



Marshalls

Creating Better Spaces

WE SUPPORT





Marshalls plc
Capital Markets Event – Mells, Somerset
Thursday 6 June 2019



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Creating Better Spaces



Capital Markets Event

Tea/coffee		0945-1030
Introduction and Agenda	Martyn Coffey	1030-1045
Trading Update		
2020 Strategy		
Next 5 year Strategy		



Capital Markets Event - Agenda

1. Specification Selling	Pete Hallitt	1045-1055	1045-1215
2. NPD	Chris Harrop	1055-1105	
3. Delivery Model	Simon Bourne	1105-1115	
4. Self Help Network Review	Simon Bourne	1115-1125	
5. Digital	Jack Clarke	1125-1135	
6. Customer Centricity	Pete Hallitt	1135-1145	
7. Emerging Businesses	Tom Poole	1145-1155	
8. Edenhall	Andy Cotton	1155-1205	
9. People & Talent Development	Louise Furness	1205-1215	
Questions & Answers		1215-1245	1215-1430
Lunch		1245-1315	
Factory Tour		1315-1415	
Summary, Q&As & Departure		1415-1430	



Martyn Coffey
Chief Executive



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Marshalls 5 Year Strategy to 2020

Our Purpose

Our purpose is to create better spaces for everyone; socially, environmentally and economically.

Our Mission

Our continuing mission is to deliver sustainable growth through a brand that drives customer specification of innovative product solutions through service excellence for the built environment

World Class Hard Landscape Business

Strategic Growth Areas

Market Innovation

Market leadership in through brand and specification based on

- Market innovation
- Product innovation
- Process innovation
- Materials innovation
- Digital innovation

Operational Excellence

Market leadership in operational efficiency & effectiveness

- *Cost leadership*
- *Quality leadership*
- *Service & logistics leadership*

Water Management

Market leadership in SuDS through

Focusing on

- Collect
- Convey
- Clean hold release
- Recycled water

Street Furniture

Market leadership through

Focusing on

- Landscape protection products
- Integrated landscape furniture

Building Products

Market leadership through

Focusing on

- Walling
- Mortars & screeds
- Mineral products

International Markets

Service & product leadership in selective markets

- Northern Europe
- North America
- Middle East

Focusing on

- Natural stone
- Specialist concrete
- Street furniture

Our Values

Leadership

Excellence

Trust

Sustainability



Delivering long-term sustainable growth

- Capital allocation policy





The Marshalls 5 Year Business Strategy

Our Vision

Our vision is to Create Better Spaces and Futures for Everyone; Socially, Environmentally and Economically.

Our Mission

Our Continuing Mission is to Deliver Sustainable Growth through a Brand that Drives Customer Specification of Innovative Product Solutions for the Built Environment

Our Strategic Goal is to become the UK's Leading Manufacturer of products for the Built Environment

Strategic Priorities

Brand Preference for Product Specification

Logistics Excellence

Sustainable Materials Supply

Customer Centricity

New Product Development

Operational Excellence

Digital Transformation

Growth in the Emerging Businesses

Enabled by People & Talent Development

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A woman in a white top and light blue trousers is walking across a paved driveway. The driveway is made of interlocking paving stones in shades of grey, brown, and tan, with a yellow border. To the left, a dark blue Range Rover is parked in front of a black garage with white window frames. The house in the background is red brick with a large white-framed window. A green lawn is visible on the right side of the driveway.

Pete Hallitt
Group Trading Director
Specification Selling

Make the spec, keep the Spec!



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Specification Strategy

Make the spec, keep the spec!

Pete Hallitt



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Commercial Strategy



Strategy:

- Make the spec, keep the spec!
- Direct links with our customers' customer

How

- Strong digital presence / strategy
- Excellent literature and reference data
- In field commercial and technical support
- Strong trading policy
- Good range
- National reach

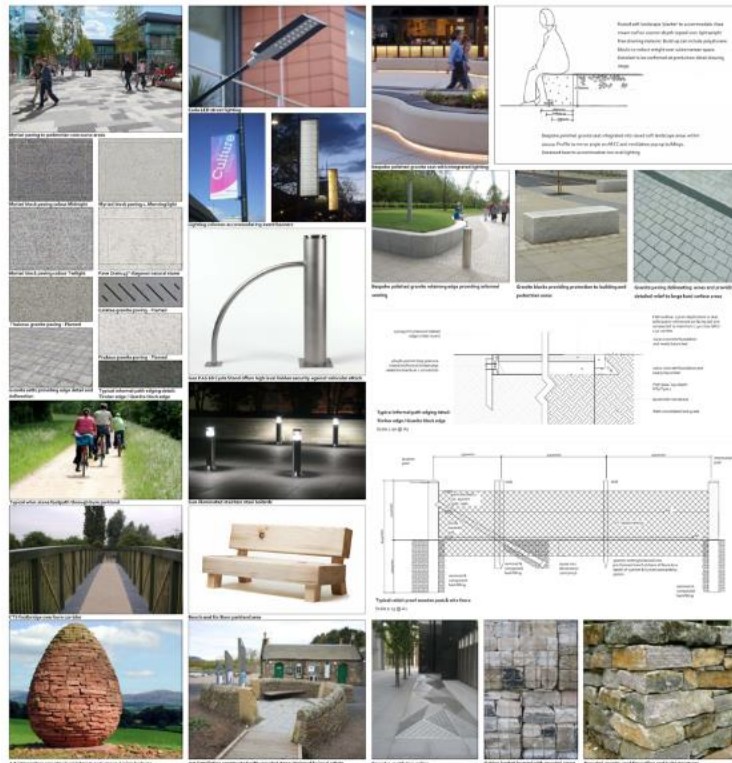
Benefits to Marshalls

- ✓ Holding, rather than chasing jobs. Last shout!
- ✓ Leading the market.

TRUST | SHARED INTELLIGENCE | COMMON GOALS | GREATER SUCCESS

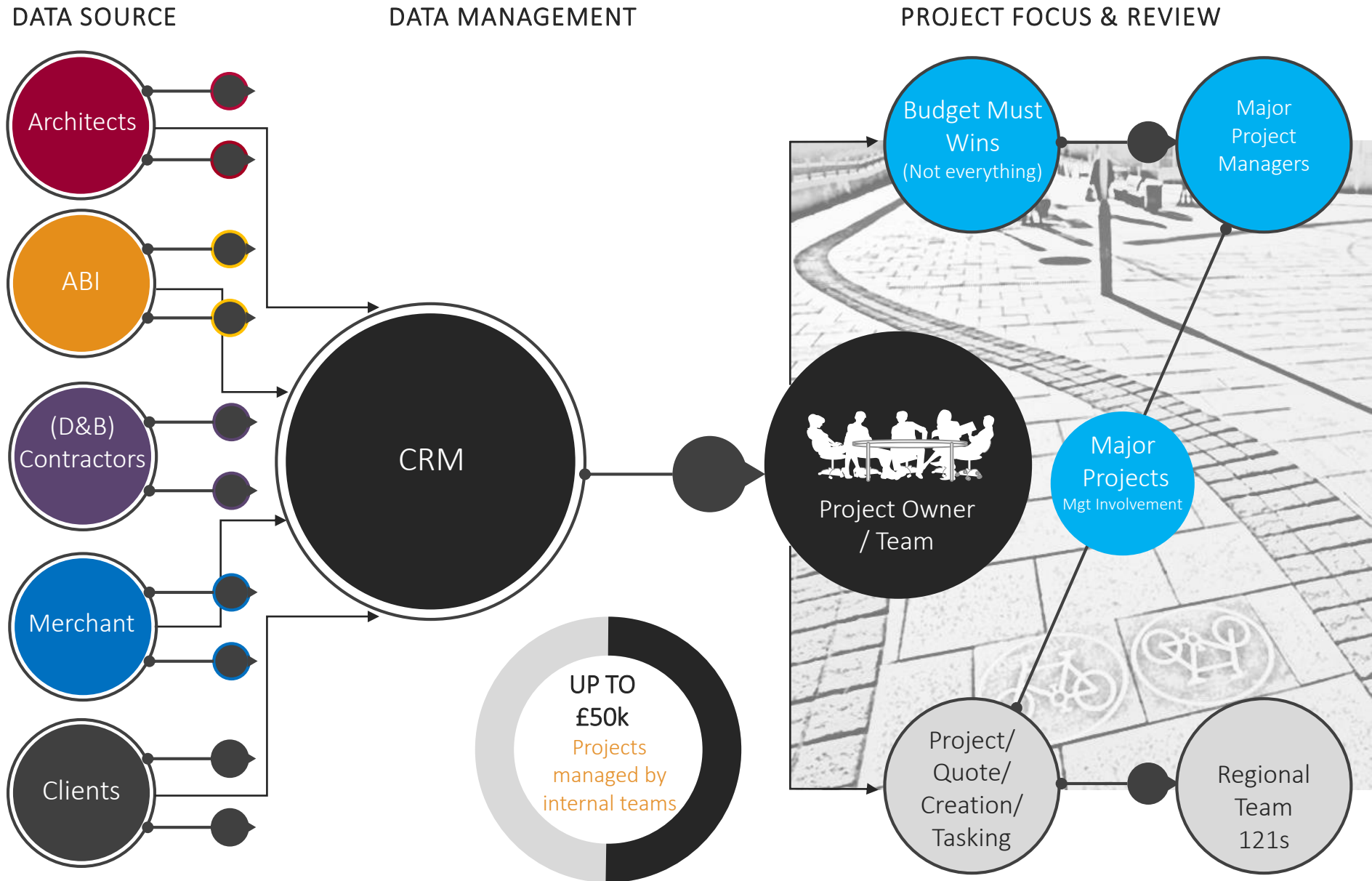
RIBA plan of works:

Two years minimum from project creation to product on site!





Pipeline Management Process





Marshalls Team

PROJECT PHASE





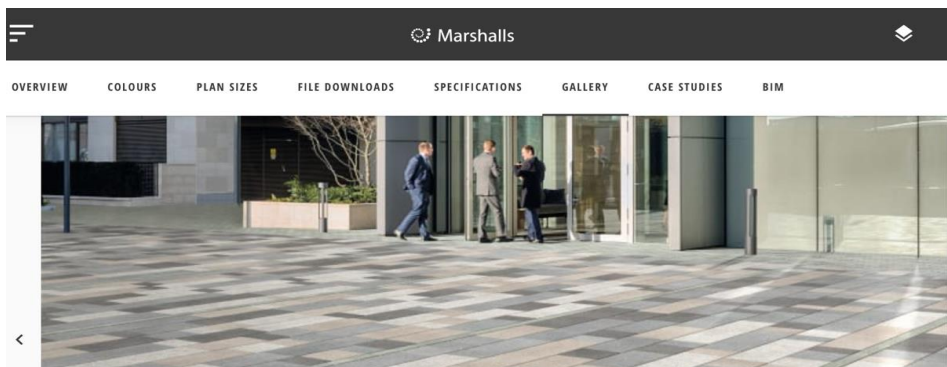
Enhancements to our Specification Offer



An updated and refreshed London Design Space to offer specifiers, designers and clients an enhanced specification experience.



A new Marshall's Design Space opening in the heart of Birmingham to support the major redevelopment of the city.



Continual development of our product ranges and systems to ensure we remain at the forefront of innovation and technology within our industry.



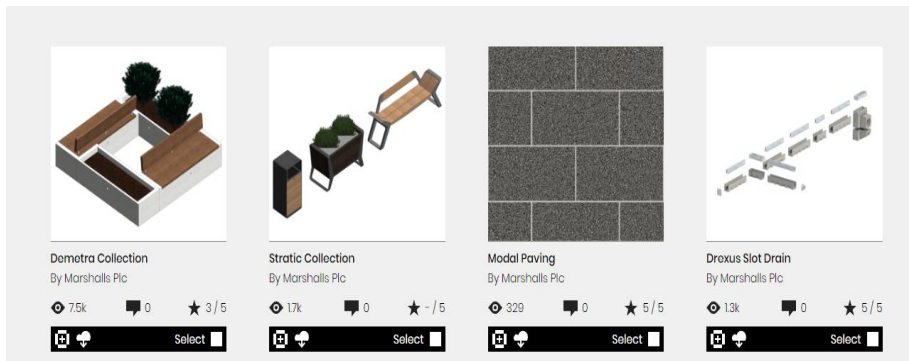
Enhancements to our Specification Offer



Development of a market leading digital and virtual reality experience to bring the designers aspirations to life with Marshalls products.



Further development of our digital web based design tools allowing designers to seamlessly work with us directly through our web portal and accessing a wealth of product and technical content.



Supporting and educating designers as the industry transitions from traditional AutoCAD design into fully capable BIM modelling.

Birmingham Big City Plan:

- **Smithfield Regen | Festival Square:** £1bn | Mixed Use & Public Realm
- **New Garden Square** £300m | Mixed Use/Public Realm | In Design
- **Paradise Circus Regen:** £250m | Mixed Use & Public Realm
- **Arena Central:** £250m | Mixed Use & Public Realm
- **Southside Square & Hill Street:** £1m | China Town Public Realm
- **Exchange Square Ph1:** £70m | Mixed Use
- **One Axis Square:** £60m | Mixed Use | SOS 2019
- **Monaco Urban Village:** £275m | Mixed Use | In Design

City-wide Infrastructure:

- **Midland Metro Extension:**
 - £200m phased 32km Metro extension now to 2023
 - Delivered through the MMJV Design & Contracting JV
 - Lines run through regen & public realm areas.
 - Marshalls currently focussing on 7 sections
- **Sprint Rapid Bus Routes:**
 - 3 of 7 planned new routes bought forward for 2022
 - Locations are along the A34 / A35 / A45

2022 Commonwealth Games:

- **Athletes Village, Perry Bar:** £350m | Mixed Use & Public Realm
- **Perry Bar Transport Interchange:** £TBC | Transport
- **Aquatics Centre:** £60m | Leisure
- **Alexander Stadium:** £TBC | Mixed Use & Public Realm
- **Other Venues:** NEC | Arena Birmingham | Symphony Hall |
University of Birmingham | Villa Park Stadium | Ericsson Indoor Arena





HS2 Birmingham

Enabling:

- **WP05 Coleshill:** £500m | Major road realignment
- **EW North Remediation Contracts:** £4m | Varied works
- **EW North Site Clearance Works:** £2m | Varied works
- **EW North Construction Works:** £3m | Varied works
- **EW North L/Itchington Tunnel Roads:** £4m | Road construction
- **EW North Earthworks:** £11m | Varied Works

Main Works:

- **Delta Junction:** £1.3bn
- **Birmingham Spur:** £ 1.3bn
- **Long Itchington Tunnel:** £TBC

Stations:

- **Curzon Street Station:** £500m
- **Curzon Street Metro Stop:** £28m
- **Interchange Station:** £500m
- **Sutton Coldfield Hub:** £49m

Public Realm:

- **Curzon Street Canalside:** £3m
- **Curzon Square & Promenade:** £3m
- **Paternoster Square:** £3m
- **Moor Street Station to Curzon Square:** £TBC





Summary

- Added value sales are very valuable to us
- We make the spec and hold the spec, early involvement is critical
- The barrier to entry for spec is high
 - Investment in facilities
 - Investment in people
 - Digital capability
- We have made excellent progress to date
- Domestic follows the same principles

} Minimum 2 year lead in!



Chris Harrop OBE
Group Marketing & Sustainability Director
New Product Development

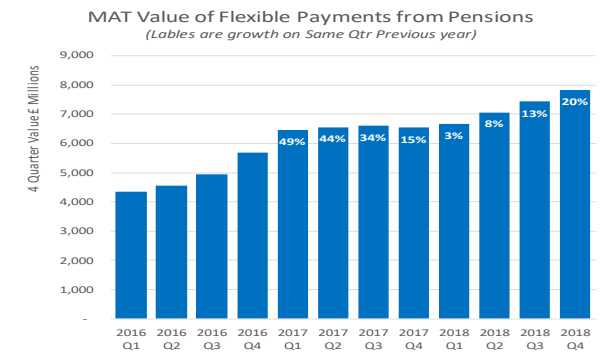
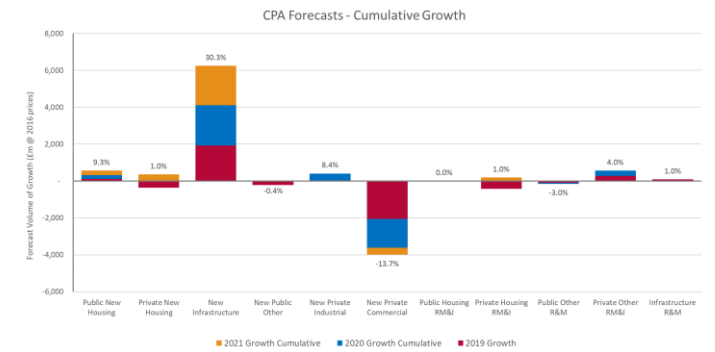
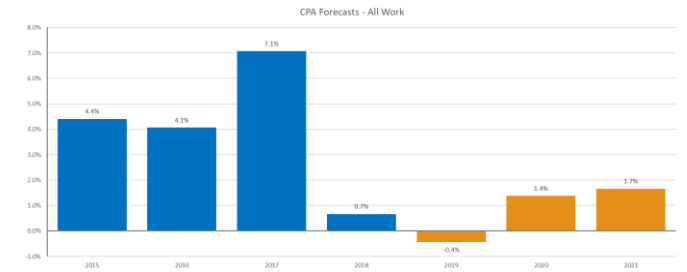


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Market Indicators & Drivers



THE CHANGING FACE OF THE SPACES WE SHARE

Discover the 12 emerging themes that will change the nature of our built environment.

WHAT PEOPLE ARE INTERESTED IN INCREASE IN INTEREST SINCE THE PROJECT BEGAN



Source: Google Trends - Average Indexed Interest over time across the highest scoring search terms | Pre FS = September 2013 - December 2015 | Post FS = January 2016 - September 2018





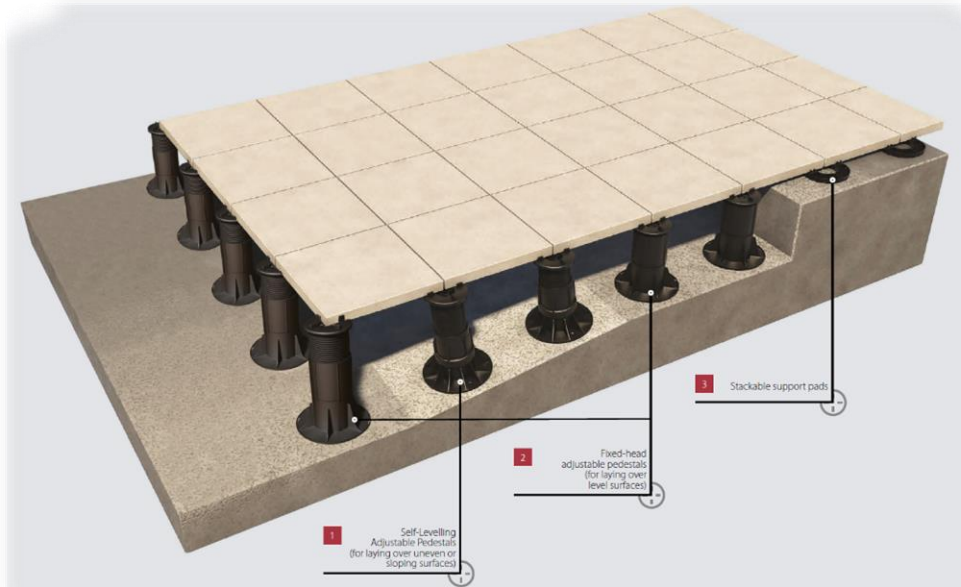
'Super Landlords': Pedestals

Our **Future Spaces** research project revealed that people are moving to cities in their droves.

Rising costs for land and lack of space means that in order to accommodate these people, developers need to build **up** instead of building **out**:

"There are currently just over 270 high rise buildings and structures in the UK. There are more than 500 currently in the UK development pipeline, and 70% of these will be residential."

- Building Specification Magazine, Apr 2018







'POPS': Modal Paving



- Available in both smooth and textured finishes
- 10 contemporary colours to choose from
- 12 plan sizes available, all in 80mm thickness
- Many are available in a permeable paving
- Suitable for both trafficked and pedestrian areas





Placemaking: Vietnamese Granite Range

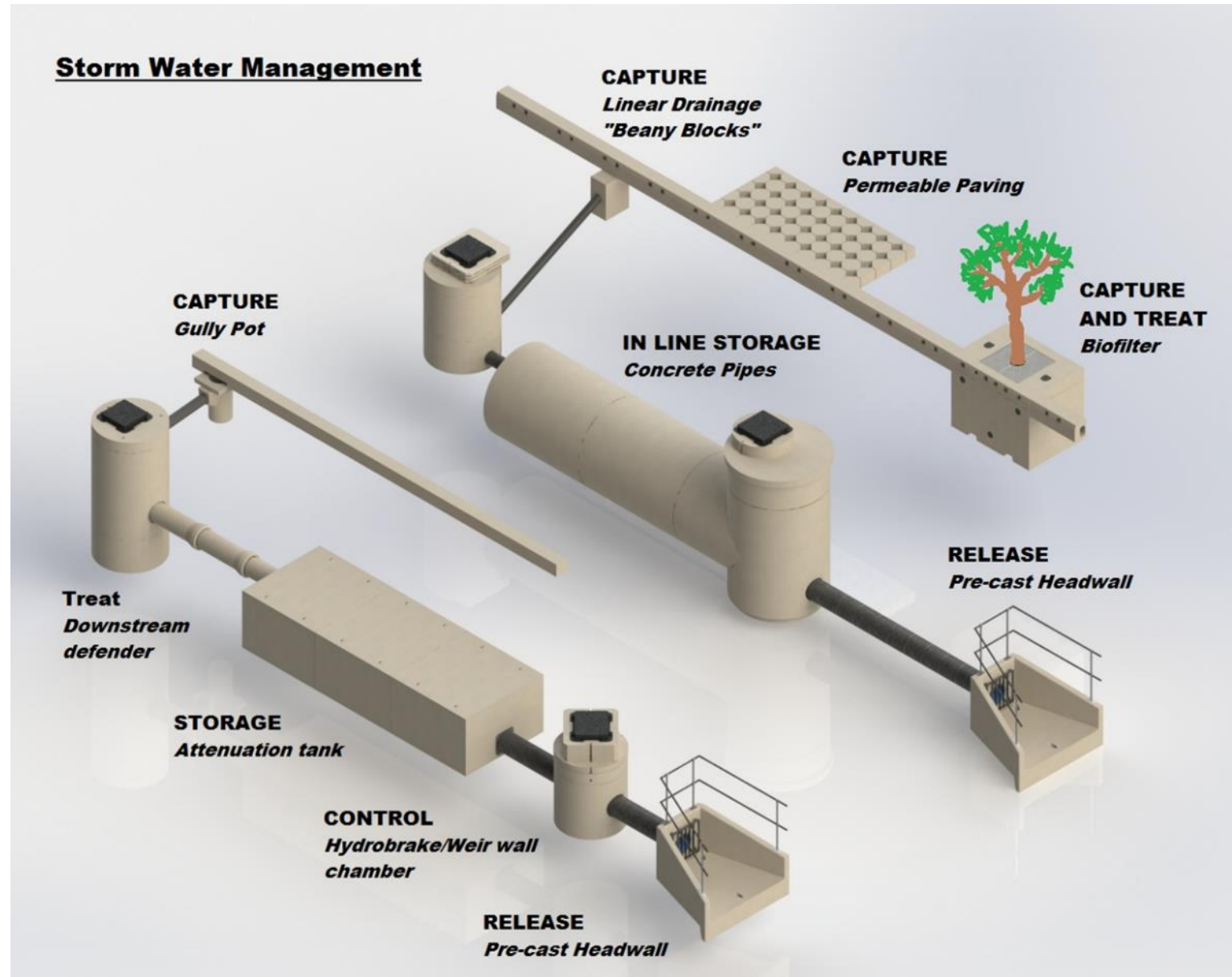
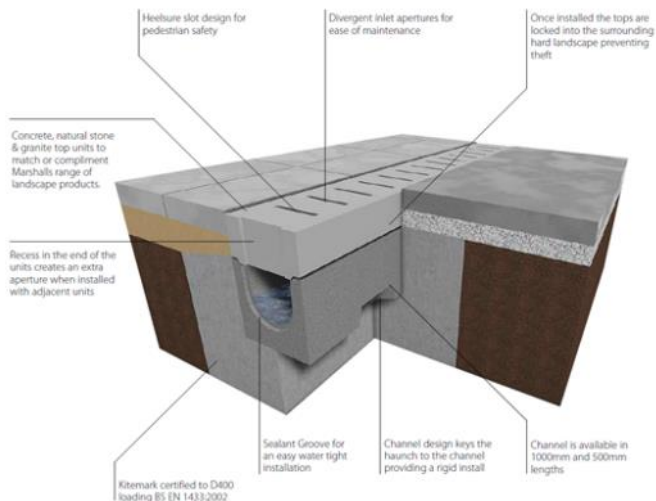
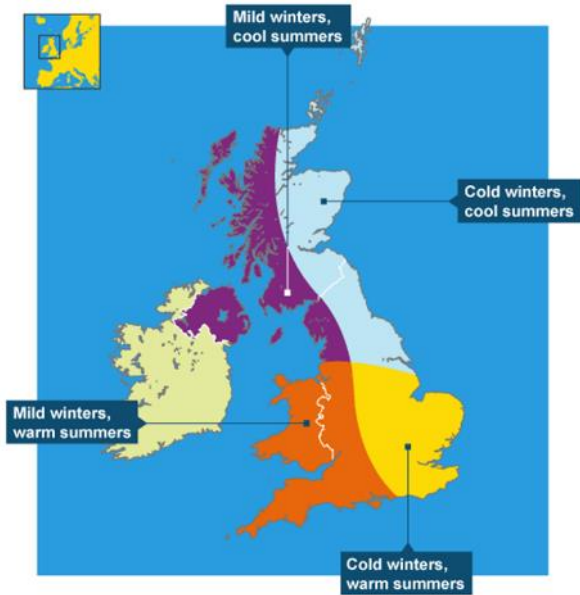


The Marshalls Ethical Risk is the next step on the journey towards full supply chain transparency in the Natural Stone sector. Using a bespoke, independently reviewed scoring framework, customers are given a genuine insight into the ethical challenges facing stone procurers to allow more informed decision making.





Water Management & Climate Change





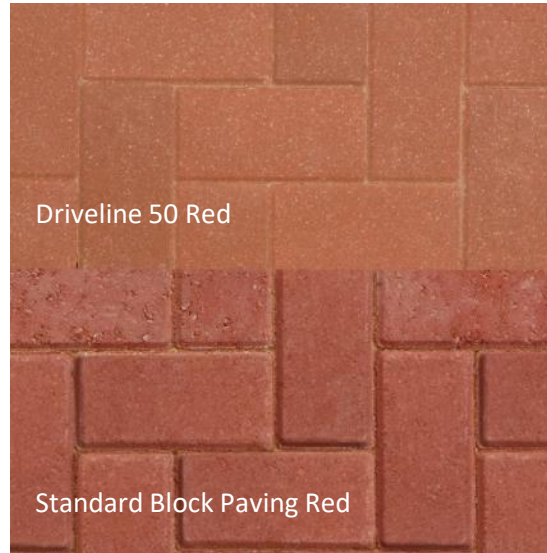


'Circular Economy': SPT

*Surface Performance
Technology*



 **Marshall's**



- **Aesthetic** – *Enhanced colour vibrancy, reduced fading and efflorescence, variety of colour blends*
- **Functionality & Performance** – *Longer lasting performance at more affordable pricing*
- **Life cost** – SPT benefits mean reduced life cost, plus extended product guarantee
- **Sustainability** – Block design means more careful use of materials and/or re-use of materials
- **Installation** – Variety of sizes, larger formats offer faster install, mixed packs for efficient install, less waste





Building in Resilience: The Super Shallow 100 Bollard







Low Maintenance: Vitrified Paving & Always Green

SYMPHONY™ CLASSIC

Vitrified Paving



- Barley (SBY)
- Buff (SB)
- Rustic (SR)
- Grey (SG)
- Dark (SD)
- Blauw (SBW)
- Blue (SBL)
- Black (SBK)

SYMPHONY™ URBAN **NEW**

Vitrified Paving



- Stone (SSN)
- Ash (SA)
- Steel (SSL)

SYMPHONY™ NATURAL

Vitrified Paving



- Seanna (SS)
- Umber (SU)
- Ecru (SE)
- Ivory (SI)
- Basalt (SBT)
- Copper (SC)
- Argento (SA) **NEW**
- Rosso (SRO) **NEW**

SYMPHONY™ PLANKS

Vitrified Paving



- Birch (SBI)
- Cherry (SCH)
- Char (SCA)
- Oak (SO)

NEW SIZE SYMPHONY™ TUMBLED

Vitrified Paving



- Gold (SGO)
- Bronze (SBR)
- Smoke (SSM)
- Storm (SST)
- Argento (SA) **NEW**
- Rosso (SRO) **NEW**

ARRENTO

Vitrified Paving



- Cream (CM)
- Belge (BG)
- Bronze (BZ)
- Silver (SV)
- Grey (GR)
- Black (BK)



MARSHALLS GRASS

Marshall's grass includes 100% latex backing which is more flexible, making it easier to work with and longer lasting.



COMPETITOR GRASS

Not all inferior products contain 100% latex backing resulting in a more complex install and the grass will start to crack and break up causing failure.





Simon Bourne
Group Operations Director
Delivery Model



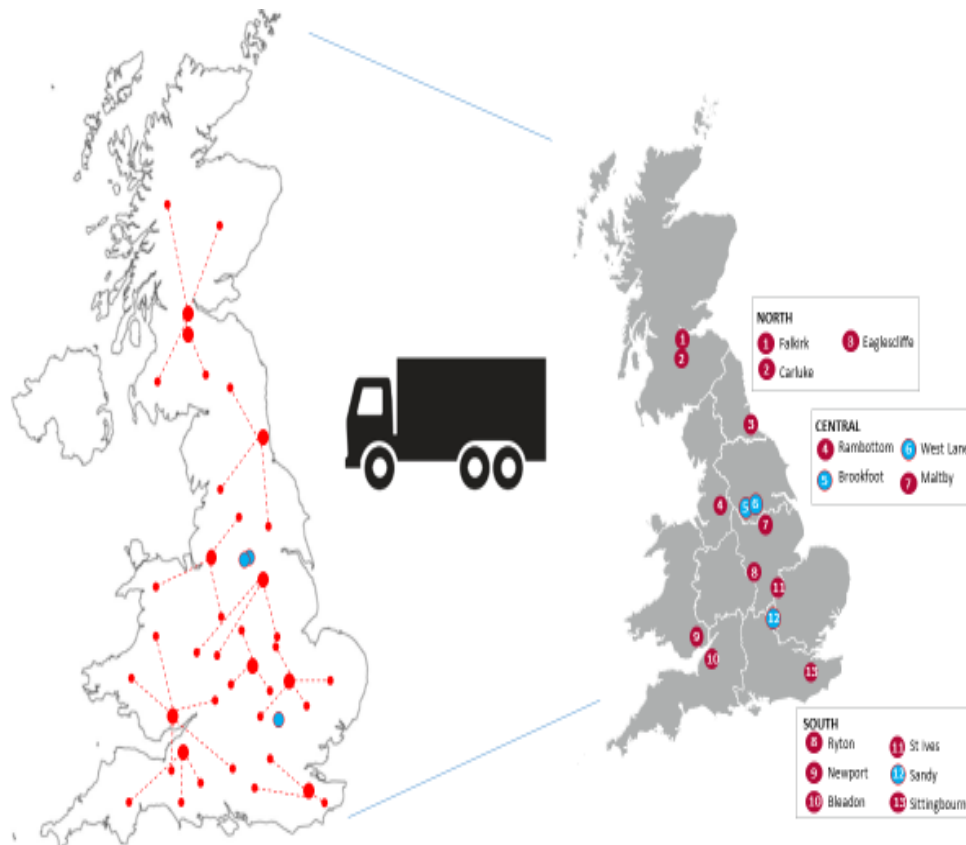
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Logistics Delivery Model - Operations

- Marshalls is running an efficient, well thought out hub & spoke logistics model reaching 95% of customers in the UK within 2hrs.



- Logistics efficiencies improving on YOY basis with the ability to flex up and down as demand fluctuates.



Logistics Delivery Model – Equipment & Process

- Well balanced fleet to cater for changing customer demands.
- Effective use of 3rd party logistics partners.



- Introduction of e-pod to reduce paperwork and increase order confirmation/receipt accuracy.
- Continued use of telematics to track customer orders and provide electronic time stamp for on time deliveries.



Logistics Delivery Model – Further Opportunities

- Continue to increase our flexibility on deliveries.
- Reduction in empty running.
- Reduction in 3PL partners.



- Introduction of WMS to our yards.
- Further utilisation of our NPS to drive customer service & engagement.
- Reduction in internal RPL's to reduce cost.



Simon Bourne
Group Operations Director
Self Help Network Review



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Self Help Network Review - Drivers

FIT FOR THE FUTURE

We need to ensure that we invest appropriately in the right areas to provide reliable supply and manufacturing flexibility for future demands.



VOLUME LEVERAGE AND PROFITABILITY

Understand how to achieve efficiencies by maximising production volumes and consolidating production.



CAPACITIES, DEMAND AND TRANSPORT

Transport costs will only increase in the future and we need to reduce this cost as much as possible.





Self Help Network Review - Approach



IT IS

- A strategy of investment & supply for the growth of manufactured products

IT IS NOT

- A strategic review of all that is Marshalls
- A fixed solution

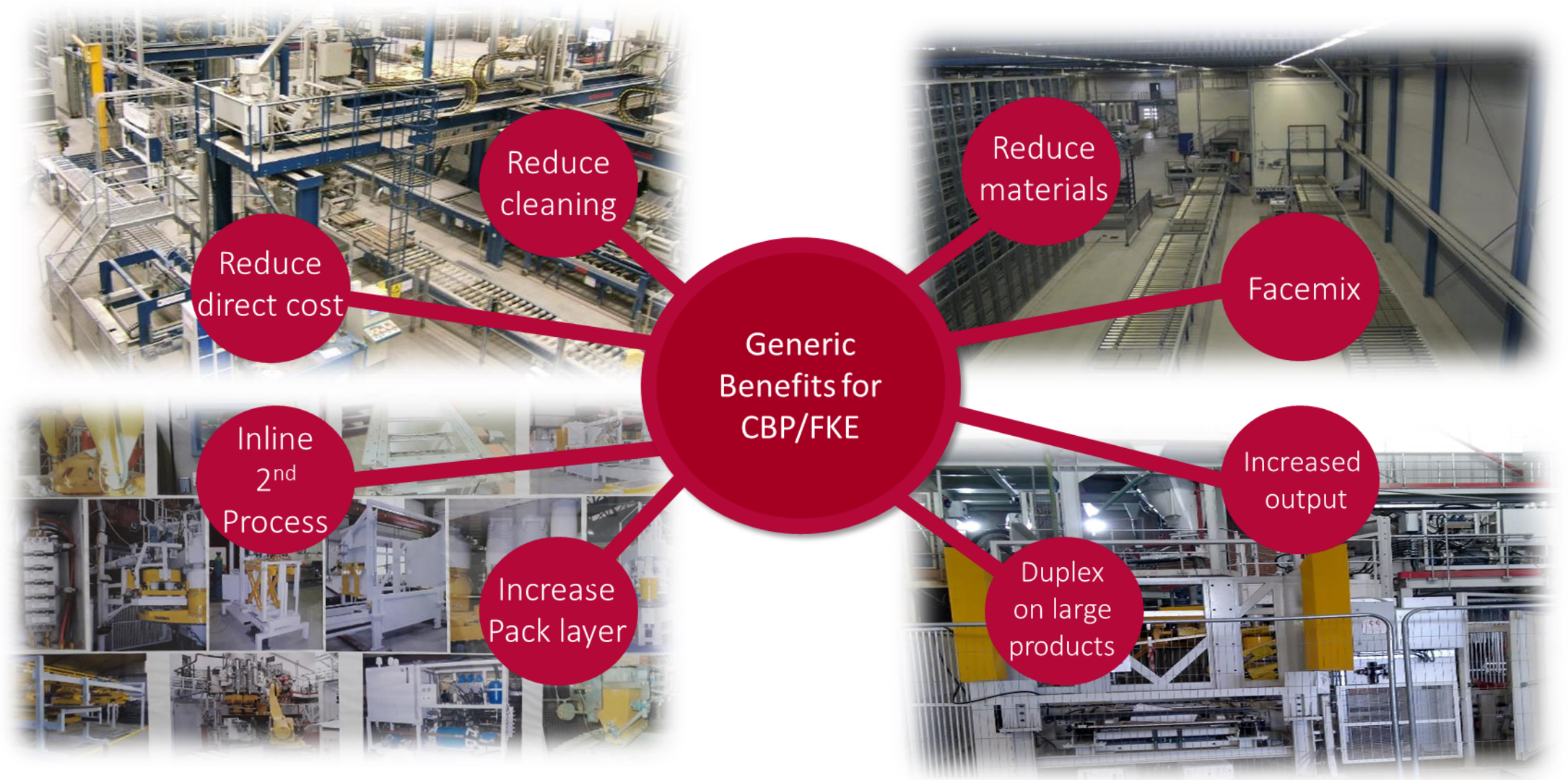
Complete in depth review of current network & capabilities



Resulted in 3 guiding principles.

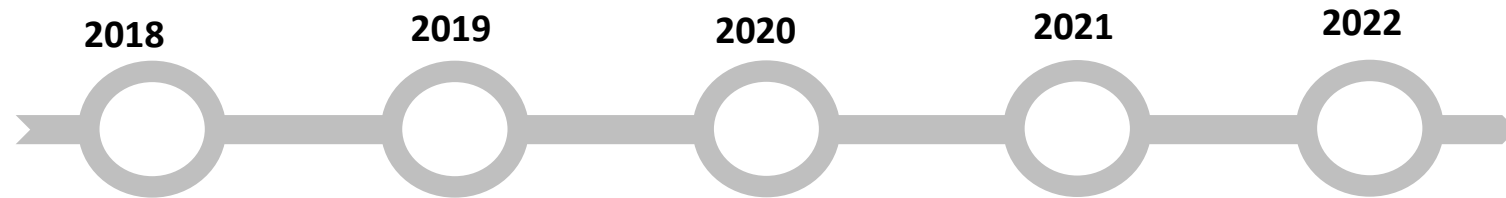


Self Help Network Review – Equipment Blueprint





Self Help Network Review – Progress So Far



✓ All 6 enabling projects completed successfully.

✓ 5 projects planned for 2019.
✓ 1 complete.
✓ 2 commenced.
✓ 2 for later in year.

✓ 5 planned.

✓ 3 planned.

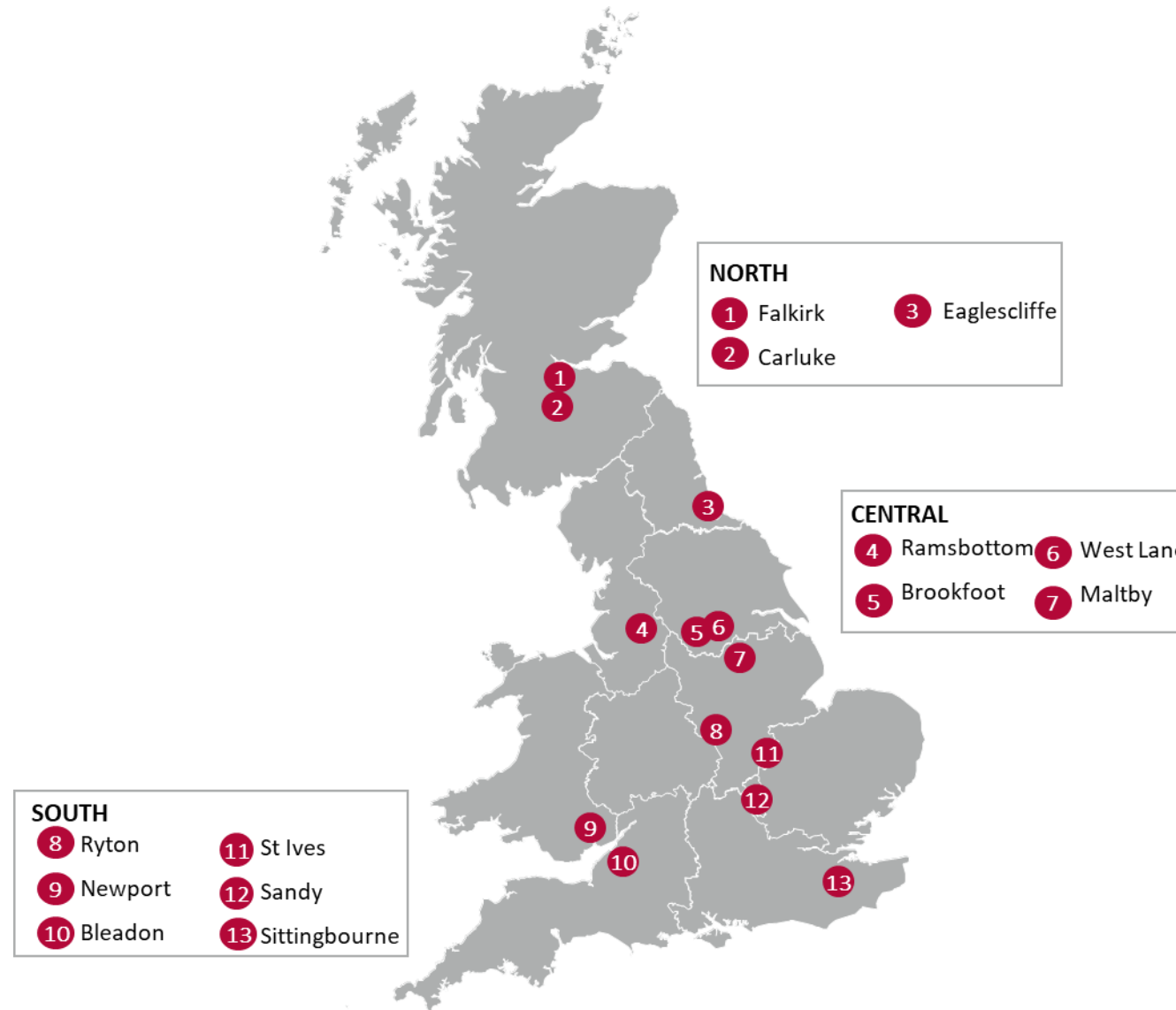
✓ 2 planned.



1. North 2nd pack line and facemix upgrade.
2. South additional press.
3. South press replacement.



Self Help Network Review – What Does It All Mean?






Jack Clarke
Group Finance Director
Digital



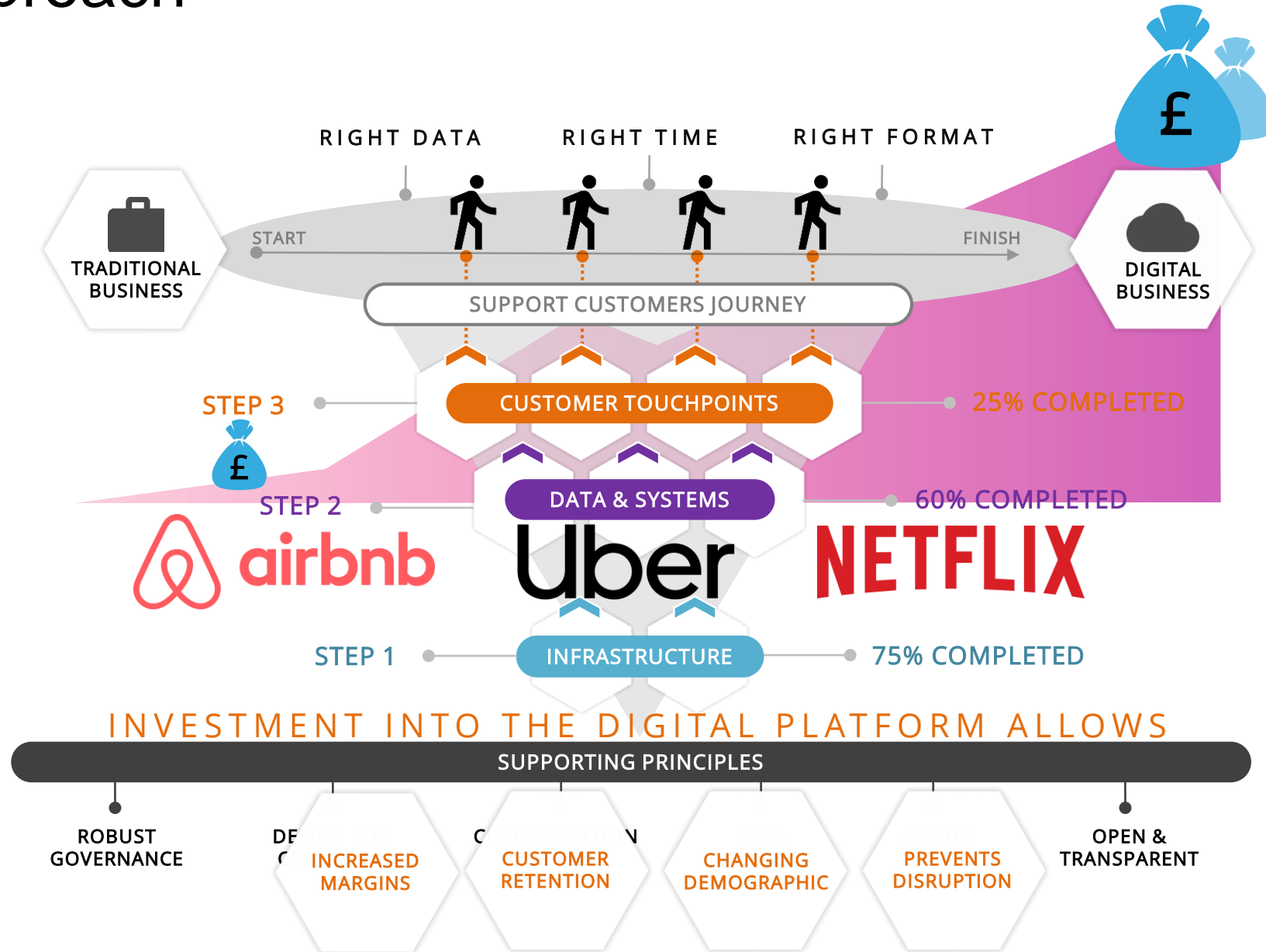
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- 
- Our Approach
 - Our Digital Platform
 - Artificial Intelligence
 - Machine Learning - Pricing
 - Language Processing - Voice / Chatbot
 - Computer Vision - Visualisers
 - Digital Disruption
 - Future Customer Journey



Our Approach



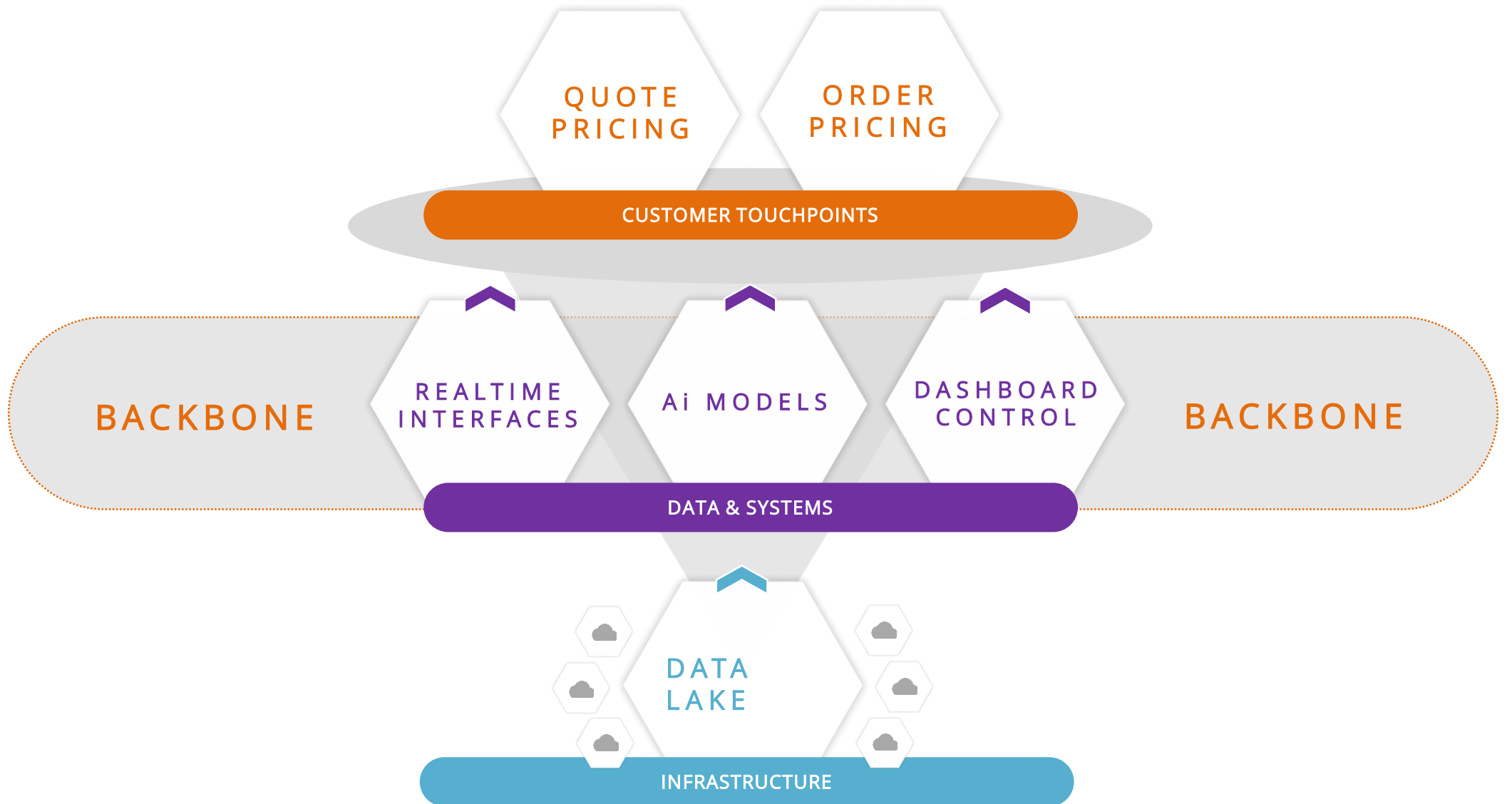


Artificial Intelligence – 3 Disciplines



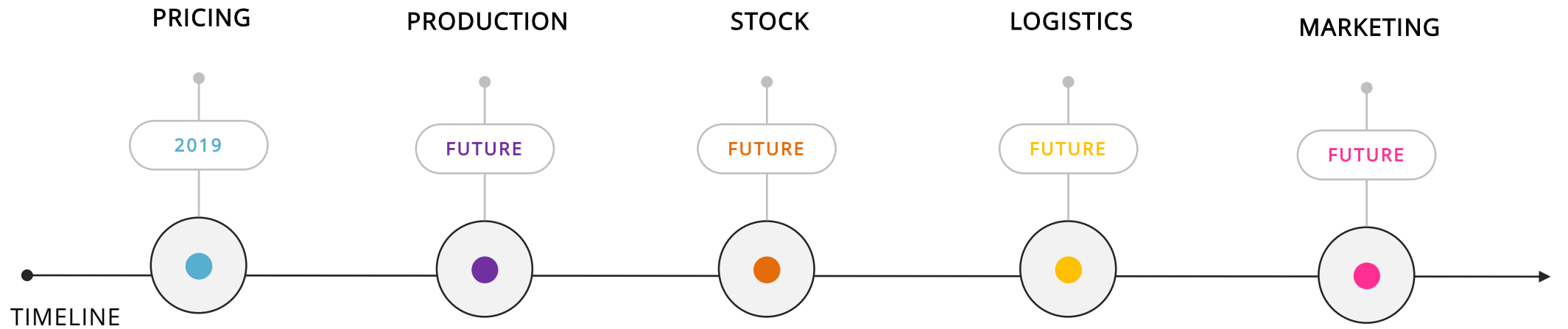


ML Pricing - Architecture





ML – Roadmap



MODEL LEARNING & IMPROVEMENTS


DEVELOPING INTERNAL CAPABILITIES



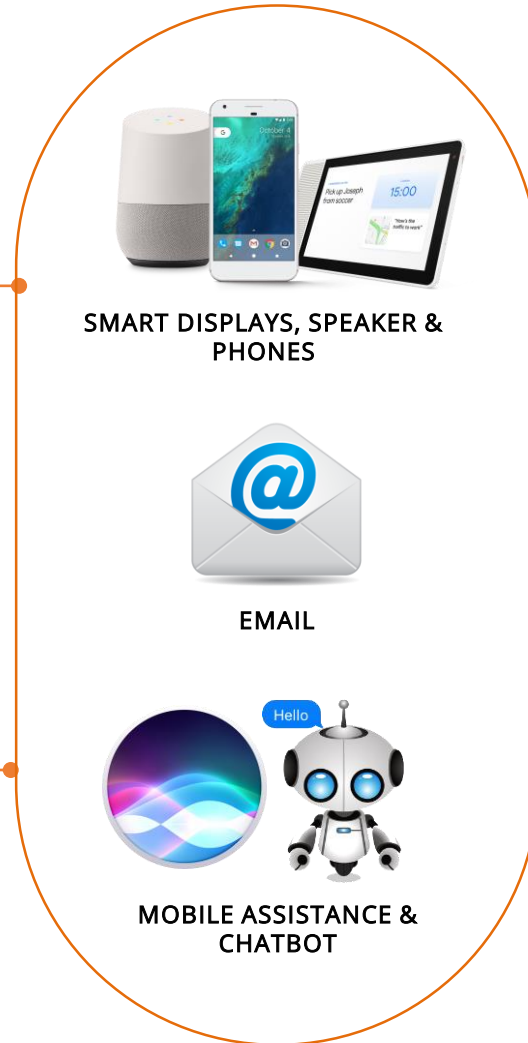

NLP – Overview

NOT JUST VOICE


Rise of smart speaker / digital assistants




365 24/7 customer assistance



Changing use of web (click to voice)



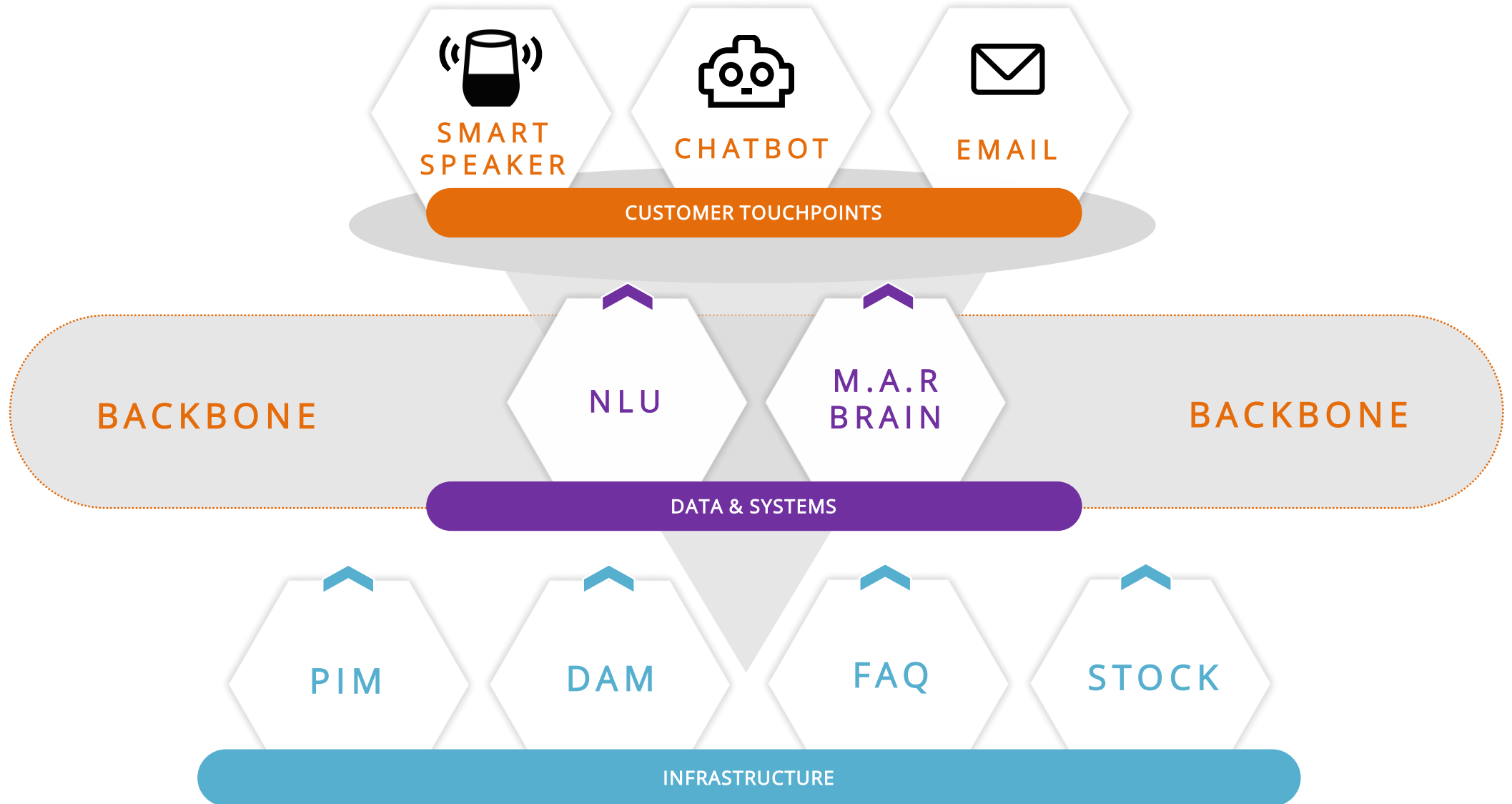
Secure invocation phrase



IT'S TEXT TOO

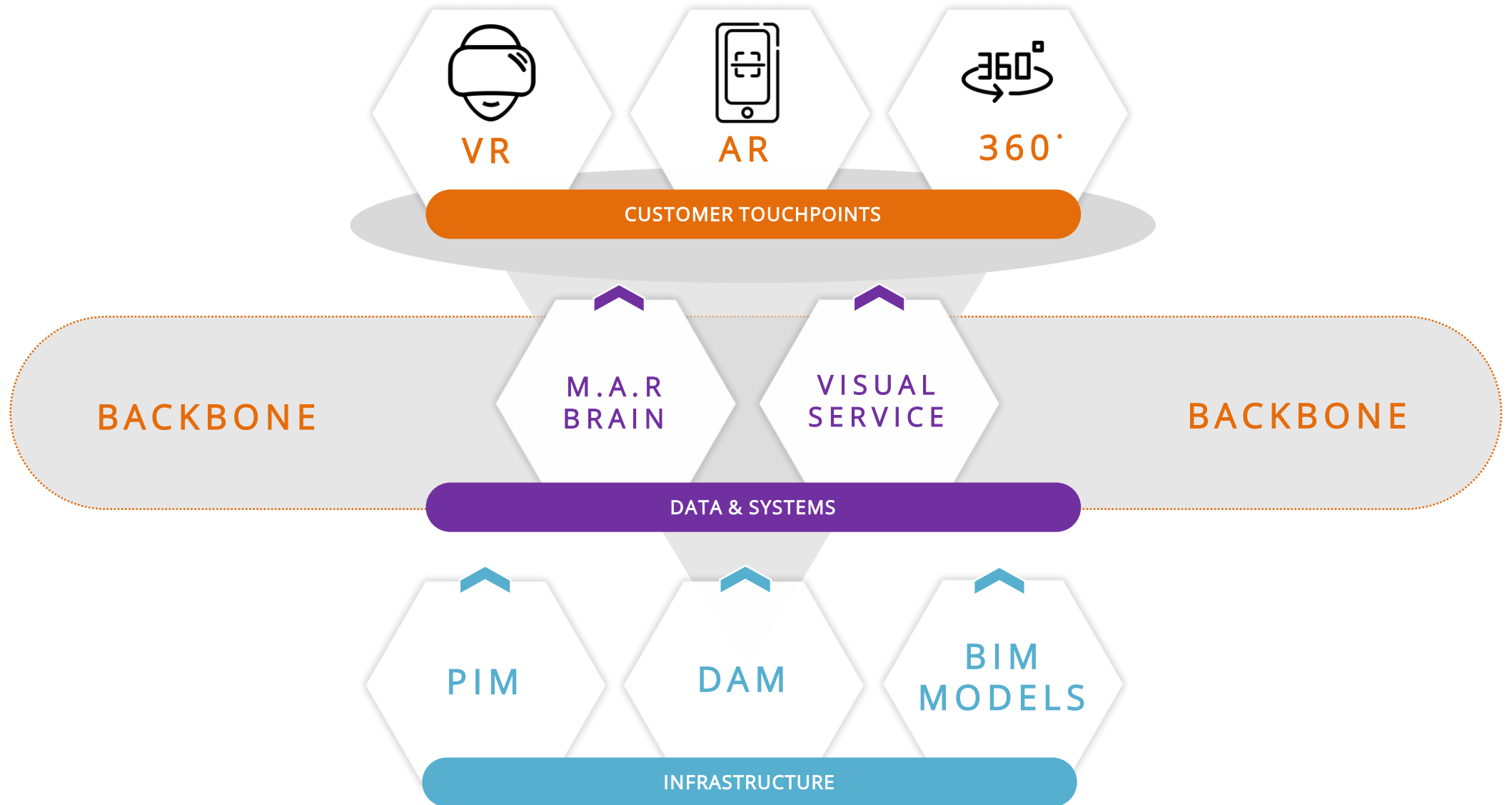


NLP Architecture





Visualisation - Architecture



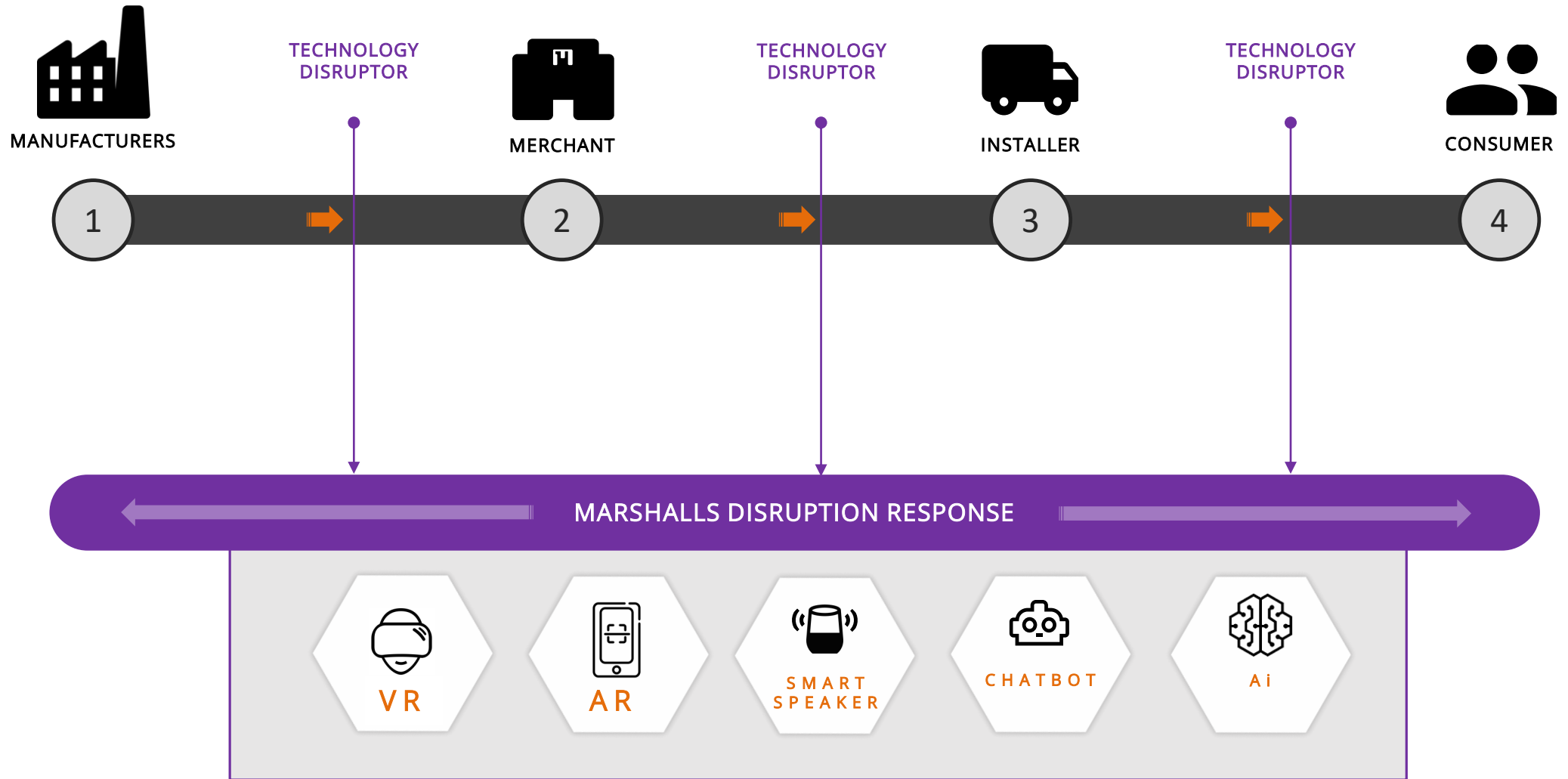


Visualisation – Web Demo



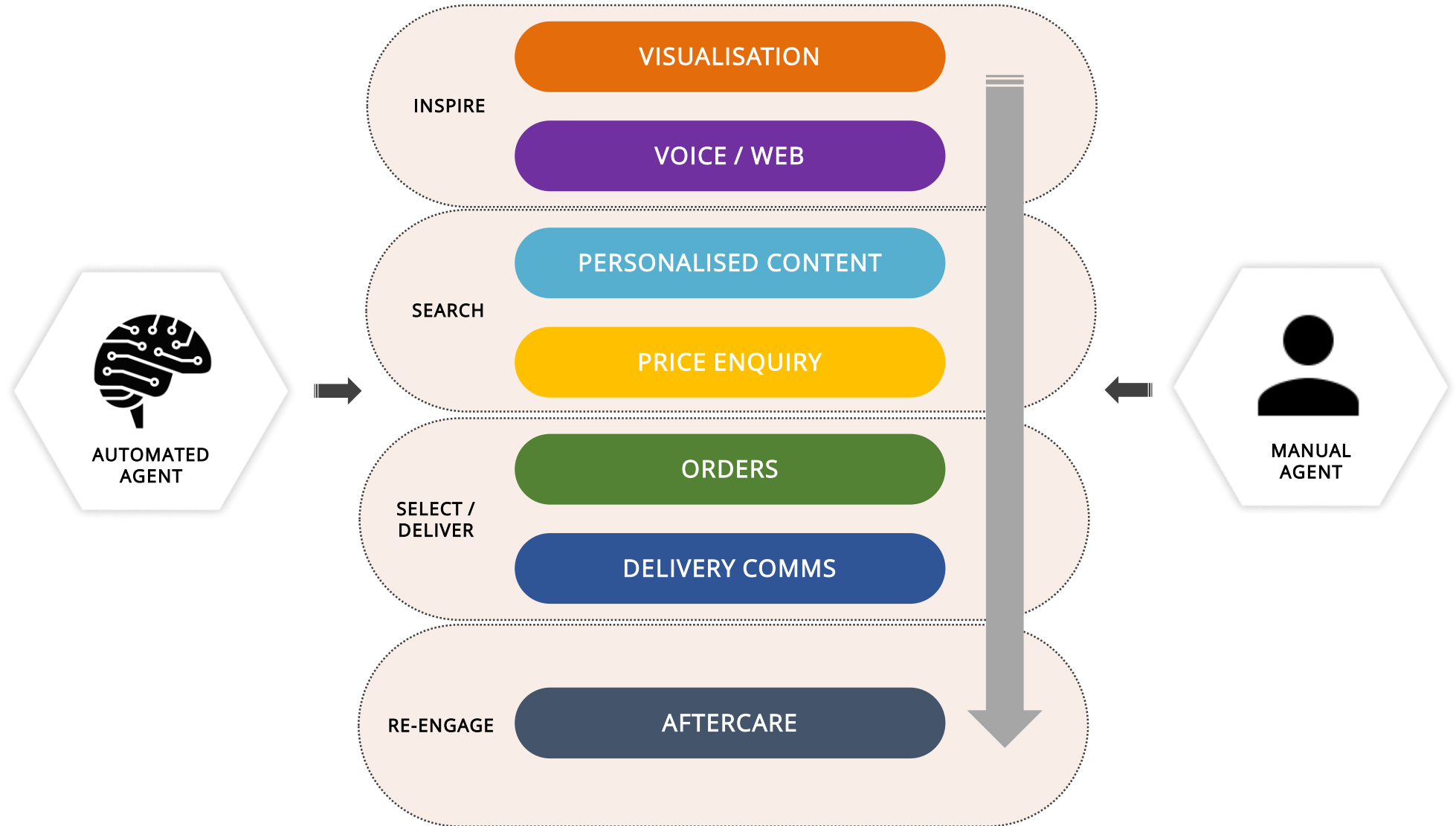


Preventing Disruption





Future Customer Journey





Pete Hallitt
Group Trading Director
Customer Experience



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The Marshalls Customer Experience Vision



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Marshalls



To grow the business by providing an outstanding customer experience at every step in the customer journey so that Marshalls remains the supplier of choice.



How do we measure Customer Experience at Marshalls?

1. Independent Survey By External Experts B2B

- Twice yearly - detailed survey
- Merchant and contractor/installer customers
- Generates **Net Promoter (NPS), Customer Satisfaction and Customer Ease/Effort scores**

2. Transactional Satisfaction Surveys

- Link on **every quote and order**
- Three simple questions & opportunity to add free text
- Generates **Satisfaction score out of ten**
- Live month on month data comparison

3. Qualitative Customer Visits/Feedback

- **Customer visits** – all employees/teams
- Management team focus
- Feedback to CustomerExperience@marshalls.co.uk





How is Marshalls performing currently?



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Commercial survey – Q4 2018



Domestic Survey – Q2 2018



- Our Commercial NPS score is **GOOD**
- Our Domestic NPS score is **GREAT**
- Marshalls significantly **outperforms its peer group** NPS in Landscaping
- However, Marshalls is striving to be **OUTSTANDING** in all measures



What do customers love about Marshalls?



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SERVICE
INCLUDING SPEED
& HELPFULNESS
OF STAFF

"It's just the whole service that they offer from start to finish and they also give you good after-care service and if there are any issues they sort them. They're very caring and if I have a problem Marshalls do give me good backing to resolve it with my customer."

Merchant Customer



PRODUCT
QUALITY

"I believe they react to what the customer wants, they are proactive in improving products and bringing out new ones. For example they changed the drainage channel and made it even stronger and more robust"

Contractor Customer



MARSHALLS DELIVERIES
AND OUR
DRIVERS

"Marshalls don't let us down on delivery and they always deliver what we ask for."

Contractor Customer



GOOD
PRODUCT
RANGE

"They have market leading products, their entire range is great. I've dealt with them for over 20 years and they're a decent firm to deal with"

Contractor Customer



What do we do with the data?

- Dedicated Customer Experience Team and Customer Experience Champions in each function across the group.
- Regular data reviews involving all internal stakeholders
- Investigate pain points identified
- Risks, Actions, Issues and Decisions log for project management
- Work streams made up of experts
 - Meet regularly to agree improvements and implement change
 - Monitor changes and adapt as appropriate
 - Share best practice





Current key focus areas

- Speed of issue resolution
- Delivery communications
- Quality and service **ALWAYS** consistent with our brand promise
- Availability of stock





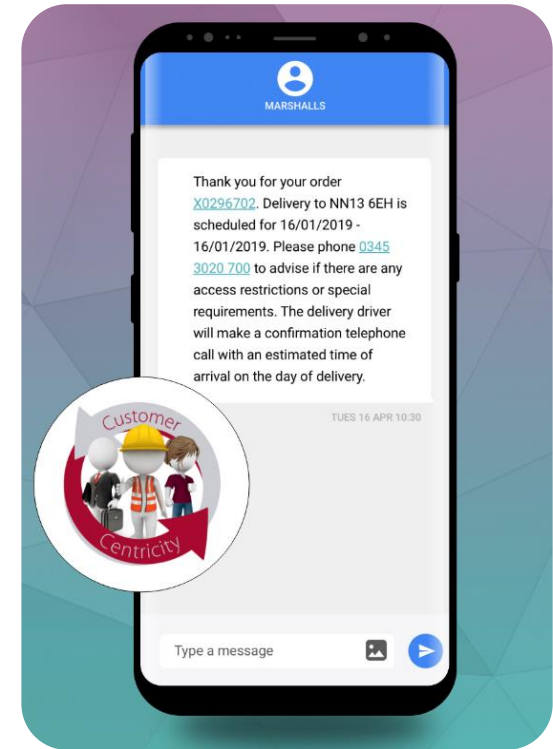
Customer Experience Improvements Implemented

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You Talk,
We Listen,
We Act

- ✓ **Delivery Communications**
 - ✓ Text order confirmation to site
- ✓ **Driver Site Instructions**
 - ✓ To avoid failed deliveries
- ✓ **Installation Instructions & Product Data**
 - ✓ Hyperlinks on orders
- ✓ **Issue Resolution Improvements**
 - ✓ **Forms** - Team assisting account holders by completing much of the complaint forms for them if required
 - ✓ **Better understanding of customer history before response**
 - ✓ **On-line complaint form**
- ✓ **Quality measures**
 - ✓ Redesign of the organisational structure in our technical function
 - ✓ New quality standards
 - ✓ Operations teams measured against compliance to standards
 - ✓ Continuing investment in our equipment





Examples of Customer Experience Improvements Currently In Trial

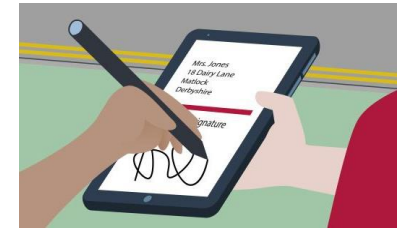


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✓ Add-on supplementary items

System automatically calculates and adds complementary items
To reduce human error and omissions.



✓ Electronic Proof of Delivery EPOD

To confirm delivery and reduce invoice reconciliations/queries.



✓ Screen Popping – Customer details on screen

To personalise service to our customers. To reduce the time handlers spend searching for information and to encourage a proactive service led approach.

✓ Complaints System Upgrades & Organisational change – Due Q4 2019

To allow more colleagues to log complaints (First contact resolution) and to effectively capture service complaints/issues. Improves resolution speed for customers by reducing stages and colleagues involved.



Creating a Customer Centric Culture in Marshalls

- World Class Training Programme
 - Customer Service Training on-going programme
- Internal communications programme
 - Infographic newsletters on latest research results and improvements
 - Screen savers
 - Booklet for all staff
 - Customer Experience Team presentations at team meetings
 - Information on works televisions
 - Customer Experience agenda regularly discussed at all team meetings
- Customer Experience KPIs in ALL reviews
- Customer Personas – real case studies brought to life...





Meet the Customer Personas!

You Talk,
We Listen,
We Act

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Mark Douglas

The Domestic Installer



Emma Rowlinson

The Private Landscape Architect



Derrick Jones

The Civil Engineer



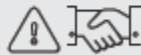
Matt Myers

The Domestic Merchant



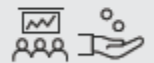
Malik Singh

The Commercial Installer



Chris Lambert

The Commercial Merchant



Heather Smith

The End User



We also share our research results and our improvement updates with our customers twice yearly.



Tom Poole
MD Emerging Businesses


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Emerging Businesses

- CPM
- Landscape Protection
- Minerals
- Marshalls Premier Mortars & Screeds



CPM - Two Manufacturing Sites of Similar Outputs

Pollington – East Yorkshire





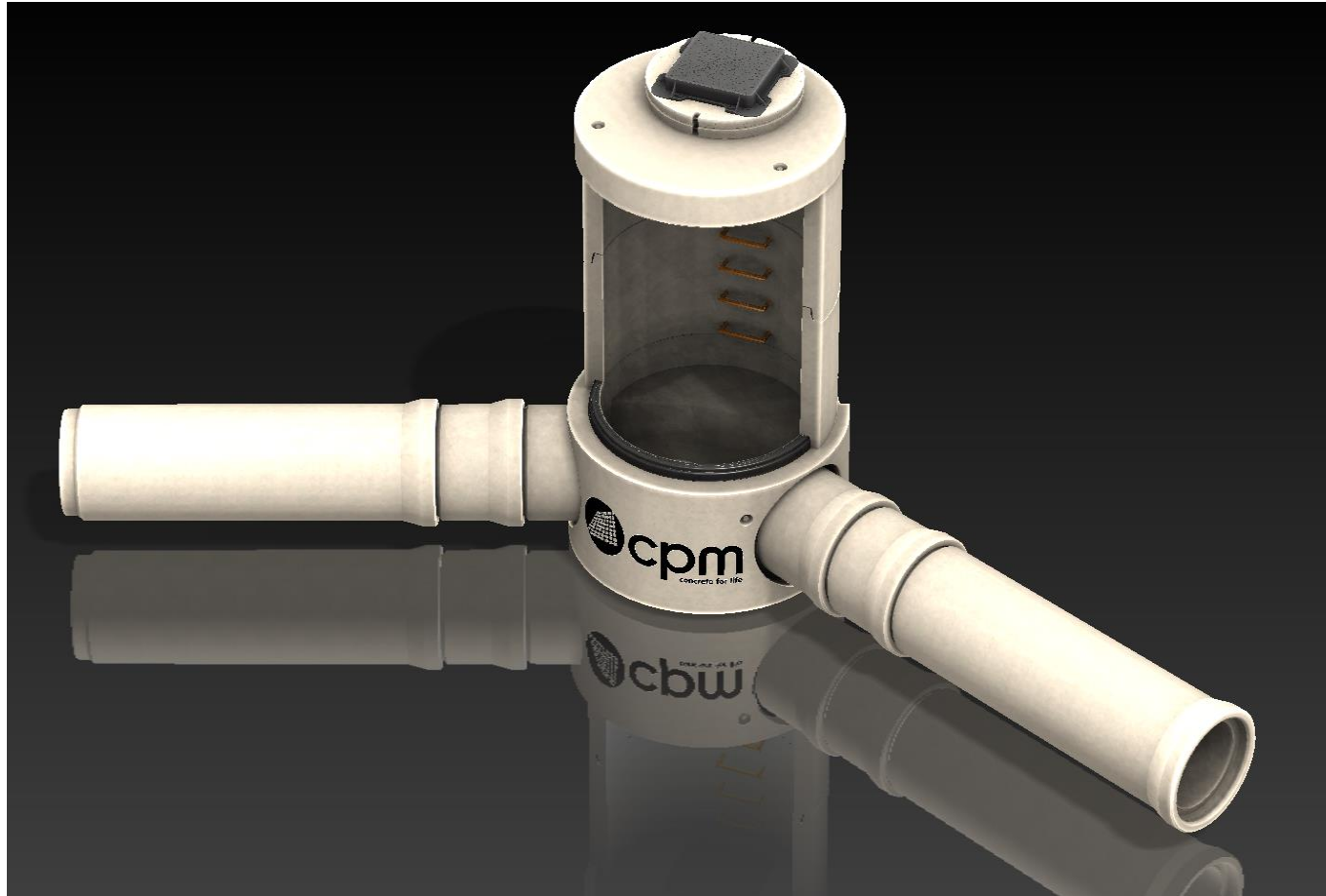
CPM - Two Manufacturing Sites of Similar Output

Mells - Somerset





Water Management Products to Convey, Store, Control & Treat



Manhole/Pipe Combination



Mells – 2018 New Precast Factory

Increasing Bespoke Products Capability





Strong Growth in Special Products



The Perfect Manhole System

Bespoke Precast Water Management – Offsite Solutions



Redi-Rock™ Modular Walling System

- Flood Defence
- Smart Motorways
- Rail
- New Build Housing



Marshalls CPM - Key Highlights

- Integration has gone to plan
- Business is performing well
- Strong experienced Management Team
- Successful capital investment in new production facility at Mells
- Growth in specialist water management products remains a key focus and opportunity
- New Product Development and specialist areas remain strong
- Management Systems accreditation BS EN ISO 9001, 14001, 45001 achieved in 15 months. ISO 50001 by year end



Marshalls Landscape Protection



Defend

Crash tested products, certified to PAS68 and IWA.14.1



Deflect

PAS 170 certified bollards and bollards for areas that do not require crash tested solutions



Deter

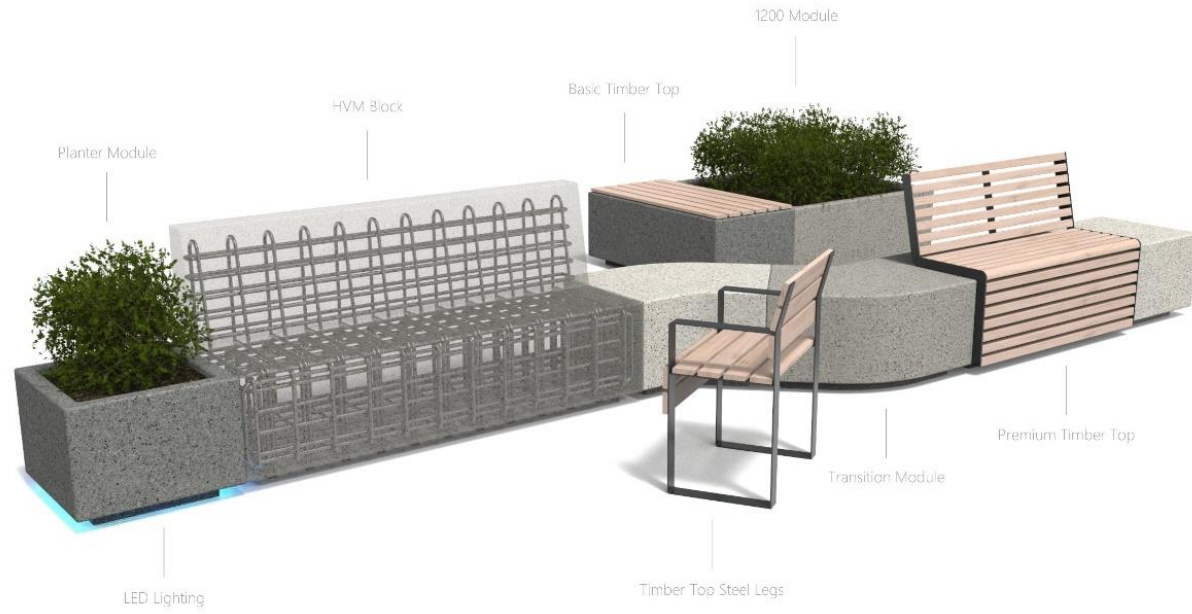
Non-crash tested street furniture products that offer a visual deterrent solution



Creating Landscapes that Protect People



The Future of Protective Street Furniture



- Enhancing public spaces
- Inherent strength
- Including Hostile Vehicle Mitigation (HVM) performance
- International traction being attained





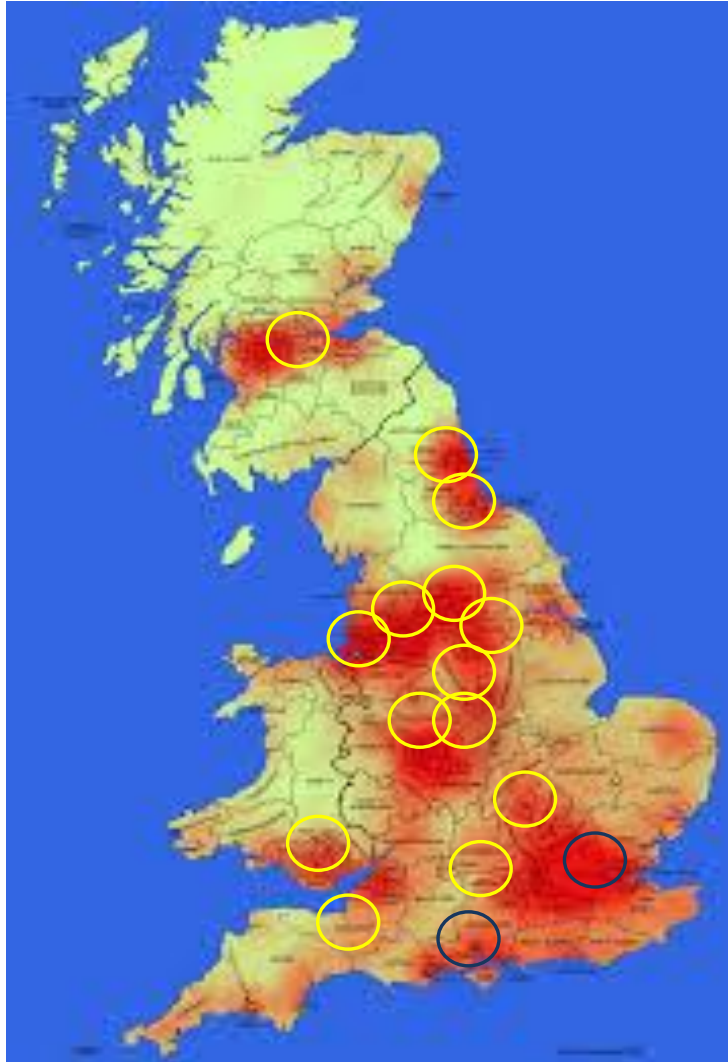
Marshalls Super Shallow 100 Bollard Test

To view video please follow the link:

https://www.youtube.com/watch?v=WWo_JkTyACs



Marshalls Premier Mortars & Screeds



- Ready to Use mortars & screeds
- Residential and commercial markets
- Still opportunities for geographical expansion
- Top line growth positive
- Differentiate on service
- Ability to use infrastructure to launch new products
- Liquid screeds opportunity



Traditional Screed



Flowing Screed



Minerals Business - Enhance Margins Through Efficiencies



Capital investments driving costs down



Andy Cotton
Managing Director
Edenhall



Marshalls

Creating Better Spaces



EDENHALL



Products & Brands

EDENHALL



80%



Darlstone Walling

Wallingstone

8%



GreconUK

ARCHITECTURAL STONE

Cast Stone



12%

2018 Sales revenue £33 Million



Customers

EDENHALL

h&b
GROUP

HUWS GRAY

**Keepmoat
Homes**

Bellway

NBG
National Buying Group LLP

G
Grafton Group plc

**BARRATT
HOMES**

GallifordTry

JEWSON

TP

Travis Perkins

**Taylor
Wimpey**

PERSIMMON

Builders Merchants

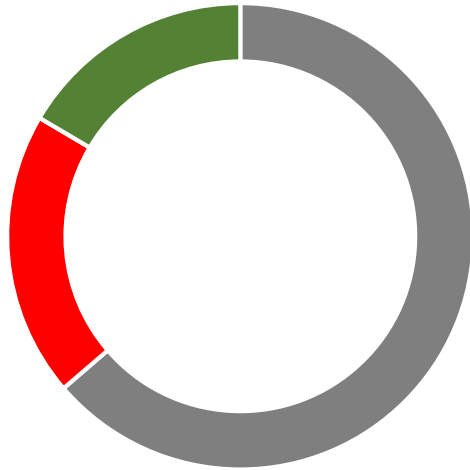
Housebuilders / Developers



Sales Revenue by Product

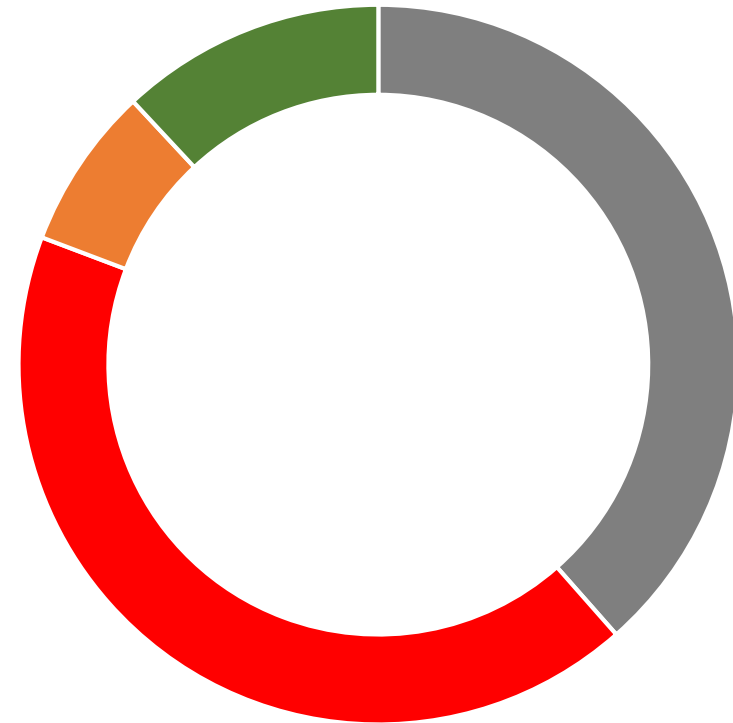
EDENHALL

2012 - £13.5 Million



■ Other Brick ■ Facing Brick ■ Cast Stone

2018 - £33 Million



■ Other Brick ■ Facing Brick
■ Wallingstone ■ Cast Stone



Edenhall Bricks

EDENHALL

- Large selection of colours and textures
- Extensive investments in R&D
- Competitive rates and availability
- Technical performance
- Resistance and objections to overcome

BUT “not all concrete bricks are the same” and we need to differentiate Edenhall.





Case Study –

BARRATT
— LONDON —

EDENHALL

2016 December – First Meeting with Barratt London and their commissioned architects

2017 January – Meeting with Barratt London Head of Design

2017 February – Barratt London visited two Edenhall plants as part of their due diligence.

2017 March – Edenhall meet with Barratt Technical Director to answer concerns regarding movement control and durability of the Concrete Brick product

2017 July – Edenhall/Barratt London review the brick palette identified & numerous (6) meetings with different departments regarding samples/technical questions

2018 March – Meeting with client architect and structural engineers for “Brick Workshop”, questions regarding suction rates and movement joints.

2018 July – Order placed for 1st phase of Hounslow Scheme

2018 July – December – 8 more visits/meetings with architects and technical personnel

2019 January – Meet with MD of Barratt London and Southern Regional MD’s

2019 February – Barratt Directors (11) visit Edenhall’s new Grove factory and host their senior meeting onsite.

2019 February – Meeting with Hayes site project team to discuss bricklayers objections to Concrete Bricks. 1300 units on former Nestle Factory site in Conservation Area.

2019 – April – meeting on site at Hayes with full project management team and brickwork subcontractors to review Edenhall sample panels and respond to subcontractors objections to the product.



Former Nestle
Factory Site in
Hayes



April
2019
Meeting



Hayes
Scheme



Edenhall New Factory

EDENHALL



- New plant commissioned in 2019 at Grove site, near Bridgend, South Wales

- £6 million investment between July 2018 and Feb 2019

- Capacity of 100 million brick equivalents per annum

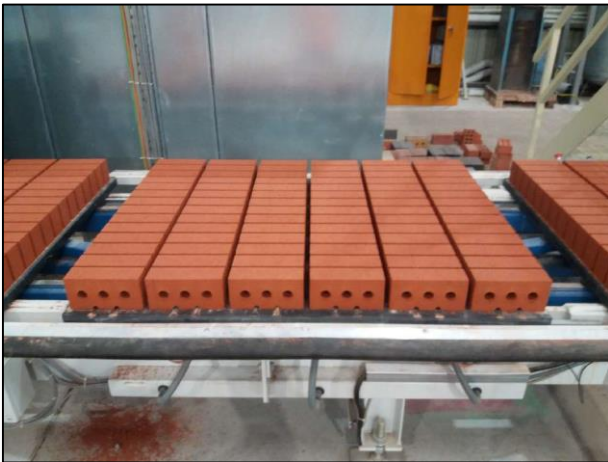
- Products include Facing Brick, Engineering Brick and Blocks





Factors Driving the Investment

EDENHALL



- Current & future market demand in housebuilding sector
- Modern low-cost plant to future proof the business
- Creates a barrier for entry to potential competitors
- Highly automated, safe & efficient manufacturing process
- Located next to sustainable raw material source of the right quality
- Strong environmental credentials: low energy, reduced carbon footprint





Marshalls and Edenhall– “A Good Fit?”

EDENHALL

EDENHALL

- Similar culture
- Background in concrete products
- Focus on manufacturing
- Overlap in customers and markets
- Complimentary product offering
- “Expansion” into the vertical masonry façade of buildings
- UK based



Marshalls

Creating Better Landscapes



Opportunities for Growth

EDENHALL

- Focus on housing market
- Walling stone – link up the 3 current brands and market
- Facing bricks – remove barriers and increase awareness
- Engineering bricks
- Other bricks and blocks – via the strong existing networks
- Architectural Cast Stone
- Utilise the assets in the Group





Louise Furness
Group HR Director
People & Talent Development





People



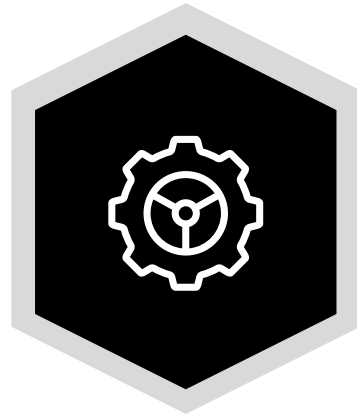
Successful business



**Focussing on improving
engagement**



**Leading the way on
recruitment and
diversity**



**Investing in talent and
development**



**People *are* the only true
differentiating asset**





People Change: Why?

- Informed and driven by the next **strategy** evolution and **direction**
- **Huge people potential** to be realised
- Appetite and emphasis on changing / people agenda is growing
- People *will* be the differentiator to future business performance
- **Priorities** now clear
- **People Essentials**
- **HR capacity** and **capability** building
- **Planning** and **delivery** is now **underway**

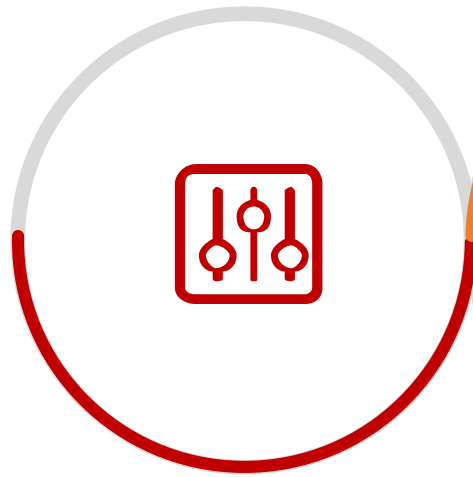


Changing: But How?

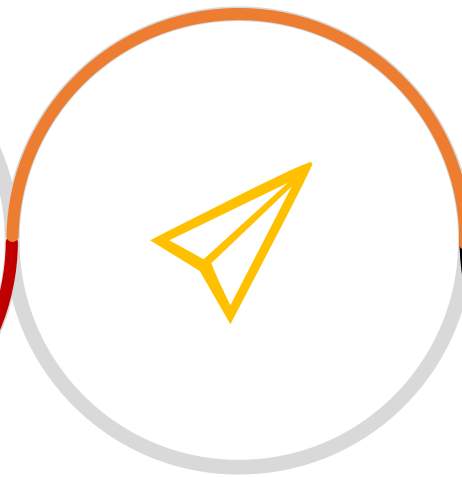




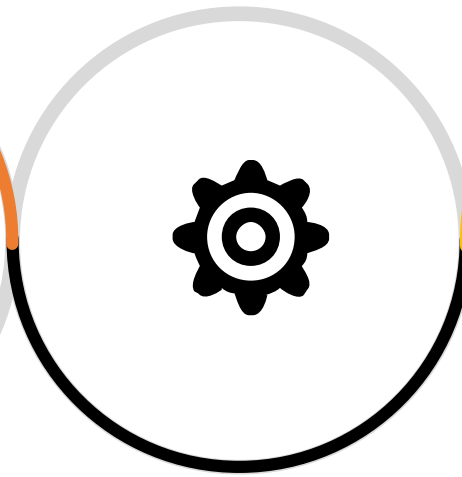
Talent and Recruitment



**In-house
recruitment model**



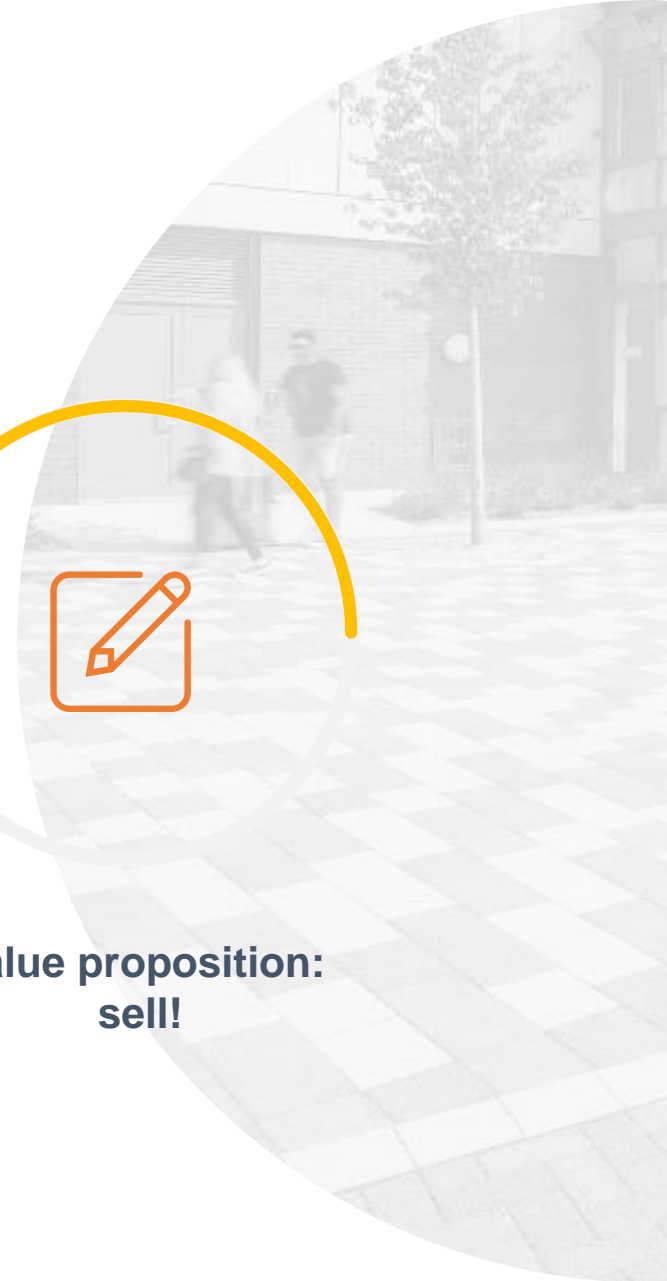
**Candidate
experience that
lasts**



**Talent moves:
internal mobility**



**Value proposition:
sell!**



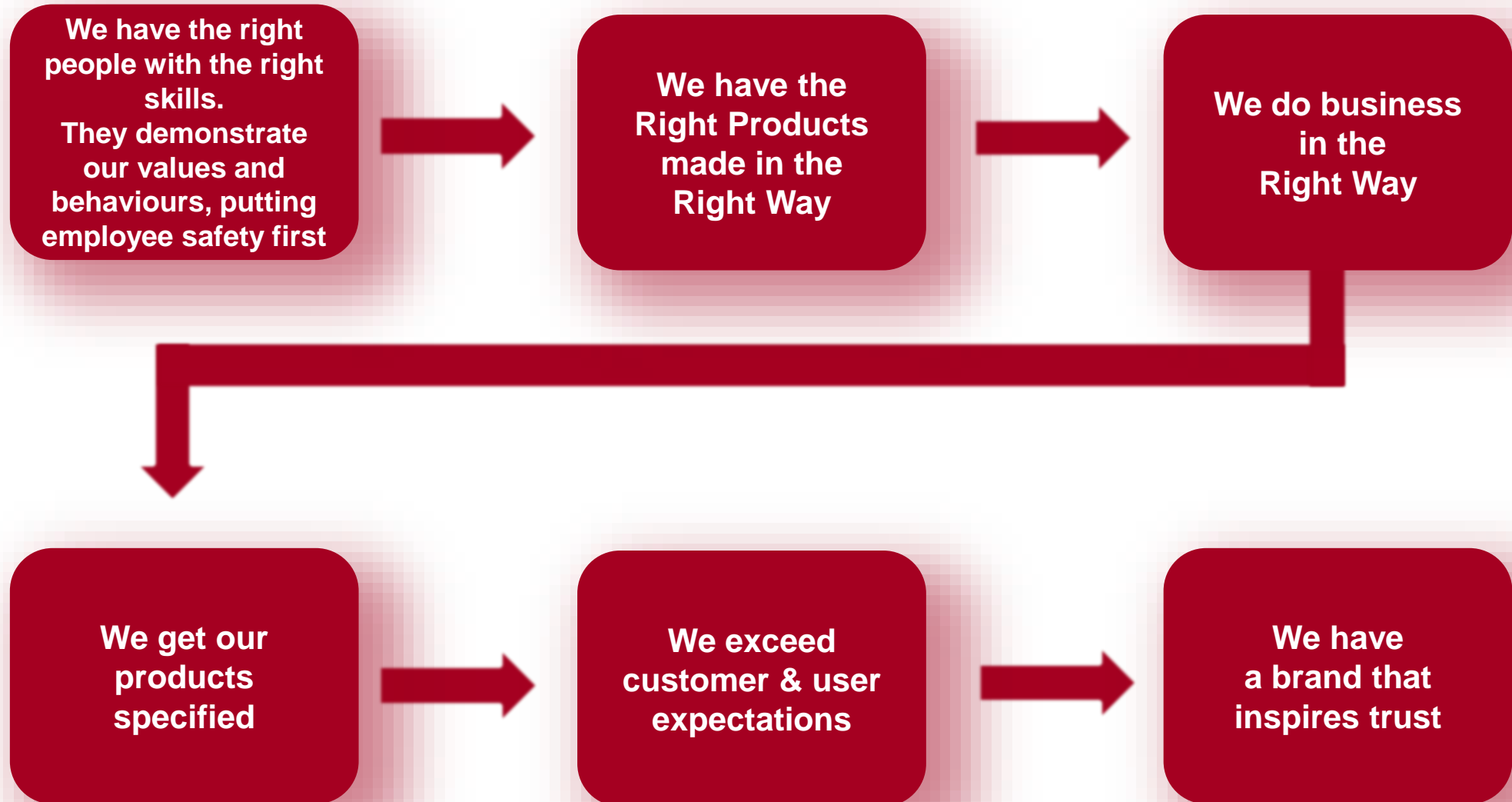


Reward and Recognition





Following The Marshalls' Way



A woman in a white top and light blue trousers is walking across a paved driveway. To her left, a dark blue Range Rover SUV is parked in a black garage. The driveway is paved with interlocking stones in shades of grey, brown, and tan, with a decorative yellow border. In the background, there is a red brick house with a large white-framed window and a wooden fence. A green lawn is visible on the right side of the driveway.

Questions & Answers



Marshalls

Creating Better Spaces