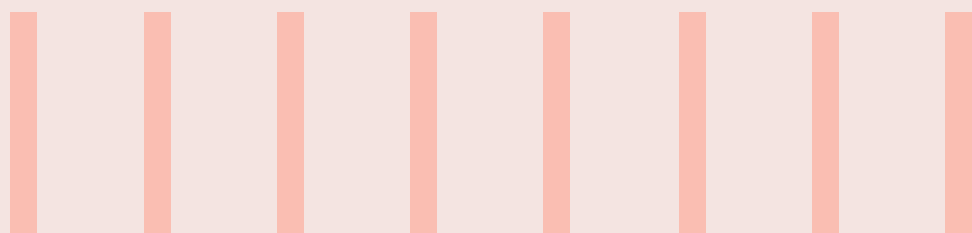




THE CURIOUS CASE OF THE 55,000 MINUTES SAVED



Abstract

Mark Dawkins, Chief Data Officer at a British financial services firm, envisioned greenfield operations to centralise strategic data efforts. Due to the niche skills required, he partnered with Infosys BPM—marking the client's first offshoring initiative. Infosys BPM assembled experts to build operations from scratch, achieving over 55,000 minutes in effort savings and slashing turnaround time from 48 hours to minutes. The case also showcases how tactical reengineering aligned with Mark's offshoring vision.



Turning Ambition into Action: Offshoring Dreams, Data Streams, and a Dash of Daring

Mark Dawkins is the Chief Data Officer (CDO) of a British multinational financial services company headquartered in London, managing assets of over £1,100 billion. Responsible for the organisation's overall data strategy, Mark ensures the quality, security, and effective use of the company's data to drive business value through effective data analytics and governance.

Recently, Mark had been gearing up for a major new challenge. With the financial services giant aiming to elevate its customer experience, Mark decided to establish greenfield capabilities to streamline data operations. His vision for the new operations included setting up a centralised data help desk with a modern ticketing system as a single stop for all the organisation's data queries—one of its kind in the asset management industry. He also wanted to implement an enterprise-level product master for the governance and maintenance of all the funds the

company offered to its customers, as well as a benchmark master to ensure accurate fund performance benchmarks. Finally, he aimed to establish robust processes for classifying and managing various types of organisational data, including index data and customers' personally identifiable information (PII), using proper labelling and access control.

The scale and scope of what Mark wanted to achieve meant that his biggest challenge would be hiring expert resources with niche skills in data operations who could establish the greenfield capabilities from scratch. With the company lacking these required skills in-house and needing to manage operations cost-effectively, Mark opted for an offshoring model. After a long search for an agile and flexible service provider to meet the requirements of his dynamic business model, Mark signed on Infosys BPM as a strategic partner. Soon thereafter, Mark was in meetings with Aarav Iyer, who

was deputed by Infosys BPM to head the project, outlining his plans and discussing his concerns.

Since this was the first offshoring model of its kind for the organisation, Mark was concerned about the cultural shift the transition would entail. He also explained that none of the envisioned processes could be lifted and shifted to Infosys BPM, as they did not pre-exist within the organisation—Aarav would need to set them up from scratch. Mark was worried about how Infosys BPM would secure resources with the core skillsets needed, as most of the required skills were scarce in the market. Aarav assuaged all of Mark's concerns by assuring him of Infosys BPM's in-house domain expertise and centre of excellence with capabilities across various cutting-edge technologies. He also committed to making additional strategic investments in acquiring and deploying skilled resources to enhance capabilities and ensure the program's success.

Building dream teams that turn goals into gold!

With Mark fully on board, Aarav kicked off the project. His initial team of nine data experts started by catering to Mark's basic service requirements and then focused on expanding these services using a phased approach.

Approach summary



The first key challenge in setting up greenfield operations was finding the right people with the right skill sets. Having secured investment commitments from Infosys BPM, Aarav began assembling the diverse team needed, staffing it with the appropriate expertise to expedite capability establishment. After a detailed skillset assessment and mapping of existing talent, he developed a comprehensive skill matrix, which he regularly discussed with Mark to ensure alignment with the overall program objectives. He then established a revised hiring strategy to identify and onboard the right people. To address talent gaps, he identified development areas for existing team members and provided them with tailored training—totalling approximately 1,500 hours of online sessions through Lex, Infosys' in-house

learning and development tool. This was further supported by training sessions from various Infosys Centres of Excellence to enhance the impact of the training.

As the team grew in numbers and skills, Mark defined the project execution approach, while Aarav and his team engaged with various business teams and users to understand migration challenges and strategise a mutual plan. This expedited the setup of centralised data operations. This was followed by the creation of dedicated hub pages to socialise the capabilities and services offered by Infosys BPM.

Later, Aarav brought in Infosys BPM's Data Centre of Excellence to train the help desk team on the functionalities of its ServiceNow ticketing tool, enabling them to transfer the knowledge to Mark's

business users. This involved over 200 hours of training sessions. He also brought in Infosys BPM's automation experts to help identify tools for ticket automation and triaging, and to collaborate with the company's IT team to create custom data query forms for an enhanced user experience. They also designed tailor-made questionnaires to gather feedback from data expert teams and business users within the organisation, aiming to further improve user experience and efficiency.

In the final phases of the program, Aarav directed some of his team to conduct detailed root cause analyses on requests and incidents, delivering valuable insights to the company's data expert teams and thereby reducing recurring queries. He also implemented reporting capabilities and built dashboards for use by the company's senior leadership team.

Enjoying the Vision Come Alive

Thanks to the ardent efforts of Aarav and his team, data operations quickly expanded from the initial help desk setup to include data classification, quality, enterprise product master, portfolio reconciliation, ESG, and global analytics—

all within just a year. In the second year, services further grew to encompass index data management, vendor management, and pricing oversight. Infosys BPM's presence extended beyond data operations into niche capabilities within

the asset management space, such as data risk and compliance, operational risk and resilience, and fund accounting.

By December 2024, the greenfield operations had grown from a team of just nine to a strength of 53 highly skilled staff.

Key benefits



Mark was delighted with the program's growth and success. The new data help desk aligned perfectly with his strategic vision of a centralised function that comprehensively handles all queries from across the organisation's data functions. As a result, over 55,000 minutes of effort previously expended by business units were now fully absorbed by the help desk. Moreover, Aarav's deployment of ServiceNow successfully managed over 15,000 tickets—more than 8,000 critical tickets were resolved within just 5 minutes, and over 6,500 non-critical tickets within 15 minutes. This marked a significant

efficiency gain, especially considering that historical turnaround times ranged between 24 to 48 hours. Additionally, the new real-time reporting dashboards and customised forms greatly enhanced ticket tracking for the company's data experts, improving their turnaround time by 50%, while Selenium automation saved over 1,200 minutes each month.

There were other benefits too. The newly developed Enterprise Product Master (EPM) enabled the successful launch of 33 new products, including 318 share class launches, all with 100% accuracy

and within stringent deadlines. Aarav's team also ensured the accuracy of the entire data dictionary, reviewing over 500 attributes, which accelerated fund launch readiness. Their tactical automation projects for the EPM team reduced manual efforts by 20%, saving over 8,000 minutes annually. In vendor management, tactical automation of over 70% of volumes delivered significant efficiency gains, allowing Mark to reduce staff headcount by one, which was later reinvested to absorb additional activities.

Mark's success with the greenfield data operations did not go unnoticed. He received high praise from the company's senior leadership team for its effectiveness. In turn, Mark was happy to recommend Infosys BPM's services to other business units across the organisation, and soon

Aarav was exploring new opportunities to support the company's US operations.

The icing on the cake came in 2024, when the program was shortlisted as a finalist for a prestigious industry award across multiple vendors. This recognition

was a true testament to the hard work and perseverance of both Mark and the Infosys BPM team in establishing the organisation's brand-new, centralised data operations with niche capabilities.

**Names have been altered to preserve the identities of the people involved.*

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