



## **Project Methodology And Sample Use Cases**

We follow a well-defined process to establish an efficient relationship with our clients. We implement it for each project we undertake, and it typically consists of the following steps:

### **Needs Assessment**

- Analysis of client requirements (functional, i.e. task specific, and non-functional, i.e. security, turnaround time, accuracy level)
- Review expectations, available information, gaps if any
- Review alternate options (if applicable or desired)
- Establish and approve final work plan

### **Project Startup**

- Integrate outsourced tasks into a client business process
- Setup and test additional technology to perform the project (if needed)
- Assemble a project delivery team (based on skill profile, anticipated load, required turnaround time)
- Train the team in new technology (if needed) and the specific task

### **Project Implementation**

- Execute task(s)
- Perform Quality Assurance, and continuous process improvement
- Support client through our On-shore team
- Adjust capacity to scale our resources up or down to follow the demand curve of the client

### **Deliverables**

- Deliver results to client (real-time or batch, via selected channels, e.g. email, secure FTP, dedicated cloud storage space)
- Report on the social impact of the project in a format suitable for the client's specific Corporate Responsibility reporting needs (e.g. Global Reporting Initiative - GRI)

### **Administrative**

- Deliver progress reports and invoices
- Participate in progress meetings
- Create project branding (if requested by client)



The following sample use cases illustrate some of the services we provide and how projects are implemented.

### **Use Case: Invoice Verification For Shipping And Freight Forwarding**

#### **NEED:**

- The requirement is to perform manual verification of data captured from invoices through Optical Character Recognition (OCR) and Intelligent Character Recognition (ICR).
- Data that has been captured incorrectly should be updated.
- In those cases where handwritten information is not recognized by the OCR /ICR technology it should be entered manually.
- Documents that are not legible should be flagged.
- Non-functional requirements call for 99% accuracy of the digitized information.

#### **SOLUTION:**

- A Virtual Private Network (VPN) is set up so that members of the off-shore team can log in to a client's application.
- The off-shore team receives one week of training in additional technology that is required for the project and the specifics of the task.
- The task is performed with the required accuracy, which is achieved through a multi-level QA process.
- The client realizes 50% cost savings compared to an in-house solution.

### **Use Case: Bill Of Lading Verification For Shipping And Freight Forwarding**

#### **NEED:**

- Bill of Lading (BoL) documents need to be verified.
- The task includes checking for specific documents that should have been attached.
- Some data needs to be extracted from the BoL and entered into a client's system.
- A special non-functional requirement is 24/7/365 operations with turnaround times of a few hours.

#### **SOLUTION:**

- Technology setup (VPN), off-shore team training, and QA are realized similarly to the invoice verification use case.
- Integration with the client's business process is set up such that a well-defined demarcation of the roles of the client team and the offshore team is ensured, as this is key to seamless operation.
- The solution is delivered with significant cost savings compared to traditional outsourcing destinations.



## **Use Case: Marketing Database Cleanup And Expansion For Food Delivery Portal**

### **NEED:**

- A food delivery portal needs to clean up its marketing database to have accurate restaurant listings (e.g. point of contact, menu items, pricing).
- An important need is to add new restaurants to the database to enable rapid growth of the business.
- There is no requirement for real-time data exchange.

### **SOLUTION:**

- The off-shore team receives training to understand what information needs to be updated and how to obtain it.
- Contact data, menu items, etc. are verified through Internet research.
- In a percentage of cases phone calls are fielded to the restaurants.
- Information about restaurants that are not yet part of the database is obtained in similar manner.
- All data is captured in Excel spreadsheets and delivered via secure FTP.

## **Use Case: Data Entry Into Customer Relationship System For Hotel Chain**

### **NEED:**

- A hotel chain has the requirement to enter information that has been captured on a variety of forms from customers into their marketing and customer care systems.
- The forms include check-in forms, promotion coupons, feedback cards, competition entry forms, etc.
- A non-functional requirement is to accommodate the large spikes in hotel occupancy that is typical in the hospitality industry during certain periods.

### **SOLUTION:**

- The off-shore team receives training to understand what information needs to be extracted and entered into spreadsheets.
- Scanned images of the forms are stored by the client in a cloud storage space that is shared with the off-shore team.
- The off-shore team transcribes information from the scanned handwritten forms relating to customer information, such as name, contact details, etc.
- The transcribed data is entered into spreadsheets that are stored in the cloud storage space.

