



**WELLS FARGO  
2020 VIRTUAL  
INDUSTRIALS  
CONFERENCE**

**NEIL M. ASHE  
PRESIDENT & CEO**

MAY 5, 2020

(NYSE: AYI)



# MARKET-LEADING INDUSTRIAL TECHNOLOGY COMPANY

## MARKET LEADING POSITION

Consisting of building management systems, controls, lighting and location-aware applications that enable intelligent spaces and drive performance

## STRONG FINANCIAL FOOTING

Strong balance sheet and historical ability to generate cash for use to grow our current businesses and to enter attractive new verticals

## TALENTED ASSOCIATES

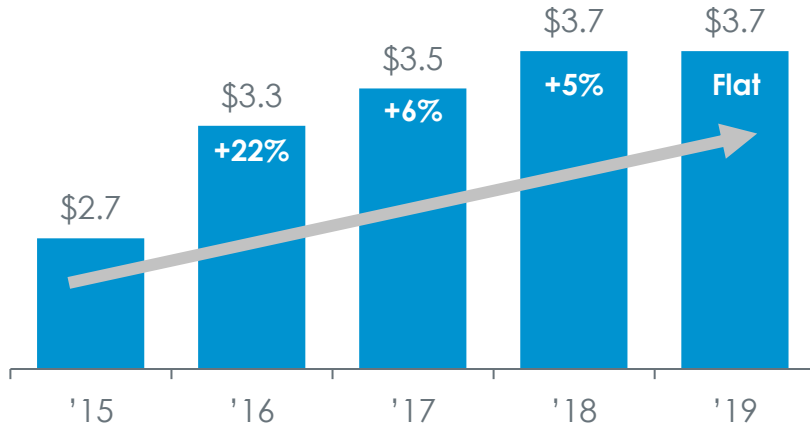
The Company is powered by over 12,000 dedicated and talented associates with operations across North America and in Europe and Asia



# AT A GLANCE

## NET SALES

\$Billions, Fiscal Year



## Business Mix

98%

North  
America

~50%

New  
Construction

~50%

Renovation

~85%

Non-  
Residential

~15%

Residential

## OPERATIONS

22

Manufacturing  
Facilities

~12,000

Associates

## COMPETITIVE STRENGTHS

### PORTFOLIO

Most Extensive lighting and controls portfolio

- Indoor, Outdoor

### MARKET ACCESS

Sales Channel Leadership

- 14 Lighting Channels Served
- #1 Sales Force in Key Markets
- 6 BMS Channels Served

### SUPPLY CHAIN & SERVICE

- Operational Excellence using “Lean” Business Systems
- Superior Customer Service
- Rapid Product Development

### TECHNOLOGY

- **nLight** Platform – Industry Leader
- **Distech** Building Automation Solutions
- **Atrius** Location Aware Applications

# DIGITAL TRANSFORMATION

## TRANSFORMATIVE CUSTOMER EXPERIENCES

- New and expanded expectations

## BUSINESS MODEL TRANSFORMATIONS

- Value chain and adaptation of business models

## USING TECHNOLOGY TO IMPROVE BUSINESS OPERATIONS

- Use of data to simplify and accelerate the business

## RUN LIKE A DIGITAL COMPANY

- Capitalize on tools and methods to be faster and more effective



**THANK YOU!**

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