



LiveHire

Empowering the flow of
the world's talent

LiveHire (ASX:LVH)
FY21 H1 Results Presentation

livehire

Agenda

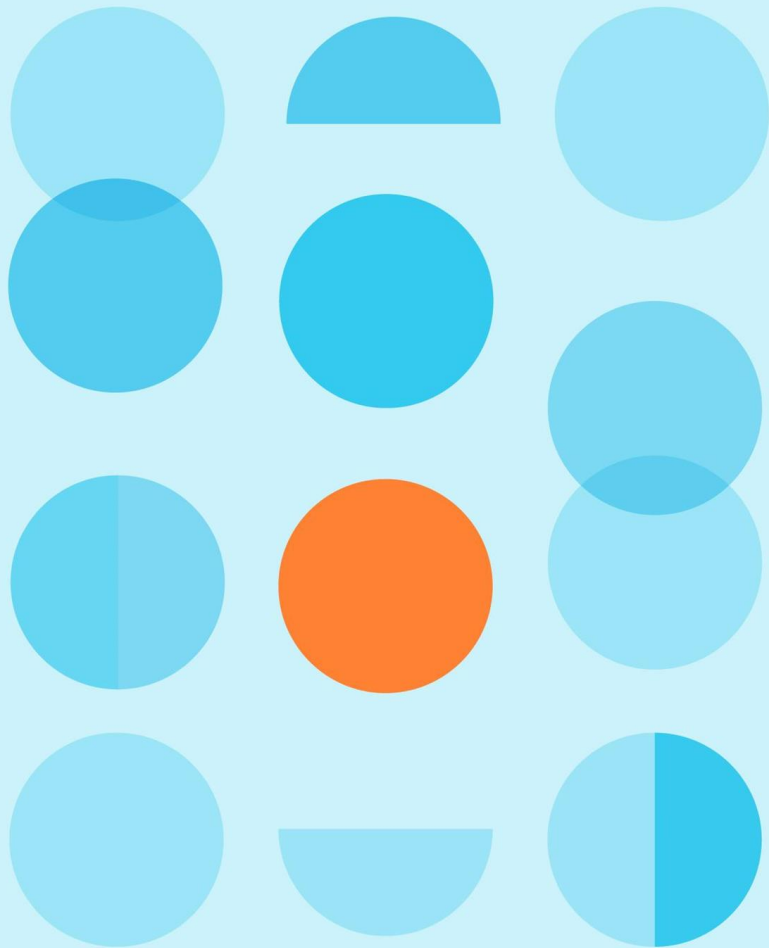
1. High Level Overview

2. Business Update

3. Financials

4. Strategy

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1. High Level Overview

LiveHire has had a strong H1 21, gaining momentum across all key metrics

Key Performance Metrics:

SaaS Performance:	H1 19	H1 20	H1 21	YOY % Var
Closing Clients (Logos)	64	99	120	21%
Closing ARR Revenue (\$m)	\$2.048	\$3.013	\$3.917	30%
Recurring revenue % of Total SaaS	71%	83%	90%	7%

Direct Sourcing Performance:	H1 19	H1 20	H1 21	YOY % Var
Closing Partners	0	0	11	100%
Closing Clients (Logos)	0	0	8	100%
Revenue (\$m)	\$0.000	\$0.000	\$0.304	100%

Financial Performance:	H1 19	H1 20	H1 21	YOY % Var
Total Revenue (\$m)	\$1.230	\$1.624	\$2.293	41%
EBITDA Statutory (\$m)	(\$5.704)	(\$8.473)	(\$3.771)	55%
Cash Burn (\$m)	(\$5.536)	(\$7.132)	(\$3.609)	49%
Closing Cash (\$m)	\$25.056	\$26.882	\$17.372	(35)%

SaaS business continues to perform strongly across key drivers:

- ✓ Recurring revenue up 30% on PCP
- ✓ 90% of total revenue is recurring (up 8% on PCP), this has been supported with a focus on multi year ARR (\$) sales which were 95% for the period (up from 37% in the PCP)
- ✓ NRR rate % (12mth rolling) for the period is 82% on the path to industry standard; net upsell for the period continues to be strong up, \$150k+ on PCP

Direct Sourcing client and revenue in line with expectations:

- ✓ 11 Partners at the end of the period, exceeding our goal of 8
- ✓ Partners include 7 Staffing Suppliers, 3 MSP's and 1 VMS
- ✓ Revenue uplift gained momentum at the end H1 21 and is tracking to plan

Financial indicators tracking to plan and TCC's grow strongly:

- ✓ Total revenue includes government subsidy (\$37.5k) in H1 21, and revenue from contracts with customers up 39% on PCP
- ✓ Cost minimisation initiatives continue to gain traction with cash outflows of (\$6.2m) down 36% on PCP and an improvement in EBITDA of 55% on PCP
- ✓ Total TCC's for the period of 3.2m was up 100% on PCP (1.6m)
 - ANZ TCC's for H1 21 of 2.3m, up 46% from PCP
 - North American TCC's for the H1 21 of 0.9m (37% of TCC's)

2. Business Update

Direct Sourcing: Drivers of growth

- ✓ The Board sees the North American Direct Sourcing market opportunity to be significant and LiveHire can disintermediate the ~ 20% mark-ups charged on \$US80b¹ Fortune 1000 contractor staffing spend. With a 1-2% technology fee giving \$US800m+ opportunity.
- ✓ Our path to market is primarily through partners who have a strong financial incentive to introduce our technology to their existing Fortune 1000 relationships. As at February 2021, we have 12 Partners, most of whom were signed in late H1 21. We are working closely with those partners on pipelines with a 4-6mth lead time to first clients.
- ✓ For the next half we have a dual strategy of enabling existing partners to first client wins while selectively signing new partners.
- ✓ In tandem we are building our brand in the procurement (buyer) community by working with leading influencers and online marketing.

The majority of our partners are Staffing Suppliers including...

About



Staffing supplier with a focus on Engineering, IT and Technical recruitment, contract management and payroll service.

What they say about LVH

"With LiveHire as our technology partner, we have achieved 70% of our last year's hiring targets in the first 4 months alone, with no capital expense and no increase in recruitment resources." Tim Masson, CEO at Ian Martin Group



Evaluent, a Staffing the Universe company, targets both large and mid-market companies with staffing supplier management, worker fulfilment, payrolling, independent contractor compliance and engagement, and direct sourcing.

The LiveHire platform enhances the critical service layer needed for vetting out the resource pool, and engaging candidates effectively for clients. Evaluent's strengths complement LiveHire's strengths - and our clients will benefit!" Steve Dern, Executive Vice President, Evaluent



Mindlance is a certified diversity business and has been ranked one of the fastest growing U.S. staffing firms by SIA for nine consecutive years.

"Mindlance's partnership strategy curates best in class digital platforms for our clients. Livehire's unique attributes position Mindlance to deliver a broader set of solution options to the market" Julie Brown, Division Leader, Mindlance Pay+



eTeam provides high-volume staffing, and payrolling services to structured contingent workforce programs and projects across the U.S., Canada and India.

"LiveHire's definition of what direct sourcing is far exceeds the other players in the industry Their technology speaks for itself. Their suite of solutions are holistic and have the features, functionality, and ability to deliver upon the promise of what direct sourcing should be. We're excited and proud to be partnered with LiveHire" Robert Merritt, CRO - eTeam and High5

We have won 8 clients as at H1 21 these include...

About

What we do for them

Ontario Ministry of Health

The Ontario Ministry of Health is the government health system for Canada's largest province.

The LiveHire platform is used to identify high volume hires to support contact tracing and case management.

Alberta Health

Alberta Health Services (AHS) is Alberta's largest employer with 102,000 employees.

The LiveHire platform is used to identify high volume hires to support contact tracing and case management.

Enbridge Inc.¹

This major \$US80b+ market cap energy company has 17,000 employees focused on the transportation, distribution and generation of energy in North America.

The LiveHire platform is used to create a talent cloud in North America to begin hiring for specific role types with plans to expand.

M Yachts

M Yachts delivers a portfolio of the world's best yachts and services for yacht owners and central charter agents.

The superyacht industry has an annual turnover of AU\$89 billion and employs 150,000 staff.

The LiveHire platform is used to create a talent cloud for M Yachts to hire superyacht crew staff to be deployed to end clients' superyacht operations.

Global professional services firm

Global business process outsourcer with market cap of \$US7.5b and employs 90,000+ staff.

The LiveHire platform is used to create a talent cloud for all roles in Australia and the US.

Our strategy for SaaS is healthy growth...

- ✓ Well fitted clients with high retention rates on our path to industry standard
- ✓ Multi-year contracts and recurring revenues - % of multi year new ARR continues to grow year on year (H1 21 circa 95% v H1 20 37%)
- ✓ Expand current clients through internal mobility and product enhancements
- ✓ Expand to larger clients and direct sourcing (including governments)

We introduced 19 new SaaS clients in the half, including...



KOMATSU

Komatsu is deeply committed to encouraging the employment of a diverse workforce into our organisation. Our MD champions initiatives such as the EveryONE counts strategy and advocates for greater inclusivity in our workforce to foster innovation and give our organisation a competitive advantage through diversity of thought. We're thrilled to see that LiveHire also plays a key role in this strategy – enabling Komatsu to increase our percentage of female hires by over 30% with a more proactive, candidate-centric approach to recruitment.

Anna Stratham – Recruitment Manager

Product investments underpins client retention & market leadership for growth

Recruitment Productivity for High Volume

- ✓ Pipeline Velocity Management
- ✓ Clients & Contacts Management
- ✓ Multi-Brand Segments and Messaging

Platform Scalability

- ✓ Profile Data Merging
- ✓ Improved platform speed and efficiency
- ✓ Elimination of Tech Debt

Open APIs and Data Publishing

- ✓ Jobs API, Application APIs, Webhooks
- ✓ Data Connector MVP
- ✓ New 3rd party Integrations

Why it matters?

Our clients achieved significant improvements in **recruiter team productivity**, especially in Direct Sourcing and High-Volume Hiring programs.

These efficiencies have been driven through investment in our unique product differentiators, AI Matching, collaboration and automation features.

Our focus on **Platform Scalability, Integrations and Open APIs** has expanded our market reach, giving us the ability to support a growing number of significantly sized organisations, in our major markets of Australia, New Zealand and North America.

3. Financials

Improved EBITDA margin expansion through solid revenue growth and cost focus

Profit & Loss Statement (\$m):

	H1 20	H1 21	YOY % Var
SaaS Recurring Revenue	1.345	1.756	30.6%
SaaS Non Recurring Revenue	0.279	0.195	(30.2)%
Total SaaS Revenue	1.624	1.951	20.2%
% Recurring Revenue	82.8%	90.0%	
Total Direct Sourcing Revenue	0.000	0.304	100.0%
Other Revenue	0.000	0.038	100.0%
Total Revenue	1.624	2.293	38.9%
EBITDA - Management	(7.338)	(3.737)	49.1%
Share based payments expense	(2.213)	(0.895)	59.6%
Software development capitalisation	1.078	0.929	13.8%
EBITDA - Statutory	(8.473)	(3.771)	55.5%
Interest & Other	0.167	(0.010)	105.8%
Depreciation & Amortisation	(0.755)	(0.919)	(21.8)%
Net (Loss) - Statutory	(9.060)	(4.700)	48.1%

Solid financial position to support future growth

Cash Performance (\$m):	H1 20	H1 21	YOY % Var
Closing Cash	26.882	17.372	(35.4)%
Receipts Rolling 12mths	3.987	4.427	11.0%
Cashburn	(7.132)	(3.609)	49.4%
Cash Inflows	2.488	2.595	4.3%
Cash Outflows	(9.620)	(6.204)	35.5%

Balance Sheet (\$m):	H1 20	H1 21	YOY % Var
Current Assets	27.772	18.815	(32.3)%
Non Current Assets	5.860	5.851	(0.2)%
Total Assets	33.632	24.666	(26.7)%
Current Liabilities	3.410	3.732	(9.4)%
Non Current Liabilities	0.894	0.581	35.1%
Total Liabilities	4.305	4.313	(0.2)%
Net Assets	29.327	20.352	(30.6)%
Issued Capital	61.813	62.125	(0.5)%
Reserves	11.667	12.665	(8.6)%
Accumulated Losses	(44.153)	(54.437)	(23.3)%
Total Equity	29.327	20.352	(30.6)%

Note:

Balance sheet comparative in this table is Dec-20 v Dec 19, the Appendix 4D and interim financial report submitted refers to balance sheet comparatives which is Dec-20 v Jun-20.

4. Strategy

LiveHire's Addressable Market & Current Progress

Direct Sourcing market

Contractor hiring sold to procurement / finance

Competitive value proposition

- Disintermediate the ~20% mark-ups paid on contractor hires
- Reducing mark-ups by half could save circa \$US10m pa for average Fortune 1000 company
- Plus faster, better hires

SaaS market

Permanent hiring sold to HR



Internal mobility sold to HR

By creating a pre-existing talent community clients can*:

- Reduce time to hire from 25 to 7 days
- Increase recruiter efficiency with AI from 50 to 3 candidates
- Reduce per hire cost from \$5,800 to \$2,500

(* Vodafone client example)

- Know all skills & use AI to search and move talent into internal roles
- Communicate seamlessly by SMS
- Avoid turnover through poor internal job markets

Market focus

North America

Australia & New Zealand

Estimated size of market

- \$US80b+ spend by Fortune 1000 on staffing companies
- LiveHire fee of 1-2% = \$US800m+

- 4,000 companies²
- \$100m potential tech spend
- Large, medium, small

- 400 companies³
- \$10m potential tech spend
- Large, medium

Go to market

Via partners who have a strong financial incentive to introduce to sell the solution to their clients

Direct sales force

Current Position

12 partners (as at Feb 2021)

8 clients

Examples of clients: Ontario Ministry of Health, Global Professional

Services Firm, Enbridge Inc.³

120+ clients

Examples of clients: Vodafone, University of Newcastle, BabyBunting

4 clients

Examples of clients: Large state governments

5. Appendices

Statutory Balance Sheet

Balance Sheet - Statutory (\$m):	H1 20	H1 21	YOY % Var
ASSETS			
Current Assets			
Cash & cash equivalents	26.882	17.372	(35.4)%
Trade & other receivables	0.890	1.443	62.2%
Total Current Assets	27.772	18.815	(32.3)%
Non-Current Assets			
Plant & equipment	0.423	0.276	(34.8)%
Intangible assets	4.100	4.606	12.3%
Held to Maturity Investments	0.000	0.000	0.0%
Right-of-use Assets	1.061	0.722	(31.9)%
Contract Acquisition Costs	0.122	0.166	36.7%
Other non-current financial assets	0.154	0.080	(48.2)%
Total Non-Current Assets	5.860	5.851	(0.2)%
TOTAL ASSETS	33.632	24.666	(26.7)%
LIABILITIES			
Current Liabilities			
Trade & other payables	0.932	0.643	31.0%
Provisions	0.574	0.660	(15.1)%
Deferred revenue	1.594	2.072	(30.0)%
Lease Liabilities - Current	0.311	0.357	(14.8)%
Total Current Liabilities	3.410	3.732	(9.4)%
Non-Current Liabilities			
Provisions	0.107	0.124	(15.8)%
Lease Liabilities - Non-Current	0.787	0.457	42.0%
Other non-current liabilities	0.000	0.000	0.0%
Total Non-Current Liabilities	0.894	0.581	35.1%
TOTAL LIABILITIES	4.305	4.313	(0.2)%
NET ASSETS	29.327	20.352	(30.6)%
EQUITY			
Issued capital	61.813	62.125	0.5%
Reserves	11.667	12.665	8.6%
Accumulated losses	(44.153)	(54.437)	23.3%
Total Equity	29.327	20.352	(30.6)%

1. Cash and cash equivalents

Refer to Cash Flow.

2. Held to Maturity Investments

Term Deposits in relation to and bank guarantees on property leases.

3. Right-of-use assets and Lease Liabilities

As a result of the adoption of AASB16, the company has recognised new assets and liabilities for its operating leases. The nature of expenses related to those leases has now changed because the company is recognising a depreciation charge for right-of-use assets ("ROU") and interest expense on lease liabilities. Previously, the company recognised operating lease expense on a straight-line basis over the term of the lease, and recognised assets and liabilities only to the extent that there was a timing difference between actual lease payments and the expense recognised.

Statutory Cashflow Statement

Cashflow Statement - Statutory (\$m):			
	H1 20	H1 21	YOY % Var
Cashflows from Operating Activities			
Receipts from customers	2.430	2.383	(1.9)%
Payments to suppliers and employees	(8.605)	(5.166)	(40.0)%
Interest received	0.267	0.071	(73.5)%
Interest expense	(0.078)	(0.059)	(24.1)%
Total Cash Flows from Operating Activities	(5.987)	(2.772)	(53.7)%
Cashflows from Investing Activities			
Receipt/(Payment) for other non-current financial asset	0.031	0.000	(99.1)%
Payment for intangible assets	(1.078)	(0.929)	(13.8)%
Payment for PPE	(0.018)	(0.000)	(98.3)%
Government Grants	0.000	0.038	0.0%
Total Cash Flows from Investing Activities	(1.065)	(0.892)	(16.3)%
Cashflows from Financing Activities			
Proceeds from the issue of shares	0.056	0.212	279.3%
Payment of principal portion of lease liabilities	(0.132)	(0.148)	11.6%
Total Cashflows from Financing Activities	(0.076)	0.065	(184.5)%
Net Cashflows	(7.128)	(3.599)	49.5%
Cash Balances			
Cash and cash equivalents at beginning of period	34.013	20.981	(38.3)%
Effect of exchange rate changes on cash	(0.004)	(0.010)	189.4%
Cash and cash equivalents at end of period	26.882	17.372	(35.4)%

1. Interest Expense & Payment of lease liabilities

Notional interest charge and lease repayment charges on property rental payments as required through AASB 16 adoption. LiveHire remains debt free.

2. Receipts from other non-current financial assets

Term Deposits in relation to corporate credit card facility and bank guarantees on property leases.

3. Payment for intangible assets

In the statutory cash flow statement payments for intangible assets are separately identified. However, in the Appendix 4C these costs are included as payments to suppliers and employees. The reason for this difference in treatment is due to the fact that capitalised salaries are processed bi-annually as a statutory adjustment, and are subject to detailed documentation and audit review, which does not occur on a quarterly basis.

LiveHire's Performance Metrics – Glossary

Below we explain a handful of the headline performance metrics, and inputs into key metrics, that we use every day to manage and drive LiveHire's performance.

Monthly Recurring Revenue

Monthly recurring revenue is a point in time monthly view of LiveHire's recurring revenue components. This is a combination of fixed monthly recurring revenue streams, variable monthly recurring revenue streams, and monthly recognised recurring revenue streams for upfront paying clients.

Annualised Recurring Revenue (ARR)

ARR represents contracted recurring revenue components of term subscriptions normalised to a one-year period.

Opening ARR

Opening ARR represents the ARR at the beginning of the period.

New Business ARR

New Business ARR represents the ARR derived from new clients secured in that period.

ARR Churn – Customer Losses

ARR Churn represents the value of ARR which was not renewed by clients lost in that period.

Net Revenue Retention (NRR) rate %

Calculated as $(\text{Opening ARR} + \text{upsell ARR} - \text{downsell ARR} - \text{churn / lost ARR}) / \text{Opening ARR}$. NRR is an indicator that measures how well a business can not only renew but generate additional revenue from its clients post initial sale.

ARR Churn

$\text{ARR Churn} = \text{Customer Losses} + \text{Net Upsell ARR}$

Closing ARR

Closing ARR represents the ARR at the end of the period and is calculated as:
 $\text{Closing ARR} = \text{Opening ARR} + \text{New Business ARR} + \text{Net Upsell ARR} - \text{ARR Churn Customer Losses}$.

Churn %

$\text{ARR Churn} \text{ as a percentage of Opening ARR}$.

Annualised Recurring Revenue Per Client (ARRPC)

ARRPC is calculated as: $\text{Closing ARR} / \text{number of clients}$
ARRPC is a key metric and can be grown by securing higher value clients, and by adding new products and functionality to provide more value to clients.

Client

A client is defined as being an entity from which ARR is generated at a point in time.

Talent Community Connection (TCC)

A talent community connection (TCC) represents a connection between a company and an employment candidate on the LiveHire platform. An individual candidate may join multiple talent communities resulting in multiple TCCs per candidate. TCCs include unclaimed candidate profiles created by a company or its service providers or by the candidate through a job application process. TCCs may also include claimed candidate profiles that remain on the platform available to be connected with live talent communities after being archived by their only active company connection.

LiveHire's Financial Metrics – Glossary

Below we explain a handful of the headline financial metrics that we use every day to manage and drive LiveHire's performance.

Recurring Revenue

Recurring revenue is the component of statutory reported operating revenue that relates to recurring revenue streams earned during the period being reported on. Recurring revenue streams include hosting fees, user licence fees and ongoing support and maintenance fees.

Non-Recurring Revenue

Non-recurring revenue is the component of statutory reported operating revenue that relates to one-off revenue streams earned during the period being reported on. This predominantly consists of upfront implementation and integrations fees as well as professional services fees.

Management EBITDA

EBITDA excluding Share Based Payments and R&D rebate income, and prior to the transfer of certain costs to the software development asset. It provides a normalised view that excludes significant non-cash expenses, income not considered part of core operations, and includes all salary costs (including those able to be capitalised under the applicable accounting standards).

Statutory EBITDA

EBITDA including Share Based Payments and R&D rebate income, and after the transfer of certain costs to the software development asset.

Annual Cash Burn excluding financing activities

Cash Burn excluding financing activities is calculated as operating and investing cash flows as reported in the statutory cash flow statement.

It does not include net cashflows from financing activities (e.g. capital raise).

Channel Partnerships Strategy – Glossary

LiveHire's partnerships include:

Outsourced Provider Partner

A company which provides an outsourced talent acquisition service to multiple client companies and enters into, or procures its client to enter into, a client contract with LiveHire for the purpose of using LiveHire's technology for that client. While there is no obligation on an outsourced provider partner to promote LiveHire, once an outsourced provider partner contracts the LiveHire technology into more than one client, LiveHire classifies them as a partner. The types of outsourced provider partners are:

- RPO - Recruitment Process Outsourcing Providers, managing permanent hires on behalf of organisations.
- MSP - Managed Service Providers, managing contingent (contractor) hires on behalf of organisations.

Reseller and Referral Partner

A company which contracts with LiveHire to refer and/or resell the LiveHire product into its client base. In such situations, LiveHire will pay a sales commission to the reseller/referrer partner. The types of reseller/referrer partners are:

- SI – Technology System Implementers who sell and implement enterprise management software, e.g. Human Resource Information Systems (HRIS), with which LiveHire integrates.
- Talent Acquisition Boutique Consultancies
- Recruitment Advertising Agencies

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