



Introduction
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INSORCE software helps plan & optimize 'Change'

Algorithmic

INSORCE™ is driven by tested and proven mathematical algorithms

Rapid

Enables Project-level Planning, Optimization, Analysis in 6-12 weeks

Agile

Ongoing changes can be modeled and optimized instantaneously

Cost Effective

Replaces and/or replenishes planning committees, consultants and pilots at a fraction of the cost



Cross Functional

Output can address requirements of all key stakeholders in Business, Operations, Risk, Fin, HR

Risk and Reg. Control

Helps complete and validate a Basel-based Operational-Risk control configuration

Broad Applicability

Works at any vertical/horizontal slice of organization - business, geography, product, process

Stand Alone

INSORCE is a *Do-it-Yourself, for repeat use*. It also does not need connectivity to existing applications

INSORCE helps design target operating models

It understands

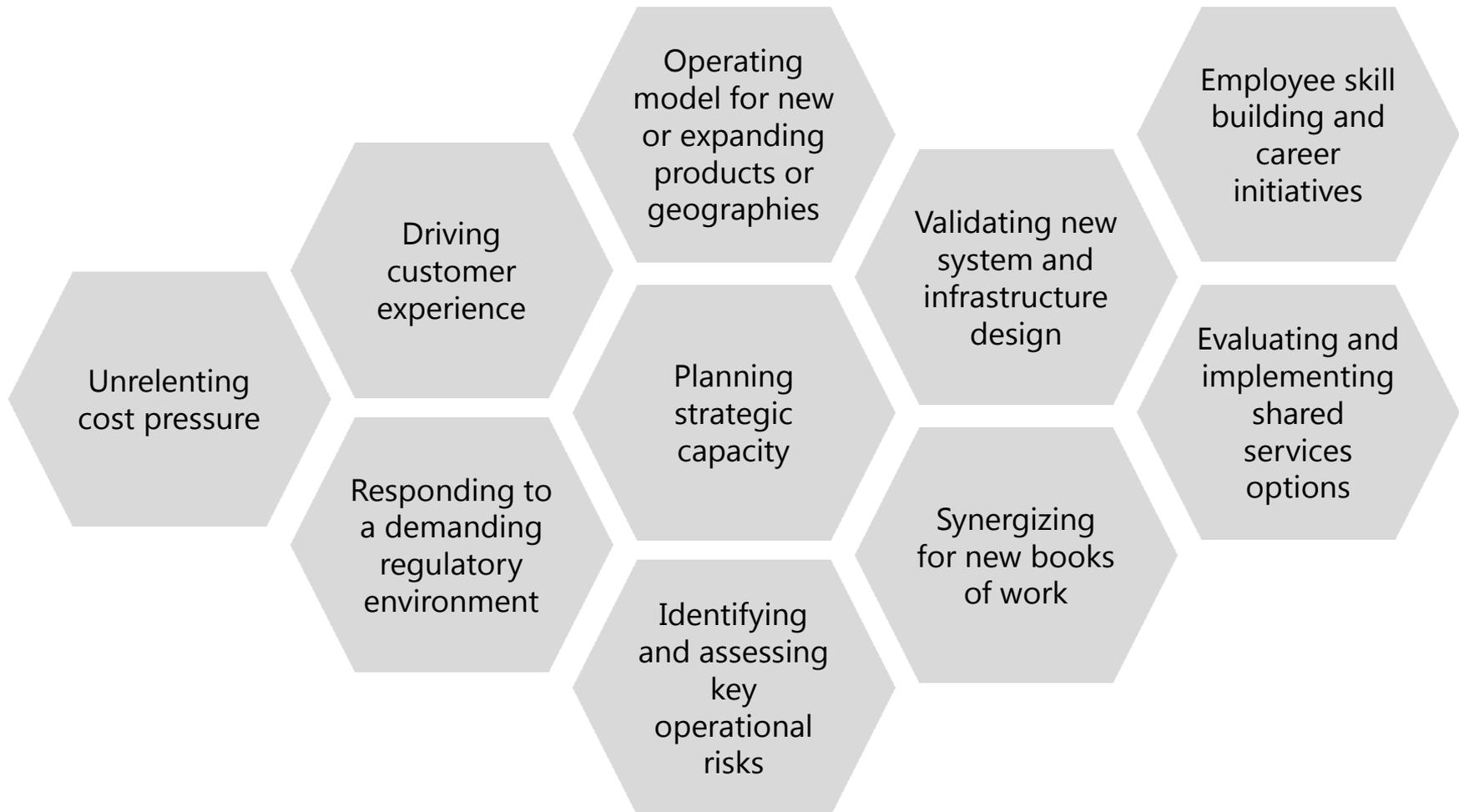
- Business processes
- Business constraints
- Working hours/ schedules
- Risk and control objectives
- Roles and skill sets required
- Location-specific talent pools
- Infrastructure requirements

And plans, models, optimizes for

- Significant reduction in effort
- Improved cycle times
- Better workday planning vs. 24-hour clock
- Full Operational Risk control configuration
- Comprehensive staffing and training plan
- Optimal team structure
- Cost-wizard across all expense lines

INSORCE mathematics identifies efficient [optimal] frontier, factoring in the complex trade offs between stakeholder objectives, business constraints & operational variables

The Problem that INSORCE helps solve: examples



Translating challenges to analysis, and decisions

Strategic view of operations

- Strategic capacity
- Sourcing decisions
- Transformation areas

Identifying process synergies

- SLA and volumes
- Shifts and scheduling
- Process bottlenecks

Understanding effort requirements

- Optimal FTEs
- Team distribution
- Team location & skillset

Assessing Infrastructure costs

- Total cost of ownership
- Infrastructure utilization
- Streamlining and cost of automation

Evaluating Risks and Embedding Controls

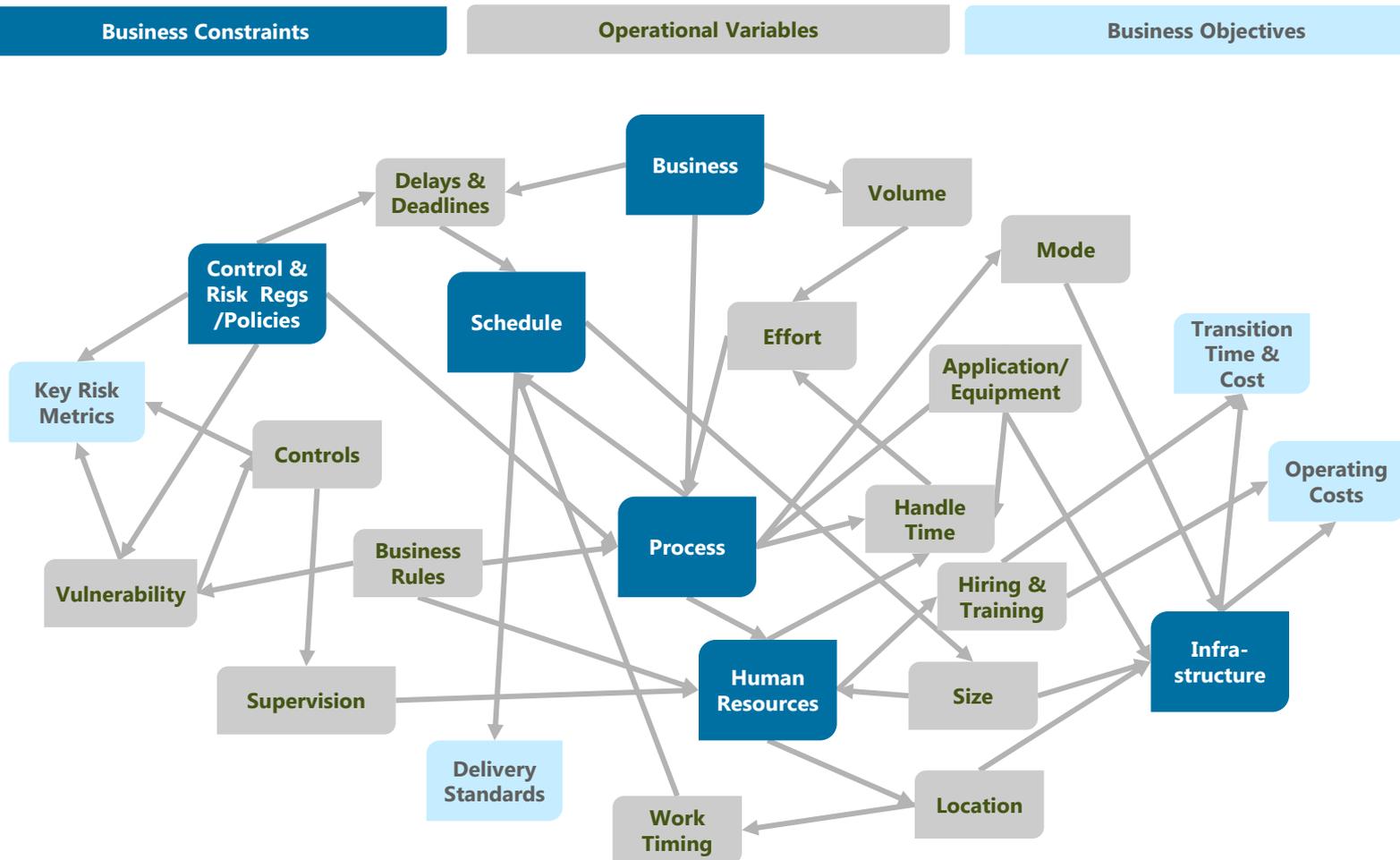
- Control requirements
- Compensating controls
- Cost of controls
- Risk and control metrics

Developing staffing and skills plans

- Competencies required
- Cost vs time to hire
- Span of control

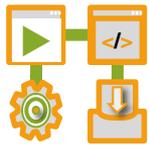
The issues are firmly interlinked and must be looked at in the context of the overall operating model to which the firm has subscribed

INSORCE optimizes for trade-offs among the multiple variables in an operating model



INSORCE creates a comprehensive design across PROFITS

PROFITS – A unified analytical framework for target operating model



Process



Risk



Operations



Financials



Infra

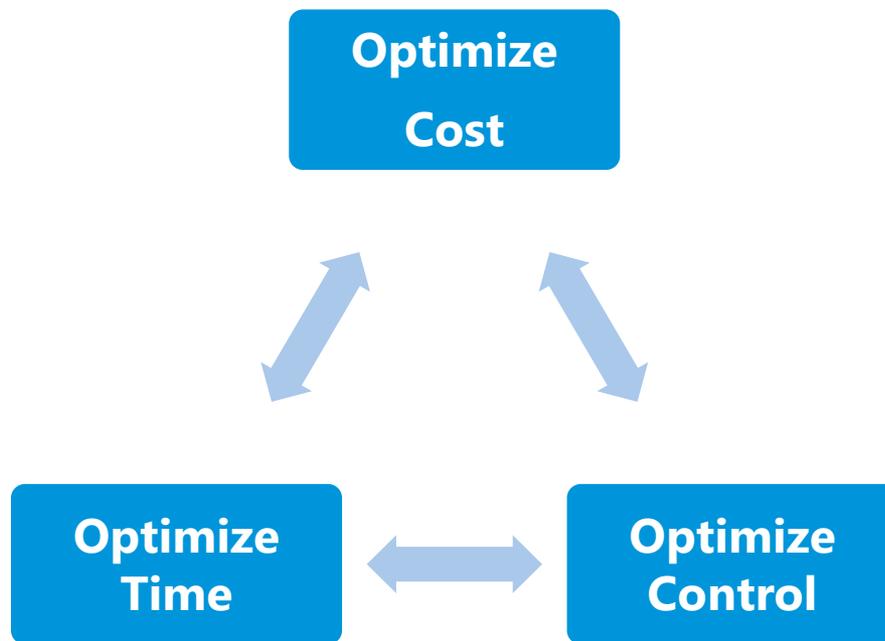


Teams



Strategy

INSORCE builds its output around the triad of key decision variables: Cost, Control and Time



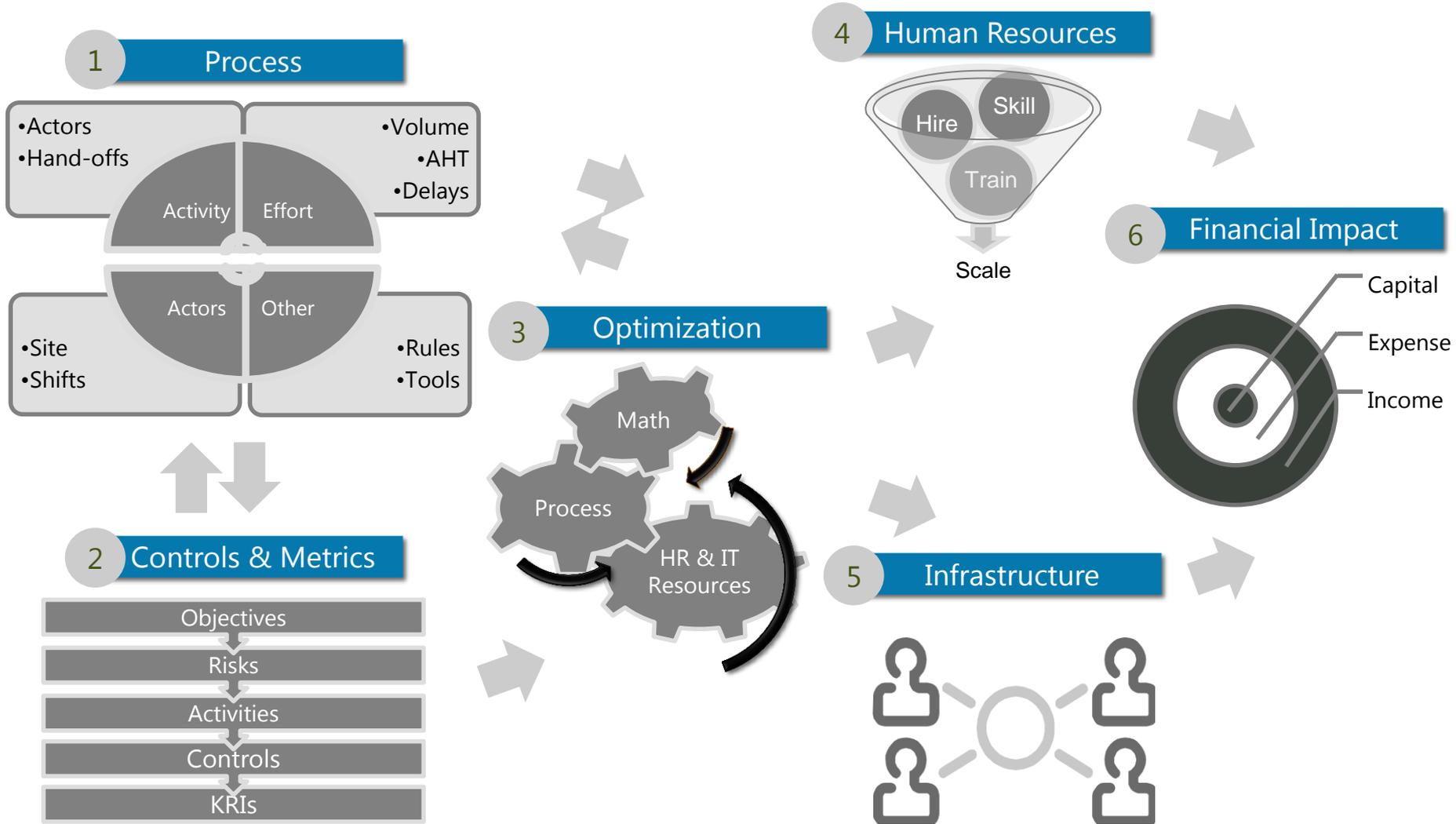
INSORCE postulates cost, control and time as the three critical constraints on decision making

While pressure to reduce costs may always be a given, it cannot come at the expense (threshold) of service quality & increased risk

Similarly, excessive process-control is costly and may come in the way of customer satisfaction

Insorce helps reach an optima across the three primary trade offs

INSORCE Product Map



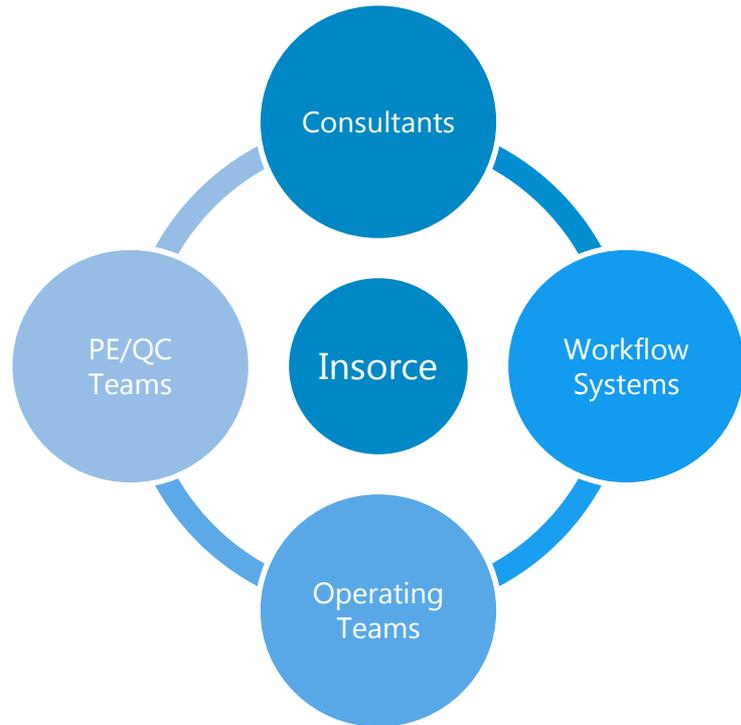
INSORCE in your organization

INSORCE works with
multiple stakeholders...

Senior Management

Operational Management

Team Leads



...and supports decision
making across all layers of
management

Differentiators of an INSORCE-enabled approach

Comprehensive

- Covers all aspects of the operating model design: Process, Risk, Operations, Financials, Infra, Teams and Strategy
- Breaks the conventional silos of analysis

Transformative

- Intended to transform management outlook
- Helps focus on what is essential in process model and weed out the unnecessary details.

Agile

- Standalone web based tool; easy to deploy and use
- No system pre-requisites/ no requirement of system integration
- Typical duration from deployment to output & analysis: 4-6 weeks

Cost Effective

- Delivers results at a fraction of the cost of traditional methods
- Replicate results at much lower costs with deskilled resources

Typical Engagement Timelines

An immediate first step is an INSORCE Demo to stakeholders

Week	Activity	Outcome
1	<ul style="list-style-type: none"> • Meetings with <ul style="list-style-type: none"> - key stakeholders to understand objectives of the firm - project participants to understand business challenges 	<ul style="list-style-type: none"> • Project objectives
3	<ul style="list-style-type: none"> • Developing a digital process model in INSORCE • Enriching the process model, and validating the information with project teams 	<ul style="list-style-type: none"> • Enriched digital model
4	<ul style="list-style-type: none"> • Optimization of the digital model • Review of outcomes by the project team 	<ul style="list-style-type: none"> • Optimized outcomes and options
5	<ul style="list-style-type: none"> • Fine tuning of the results • Presentation to executive management/ committee 	<ul style="list-style-type: none"> • Final presentation

**An INSORCE Pilot engagement helps clarify the use, ability, adaptiveness of the product
Our consulting team helps extract pilot results, enabling product usage going forward**

About insorce™

Background

- Consulting established in 2007 with the objective of helping firms solve the “Efficiency” conundrum
- Partnered with a consulting effort in Risk Management
- Hence, consulting focused on the Cost - Control real and apparent tradeoff
- From Services to Product : Desktop and then Web-based product development since 2010
- Present in Bangalore, Hyderabad, Mumbai, and New York
- Run by industry veterans and professionals with significant financial services experience globally
- Management resumes include Citi, UBS, JPMC, SocGen, Reuters, Tesco, HDFC, Progeon, Mphasis, PwC

Established relationships

- A multinational US Bank in Commercial lending
- A leading global service-provider in BPM across financial services
- Operations center run for a leading European investment bank
- Service-provider for a leading US based investment management firm
- Commissioned for a project with a leading mortgage servicing institution in the US
- Several banks and asset managers in various stages of Pilots and discussion

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