

Transforming a delivery model

Remaining competitive amid changing regulations



Client

A strategic financial services advisory and research firm.

Business Case

The client needed to transform its delivery model with the advent of new regulations for independent appraisers.

Scope

- › Security valuation services (IRC section 409a)
- › Specific valuation support (compliance with FAS 141 157, 142)
- › Development and maintenance of valuation database
- › Advisory services

Challenges

- › Post-recession macroeconomic inhibitors to new venture capital funding for startups, impacting growth and margin pressures.
- › Competitive landscape with large financial conglomerates and leading financial and audit firms commoditizing the services and offering unsustainable price discounts.
- › Inability to leverage one of the industry's large private company databases to generate insights and research-based offerings.
- › Growing need to reinvent operations to make processes faster, smarter and more nimble.

25-30%

Efficiency gains recorded

30 hours

Reduction in average touch time per valuation

2,500+

Professional valuation opinions delivered

Value

by supporting auditor inquiries, peer review of opinions and redefining client service offering

Managing changing regulations with a redefined operating model

The solution

EXL helped the company transform its service offerings and value proposition to keep pace with the environment.

- › Developed a comprehensive multivariate decision tool to automate business valuation services.
- › Created a web-based research engine to enable users to perform valuations by accessing external databases.
- › Built proprietary data repositories to enable access to venture capital and private equity firms, thereby opening an untapped growth stream for the client.

The results

- › Achieved an overall optimization of 25-30% in comparable activities from standardization and automation of valuation models.
- › Freed up 20% of client and offshore analysts to perform peer review and continuously improve performance of the models.
- › Better use of residual research data to support high-end line of advisory services for private equity and venture capital investor community.

About EXL

EXL (NASDAQ: EXLS) is a leading business process solutions company that looks deeper to drive business impact through integrated services and industry knowledge. EXL provides operations management, analytics and technology platforms to organizations in insurance, healthcare, banking and financial services, utilities, travel, and transportation and logistics, among others. We work as a strategic partner to help our clients streamline business operations, improve corporate finance, manage compliance, create new channels for growth and better adapt to change. Headquartered in New York and in business since 1999, EXL has 23,000 professionals in locations throughout the U.S., Europe and Asia.

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