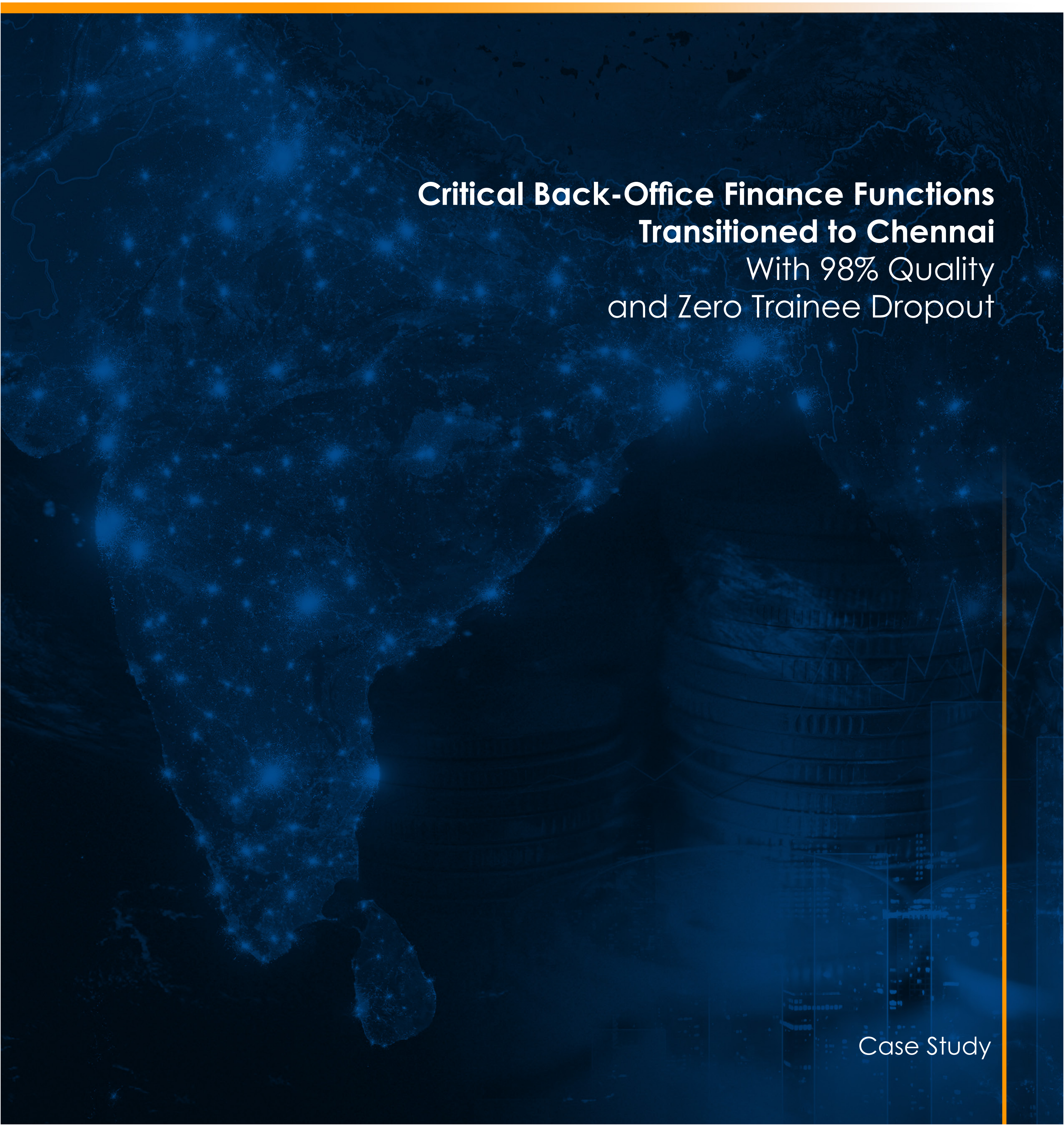
DATAMARK

America's Premier *Outsourcing* Partner



Critical Back-Office Finance Functions Transitioned to Chennai

With 98% Quality and Zero Trainee Dropout

Case Study

Critical Back-Office Finance Functions Transitioned to Chennai With 98% Quality and Zero Trainee Dropout.

Underwriting capacity rebuilt in Chennai, sequenced in three waves and engineered to grow.

Snapshot

Facing rising costs, a leading real estate finance and underwriting firm needed to address attrition in its North American underwriting back office. The operations team needed to restore capacity, without absorbing another year of training churn.

The firm partnered with DATAMARK to transition critical back-office finance and accounting functions to DATAMARK's offshore delivery center in Chennai. This phased move was designed to protect quality before a period of accelerated scaling.

Three training waves later, the new offshore team had cleared every phase gate, beat the 90% quality target by more than eight points, and retained every hired analyst. Moving forward, the firm has a defined runway for scaling full-time agents by 5X.

About the Client

Top-tier commercial real estate finance and underwriting firm with a national platform serving multifamily, healthcare, and affordable housing markets.

Industry: Real estate finance / financial services

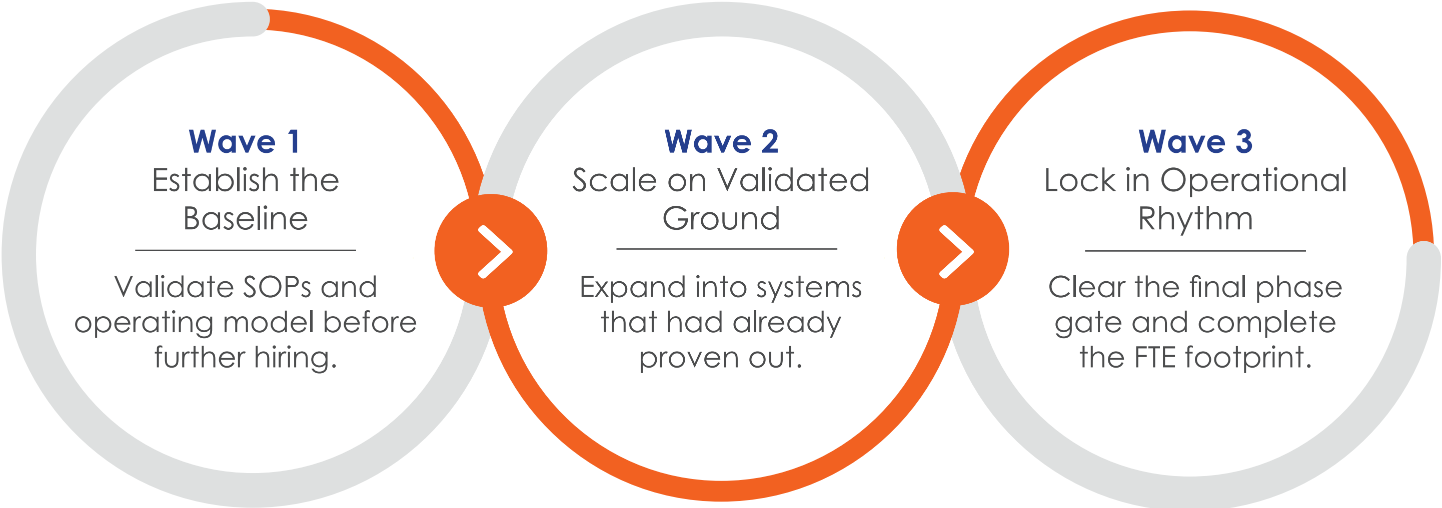
Functions transitioned: Underwriter Analyst

Goals:

- Restore back-office stability under attrition pressure
- Transition critical F&A functions without disrupting closing timelines
- Establish a scalable operating model for future expansion

Delivery location: Chennai, India

One Operational Model, Rolled Out in Three Waves



That model came from a partnership with DATAMARK, which has engineered financial services back-office transitions for more than three decades. The implementation was sequenced around five interrelated design decisions.

1. Locked the requirements before any seats were filled:

A PMP-certified project manager ran requirements gathering and stakeholder alignment across more than six departments and fifteen internal stakeholders. The specification was closed and signed off before training began.

*Results: **Zero change requests** during the build and **zero carry-over items** at handover.*

2. Built the operating standard before the team:

Independent SOPs were developed to supplement the client's existing materials and ensure operational continuity through the transition, paired with a proprietary pre-training program that prepared analysts ahead of the client's LMS. Quality was set as the constraint before any analyst went live.

*Results: **98.39% quality scores** against a 90% target, held across all three waves.*

3. Phased the team across three waves:

Wave one established baseline processes, validated the SOPs in production, and surfaced friction before scaling. Waves two and three inherited a working system. Each wave cleared a defined phase gate before the next began.

*Results: Kept Turnaround Time **(TAT) at 100%** and held trainee dropout at zero.*

4. Deployed by specialty:

The agents were deployed as Underwriting Analysts across multiple specializations for various property types. DATAMARK drew on deep financial services sector experience to tailor each role's compliance posture and quality controls. Specialization protected per-function quality scores.

*Results: **Additive runway to 5X full-time agents:** more seats inside the same lanes, without structural rework required to scale.*

5. Built on Chennai infrastructure already in place:

Existing delivery center capacity absorbed the workload; new facilities expanded the footprint as needed. Technology procurement and build-out costs stayed contained, and the financial services compliance posture was already operational on day one—a cost line the executive sponsor never had to defend.

*Results: Significantly **reduced technology procurement and build-out costs**: the workload moved into a delivery center operating at compliance grade, without a greenfield build cycle to absorb.*

The implementation of this new operating model delivered a smooth transition with minimal friction, giving the firm a defined path to scale its agent base with the required infrastructure already in place.

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About DATAMARK

Founded in 1989, DATAMARK is a privately held, family-owned contact center and business process outsourcing company headquartered in El Paso, Texas. From delivery centers in the U.S., Mexico, and India, the company supports Fortune 500 enterprises and government agencies across healthcare, financial services, retail, and the public sector.

The DATAMARK approach pairs decades of Lean Six Sigma discipline with a people-first approach to AI through the Nexus AI platform. Many of DATAMARK's client relationships span more than a decade, and in 2025, Everest Group recognized DATAMARK as a Major Contender in its Customer Experience Management Services PEAK Matrix Assessment for the Americas.

To learn more about how outsourced solutions can improve your organization's contact center and back-office operations, contact us at: 855-374-5155 or email info@datamark.net.

datamark.net