

# BPO FUTURE FORWARD➤

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Offshoring in the asset management industry:  
6 questions to ask before selecting a service provider

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Forces such as increasing customer requirements, stringent regulatory environment, and newer delivery options are forcing the asset management industry to design new service delivery models.

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### WILL THE ENGAGEMENT AUGMENT REACH FOR MY PRODUCTS?



Large BPO service providers deliver services at a committed quality and cost. This helps free-up resources and time to focus on portfolio performance; thereby helping create differentiation in terms of product types, geography, service timings, and enhanced reporting.

2

### IS THE PROVIDER WILLING TO INVEST?



Providers with in-depth industry insights have invested in centers of excellence that focus on a pool of trained resources, enveloping deep domain competencies, creating industry-leading view points, and building tools.

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3

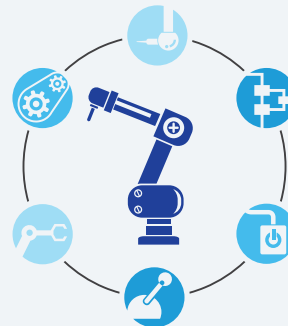
### DOES THE PROVIDER OFFER BETTER IT CAPABILITIES?



Many BPO service providers can offer better deals through utility pricing models / platforms and BPO / software-as-a-service (SaaS). Providers are also technology agnostic i.e. they act as a one-stop-shop to service multiple platforms.

4

### IS AUTOMATION PART OF THE PROVIDER'S AGENDA?



Successful providers aggressively pursue automation and transformation to bring down the total cost of operations. For example, the use of automation as a wrap layer to enhance efficiencies, and artificially improve straight-through processing (STP) rates and controls.

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### IS THE PROVIDER FLEXIBLE?



Many providers demonstrate flexibility in servicing non-core functions such as human resources outsourcing, sourcing and procurement, and legal process outsourcing. They also exhibit flexibility in terms of their pricing, operating models, and governance.

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### DOES THE PROVIDER HAVE A PROVEN TRACK RECORD?



Using historical data, research and market studies, it may be possible to gauge the reliability of a service provider and their adeptness when outsourcing certain key functions.

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