

# ELEVATE

ENGINEERING THE  
FUTURE OF INSIGHTS  
WITH AI AND ANALYTICS

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REDEFINING  
INTELLIGENCE IN  
MODERN BANKING

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EXPLORING THE FUTURE  
OF SUPPLY CHAIN  
WITH GOOGLE CLOUD  
& EVALUESERVE

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SPREADING FINANCIAL  
DATA IN MINUTES, NOT  
HOURS

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BUILDING AN IP ENGINE  
THAT SCALES





**EVALUESERVE**



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# 25 Years, 25 Voices

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Twenty-five years ago, two visionaries, Marc Vollenweider and Alok Aggarwal, bet on a simple but radical belief: ***When you scale knowledge with the right technology, you can change the way the world makes decisions.*** What began in 2000 as a new kind of insights and analytics partner has grown into the global organization we are today, driven, every step of the way, by curiosity, courage, and an instinct to reinvent before the world forces us to.

As we expanded, so did our ambitions. Evalueserve became a trusted partner to hundreds of leading organizations, including many of the Fortune 1000, top global consultancies, and some of the world's largest financial institutions.

Long before “AI-first” became a buzzword, Evalueserve was already reimagining how human expertise and technology could work together. This mindset sits at the heart of everything we do. Our domain experts, researchers, data scientists, and technologists bring deep human judgment; our digital platforms and AI solutions bring scale, speed, and consistency.

Over these two and a half decades, Evalueserve's voice has contributed quietly but decisively to how modern businesses run. We have helped banks and financial institutions better understand risk and opportunity; life sciences and healthcare companies bring therapies to patients more efficiently; manufacturers and energy companies reimagine their operations; and organizations in many sectors reframe decisions through the lens of data and evidence.





Our teams have designed and delivered solutions in more than 45 countries, across more than 50 languages, often working behind the scenes but always close to the decisions that matter. In analytics, our work has powered everything from customer segmentation and marketing effectiveness to advanced reporting and decision-support systems. In IP and R&D, our patent research and analytics capabilities, supported by one of the largest patent specialist teams in the world, have helped protect innovation and map the technologies that will shape tomorrow.

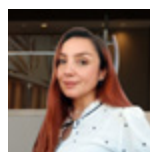
That is why this special edition, “25 Years 25 Voices,” is a celebration of a company milestone and the people who built this journey. Clients who trusted us with their most critical questions. Leaders and Country Heads who steered growth while preserving our values. And above all, colleagues around the world, whose curiosity, resilience, and collaboration turned challenges into opportunities.

This magazine is both a retrospective and a promise. It honors where we have come

from and affirms what we stand for: being a partner that brings clarity, confidence, and impact to every decision we support.

To everyone who has been part of this story, thank you for sharing these 25 years. The next chapter will be written, once again, in many voices. And we are just getting started.

**Author:**



**Marcela Cortez**  
Editor & Senior Associate  
Evalueserve

# Engineering the Future of Insights with AI and Analytics

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**Swapnil Srivastava**

Global Head of Data & AI, Evalueserve

Swapnil Srivastava, Global Head of Data & AI, enables enterprises to translate cloud migration, data modernization, and AI initiatives into tangible business outcomes. In this interview, he discusses how his philosophy of “engineering the future of insights” converts advanced analytics into a measurable impact.

**How do you define the critical success factors of a strategy that links cloud migration, data modernization, and the goal of enterprise-wide digital transformation?**

**Swapnil:** A successful strategy links cloud migration and data modernization to digital transformation by anchoring everything to high-impact business use cases—not technology for its own sake. For a U.S.-based logistics company, the real unlock came from treating Google Cloud as a performance platform, not just an infrastructure provider. By consolidating data in BigQuery, using Cortex for accelerated supply chain and marketing analytics, exposing services through Apigee, and operationalizing

insights in Looker, the organization created a foundation where advanced capabilities like Vertex AI, Gemini, Gen AI, AI Agents, and Agentic Automation could meaningfully improve outcomes. This approach allowed us to focus on measurable value in areas such as Supply Chain Optimization and Marketing Spend Optimization, where AI-driven forecasting, optimization, and autonomous recommendations directly translated into faster decisions, lower costs, and sustained digital transformation.

**In today’s highly regulated environment, how should leaders balance the need for such a hybrid, adaptive data architecture with the non-negotiable demands of data governance, security, and building the organizational “data trust” needed for AI adoption?**

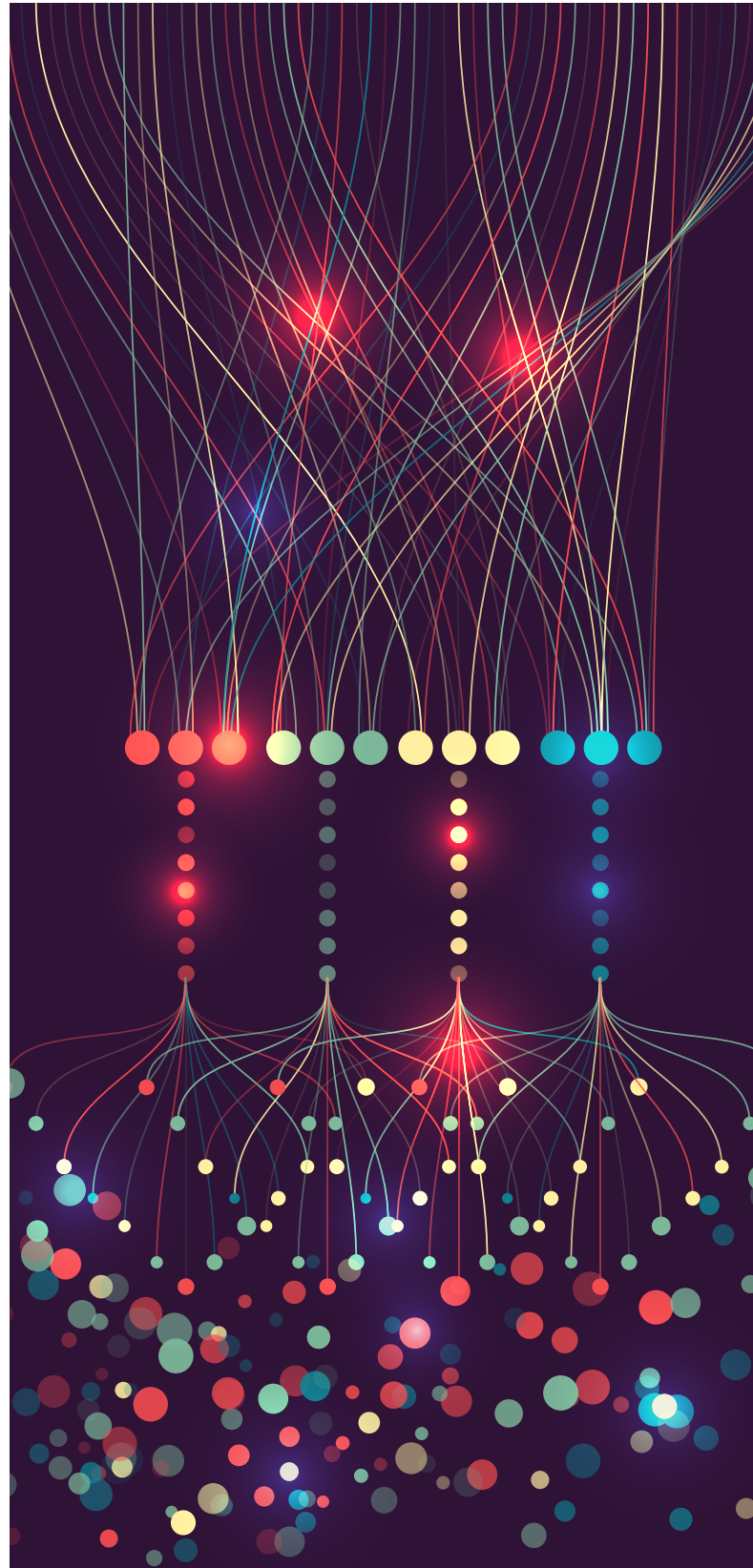
**Swapnil:** Leaders must recognize that agility and compliance are not opposing forces; they are co-dependent. The only sustainable path is a hybrid, adaptive data architecture where governance, security, and trust are engineered into the design from the start, not added later as control gates. In practice, this means establishing centralized standards for metadata, lineage, access, and quality while enabling decentralized, domain-led consumption through well-governed data products.



This is the operating model we implemented at a large financial institution: treat governance as a set of reusable architectural building blocks, such as identity, policy enforcement, classification, and quality monitoring, that apply consistently across warehouses, lakes, and fabrics. This ensures that every dataset is trustworthy, every AI model is auditable, and every decision is defensible. When leaders embed trust and compliance into the architecture itself, they unlock safe, scalable innovation without slowing down the business.

**When tackling complex business challenges like supply chain optimization, what is your philosophy for scaling analytical value? Specifically, how do you manage the transition from initial diagnostic and proof-of-concept wins to achieving and sustaining large-scale, quantifiable business impact?**

**Swapnil:** My philosophy is to scale analytical value through a clear progression from descriptive to predictive to prescriptive outcomes, starting with the highest-value use case that has strong business ownership. Early diagnostic wins come from unifying fragmented data, but real momentum begins when predictive models meaningfully improve decision quality, as we saw when AI-driven forecasting reduced MAPE (Mean Absolute Percentage Error) by 56 percent for a global home appliance manufacturer. The final step is operationalization: embedding these predictions into core workflows, activating prescriptive levers such as inventory or replenishment optimization, and using the right technologies and change management to scale POCs into enterprise capabilities. This structured approach is what turns early insights into sustained, quantifiable business impact.



# Building an IP Engine That Scales

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A multinational industrial company needed to modernize how it managed intellectual property. The demand was rising. Innovation was accelerating. The existing system couldn't keep pace.

Evalueserve designed a blended support model combining onshore and offshore teams, standardized docketing processes, and built automation directly into the client's systems. The approach delivered 99%+ accuracy and faster turnaround times while freeing internal teams to focus on strategic work.

During M&A activity, the system absorbed spikes in workload without missing a beat. The company now has an IP operation built for growth: stable, efficient, and ready for whatever comes next.



**“The Evalueserve team gained deep expertise in the Power Generation & Electrification segments, which has been crucial in our continuous improvement journey towards becoming a world-class organization.”**

**RAFAEL**

**AKHMEDGARIYEV**

COMPETITIVE INTELLIGENCE  
LEADER, GE VERNOVA  
– ELECTRIFICATION SYSTEMS







# AI's Breakthrough in SLR Transformation

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A global pharmaceutical company implemented an AI-driven SLR platform, transforming systematic literature reviews from static, manual exercises into a dynamic “living evidence” engine. The shift delivered always-on insights, expanded review capacity, and helped reduce bias across studies.

*“We moved from being the team that delivers evidence reports on a quarterly basis to being the team that maintains a living evidence platform accessible to the entire organization. We went from reactive to proactive.”*

**— VP of Real-World Evidence, Global Pharmaceutical Company**





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“Evalueserve didn’t just implement what I asked—they challenged assumptions, pressure-tested ideas, and acted as a true partner in solving a very complex problem.”

LEADER,  
GLOBAL PHARMACEUTICALS  
COMPANY

- Client Story

# \$100M in Savings, One Network Redesign

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A North American logistics provider was spending over \$700 million annually to run its linehaul network. Costs were climbing. The company needed a smarter way forward.

Working with Evalueserve, they used Mixed-Integer Programming (MIP) to test millions of scenarios: different distribution center locations, transport modes, and service configurations. The answer was \$100M+ in annual cost savings. Routes became more efficient. Capacity saw better utilization. Delivery times improved.

The company also gained a decision-support dashboard that lets them model changes and respond quickly to market conditions. What started as a cost problem became a competitive advantage.



- Interview with Evalueserve's Chile Country Head

# How Chile Became a Powerhouse of Analytics & Innovation

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**Carolina Zamora**  
Head of Latin American Operations,  
Evalueserve

As Evalueserve's tech capabilities expand worldwide, Chile plays a key role. Carolina Zamora, Evalueserve's Chile Country Head, reflects on how this transformation is redefining her team's work and contribution.

**Over the years, Evalueserve has evolved its technology and analytics capabilities across geographies and industries. What does this journey of digital transformation and innovation mean to you and the team in Chile?**

**Carolina:** When I look back at our journey in Chile, it feels like a story of transformation and possibility. When I first joined Evalueserve, our tech capabilities were limited, and there was no dedicated data analytics team in the Chile office. Over time, we grew from traditional research into advanced analytics and AI-driven solutions, and Chile emerged as a strategic hub serving clients across the Americas and Europe.

This progress was not easy. In the early days, finding talent with the right technical skills, domain knowledge, and English proficiency was a challenge. Instead of waiting for the market to catch up, we created our own rigorous trainee programs focused on technical expertise, business problem-solving, and communication. That investment paid off. It shaped a strong pipeline of professionals and helped strengthen the local tech ecosystem.

Today, digital transformation is part of everything we do. Technology is no longer confined to specialized teams; it is a tool used by every line of business to improve quality, accuracy, and efficiency. Being in the same time zone as many of our clients allows us to co-create and innovate in real time, delivering smarter and more scalable solutions. For us, this journey has never been just about technology. It has been about empowering people, enabling decision-making, creating opportunities, and staying ahead in a world that moves faster every day.

**Every region has its defining moments. Looking at Chile's operations, which achievement or milestone around technology adoption, AI/analytics solutions, or digital delivery models are you most proud of?**





**Carolina:** A defining milestone that stands out to me is the growth and evolution of our data analytics capabilities in Chile. In 2010, we started supporting a single client in customer analytics with a small team of 10 people. Over time, that team grew to nearly 200 professionals and became the largest account in our center, laying the foundation for our analytics and risk practices. What makes this achievement truly special is how it expanded beyond its original scope. We began with customer and marketing analytics, then moved into risk and compliance, and later investment banking analytics, positioning Chile as a regional powerhouse for analytics and tech solutions.

This success sparked a broader shift across our Chile operations. As the analytics and risk teams matured, we saw new opportunities for analytics projects with other clients, including corporates. We also saw other teams adopt digital tools, automation, and data-driven delivery models, which became part of everyday work and improved quality and speed across the center.

These changes also opened doors for our people. Many of those who joined us during this journey now hold local, regional, or global leadership roles. For me, this milestone is proof that when you combine vision with perseverance, you can transform not just a team but an entire organization and inspire a culture of innovation that continues to move forward.

**As Evalueserve enters its next chapter in Chile, what excites you most about the technology and client trends shaping the market? And, how do you see your team continuing to drive impact, innovation, and scalable growth for our clients in the coming years?**

**Carolina:** The next chapter is full of possibility. Technology trends such as AI, automation, and data-driven decision-making are transforming industries at an unprecedented pace. What excites me most is the opportunity to help clients navigate this complexity with clarity and confidence, while empowering our teams to redefine how we create value. We have moved from an era of information overload to one where powerful tools enable us to analyze, generate insights, and deliver smarter solutions. The real differentiator will be how we harness these tools: by combining the breadth and depth of our solutions with the diverse expertise of our multinational, multifunctional teams.

For our teams in Chile and Colombia, this means continuing to evolve and stay ahead of the curve. We will focus on expanding tech and AI-enabled capabilities, deepening client partnerships, and leveraging cloud and automation to create efficiencies that matter. At the same time, we will keep investing in talent development, because innovation starts with people. Our goal is to ensure that every solution we deliver blends cutting-edge technology with deep business understanding.

Chile will remain a strategic hub for innovation, not just for clients in the Americas but globally. I am excited to see how our people rise to this challenge, shaping new ways of working and creating impact that goes beyond numbers.

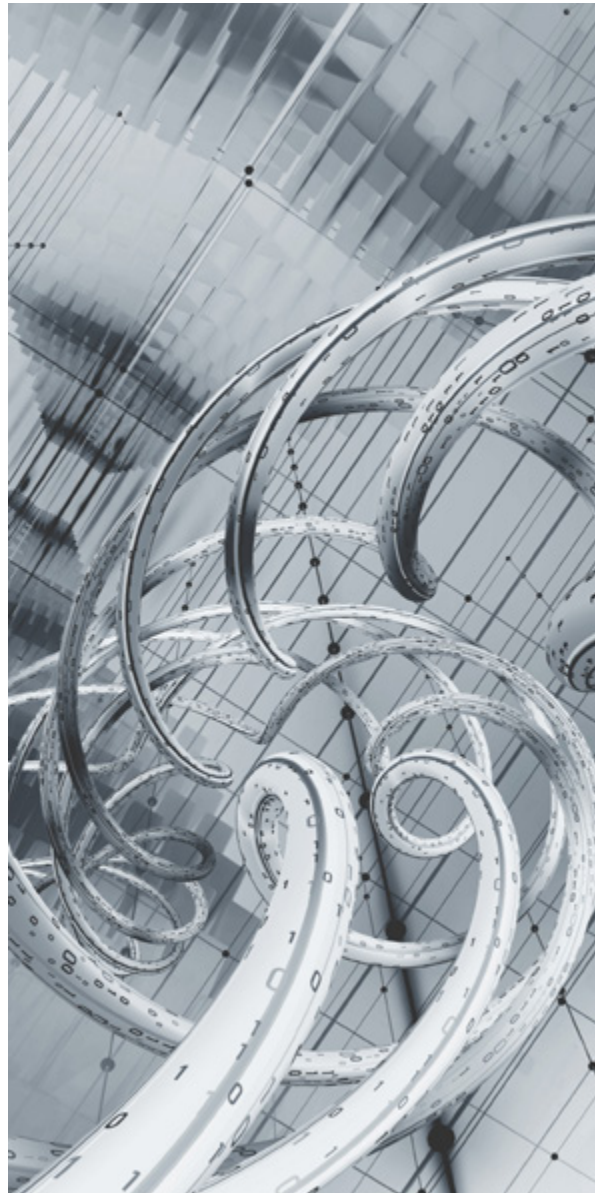
# Rebuilding Mortgage Model Accuracy Through Data Integrity

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A global financial institution needed to restore accuracy across its mortgage models covering agency and non-agency residential mortgage-backed securities. Core models required recalibration to capture recent shifts in rates, prepayments, and delinquency behavior. The loan-level dataset spanned billions of records and multiple terabytes from different sources, with gaps and inconsistencies throughout.

Evalueserve built a cloud-based data backbone to unify multi-source loan data and redesigned the delinquency and prepayment approach using clustering that preserved signals while reducing compute requirements. The scope covered approximately 200 sub-models, translated into the client's C++ production engine through a phased rollout.

The client gained reliable model runs at scale with reduced rework, consistent outputs that improved trust in analytics, and shorter approval cycles. Manual, error-prone steps became resilient, auditable operations.







“Evalueserve stood out because they weren’t just another vendor—they offered a talent-rich, flexible resource pool and tailored their approach to our needs. Looking ahead, we’re combining Evalueserve’s analytics expertise with our internal teams to drive Gen AI-driven insights and deliver amazing solutions for stakeholders.”

**IVO RUFF**

EMEA HEAD OF PERFORMANCE ANALYTICS &  
FORECASTING – J&J INNOVATIVE MEDICINE





# Exploring the Future of Supply Chain with Google Cloud & Evaluateserve

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**Paula Natoli**

Director, Global Strategic Industries,  
Supply Chain & Logistics at Google Cloud

For 25 years, Evaluateserve has been at the forefront of analytics, AI-driven insights, and domain expertise, helping organizations navigate disruption with clarity and precision. Today, as supply chains face unprecedented volatility, our long-standing expertise finds new power through our strategic partnership with Google Cloud.

Together, Google Cloud's data and AI leadership and Evaluateserve's deep domain experience enable companies to solve the most complex operational challenges.

To explore these changes, we sat down with Paula Natoli, Director, Global Strategic Industries, Supply Chain & Logistics at Google Cloud.

**Paula, supply chains seem to face new challenges every day. How do you see the current landscape?**

**Paula:** We are definitely not short of supply chain challenges today. In fact, many of them continue to grow and intensify.

From a global perspective, we're dealing with trade wars, geopolitical tensions, tariffs, and major weather disruptions, whether it's a hurricane in an unexpected area or a drought that alters production. On top of that, consumer expectations are constantly shifting. We're all fickle at times, and those changes ripple through the entire supply chain. Inside organizations, there are data silos, new technologies to adopt, and evolving skill sets required of supply chain professionals. Bring all that together, and it's clear we need strong technology and processes to support an increasingly complex ecosystem.

**This is where partnerships come in. What makes the Google Cloud–Evaluateserve collaboration powerful for customers?**

**Paula:** What I love about this relationship is that it combines the best of both worlds. Google is the leader in data and AI, and Evaluateserve brings deep supply chain experience and exposure. By putting those strengths together, we can work holistically to solve the most complex supply chain challenges for our joint customers.

**Your partnership emphasizes a diagnostic-led approach. Why is diagnosing the root cause so important?**

**Paula:** Too often, companies try to solve a symptom instead of the real problem. A diagnostic helps identify where the true challenges lie, in inventory, network design, transportation, or labor, to name a few. So, the approach works on two levels: first, pinpoint the actual issue, and then work through the modules to understand what needs to change. That's how you get meaningful, long-term results.

**Can you share an example of a customer who benefited from this joint approach?**

**Paula:** A great example is the home appliance retailer we worked with. Everything starts with forecasting: better forecasts feed better decisions downstream, whether it's inventory, labor, or warehousing. This customer used Evalueserve's Suppl.AI solution to significantly improve their forecasting accuracy. Because of that, they were able to optimize their inventory, ultimately saving \$6.5 million. That's the kind of tangible result that demonstrates the value of combining AI, data, and supply chain expertise.

**What should companies keep in mind when adopting AI-driven supply chain solutions?**

**Paula:** I would highlight three key factors:

1. Understand the problem.
2. Know your data. Any AI solution is only as good as the data it learns from.
3. Solve problems, not technology for technology's sake.

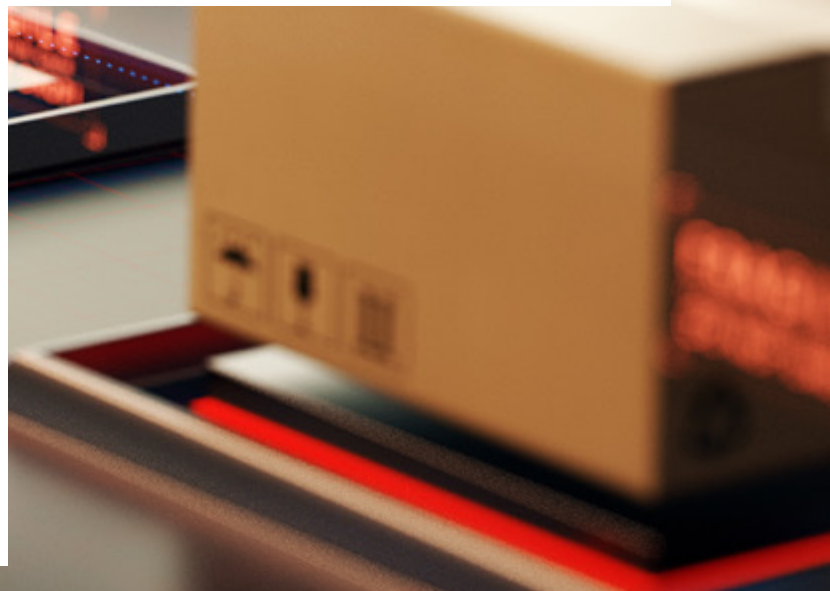
Tech is an enabler. Success comes from pairing problem understanding, good data, and the right technology.

**Looking ahead, what trends do you see shaping the future of supply chain?**

**Paula:** First, we're moving from reactive to prescriptive. Forecasting and predictions will serve as the foundation. Second, integration will be critical. Companies use best-of-breed solutions, but tying them together seamlessly through data and solutions will allow them to think and operate holistically. Third, we're entering the era of autonomous operations, powered by supply chain agents—AI sidekicks that analyze data, optimize tasks, and harmonize decision making.

**With all these shifts, how do you feel about the future of supply chain?**

**Paula:** Honestly, this is a great time to be in supply chain. We have incredibly complex challenges, but we also have rapidly advancing technology designed to solve them. It's a perfect storm for innovation, and I'm excited about the opportunities we have, especially working together, to solve the most complex supply chain problems.



“Evalueserve didn’t just implement what I asked—they challenged assumptions, pressure-tested ideas, and acted as a true partner in solving a very complex problem.”

ERIK LINDBERG





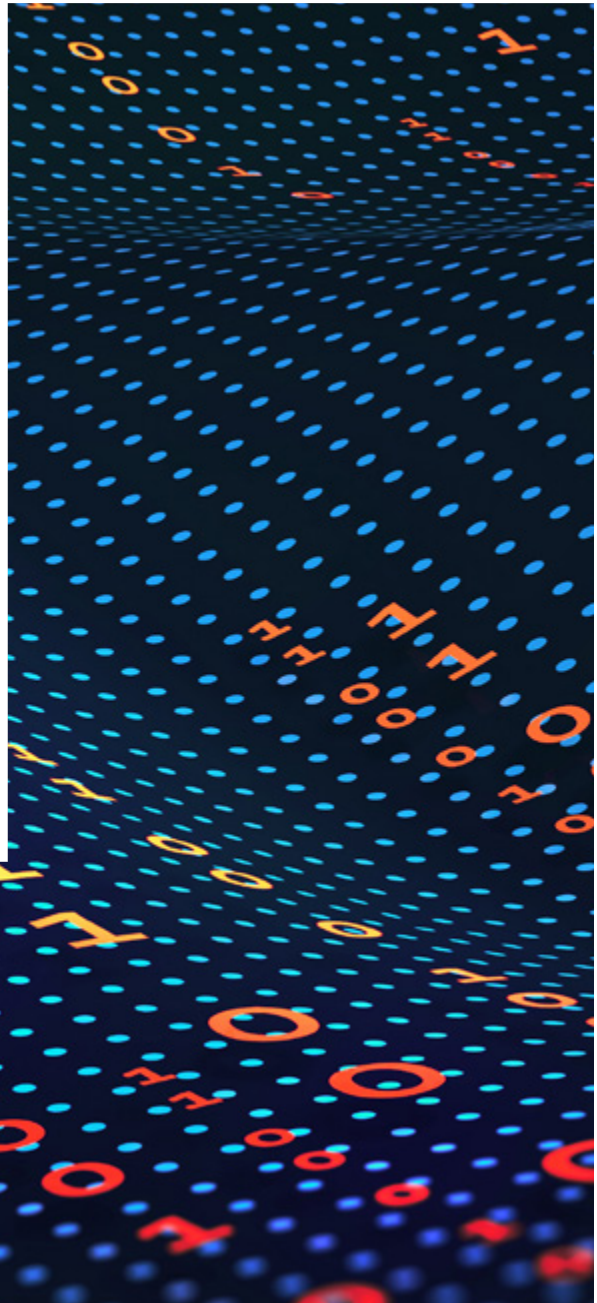
# Making Knowledge Engines Actually Work

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A global consulting firm had built a Gen AI knowledge engine but struggled with data quality and accuracy. Evalueserve took on the hard work. They cleaned messy unstructured data, converted it into structured JSON, and configured the system to match the client's taxonomy.

Taxonomists reviewed edge cases and fed corrections back into the system, creating a loop of continuous improvement. Performance improved dramatically: 60% better precision, twice the speed, eight times the efficiency, and 70% lower costs.

Business users can now pull reliable information from complex documents quickly. The system maintains governance standards and gets better over time. Automation works best when experts stay in the loop.



# Redefining Intelligence in Modern Banking

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**Nitin Garg**  
Global Leader for Corporate Investment  
Banking, Evalueserve

Nitin Garg, Global Leader for Corporate Investment Banking, has spent more than two decades at Evalueserve enabling banks to achieve what often appears unattainable on paper: delivering more, faster, and with greater precision. In this interview, he discusses how the integration of deep domain expertise with advanced technology is redefining the future of banking.

## How should banks and financial institutions think about transformation?

**Nitin:** When we talk about transformation, generally clients are hesitant about implementing any transformation in their processes. They feel that it is very disruptive.

But when we at Evalueserve talk about transformation, it does not mean changing the current processes completely. Transformation can start with very basic automations.

When we look at any process, we try to find out the low-hanging fruits or low-hanging tasks that can be automated using simple technologies. We have seen that by using simple automations, one can improve

process efficiency by 20 to 30%. Once we have looked at all such tasks that can be automated through simple technology, we move to more established platforms.

At Evalueserve, we've built platforms like Company Profile Builder, Comms Builder, and Spreadsmart that can automate workflows end-to-end. They require some upfront effort from clients, around implementation and security reviews, but they consistently deliver substantial cost and time savings.

And lastly, with generative AI, there is scope to look at existing processes and reimagine or recreate those processes completely. This has the potential of giving another 60 to 70% savings in current processes.

I'd say: start small, start simple, and scale as you see success. Even basic automation of repetitive tasks can unlock 20–30% savings. Take something as mundane as converting Excel data into PowerPoint—analysts spend hours copying and pasting. Simple automation can handle that end-to-end, freeing them to focus on actual analysis instead of mechanical work.

## What challenges are your clients facing in today's banking landscape?

**Nitin:** Every bank is under pressure and needs to do more with the same budget. There are only a few real levers to achieve that, and technology is one of the most powerful.



A second, equally important challenge is work-life balance. It's common for analysts and associates to work 80–100 hours a week, and we've seen talented people leave investment banking—or avoid it altogether—because of this.

Our platforms and tools are designed to address both issues. With Evalueserve and our global delivery teams, much of the heavy lifting can be automated or handed off across time zones. Bankers get faster access to the information and outputs they need, without having to create everything themselves at 2 a.m. The result is doing more without increasing cost—and improving work-life balance at the same time.

These pressures aren't going away. Banks will continue to face cost constraints, and the only sustainable way to manage them is to embrace technology and systematically reimagine processes to be more digital, more automated, and more efficient.

### **How does your team ensure you are delivering value for clients?**

**Nitin:** Analyst teams are burning out. Eighty-hour weeks are still common, and banks are losing talent or struggling to attract it because work-life balance hasn't kept pace with expectations.

That's where our platforms and Evalueserve come in. We automate the heavy lifting and use global teams to work across time zones, so bankers get the analyses, decks, and insights they need faster, without having to create everything themselves at midnight. Clients do more without increasing cost, while improving quality of life for their teams.

These challenges aren't going away. Cost pressure is structural. The sustainable response is clear: embrace technology and systematically redesign processes to be more digital, automated, and efficient.

We work with our clients as partners. In many cases, the solution is not very evident when clients reach out to us, but through a partnership approach, we try to solve the problem together. We also encourage our teams to come up with ideas, and many of those ideas sometimes translate into technology tools and products that we implement across clients.

Essentially, we encourage a culture of innovative problem-solving within our teams.



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**“We went from hoping we’d hear about opportunities before competitors to systematically identify them first. Our reps went from researchers to closers.”**

**SALES DIRECTOR,  
MAJOR BUILDING  
TECHNOLOGIES COMPANY**





# China's Journey to AI-Enabled Decision Intelligence

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**Kevin Wang**

Country Head - China, Evalueserve

As technology and AI reshape Evalueserve globally, China offers a distinct vantage point. We asked Kevin Wang, Evalueserve's China Country Head, how this transformation is influencing the way his team partners with clients and drives innovation.

**From China's perspective, how has Evalueserve's transformation in analytics, digital platforms, and tech-enabled decision support shaped the way you and your team work with clients?**

**Kevin:** Many of our major China clients still rely on traditional services, and large multinationals typically adopt new technologies gradually. But in recent years, this has clearly accelerated.

We're moving from a classic "problem-solution, bill-by-hour" model to long-term, tech-enabled partnerships built on deep industry expertise. Clients expect faster delivery through automation, less manual work, and more impactful, AI-driven solutions.

They want centralized digital platforms with real-time data, early visibility into risks and opportunities, and access for multiple teams. This shifts us from a vendor role to a digital asset partner, where both sides use AI to achieve shared goals.


By embedding AI in our offerings, we don't just deliver services—we enable new capabilities. Our clients also bring strong human-AI skills, acting as co-pilots and working closely with us to shape and refine solutions.

**China leads in digital adoption. Which achievement within Evalueserve China best reflects our innovative spirit and ability to stay ahead?**

**Kevin:** Evalueserve China was one of the first offices to start AI research. A key moment was our leadership visit to Intel in 2018, when we saw how powerful AI could be in business. Since then, we've evolved from simple automation to large-scale digital process redesign and real AI use cases for both internal efficiency and client impact.

Our biggest achievement is our early start. It allowed us to build domain R&D ahead of competitors and scale AI best practices from China to global teams. Even through macro challenges, we kept investing in technology, and those efforts are now paying off.





AI is now part of our culture. A long-standing global FMCG (Fast-Moving Consumer Goods) client recently visited and was impressed by our AI applications and digitalization journey. This recognition is a testament to the dedication of our China and global R&D teams.

What I value most is that Evalueserve consistently embraces change. We accept failures as part of innovation and keep pushing to transform our business model and influence on the industry.

**Looking ahead, what excites you most about China's technology momentum, and how will your team leverage local innovation to create future impact?**

**Kevin:** China has three major strengths in AI development:

1. **Talent & Data:** It has the world's largest AI talent pool—over half of all global AI researchers are of Chinese origin—and leads in patents and user adoption.
2. **Infrastructure & Energy:** It is the world's top power producer, particularly strong in renewable energy.
3. **Cost Efficiency:** With less capital-market funding than the U.S., China demands fast, practical, cost-effective solutions, driving rapid innovation.

Local models such as DeepSeek, Kimi, Qwen, and Doubao also create strong opportunities for localization partnerships. China's market requires technology to be immediately applicable, industry-specific, and fast to execute.

#### **This means:**

- Speed over structure
- Deep vertical integration in sectors like manufacturing, healthcare, and e-commerce
- Strong localization, with local platforms, engineers, and consultants who understand market dynamics

For Evalueserve China, our domain expertise can increasingly link to AI applications in areas such as:

- Smart manufacturing
- Smart procurement and logistics
- Corporate digital transformation, including FinTech tools and autonomous AI agents for workflows and research

We are committed to accelerating the integration and commercialization of our AI solutions in the local market and contributing to the next wave of growth for our clients.





“[Evalueserve] helped us deliver a complex, multi-country market share data product on time and with transparency, which has been crucial for stakeholder alignment.”

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**VIJAY CHAND**

HEAD OF TRANSFORMATION,  
GMMA ALEXION,  
ASTRAZENECA RARE DISEASE





# Building Trust at AI Speed: Turning Gen AI Risk into Value

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**Anna Słodka-Turner**  
Global Head of Risk and Quant Solutions,  
Evalueserve

As AI accelerates the transformation of global finance, Dr. Anna Słodka-Turner, Global Head of Risk and Quant Solutions, stands at the intersection of innovation and governance. She guides leading financial institutions in elevating risk from a regulatory requirement to a strategic differentiator, particularly amid the fast-moving advances in generative AI.

**Risk functions don't have to be just about compliance; they can create real value. Which areas of risk management do you see as most strategic? And how is Evalueserve turning these areas into real competitive advantages for its clients?**

**Anna:** Risk is not about compliance. They are separate topics, and each has a different set of priorities.

In December 2025, the risk functions have a few priorities, but number one hot topic if you wish just now is: how do we understand and prepare for the risk associated with Gen AI? This technology is transforming

businesses but is also a risk that very few organizations understand and are able to manage. Managing the risk of Gen AI as a service is something I see as a top priority for us at RQS.

Across leading financial institutions you advise, what patterns separate the firms that scale AI safely from those that stall, and what benchmarks or decision frameworks do you recommend to measure "safe speed" at scale?

It starts with a vision. Does the organization have a clear vision of how it wants to benefit from the new technology? In many places you have BFIs that clearly say: we want to be leaders and make sure we capture the benefits.

This allows all teams to work together to find the relevant use cases, match them with the right and high performing technology, and put them under the right governance umbrella.

We recently spoke with one of the leaders in space, and he listed some of the departments involved – from risk, cyber security, technology, finance, HR. There are many teams that must play a role to allow the Gen AI transformation.

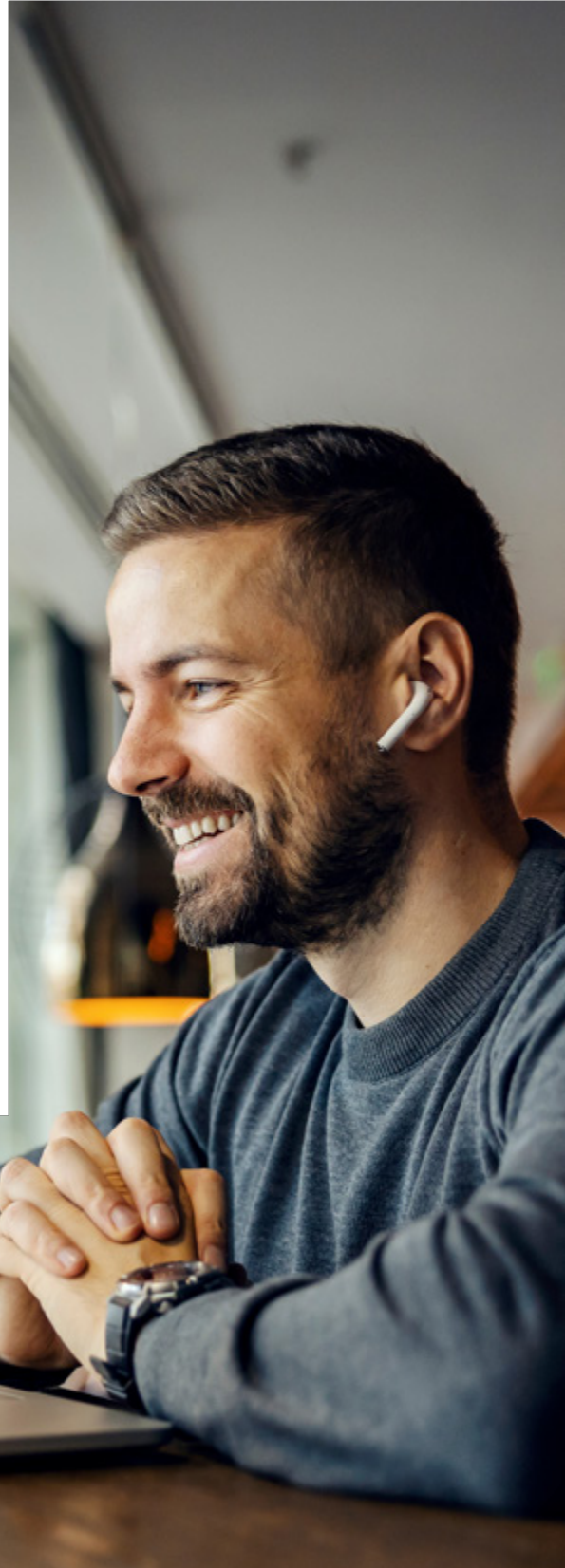
With a clearly defined vision, ambition and budget, all the pieces can fall into place.

**What non-obvious market shifts will re-shape risk and compliance over the next 24 months (e.g., Gen AI in model lifecycle, climate risk, real-time monitoring)—and how is Evalueserve positioning clients to capitalize on them, not just comply?**

**Anna:** It comes back to the very basic role of financial institutions. They lend money, 'sell credit risk' if you wish. The quality of this credit risk determines their standing and stability. We can make the decisions faster and cheaper, but what really matters is: have we made the right decisions? Have we priced the risk correctly? What is the quality of our portfolio.

With uncertainty, ongoing monitoring and ability to take swift corrective actions comes to the fore. Gen AI can assist here, but it is not a silver bullet.

We help clients make better decisions, then monitor, report, stress, and analyze their portfolios. I can see this work increasing in the foreseeable future.



# Lasting Innovation & IP Leadership

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**Justin Delfino**  
Global Head of Intellectual Property and  
Research & Development, Evalueserve

Justin Delfino, Global Head of Intellectual Property and Research & Development, enables global innovators to rethink their approach to intellectual property. In this interview, he explains how combining deep domain expertise with advanced analytics and generative AI is transforming IP into a catalyst for commercialization, competitive advantage, and industry-shaping decisions.

**Intellectual property has traditionally been viewed as a means of legal protection. How is Evalueserve helping clients shift their perspective to see IP as a driver of growth and innovation?**

**Justin:** The best way to explain this transformation is through the lens of commercialization. When organizations start to think about turning ideas into marketable products, IP becomes the central mechanism for capitalizing those ideas.

Take, for instance, a global consumer goods company developing a new concept. The motivation behind creating an IP asset is not solely protection but also the ability to make new product claims and create unique value propositions. These claims can reshape how

products are positioned in the market and secure long-term competitive advantages. We help clients recognize that IP is far more than a legal safeguard—it's a strategic differentiator. When used effectively, IP allows companies to capture and defend markets for decades. By understanding and leveraging different forms of IP—patents, trademarks, design rights, trade secrets, and copyrights—businesses can unlock tangible strategic value.

At Evalueserve, our IP and R&D teams provide both advisory and research services, helping companies optimize the deployment of IP for commercial gain and protection. Some focus on achieving market advantage; others on mitigating risks and preventing infringement. We support clients across both dimensions.

**You operate across R&D, analytics, and IP. How do you balance deep domain expertise with tools such as generative AI and advanced analytics to ensure genuine insight rather than noise?**

**Justin:** It begins with a clear understanding of the client's needs. Deep domain expertise is essential—particularly in R&D analytics, where we explore market insights, benchmarking, and white-space opportunities. Without a firm grasp of the sector, there's a real risk of misinterpreting what is relevant or valuable.



Generative AI plays a complementary role. We've conducted extensive audits of our processes to pinpoint where automation can enhance efficiency. Through process mapping, we've integrated generative AI and robotic process automation (RPA) at specific points along the research journey—where they genuinely add value.

Our most effective model combines expert knowledge with AI acceleration—an “expert-plus-AI” approach. In fact, AI increases the demand for deep expertise. If AI can handle tasks equivalent to those of a mid-level analyst, the differentiator becomes human expertise at a strategic level.

**You often speak about making decisions that shape industries rather than just careers. Can you share an example of a bold decision or pivot that changed not only your business but also the direction of a client or market?**

**Justin:** A great example is our long-standing collaboration with a leading global chemicals company. When we began working together more than a decade ago, their IP management processes were highly inefficient.

By auditing workflows and documentation, and by identifying what was essential versus redundant, we helped them streamline operations. The outcome was tangible: improved efficiency, higher quality

standards, and measurable cost savings. They saved millions annually by eliminating late-payment fees and redundant procedures—essentially recouping the full value of our engagement.

For us, this partnership became a catalyst for growth. The experience provided deep expertise in IP management optimization, enabling us to deliver similar solutions to other major industry players. It transformed how the client operated and simultaneously opened a new, highly successful market for us—one that remains among our most profitable areas today.

**When assessing innovation and IP initiatives, what hard metrics or KPIs do you monitor to ensure that what's being built endures — not just performs?**

**Justin:** KPIs are always context-specific and depend on why a client is innovating. If the goal is market protection, success metrics focus on blocking competitors or securing exclusivity. If the objective is market expansion or capitalization, KPIs could revolve around revenue growth, market share, or compound annual growth rate (CAGR).

Ultimately, KPIs must align with the company's broader strategic goals. There's no universal formula—the key is ensuring that innovation and IP outcomes directly support the organization's long-term ambitions.

# How Peel Hunt and Evalueserve Built a Differentiated, AI-Enabled Research Portal

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**Lars Mitchell**

Head of Research Publications, Peel Hunt

Evalueserve has helped organizations turn data, content, and domain intelligence into differentiated digital experiences. As investment research becomes more competitive, and clients demand faster insights and richer interfaces, platforms must go far beyond basic document repositories.

Peel Hunt, a leading UK investment bank, partnered with Evalueserve to develop a new generation of equity research portal powered by the InsightsFirst platform. We spoke with Lars Mitchell, Head of Research Publications at Peel Hunt, about collaboration, the technology behind it, and why differentiation matters more than ever.

**Lars, what made Peel Hunt choose Evalueserve as a partner for this initiative?**

**Lars Mitchell:** We chose Evalueserve because we were impressed with the size of

their development team, their capabilities, and the track record that they had. We also found them very open to innovation and trying out new ideas, which was important because we were trying to create a portal that was highly differentiated, something beyond a simple document repository, and give users a real reason to come to us rather than stay on aggregators like Bloomberg.

**The portal integrates multiple systems. What was that experience like?**

**Lars Mitchell:** We were able to integrate across three separate vendors and also employ our own APIs here at Peel Hunt to create a feature- and data-rich portal experience.

We have high levels of access to curated data, and that allows us to scale and iterate quickly. We found that extremely beneficial for creating various components within the portal. It's easy for me to iterate, update, and create new exhibits on the fly and deploy them quickly.

**How did the collaboration support your move into AI-enabled research features?**

**Lars Mitchell:** We worked very closely with the Evaluateserve dev and design teams and were able to bring our first AI product into production within a matter of weeks—it was very quick.

We're currently working with them to bring our second feature live, and we expect that will take about a quarter from the incubation of the idea.

**Why is differentiation so important for modern research portals?**

**Lars Mitchell:** I think it's very important to differentiate your research portal. Having a simple document repository is simply not enough in today's world. You need a feature-filled experience that draws clients in—giving them access to information and data they wouldn't normally be able to access easily.

**What makes the resulting Peel Hunt portal unique in the market?**

**Lars Mitchell:** With Evaluateserve, we've found a flexible and competent partner who has helped us create something I feel is unique. It has features that give our users a richer experience when they visit—not just reading a report, but actually understanding the data around the company and sector, accessing multimedia, using AI to query, and more. We're also hoping to enable real-time conversations with analysts. So overall, our experience with Evaluateserve has been excellent, and I would recommend them to anybody.





# Spreading Financial Data in Minutes, Not Hours

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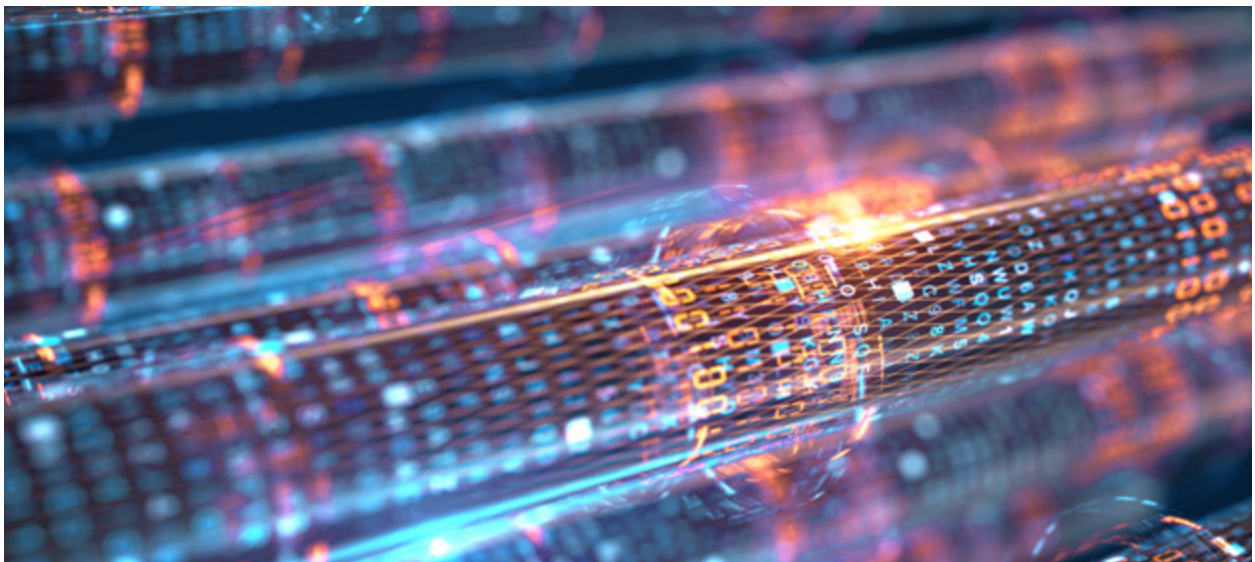
A global bank was stuck with manual financial spreading. The process was slow, labor intensive, and prone to inconsistency.

Evalueserve deployed Spreadsmart, an AI-based spreading platform, and connected it to Moody's CreditLens. The system handles table detection, data validation, and text analysis across multiple languages automatically. The bank cut spreading time by 21%, extracted data 70% faster, and hit 99.6% accuracy. Newer AI features reduced manual work by another 18%.

Credit decisions happen faster. Reporting is cleaner. The bank has a foundation to build on for future lending automation.

*"Integration of Spreadsmart with CreditLens spreading tool helps us achieve a critical milestone in the journey to automate Financial Spreading process. The solution is expected to deliver tangible improvement in efficiency and processing quality. Would like to thank the project team members for their tireless efforts in accomplishing this."*

**— Reengineering and Production Management Lead**



“We used to be the team that took weeks to tell leadership what something might cost. Now we’re the team that pressure-tests strategy with live scenarios in real-time conversations.”

ANALYST,  
SPECIALTY CHEMICALS  
COMPANY

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- Interview with Evalueserve's Romania Country Head

# Romania's Strategic Role in Evalueserve's Digital Future

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**Corina Peiu**

Country Head - Romania, Evalueserve

As Evalueserve grows alongside global tech and analytics innovation, Romania plays an increasingly pivotal role. Corina Peiu, Evalueserve's Romania Country Head, shares what this evolution means for her teams and where the region is headed next.

**Evalueserve's evolution has been closely tied to advances in technology and analytics worldwide. From the vantage point of Romania, what does this journey of growth mean to you and your team?**

**Corina:** One of the things I'm most proud of is that we don't just adapt to technological changes, but we're often at the forefront of them.

Our partnerships with both major players and specialized startups give us access to cutting-edge innovations, and when we combine that with our deep industry expertise, we deliver solutions that truly make an impact.

From Romania's vantage point, this shift from traditional delivery models to AI-enabled and tech-driven services has strengthened our role as co-architects of digital transformation. Much like the evolution we're seeing across European investment and corporate banks, where AI is becoming part of the core infrastructure, our teams blend automation, analytics, and human judgment to deliver faster, more rigorous, and more discoverable insights.


For us, this journey has meant stepping confidently into work that shapes how clients operate, not just how we support them.

**Central and Eastern Europe is a dynamic tech hub. Within our Romanian operations, what milestone or achievement best captures Evalueserve's culture of innovation and excellence?**

**Corina:** With a highly experienced team here, we're often entrusted by clients to lead their digital initiatives. I regularly see colleagues proactively upskilling to stay ahead, and I'm proud of how enthusiastically they embrace this evolution of human intelligence.

A milestone that reflects our culture of innovation is the way Romania has helped clients navigate major industry shifts, whether through regulatory changes in



An aerial photograph of a city, likely Bucharest, Romania, showing a river winding through the urban landscape. The city is densely packed with multi-story apartment buildings. In the background, there are rolling hills and mountains under a clear blue sky with some clouds. A large, modern building with a curved facade is visible on the left side of the image.

European investment research or the move toward structured data, APIs, and AI-supported workflows. Our ability to combine technical depth, compliance awareness, and strong client engagement has allowed us to deliver scalable, high-quality solutions in some of the most demanding environments.

**As we look ahead, what excites you most about Romania's role in Evalueserve's future technology roadmap? How do you see your team harnessing emerging tech trends, talent, and client expectations to keep building momentum and deepen our impact across European and global clients?**

**Corina:** Being close to our clients is central to our presence in Romania. Regular conversations and participation in industry events help us shape a technology roadmap grounded in what truly matters. For example, with AI agents, our focus is on precision and contextualization and not volume. Recently, we deployed agents that automate battle cards and boost sales conversion rates, proving once again that quality beats quantity.

Looking ahead, I'm excited about Romania's growing role as a hub for applied AI and domain-specialized analytics across Europe.

As clients expect more personalization, transparency, and efficiency, our teams are well-positioned to harness emerging technologies responsibly by building workflows with clear governance, pairing machine speed with human judgment, and enabling analysts and business users to spend more time where they add the most value. This is where Romania will continue to deepen its impact both regionally and globally.





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“I cannot tell you how thankful I am for the partnership you provide, and the diligence you put into each request... I cannot count the hours this helped to save on our end.”

DIRECTOR OF FINANCIAL  
OPERATIONS – TOP 5  
GLOBAL BANK

# Finding AI Use Cases in a Fraction of the Time

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A consulting firm was spending 90 hours per sector manually hunting for AI use cases. Evalueserve automated the process using Agentic AI.

The work happened in phases: manual groundwork, proof of concept, then full automation. Evalueserve developed three specialized W agents for identification, profiling, and segmentation. Domain expert hours dropped by 61%. Turnaround time fell 40%. The firm freed up over \$1M in capacity.

They can now cover more sectors and access all insights through a single dashboard. What was once a bottleneck is now a repeatable system that scales across industries.





# Turning Expertise into Scalable Intelligence

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**Pratyush Prabhat**

Global Head of Professional Services and Asset and Wealth Management, Evalueserve

Pratyush Prabhat, Global Head of Professional Services and Asset and Wealth Management, shares his vision on AI turning static research into living intelligence.

**Pratyush, at a global strategy firm tracking AI across eight industries, manual research fell behind—how did you deploy AI agents to automate intelligence, what was failing before, and how did real-time sector intel change how consultants advised clients?**

**Pratyush:** This was a significant strategic initiative for our client who wanted to shift the focus of their GTM efforts to more current and relevant AI focused use cases for every sector. An understanding of relevant use cases would not only be useful for their sales and GTM efforts but would also be key to internal capability building. The old school, 'human only' approach to this would have been very time consuming, researching every industry sector in depth, aggregating and curating the use cases, and supporting our recommended use cases with relevant examples and case studies.

To improve the time to market, our team created an agent leveraging one of our partners' ecosystem of indexed

and searchable web content. The agent researched the latest sector specific news related to AI enabled use cases, picked up relevant case studies and presented a very concise list of use cases by sector answering the following key questions:

- What are the leading players doing with AI, and what impact is it having?
- What technologies are being utilized?
- How is AI going to disrupt the business model?
- What are our competitors doing in the field?
- What are the use cases that are getting the most traction?

In summary, we were able to deliver a very heavy-duty piece of research using an AI agent in about 40% less time than it would have taken a human only team to deliver.

**Also, one of the Big Three came to you with thousands of supplier records, but inconsistent naming, hidden relationships, a data nightmare that made procurement intelligence nearly impossible. Walk us through the agent solution you built. What convinced their leadership to expand beyond the pilot, and how did clean, structured supplier data change what their teams could do?**

**Pratyush:** The procurement and sourcing team of a large consulting firm when working with their end clients was dealing with messy spend data as articulated accurately in your question. Our AI agent squad built an innovative multi-agentic Spend Intelligence platform, integrating Spend Normalization, Classification, Analysis, and Optimization with AI-driven Recommendations. After a successful POC for the client, the agentic workflow has been upgraded to deliver next generation spend insights, identifying leakages, pricing variances, supplier overlaps, and ESG risks providing forecasting, optimization recommendations, and real-time alerts for smarter procurement. The spend harmonization, classification and intelligence program, which would have been a long, expensive and time-consuming process, can now be implemented with more than 30% efficiency with 'humans in control'.

**Finally, professional services firms are sitting on decades of institutional knowledge trapped in documents, emails, and expert heads. What's your perspective on how AI agents and knowledge management are reshaping the competitive dynamics in consulting? Where do you see firms winning with this technology versus struggling to get value from it?**

**Pratyush:** Effective knowledge management has been an enigma not only for the world's largest corporations but also for some of the world's most sophisticated consulting firms. Just throwing technology at the KM problem has never been effective in the absence of a robust data strategy and governance framework. Even with the promise of AI, a recent report by Gartner says that while 70% of the enterprises invest in AI for KM, only 18% believe that they have a KM strategy

to support it. The firms who win with this technology will be the ones who will look at the problem holistically with technology being only a part of the solution. Data strategy, governance framework, change management culture and technology enablement will separate the winners from 'also rans'.

With the approach outlined above, we recently helped a development consulting firm save 40% of time responding to new RFPs by effectively leveraging organizational knowledge repository and streamlined processes and KPIs.



# What's next?

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Evalueserve has grown into a mature, global partner, without losing the entrepreneurial mindset that has driven us from the start. We question assumptions, move fast on good ideas, and treat every new brief as if we're earning trust for the first time. That attitude is what keeps us reinventing how we work and deliver. We build, test, and refine with our clients, inside the complexity of their reality. We're comfortable in the messy middle, where data is imperfect, stakes are high, and answers aren't obvious.

This Issue has showcased just a fraction of the people and stories behind that mindset: colleagues who stretch beyond their roles, leaders who make room for experimentation, and clients who are brave enough to ask harder questions and expect more from their partners.

Looking ahead to 2026, we're not planning to slow down or play safely. We are excited about more pointed insights, bolder solutions, and a continued push to turn emerging technologies into everyday advantage. The next wave of ideas is already in motion, and we're excited to create what comes next, together.