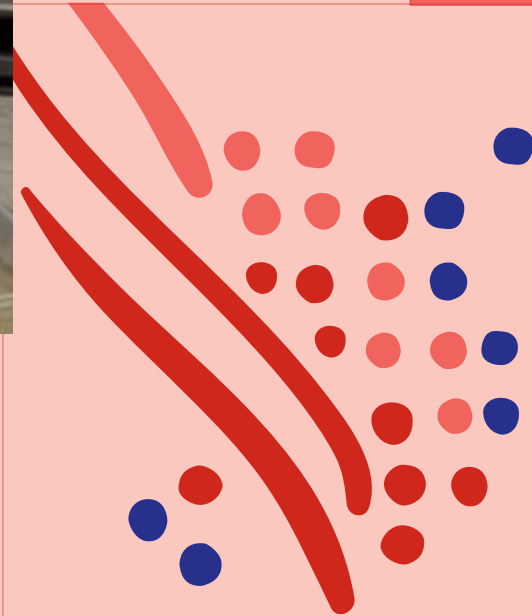


What are you #WorkingFor?



ADP
Always Designing
for People™



The Evolution of Work

Always Designing for People

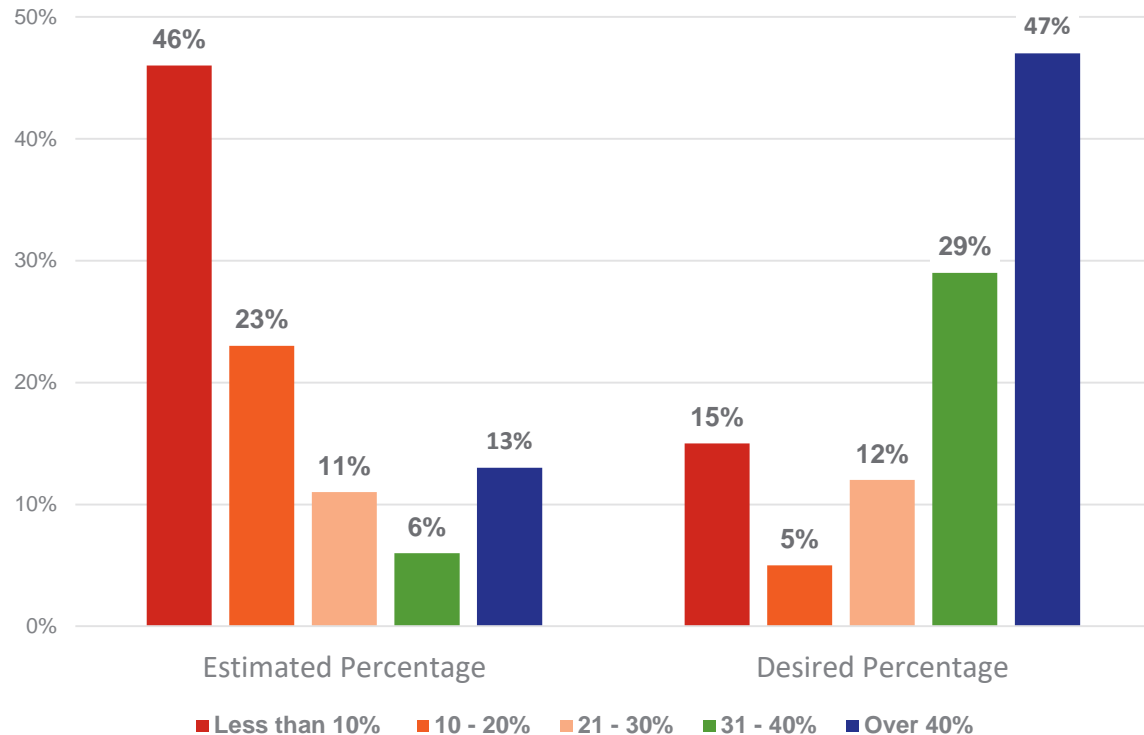
Everyone has different dreams,
different goals and different
reasons for working hard.

That's why we never stop
reimagining a better world at work.

So whatever you're #working for,
we've got multiple ways to help
you get there, faster.



Accountants were asked what percentage of firm revenue comes from advisory and consulting, and what percentage would they like to get from advisory and consulting.

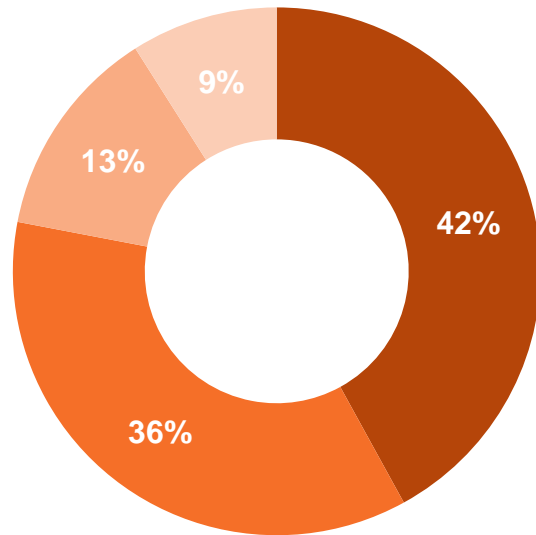


“ Our profession... will probably be unrecognizable in five years... We need to evolve as a profession ”

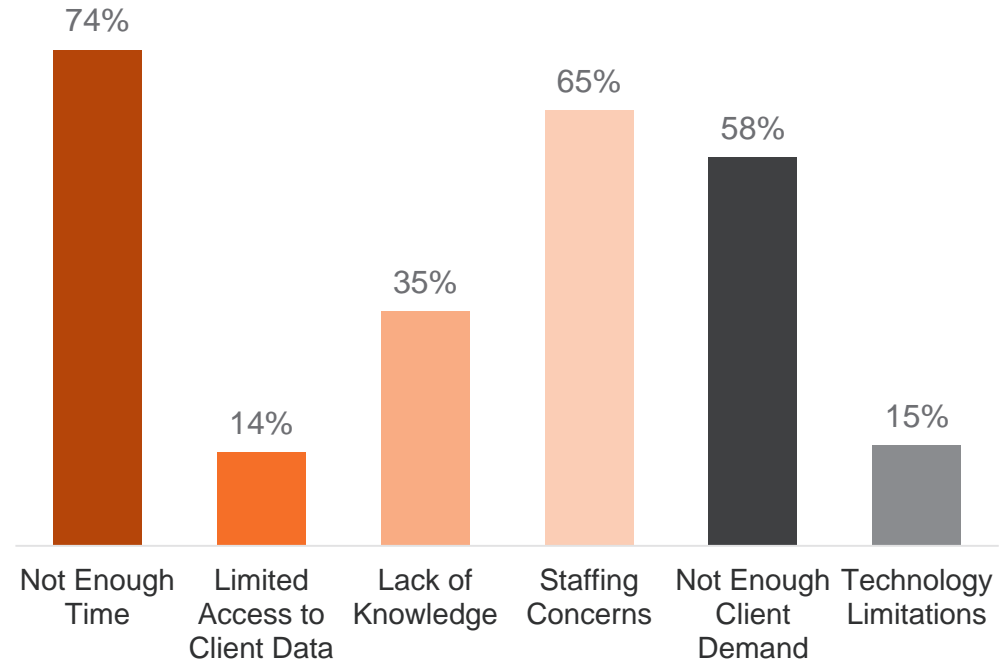
– Barry Melancon, President and CEO, AICPA

The Interest is There...But Barriers Stand in the Way

Nearly 80% of accountants acknowledge the importance of offering more consulting & advisory services to their clients...



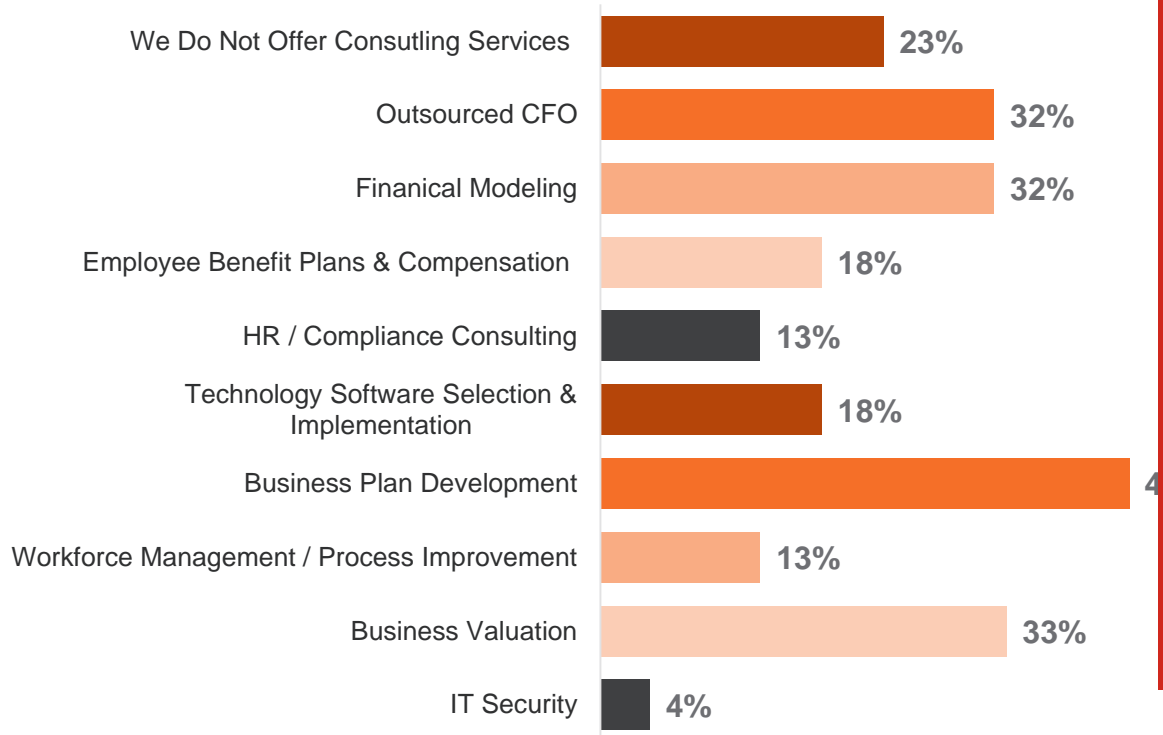
■ Extremely / Very Important ■ Somewhat Important
■ Not Very Important ■ Not Important at All



...yet the same number admit to not having enough time or knowledge to do it.

Accountants Confidence Index (ACI), Nov 2017, Accounting Today.

Opportunities Exist in Many Areas



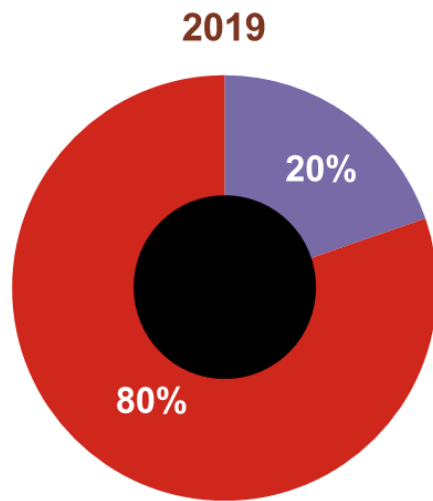
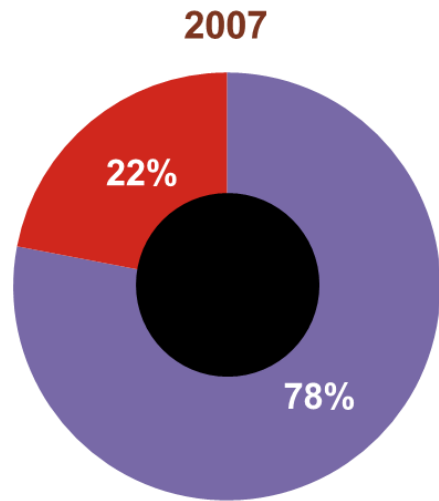
Accountants Confidence Index (ACI), Nov 2017, Accounting Today

“If your firm already handles the books for business clients, therein lies an opportunity to provide additional services, like financial planning, strategy and analysis. This progression and extension of services is a natural one. You already know the business and have built a trusting relationship with the client, so who better to help plan and implement initiatives designed to reduce costs and increase profits than you and your firm?”

CPA Practice Advisor, May 2016

ADP's Transformation

MAS CLIENT BASE TRANSFORMATION



■ Payroll ■ HCM



The Gig Economy

The Bureau of Labor Statistics reported that **55 million** people in the U.S. are “gig workers”

- That number is projected to jump to 43% by 2020


McKinsey Global Institute: Up to **162 million** people in Europe and the U.S., 20 - 30% of working-age population – will engage in some form of independent work

Digital Pay / On Demand

- **86%** of traditionally banked employees are interested in using non-traditional financial tools
- **45%** of millennials own a pre-paid card and a checking account – 50% more than Gen X
- **50%** of Lyft drivers (~50k) signed up for Express Pay within 9 Months of launch



The HCM Analytics Challenge



- **28%** say they use data analytics to inform workforce strategy, but **21%** say the usage of this data is a challenge
- **61%** said they are increasing their budget for workforce analytics in response to market trends

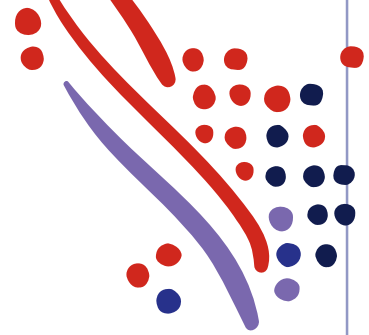
Evolution of Business: Globalization



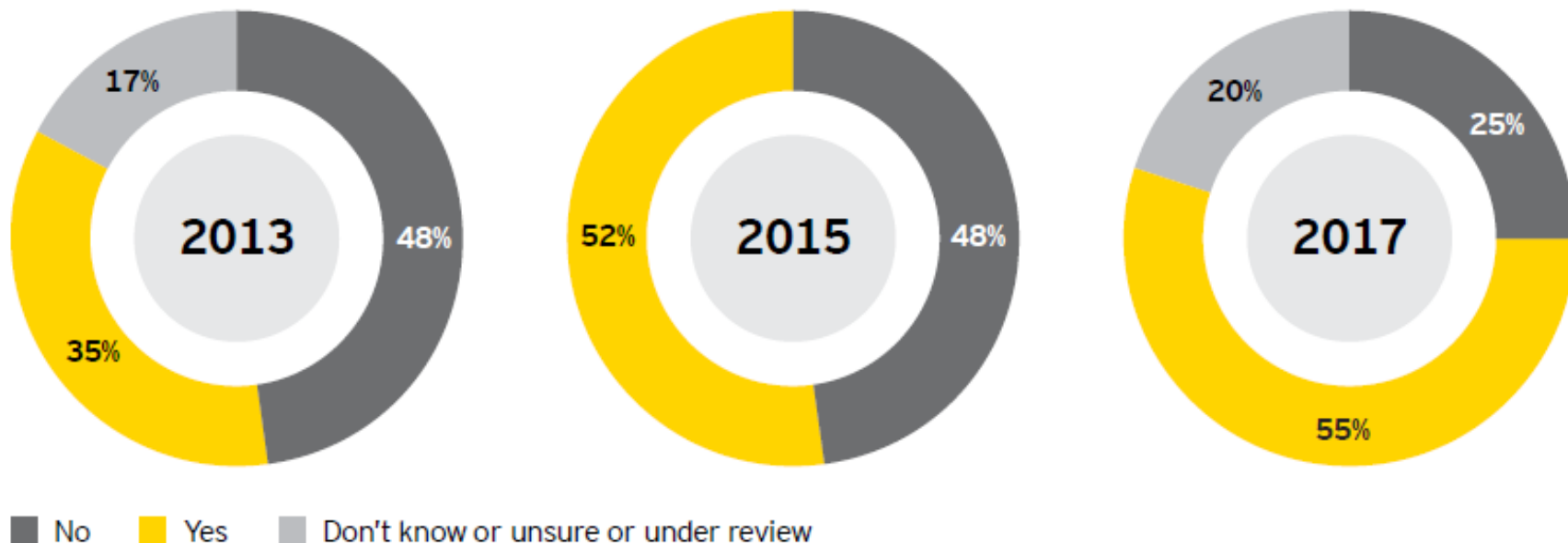
- **23%** say globalization of business is a top factor impacting the job market today
- **55%** over half (55%) of executives are planning to expand business into global markets, this is up 20% in the past 4 years

Global Payroll Growth

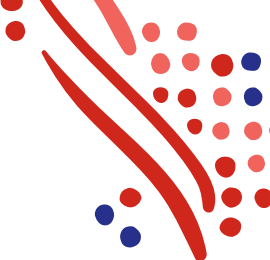
How Companies are preparing for the payroll future – EY 2017 Global Payroll Survey



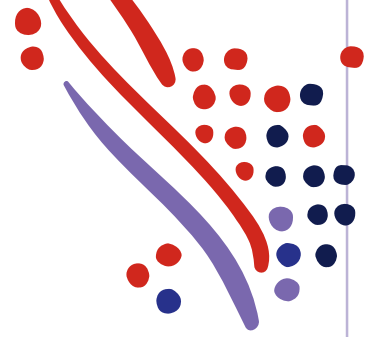
Are you planning to expand your business into new global markets?



How does your firm stay abreast of global complexities?



Recent Legislative Pressures on Global Payroll



- eSocial

- HR & Payroll data integration
- Reporting

- GDPR

- Cloud Hosting
- Cross border Data Transfer
- Employee Data Retention
- Right to be forgotten



- Brexit, Russia, China, Australia

- New Regulatory uncertainty
- Which country is next

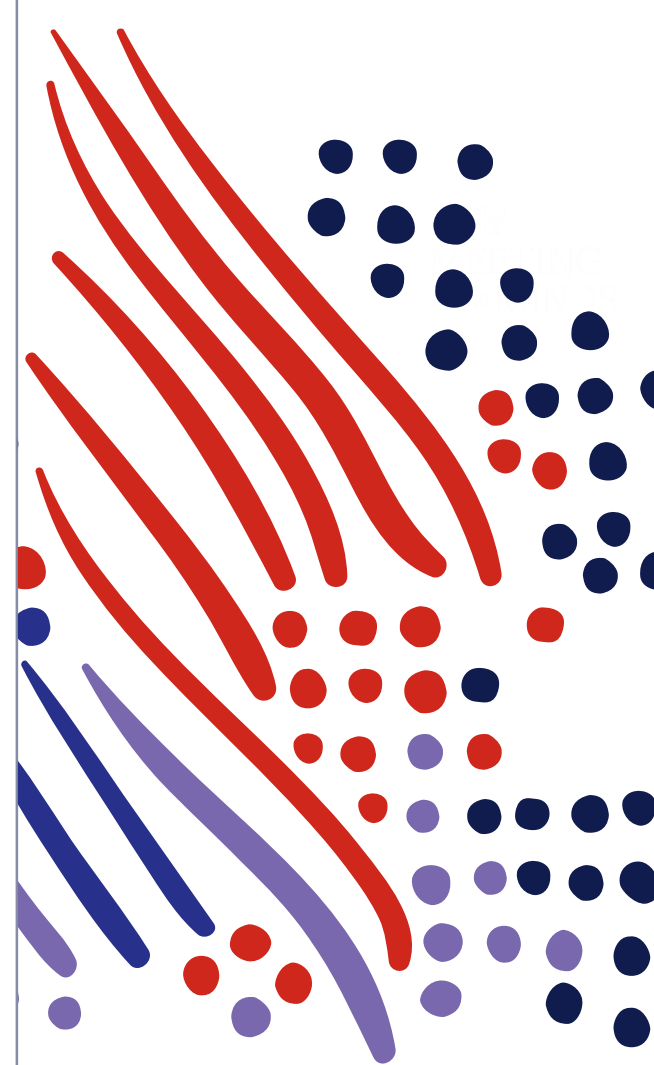
The Evolution of Tech: Trends on Open HCM/App Ecosystems



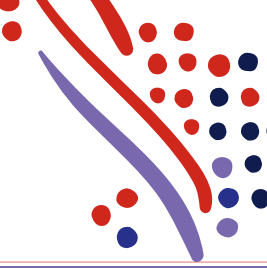
- ADP research shows that companies globally use more than **30 applications** or vendors to fulfill their HCM needs
- Two trends serve HR in the Digital Age: **Ecosystems and platforms**

- Optimize Providers
- Shift Liability
- Harmonize Technology
- Promote Data Visibility & Measurement
- Enable Automation
- Harmonize Process
- Global Governance & Service Delivery

Global Best Practices



Scoping Vendors, Relationships & Connectivity



How do you identify vendors to align with and recommend?



In researching new technologies, what criteria do you look for?



Is a cohesive ecosystem important to you?

The World is Changing at a Rapid Pace



Together we can better equip your clients so they are future ready



EVOLUTION OF WORK

- Growth of gig economy
- Emergence of Agile orgs

Empowers agile organizations



EVOLUTION OF PAY

- Empowering financial wellness through pay

Delivers person centric pay



EVOLUTION OF HR

- Becoming more analytical
- Talent and engagement focus

World's richest and most accurate dataset



EVOLUTION OF BUSINESS

- Globalization of workforce
- Tightening labor markets
- Growing regulatory pressures

Powered by global core capabilities

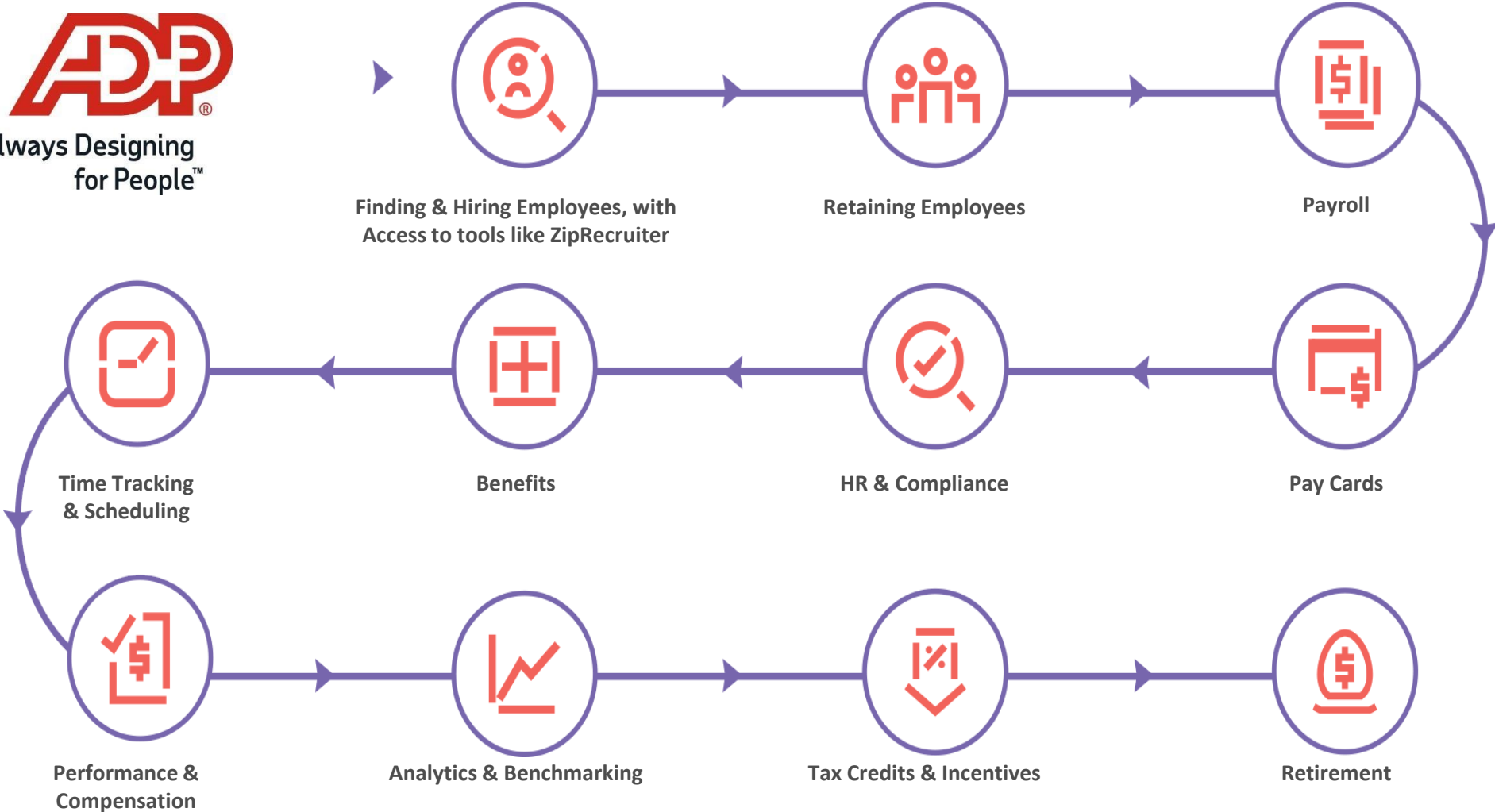
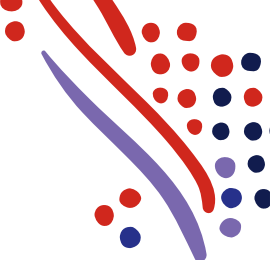


EVOLUTION OF TECH

- HCM tech transforming into platforms and app ecosystems
- Growth of AI in enterprises

Enables an open ecosystem

You do more than accounting – We do more than Payroll



Americas

Anguilla
 Antigua & Barbuda
 Argentina
 Aruba
 Bahamas
 Bermuda
 Bolivia
 Brazil
 British Virgin Islands
 Canada
 Cayman Islands
 Chile
 Colombia
 Costa Rica
 Curacao
 Dominica
 Dominican Republic
 Ecuador
 El Salvador
 Equatorial Guinea
 Guatemala
 Honduras
 Jamaica
 Mexico
 Netherlands Antilla
 Nicaragua
 Panama
 Paraguay
 Peru
 Puerto Rico
 Saint Kitts and Nevis
 St. Maarten
 Trinidad & Tobago
 Uganda
 United States
 Uruguay
 US Virgin Islands
 Venezuela
 Zimbabwe

Asia Pacific

Australia
 Bangladesh
 Cambodia
 China
 Fiji Islands
 Guam
 Hong Kong
 India
 Indonesia
 Japan
 Macao
 Malaysia
 Maldives
 Myanmar
 New Zealand
 Pakistan
 Papua New Guinea
 Philippines
 Samoa
 Singapore
 South Korea
 Sri Lanka
 Taiwan
 Thailand
 Tonga
 Vietnam

EMEA

Afghanistan
 Albania
 Algeria
 Angola
 Armenia
 Austria
 Azerbaijan
 Bahrain
 Belarus
 Belgium
 Bosnia and Herzegovina
 Botswana
 Brunei
 Bulgaria
 Cameroon
 Croatia
 Cyprus
 Czech Republic
 Denmark
 Egypt
 Estonia
 Ethiopia
 Finland
 France
 Georgia
 Germany

Ghana

Greece
 Guernsey
 Hungary
 Ireland
 Isle of Man
 Israel
 Italy
 Jersey
 Jordan
 Kazakhstan
 Kenya
 Kuwait
 Latvia
 Lebanon
 Liechtenstein
 Lithuania

Luxembourg

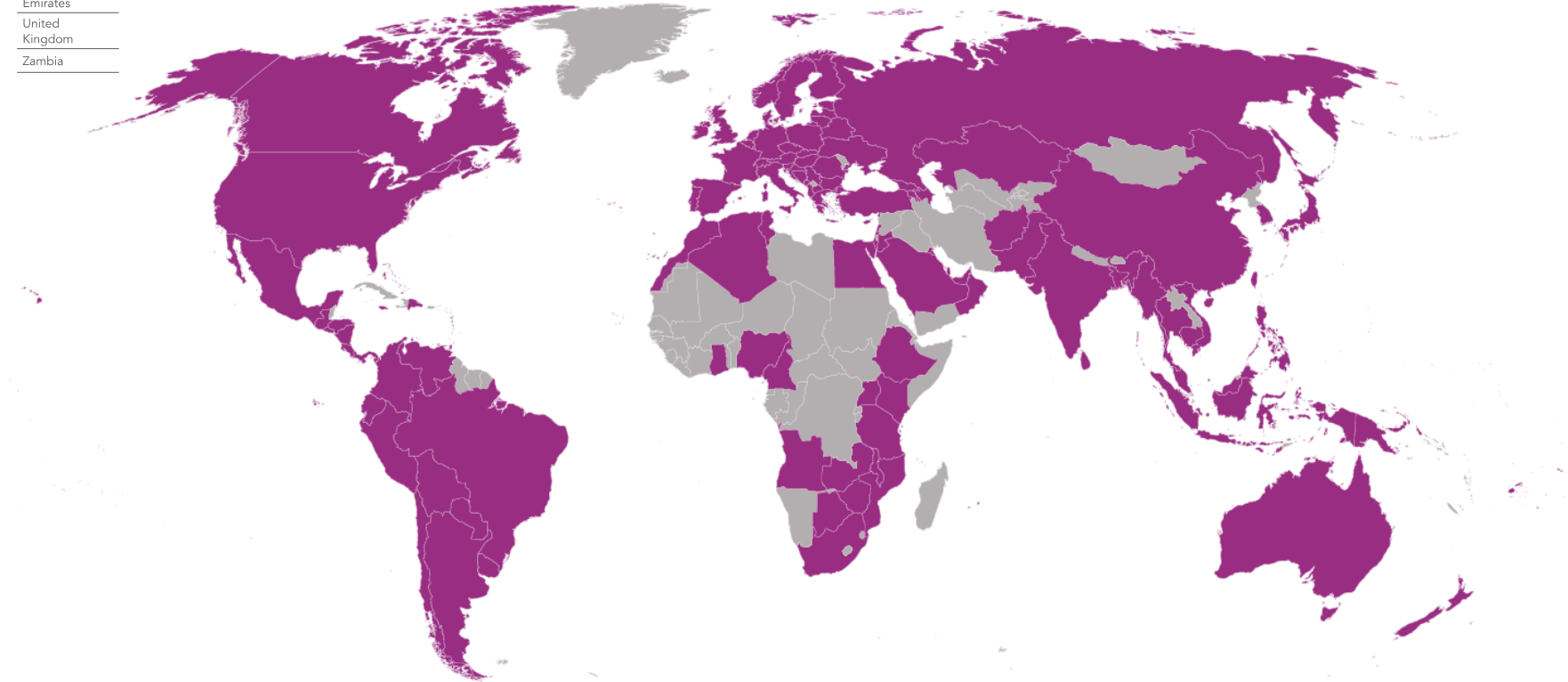
Macedonia
 Malawi
 Malta
 Mauritius
 Monaco
 Montenegro
 Morocco
 Mozambique
 Netherlands
 Nigeria
 Norway
 Oman
 Poland
 Portugal
 Qatar
 Romania

Russia

Saudi Arabia
 Serbia
 Slovakia
 Slovenia
 South Africa
 Spain
 Sweden
 Switzerland
 Tanzania
 Tunisia
 Turkey
 Ukraine
 United Arab Emirates
 United Kingdom
 Zambia

ADP Global Payroll services are available in 140+ countries and territories

39 America
 26 Asia Pacific
 76 EMEA

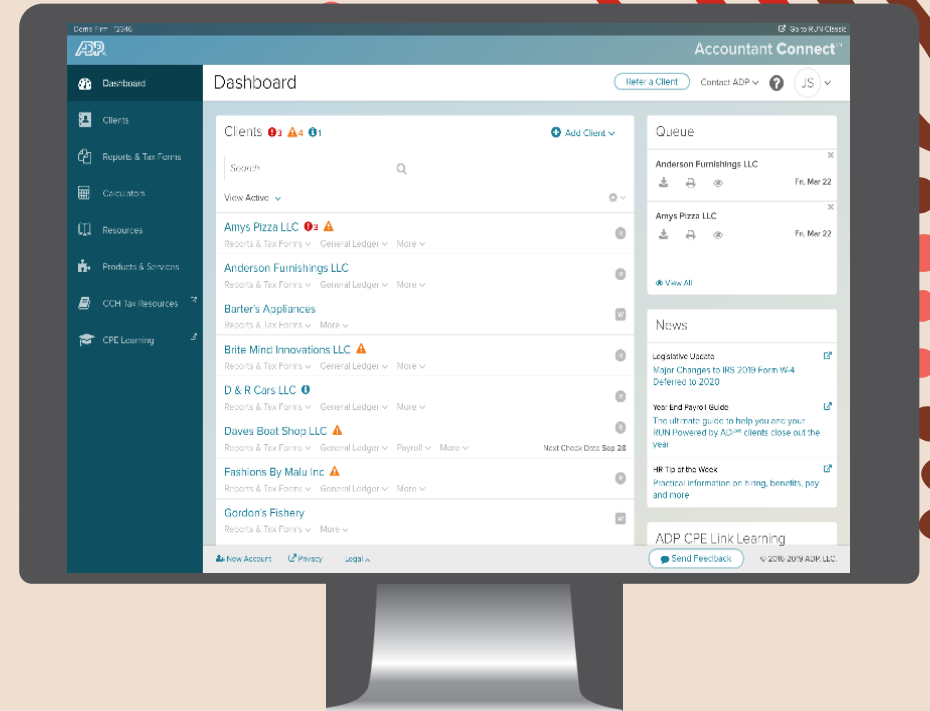


Accountant ConnectSM

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What are you #WorkingFor?

ADP can help you get there.



accountingTODAY

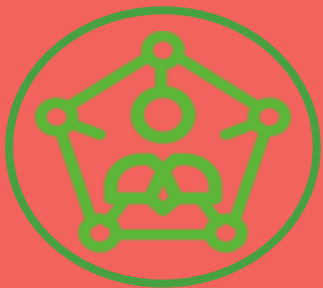




Brilliant Data



Talent Focused on the Future



Humanity Behind the Technology



A more human resource.®