

Process Transformation and Optimization





1. Strategic Process Transformation & Optimization - Design & Construction Services Company

Redesigned client's business operations entirely by standardized global processes, optimizing resource allocation, supplier management, data analytics, category intelligence and ensuring risk management and compliance, resulting in substantial cost savings of approximately \$5 million.



STATXO's expertise in optimizing our processes and workflows has not only streamlined our operations but also brought significant cost savings. The team provided exceptional support and a deep understanding of our industry. Designed solutions have enhanced our data management and reporting transparency. We greatly value their partnership and the positive impact they have had on our business."

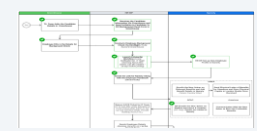
COO, Global Operations

Q CASE FOR CHANGE

- Client, a global firm (\$1B Revenue) specializing in strategy, design, and construction services, with a presence in 26 countries (major presence in North America, Europe, and Asia-Pacific)
- The company was operating in a decentralized model and had inconsistent, complex, and highly inefficient processes (back-end) running in silos, ineffective data management, and over-sized teams across **Finance, Procurement, HR, HSE, and IT**

🚲 SHARED VISION

- To provide strategic guidance by thoroughly analyzing their current processes and workflows. This involved a comprehensive examination of departmental processes, gap identification, and the introduction of industry-proven practices.
- The primary focus areas encompassed cost-saving strategies, supplier management, streamlining support operations, optimizing departmental structures by shifting redundant processes to a Shared Service Center and elevating data management through improved accuracy, transparency, and automation.
- Aim was to empower the client with a more efficient, cost-effective, and agile operational framework



🧑‍🔧 FEASIBLE PLAN

- The solution was designed in three phases.
 - **Phase 1** - In-depth assessment of the existing processes, focusing on potential savings
 - **Phase 2** - Implementing quick-win strategies, optimizing processes, and integrating third-party solutions
 - **Phase 3** – Enabling business to execute and realize benefits such as providing data management support, real-time KPI reporting via dashboards, spend & tail analytics, supplier management, category intelligence and RFX support on key categories
- The approach included benchmarking existing processes with industry best practices and ensuring alignment with global standards
- Impact analysis conducted for every major change suggested indicating how such changes would affect the organization. Future processes were designed with a focus on identifying and quantifying cost-saving opportunities

✅ CAPABILITY TO DELIVER

- Redefine and optimize every facet of back-end processes – from Finance to HR, Procurement to IT. Streamline operations, optimize teams, and embrace data-driven automation (**using Machine Learning, RPA**). With a laser focus on savings, efficiency, and transparency, poised to leap into the future of strategy and design
- **For Procurement Function:** Using integrated research approach (secondary + primary + expert consultations) provided customized category intelligence reports for defining sourcing strategy on a few high-spend categories



2. Transforming Finance Operations for a **Global Construction & Design Firm**



Transformed invoice processing process by achieving 5-6 times faster speeds with OCR and eliminating manual entry. Boosted data accuracy from ~85% to ~95%, saving over ~180-200 monthly hours and freeing 1 FTE bandwidth

Will be sharing an updated version

STATXO



STATXO's solution was a game-changer. Our invoicing process is now lightning-fast, thanks to OCR technology. We've achieved exceptional data accuracy, a significant leap from before. This solution not only saved us time but also enhanced operational efficiency. Outstanding results!"

Global Head of Finance Function



CASE FOR CHANGE

Global construction & design leader in 26 countries faces finance department inefficiencies in invoice processing. Manual data entry for 6,500+ monthly invoices results in high costs, inefficiency, and ERP data inaccuracies.



SHARED VISION

To streamline and optimize the financial processes within the company, particularly in the areas of Invoice Processing (AP), Purchase Orders (POs), and Subcontracts. The aim is to transition from a labor-intensive manual data entry method to an efficient, automated system, reducing costs, improving accuracy, and enhancing overall financial operations



FEASIBLE PLAN

STATXO automated invoice processing by using OCR technology from Azure AI Services. Invoices were accessed via a shared database, with built-in validation rules for completeness. The process included data extraction from invoices, storing it in a structured format for analysis, performing AP audit checks, and feeding invoice data into the ERP system. A dashboard was developed to track KPIs, including invoices without PO, exceptions, payment mismatches, and trend analysis



CAPABILITY TO DELIVER

To evolve, envisioning a future where finance operations seamlessly process invoices, eliminating inefficiencies. Harnessing advanced AI and automation, aiming to revolutionize the approach, ensuring accuracy and speed in financial processes.

The aim is to establish a streamlined, error-free system that optimizes resources and enhances data integrity, driving success in global construction and design endeavors



3. Strategic Finance Process Transformation & Optimization - Leading Software Provider

Empowering Finance Through ML, RPA, and Predictive Analytics: Achieving Savings and Budget Targets by Unifying Procurement Networks, Optimizing Decision-Making, Driving Revenue Growth, Cost Efficiency, and Ensuring Effective Compliance.



Will be adding sample images & outcome numbers

Working with STATXO has been transformative for our organization. Their innovative solutions provided us with real-time insights, streamlined processes, and unprecedented cost savings. We've not only met but exceeded our targets, thanks to their expertise and cutting-edge dashboards. It's been a game-changer for us."

VP, Global Finance Team

CASE FOR CHANGE

Client, a leading enterprise software provider, delivers mission-critical technology and supporting services that help customers worldwide manage core IT elements of the business. More than 11K Employees in 48 Countries.

- Finance Target Operating Model aims to achieve annualized savings to deliver a net Finance cost, including people and non-people costs
- Savings targets through third-party fee reduction, from process simplification, process improvement, and automation leading to reduced headcount

SHARED VISION

- Our objective was to align stakeholders by crafting a shared vision and change plan. Conduct workshops with team leaders to establish baseline processes for key service areas, ensuring clarity and consensus
- Collaborative budget planning sessions with business leaders to guide the creation of a detailed financial plan. Mobilize process improvement experts to provide crucial support. Through dedicated teams, develop and finalize an implementation plan, fostering efficiency and cohesion

FEASIBLE PLAN

STATXO proposed a three-phase approach to achieve the Finance Targets:

- **Phase 1** - Engaging stakeholders to understand current operating models, gaps, FTE requirements, and potential third-party support. analyzing existing team size and design
- **Phase 2** - Detailed design, confirming process changes, defining headcounts, and creating an implementation plan. Tasks included identifying non-value-generating work, setting forecasting frequency, standardizing reporting, consolidating operational processes, and automating repetitive tasks
- **Phase 3** - Implementing agreed process changes, automation, and designing the organizational structure

CAPABILITY TO DELIVER

- Utilizing **Machine Learning (ML), RPA, and Predictive Analytics**, our solution aimed to facilitate process enhancement and achievement of savings objectives, fostering a unified spend source across varied procurement networks. This ensured our Finance team delivered value to the business by supporting optimal decision-making, driving revenue growth, optimizing costs, and meeting compliance requirements effectively
- We successfully reached savings and budget targets

AI-Powered Market Intelligence





1. Engineering Tools & Platforms Capacity, Maturity, and Position Assessment – Food and Beverage Processing and Packaging Machinery OEM

By gaining actionable insights into engineering tools' operational capabilities, pricing structures, and competitors' user scale, the client strategically upgraded its internal systems and tools to improve customer collaboration throughout the engineering process, improve the speed of delivery, and enable the use of 'Digital Twins' technology across the entire plant and product lifecycles.



Extremely satisfied with the advisory services provided by STATXO. Their expertise in assessing competitors' engineering tools' user scale and capabilities has proven vital to our organization. The thorough analysis, insightful recommendations, and prompt communication have significantly enhanced our decision-making process."

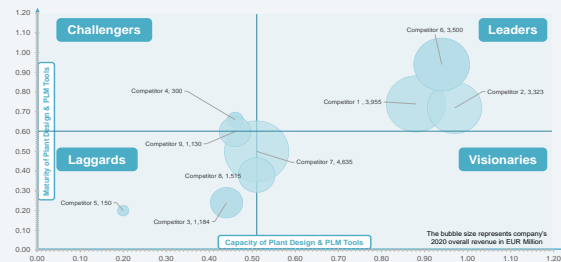
Director, Engineering Excellence, Platforms & Tools

CASE FOR CHANGE

- A global leading food and beverage processing and packaging machinery OEM was **undergoing a digital transformation and was investing in a new plant solution engineering platform**. The client sought to evaluate its **current positioning** relative to competitors in the industry
- The client also needed to understand the **differential value** it offers to the market and determine the strategic technology initiatives required to effectively compete with other players in the industry

SHARED VISION

- To refine the competitive edge, **assess the client's capacity, maturity, and position for engineering tools and platforms** compared to those of its 10 competitors globally
- Identification of the additional state-of-the-art plant solution engineering technology for improving the client's offerings in the food and beverage processing and packaging solutions space



FEASIBLE PLAN

- Conducted a **three-month research**, using a robust 360-degree methodology. This included extensive secondary research, primary research, and expert consultations. Subject-matter experts were engaged to ensure a thorough examination of the landscape
- Examined the Digital Engineering Tools and Plant and Product Lifecycle Management Tools/ Systems** utilized by competitors. Key parameters, such as the 'No. of Unique Tools/ Platforms', 'No. of Users', 'No. of Projects/ Year' executed on these platforms/ tools, 'No. of Calculation Tools', and 'No. of P&ID Tools', were studied to measure the capacity and effectiveness
- Analyzed to **identify and benchmark multiple engineering tools and platforms deployed by 10 competitors globally**. This included benchmarking of competitors' Product and Plant Solution Design Platforms, covering aspects like integration with other systems, reusable design elements, best practice templates, 2D & 3D CAD tools, and the deployment of Digital Twins use cases to quantify maturity and sophistication

CAPABILITY TO DELIVER

- To present outcomes on a strategic 2x2 matrix. This framework allowed the client to understand the competitive landscape in terms of tools and platforms, providing insights into the relative capacity, maturity, and position of competitors and chalking out an informed strategic roadmap
- To facilitate the approval of the strategic roadmap from the Executive Committee by providing tangible samples, such as P&ID, 3D Models, and Digital Twin specifications used by the client's competitors as well as investment and pricing (*element & details*) indicators for missing tools/ platform

2. Near Real-time AI-based News Tracking and Impact Analysis - Leading Medical and Pharmaceutical Device Company



AI-based News monitoring tool strengthened clients' innovation intelligence by keeping them updated on sector developments, enabling deeper analysis and strategic recommendations. It offered news impact analysis, including impact intensity, overall sentiment, potential opportunities or risks, and impact duration aiding in informed decision-making. Additionally, it enhanced client responsiveness by swiftly identifying emerging issues or opportunities, ensuring proactive management of business impacts.



The AI-based news monitoring tool from STATXO has transformed our innovation intelligence capabilities. By keeping us updated on sector developments it enables deeper analysis and strategic insights. Additionally, its ability to quickly identify emerging issues or opportunities enhances our responsiveness to proactively manage business impact."

Director, Innovation Intelligence

Q CASE FOR CHANGE

- A German medical and pharmaceutical device manufacturer faced complex challenges tracking developments in the rapidly evolving med-tech and pharma industries
- The vast nature of the sector made it difficult to gather relevant insights from different sources efficiently and effectively. Despite attempts to track information in-house, the client struggled to stay aligned with the dynamic market landscape due to the following:
 - Missing relevant information and sources
 - Capturing too much irrelevant information/ noise
 - Inadequate bandwidth availability to take the right actions at the right time
 - Extremely time-intensive manual process
 - No proper analysis with too much relevant information

🔗 SHARED VISION

- To support the client with efficient and effective news monitoring via a new process for Sensing Analysis. Our goals included designing an external news/ data tracking and impact analysis system/ mechanism for select clinical & product focus areas and 15 competitors within the med-tech and pharma spaces
- Our goals included:
 - Monitoring overall clinical and product trends
 - Tracking and reviewing the clinical studies/ research papers for insights into R&D
 - Monitoring competitor-specific products and identifying threats
 - Identifying customer unmet needs and innovation opportunities
 - Generating quarterly reports on clinical and product trends



📌 FEASIBLE PLAN

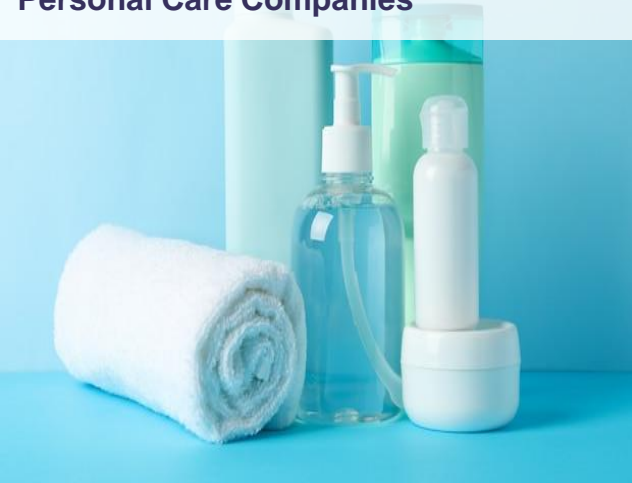
- Staffed med-tech and pharma subject-matter experts (SMEs) with strong business acumen on the project to conduct extensive secondary research and detailed analysis of news filtered through a proprietary AI-based news engine along with a BI specialist
- Identified key sources through thorough secondary research and fed them into the AI-based news engine. This enabled our team to track relevant news in near real-time, ensuring timely updates on competitors' developments
- To filter out only relevant news/ information by avoiding noise/ irrelevant ones, a mind map of **150+ tags** was created based on the **4 main categories, 17 sub-categories, and 35 micro-categories within clinical focus areas** as well as **20 categories and 80 sub-categories within product focus areas** across target news/ intelligence types (*M&A, innovation, business expansion, new launches, regulatory & legal, financial results, partnerships & alliances, management changes, ESG, divestiture, demerger/ spin-off, etc.*) for target **15 competitors**

✅ CAPABILITY TO DELIVER

- Quasi-automated (*Human + Technology*) AI-based interactive user-friendly news monitoring tool **enhanced the client's innovation intelligence team efficiency** to stay proactively informed about relevant developments across target competitors and products & clinical areas. Further, facilitated enhanced accuracy and effectiveness based on value-added analysis and strategic recommendations through news impact analysis (*impact intensity, overall news sentiment, potential opportunity/ risk, and impact duration*) to make informed decisions with the right actions at the right time
- **Improved client proactive responsiveness** by promptly identifying emerging issues/ risks or opportunities that could impact their clients' businesses on a near-real-time basis



3. ESG Maturity Assessment – Personal Care Companies



Helped the client evaluate their Environmental, Social, and Governance (ESG) maturity by directly comparing their performance against competitors across six (6) key parameters and 27 sub-parameters. This comparison enabled the client to identify strengths and weaknesses in their ESG practices. By prioritizing areas with the greatest potential for impact and positive social outcomes, the client made more informed strategic investment decisions.

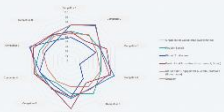


Thanks to STATXO, we assessed our ESG maturity against competitors across multiple parameters and sub-parameters. This highlighted our strengths and weaknesses, guiding us to prioritize impactful areas for better strategic investment decisions. Highly recommended for their expertise in driving sustainable growth.”

VP, Global Sustainability

Q CASE FOR CHANGE

- A leading global personal care company observed a **shift towards more stringent ESG regulations**. The client wanted to assess its direct and indirect competitors in terms of maturity concerning ESG and benchmark competitors against its ESG performance
- To gain a more comprehensive understanding of the ESG aspects, the client sought assistance in analyzing the market and competition



Category	Parameter	Sub-parameter	Competitor A	Competitor B	Client
Environmental	Carbon Footprint	Scope 1	Low	Medium	High
		Scope 2	Medium	Low	Medium
		Scope 3	High	Medium	Low
	Water Usage	Production	Medium	Low	High
		Operations	High	Medium	Low
		Product	Low	Medium	High
Waste Management	Recycling	Low	Medium	High	
	Landfill	High	Medium	Low	
	Incineration	Medium	Low	High	

🔍 SHARED VISION

- To assess the ESG maturity, **identify emerging ESG trends, monitor ESG-related parameters of 10 competitors and the client itself** to evaluate relative positioning, and identify key differentiators and similarities
- To monitor competitors' long-term and short-term strategic activities and actions in the social justice domain and identify **best practices** to improve their market positioning. Further, we aimed to gain a deep understanding of **each company's response towards their responsibility to their communities** that might affect the business in the future positively or negatively



📌 FEASIBLE PLAN

- Conducted an in-depth study using a custom-made framework approach **to understand the client's position** by tracking 6 major parameters and 27 sub-parameters:
 - **Strategy** (*Holistic Strategy, Bold & Sustainable, Clear Links to ESG, Measurable Targets, Material Progress*)
 - **Planet** (*Breadth of Ambition, Clear "Net Zero" Targets, Material Progress*)
 - **People** (*Breath of Ambition, Leveraging Scale on Social Impact, Zero Accidents Policy, Diversity & Inclusion, Material Progress*)
 - **Product and Innovation** (*Breakthrough Innovation, Partnerships, Business Model Reinvention, Innovation Investment*)
 - **Stakeholder Engagement and Communication** (*Authentic & Impactful Communication, Employee Engagement, External Stakeholders, External Leadership, External Recognition*)
 - **Organization Capabilities** (*Dedicated Structure, Talented People, Rewards, Information, Decisions*)

✅ CAPABILITY TO DELIVER

- Facilitated the client with the ability to assess its current ESG maturity with **head-to-head comparisons of competitors** across 6 parameters
- Assisted the client in making strategic investment decisions by pinpointing the strengths and weaknesses within their ESG practices. This enabled them to make informed choices regarding their future investments for the greatest impact and improvement in ESG performance



4. Voltage Regulator Market Sizing & Competitive Assessment – A Fortune 100 Automotive Engineering Company



The client was able to make the strategic decision of not expanding or making any further investment in the Voltage Regulator business. As this product application was decreasing slowly in the automotive sector and high possibility of the market getting impacted in the next 5 to 7 years due to the launch of electric and hybrid vehicles.



Working with STATXO was a delight. Their market forecasting and competitive assessment services showcased deep industry knowledge. Their data-driven approach and strategic insights significantly influenced our business trajectory.”

Vice President, Strategy Operations

CASE FOR CHANGE

- A global automotive engineering and electronics company was among the top 5 Global Voltage Regulator (VRs, used by OEMs in Passenger Vehicles and Commercial Vehicles) manufacturers
- The client needed to assess and analyze Automotive Voltage Regulators and their need in the growing market of electric and hybrid vehicles
- Scrutinize the technological trends, drivers, and opportunities affecting the future growth of the VR market

SHARED VISION

- To determine the **future growth prospects and insights for strategic decisions**. The goals included estimating the present and future market size of VR, understanding the market potential at different levels – by end-use segment (commercial vehicles and passenger vehicles) and sub-product type (3 terminal, 5 terminal, and multi-terminal voltage)
- Judge the present scenario of industry competitiveness by benchmarking the top 10 competitors based on strategic changes executed related to acquisitions, market focus, and product changes. Further, benchmark the competitor’s product specifications and their respective pricing for OEMs
- Gauge the market changes and application of VRs in electric and hybrid cars in the future

FEASIBLE PLAN

- Executed **market sizing and competitive assessment study** for Automotive Voltage Regulators (VRs) at both regional and global levels. This encompassed an integrated research approach, combining secondary research, primary research, and expert consultations
- Framed **advanced forecasting methodologies**, estimated and forecasted the VRs market size with high accuracy for the period 2019-2026. This analysis was conducted at different levels, including segmentation by end-use segment, sub-product type, and key manufacturers
- Conducted a detailed **peer benchmarking** exercise focusing on the top 10 competitors in the VR market. This involved analyzing strategic changes made by competitors, such as acquisitions, shifts in market focus, and product modifications
- The study included a **comprehensive benchmarking of competitors’ product specifications** and their respective pricing strategies for OEMs

CAPABILITY TO DELIVER

- To present the **client’s relative position** in the regional and global markets and underscore the market transition from a traditional model to a more technology-driven and low-cost model
- To highlight the **strategic gaps** compared with different competitors to strengthen the competitiveness of the client’s core businesses
- To facilitate the alignment of the client’s services as per changing market conditions and focus on futuristic products Voltage Regulators to be used in hybrid and electric vehicles via the latest insights and best practices



5. Target Identification Support in Medical Technology across DACH – European PE Firm



Successfully delivered a tailored list of over 3,000+ filtered targets for the medical technology & healthcare domains, meticulously aligned with the specific requirements outlined by the client. Presented a highly proficient and streamlined custom target search framework, thereby empowering the client to expedite the target search and selection process, to facilitate a smooth transition for the client, allowing them to redirect their focus towards deal-making strategies.



Thoroughly impressed with the dedication of STATXO. They delivered a curated list of filtered targets that were precisely tailored to our needs. Their support in custom target search framework was instrumental in enabling a seamless transition towards achieving our objectives."

Investment Director

CASE FOR CHANGE

- A Europe-based financial investment firm focused on acquiring small & medium enterprises (SMEs) that are facing succession issues and wanted to acquire a company in the medical technology & healthcare domain across the DACH (Germany, Austria, & Switzerland) Area
- The client faced the **challenge of swiftly and accurately identifying acquisition targets** that aligned with their specific criteria and have continued growth prospects. An evaluation was crucial to avoid overlooking key factors that could impact the success of the acquisitions. Thus, the challenge lay in **developing a streamlined system** that could rapidly identify suitable targets while guaranteeing alignment with the client's selection criteria and long-term growth objective

SHARED VISION

- To enable **effective and efficient identification of target companies**, have a continuous process for identification & selection of targets and a robust mechanism for the selection of the company to be acquired to ensure the decision-making processes are inexpensive which could enable the client to focus on making strategies and discussing deals
- To maintain continuity and ensure the growth prospects of the companies identified by minimizing time and efforts between target identification and deal discussion through a comprehensive target identification and selection criteria which allows the client to speed up the processes

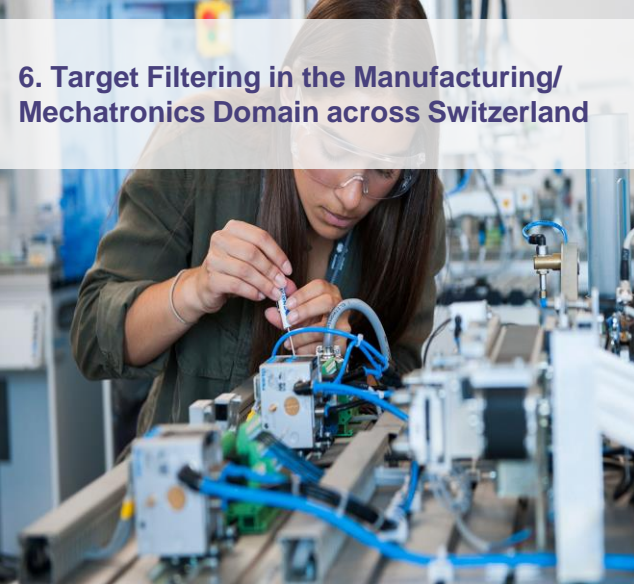
Company Name	Country	Industry	Revenue	Employees	Year Founded	Website	Contact Info	Status	Last Updated
ABC GmbH	DE	Medical Devices	10M	50	2010	www.abc.com	John Doe, CEO	Present	14.10.2023
XYZ AG	AT	Healthcare	8M	40	2012	www.xyz.at	Jane Smith, CFO	Present	14.10.2023
DEF SA	CH	Pharmaceuticals	15M	60	2008	www.def.ch	Michael Müller, CEO	Present	14.10.2023
GHI AG	DE	Medical Equipment	12M	55	2011	www.ghi.de	Sarah Klein, CEO	Present	14.10.2023
JKL AG	AT	Healthcare	9M	45	2013	www.jkl.at	Thomas Weber, CEO	Present	14.10.2023
MNO AG	CH	Medical Devices	11M	52	2009	www.mno.ch	Anna Fischer, CEO	Present	14.10.2023
PQR AG	DE	Healthcare	7M	35	2014	www.pqr.de	Markus Bauer, CEO	Present	14.10.2023
STU AG	AT	Medical Equipment	13M	58	2007	www.stu.at	Christina Huber, CEO	Present	14.10.2023
VWX AG	CH	Pharmaceuticals	14M	62	2006	www.vwx.ch	David Schneider, CEO	Present	14.10.2023
YZA AG	DE	Medical Devices	10.5M	53	2010	www.yza.de	Emma Richter, CEO	Present	14.10.2023

FEASIBLE PLAN

- Conducted a comprehensive review of each company and its vision to clearly and concisely understand the required criterion for target identification; supported in creating tailor-made criteria for target selection for both the focused industries
- Performed comprehensive analysis of the target companies to filter the companies further based on a **custom framework** and documented each decision in a master Excel file. Evaluated targets based on custom criteria and **either 'Accepted' or 'Rejected'** and ranked based on **'Attractiveness of a Company' (A/B)** and **'Probability of Closing a Deal' (A/B)**
- Conducted thorough secondary research and utilized contact databases to **identify the owner/ chairman/ founder of target companies** and find their **contact information** to facilitate communication between the client and filtered targets

CAPABILITY TO DELIVER

- Delivered **custom 3,000+ filtered targets** (*medical technology & healthcare domain*) based upon client requirements and presented in an efficient and effective custom target search framework enabling the client to speed up the target search and selection process and shift their focus to deal discussions
- Delivered an Excel master file equipped with a **comprehensive ranking mechanism for target companies**, which systematically assessed and rated the companies based on their 'Attractiveness' and 'Probability of Successfully Concluding a Deal', thereby facilitating well-informed and agile decision-making processes
- Furthermore, meticulously compiled a list of contact information of the heads of the filtered target companies, enhancing the client's ability to engage in swift and efficient communication channels



6. Target Filtering in the Manufacturing/ Mechatronics Domain across Switzerland

Through a streamlined and cost-effective continuous target search mechanism, STATXO has identified a list of 20 companies by leveraging automated tools and algorithms for initial screenings, minimizing manual efforts. The firm's utilization of technology enables efficient monitoring of industry trends through automated alerts, ensuring that search criteria remain dynamic and aligned with emerging opportunities.



Will be sharing an updated version

STATXO prioritized high-value targets by employing responsive search strategies to adapt swiftly to market dynamics. This proactive and technology-driven approach enables the firm to stay ahead in the competitive landscape, facilitating the identification of promising acquisition targets that align with our investment objectives."

Partner, Angel Investor

CASE FOR CHANGE

- A Europe-based financial investment firm focused on acquiring small and medium enterprises (SMEs) that are facing succession issues and wanted to acquire a company in the mechanical/ mechatronics across Switzerland
- The client encountered the **challenging task of distinguishing the most suitable company for acquisition from a list of identified potential targets**. This challenge necessitates a strategic approach, requiring smart analysis, robust evaluation methodologies, and decisive action to identify and capitalize on the optimal acquisition opportunities

SHARED VISION

- To successfully steer the challenge of supporting the target search for acquisition, our goal was to create a custom framework for the financial firm to establish a comprehensive approach with smart analysis
- To implement advanced data analytics and market research tools, our goal included fact-based evidence to identify relevant companies that align with specific acquisition criteria

FEASIBLE PLAN

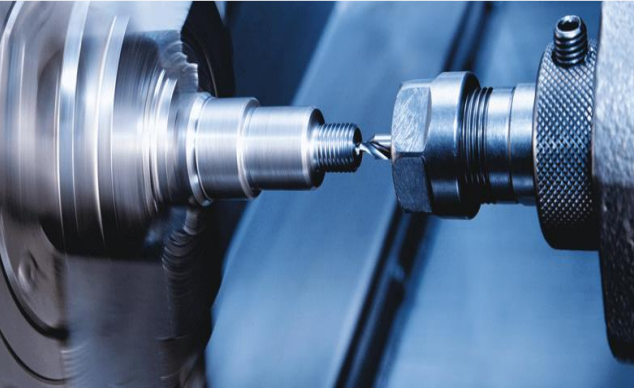
- Selected 6,000+ targets based on a thorough review of the company's website and conducted a comprehensive review of the websites of potential target companies
- Applied specific criteria to filter and identify 6,000+ relevant companies and decided whether to **'Accept' or 'Reject'** each company based on predetermined criteria
- Developed criteria for assessing the **attractiveness of a company (A/B/C)** and the **probability of successfully closing a deal (A/B/C)** to each company based on the established criteria
- Identified and gathered the email ID and contact information of the key decision-makers, particularly the owner (*chairman/ founder*), of the active targets through contact databases or other reliable sources

CAPABILITY TO DELIVER

- **Identified a list of 20 companies from 6,000+ targets** that were the result of a streamlined and cost-effective continuous target search mechanism, STATXO employed automated tools and algorithms for initial screenings, **leveraging technology to minimize manual efforts**. Continuous monitoring of industry trends through automated alerts ensures that our search criteria remain dynamic and aligned with emerging opportunities
- STATXO prioritized high-value targets, employing agile search strategies to adapt to market dynamics swiftly

Company Name	NACE	NACE	Company	Overall Status	Checked by	Manual of Initial Contact	Priority	Address	Phone	Email	LinkedIn	Website	Number of Employees	Address	Year to Date	Address Line 1	City
Company A	3310	B	Obs	Definitely rejected	Yes	-B	Chairman	none	1:45-0	1:30	Walthamstead 5	London					
Company B	3310	B	Obs	Definitely rejected	Yes	-B	Chairman	none	1:45-0	1:30	Viktor Gagarin	Chicago					
Company C	3310	A	Obs	Active	Yes	C-B	Chairman	none	1:45-0	1:30	Dunelmitham 33	Prague					
Company D	3310	A	Obs	Definitely rejected	Yes	-B	Chairman	none	1:45-0	1:30	Cheshamstead 10	London					
Company E	3310	C	Obs	Definitely rejected	Yes	-B	Chairman	none			Shenstone Lane 154	Stoke					
Company F	3310	A	Obs	Active	Yes	B-B	Chairman	none	1:45-0	1:30	Nov 27	Waterhouse					
Company G	3310	A	Obs	Active	Yes	B-B	Chairman	CEO	1:45-0	1:30	Largest	Shelton					

7. Commercial Due Diligence Support for Acquisition of Machine Tool Distributor in Switzerland – Capital Investment Company



Equipped with in-depth insights, the client effectively formulated a strong business plan and strategy, influencing investor decisions positively. This, in turn, allowed the client to devise a growth strategy in line with the target company's strengths and market dynamics, fostering long-term value creation and successful investment outcomes.



Thanks to STATXO for the valuable insights provided in the commercial due diligence phase, I was able to craft a robust business plan and strategy that resonated with our investors. The depth of understanding I gained enabled us to steer investment decisions in a positive direction.”

Investment Advisor, Industrial Goods

CASE FOR CHANGE

- A Switzerland-based capital advisor firm had identified a family-owned target company for acquisition. It required support in commercial due diligence to facilitate its clients/ investors with investment amount and growth strategy
- The client had **limited time and resources** while ensuring the diligence process was thorough and insightful enough to mitigate investment risks and maximize returns. Thus, the challenge lay in devising **an efficient and effective due diligence approach** that addressed the client's specific investment goals and provided actionable recommendations for informed decision-making

SHARED VISION

- To conduct comprehensive commercial due diligence for the identified target company to assess its feasibility and potential for acquisition
- To gather actionable insights that will enable the client to evaluate the target company's commercial prospects, identify potential risks & opportunities, and ultimately determine its suitability for acquisition
- Key markets:
 - Core Business
 - Machine Tool – Overall Machine Tool, Traditional Machine Tool, Imports of CNC Machine Tool from Japan
 - Tools for Machining
 - Industrial Automation
 - Adjacent/ Additional Focus Area
 - 3D Printing
 - Customer Industries – Watch-making, Medical Technology, and General Manufacturing Industries

FEASIBLE PLAN

- Evaluated the **market size and future potential** of nine (9) markets including customer industries in Switzerland. Conducted **Porter's Five (5) Forces Industry Assessment** and analyzed the regional market dynamics & trends, customer industry trends, profiling & competitive benchmarking of 14+ competitors in Switzerland & Europe for **SWOT Analysis** and buyers with their purchasing criteria
- Compiled competitors' information on partner brands, key industries served, acquisitions, sales channels, # of machines installed, service locations, product offerings (*customized or general*), USP/ service concepts learning, technology adoption rate, customization levels, and additional services (*customer support, logistics support, maintenance services, spare parts availability*)
- Compiled suppliers' information on partner distributors in Europe, sales channels; and machine tool offerings with the level of customization that can be done, history of forward integration; and frequency of changing distributors
- Compiled buyers and their purchasing criteria through customer testimonials and conducted a relative assessment of each competitor's buyer's priority parameters

CAPABILITY TO DELIVER

- Empowered by the insights provided, the client **successfully crafted a robust business plan and strategy** to present to its investors. The client was able to successfully drive the investment decision for its investors
- Enabled the client to develop a robust growth strategy tailored to the target company's strengths and market dynamics supported by best practices of service concepts, and buyers' purchasing criteria

Executive Summary (1/2)

Market	Market Size	Market Growth	Market Attractiveness	Market Risk	Market Opportunity
Machine Tool	1.2B	3.5%	High	Low	High
Tools for Machining	0.8B	2.8%	Medium	Medium	Medium
Industrial Automation	1.5B	5.2%	High	Low	High

Executive Summary (2/2)

Competitor	Market Share	Strengths	Weaknesses	Opportunities	Threats
Competitor A	15%	Strong R&D	High Costs	Global Expansion	Market Saturation
Competitor B	10%	Excellent Customer Support	Limited Product Range	Service Diversification	Price Competition

8. Coconut Water Supply Chain Analysis - Leading Water Processing Technology Firm



The client determined that the non-thermal technique would enhance profit margins for all stakeholders. This conclusion was supported by detailed analyses such as margin and characteristics comparisons, transportation cost assessments based on Brix Levels and packaging types, and insights into concentration technology and supply chain dynamics



Thanks to STATXO's supply chain analysis and their comprehensive analysis, especially in margin comparison and transportation cost assessment, gave us the confidence to make informed decisions that positively impacted our profitability

Director, Supply Chain

Q CASE FOR CHANGE

- The client, a global water processing technology firm, observed a **growing trend in non-thermal techniques**. It has developed a non-thermal technique of coconut water in which the coconut water is dehydrated into a concentrate and rehydrated later at a retailer.
- The client **struggled to access the viewpoint of supply chain stakeholders** in its main market i.e., Europe, and North and South America. It was struggling with collating and analyzing the views of supply chain stakeholders (*Farmers, Producers, Distributors, Retailers*) on the new non-thermal technique

🚲 SHARED VISION

- To evaluate the technique's feasibility within the supply chain stakeholder. Our goal was to gauge technology's value proposition within the coconut water supply chain
- Assess potential impacts on each player in the supply chain.
- Determine effects on margins for interested producers and distributors compared to traditional coconut water processing methods.
- Identify primary beneficiaries of technology adoption within the supply chain



📏 FEASIBLE PLAN

- Executed a thorough supply chain analysis through exhaustive survey and primary research across producers, distributors, and retailers
- Producers:** Top companies operating in Europe and North America that have manufacturing locations in one of the major coconut-producing countries such as Thailand, Vietnam, Philippines, among others. Producers had contact with farmers and agents that supplied them with raw tender coconuts.
- Distributors:** These were company-owned distributors and independent distributors located either in the producer country or at a separate location
- Retailers:** These players were mostly located in Europe and North America

✅ CAPABILITY TO DELIVER

Empowered with the insights the client was able to conclude that the non-thermal technique would help each stakeholder with improving the profit margins. The following detailed analysis supported the client in making informed decision

- Margin Comparison:** Analyzed margins for coconut water and concentrate per liter, including logistic costs, markups, and pricing for each supply chain member
- Characteristics Comparison:** Compared key traits and major companies across Brix Levels 3 to 10
- Transportation Cost Analysis:** Assessed cost reductions based on coconut water Brix Levels and packaging types
- Concentration Technology Insights:** Provided detailed insights into existing concentration technology and a comprehensive understanding of supply chain dynamics



9. Market-Entry Assessment & Business Planning – Thai Health & Wellness Company



The client received support in choosing Portugal for their wellness center, considering its strategic benefits, competitive environment, and government support. Continuous assistance in refining financial models and business plans led to securing around EUR 10Mn in equity and loans, fueling their expansion efforts. Insights into market outlook, growth opportunities, best practices, and risks were also provided.



STATXO's expertise and support were instrumental in shaping our successful entry into the European market. Their market analysis and opportunity assessment provided invaluable insights that guided our strategic decision-making process. Their financial planning and framework design ensured we had a solid foundation for financial sustainability."

Director, Innovation Intelligence



CASE FOR CHANGE

- The client is a non-profit organization headquartered in Thailand. They provide an accessible and impactful program aimed at assisting individuals grappling with stress, burnout, anxiety, depression, addiction, abuse, or trauma, while also facilitating self-development
- The client faced several challenges as it aimed to enter the Western European market. These include the necessity to adapt its program to diverse European cultures, navigate complex regulatory landscapes across different countries, effectively compete in a potentially saturated market, overcome language barriers, and secure sufficient funding and resources for expansion



SHARED VISION

- To ensure a successful entry into the Western European market, our goal was to develop a comprehensive **business plan** (*framework & financial Structure {Equity vs Loan}, project completion stages, ROI for Investors {short-term & long-term}*) supported by:
- **Market assessment and customer analysis** included potential market & growth, market trends, drivers, & inhibitors, opportunity analysis, and customer needs
- **Competitive benchmarking** included competitor profiles & capabilities benchmarking, & pricing details (*daily rates and variations in quality of facilities for increased rates*)
- **Financial Modelling** included financial analysis (*income statement, balance sheet, cashflow*), budget assessment with operational costs, & equity vs loan calculation



FEASIBLE PLAN

- Analyzed the **key sustainable strategies adopted by competitors** such as service quality, reputation, customer satisfaction, and innovative approaches
- Identified **potential gap areas** or untapped opportunities in the Western European market. These opportunities were assessed based on factors such as customer demand, emerging trends, and unmet needs within the target segments
- Detailed **financial modeling of various investment scenarios** to provide insights into potential returns and financial viability
- Consistent support to the client during regular investor meetings, offering expertise and data-driven insights



CAPABILITY TO DELIVER

- Supported the client in **finalizing Portugal as the location** for their wellness center due to its strategic advantages, competitive landscape, and government backing
- Continuous assistance in refining financial models and business plans facilitated the client in securing approximately **EUR 10Mn in equity and loans**, empowering their expansion endeavors
- Provided insights into the outlook of the market, **highlighting growth prospects, best practices, and potential risks**



Procurement & Supply Chain Transformation





1. Real-Time Spend Analytics & Forecasting and Savings Tracking for a Global Automotive Leader

Facilitated a unified financial/ procurement view with real-time dashboards, enabling swift metric tracking. Lead buyers saved time on real-time spend analysis. Uncovered consolidation opportunities and tracked savings against targets. Monitored procurement health through KPIs and harnessed pre-built dashboards for detailed spend visibility & forecasting. Achieved over 6% total spend savings in the first year.

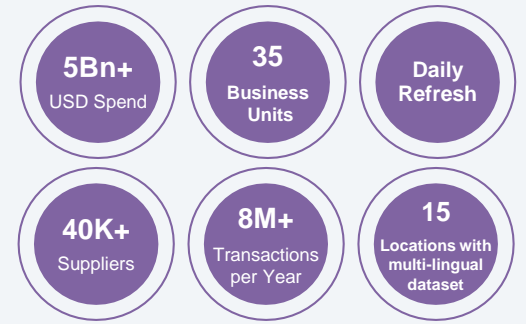


Working with STATXO has been transformative for our organization. Their customized solutions provided us with real-time insights, streamlined processes, and unprecedented cost savings. We've not only met but exceeded our targets, thanks to their expertise and user-friendly dashboards. It's been a game-changer for us."

CPO, Global Procurement

Q CASE FOR CHANGE

- Client, a global automotive company (~\$5B spend per year). Sought assistance in streamlining spend management and savings tracking. Existing processes were time-consuming, lacked visibility, and struggled to identify cost-saving opportunities



🚲 SHARED VISION

- Automating manual tasks, standardizing savings calculations globally, and creating user-friendly dashboards for both direct and indirect spend. The goal was to establish a single source of truth for spend payables across finance and global/ local procurement teams, enabling process improvement, system transformation, and effective measurement of team savings.

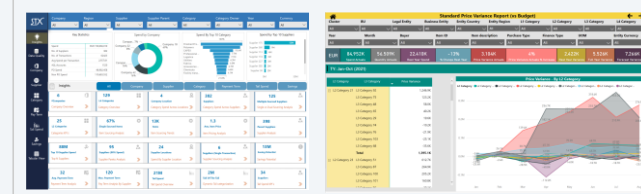
- Key Objectives:**
 - Spend visibility (*Direct/ Indirect*) in global & local currencies
 - Spend & savings forecasting
 - Portfolio analysis & Vendor segmentation
 - Variance report on Cost of Material/Cost of Goods Sold/Opex
 - Payment term optimization & Item sourcing trends

👤 FEASIBLE PLAN

- STATXO conducted a comprehensive assessment of the client's data landscape, spanning direct and indirect spend data across ~35 locations. The dataset covered years from 2020 onwards, with direct access from ERP/Middleware systems and a daily data refresh schedule for all dashboards
- Key client priorities included the development of daily-refresh spend analysis and savings tracking forecasting dashboards, allowing for user inputs in calculations, actual vs budget analysis, an action tracking and updating process
- To address these needs, STATXO proposed a customized solution (**SpendXO**) integrating Machine Learning, RPA, Predictive Analytics, and automated workflows. The project unfolded in phases, from data collection and preprocessing to real-time dashboard access

✅ CAPABILITY TO DELIVER

- To foster a single source of truth for spend across diverse procurement networks. **Leveraging Machine Learning, RPA, and Predictive Analytics**, our solution aimed to empower process improvement and savings goal attainment
- Through phased implementation, testing, data enrichment, and real-time dashboard access, we set the stage for a brighter, data-driven future



2. Data Management, Spend Analytics & Forecasting and Savings Tracking for an Industrial Automation Company



Full visibility for the first time on €2B+ spend + 12 month forecast, regular savings tracking against budget, NSV targets. Monitored Spend KPIs for 70+ BU's. Identified savings potential of over ~5% total spend.



STATXO helped us to establish full visibility of our global direct & indirect spend and to align the organization behind a well-defined opportunity. They understood our internal complexity and provided us very efficient dashboards (*spend and savings*) including actionable category playbooks and drove clarity of our strategic plan.”

CPO, Global Procurement



CASE FOR CHANGE

- The client (*Global Industrial Automation company with €2B+ spend per year*) has a diversified portfolio with 100+ brands. It needed to embrace digitalization to manage spend, identify tail spend and savings strategically, and strive for continuous improvement. Key challenges included: spend managed across 10+ ERP legacy systems, intermediate data quality & high complexity, no standard process, no supplier monitoring, and no savings tracking.

2Bn+

Euro Spend

70+

Business Units

500+

L4 Category

27K+

Suppliers

4M+

Transactions per Year

220K+

Items



SHARED VISION

Accelerate spend data coverage at the organizational level with enhanced reporting structure, consolidating the entire analysis, and effectively tracking savings.

Key Objectives:

- Improved Spend visibility (*Direct/ Indirect/ Maverick/Tail*)
- Payment term optimization & Item sourcing trends
- Category & item saving opportunities and categorized vendor and accounting invoices
- Setup ongoing data quality, mapping improvement processes
- Savings Tracking & Forecasting Analysis (*variances monitoring*)
- Actual vs Budget and Actual vs Net Sales Analysis
- Spend & Volume Forecasting



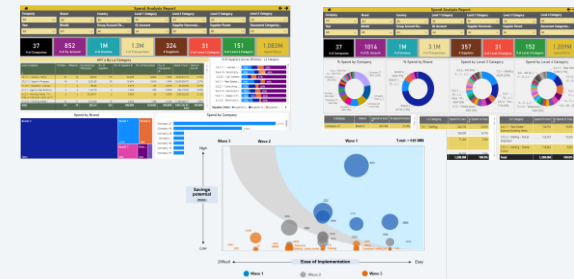
FEASIBLE PLAN

- STATXO set up a data warehouse with cleaned data and automated refreshes (*for regular monthly updates*). Planned to develop 2 different dashboards (*using Power BI*) – 1st for spend reporting & forecasting, 2nd for savings tracking & forecasting (*using YTD spend data*) in order to meet business objectives and designed an effective implementation & training plan (*global level*).
- Build comprehensive dashboards (*AI-driven*) to provide an in-depth view of spend & savings across business units/ categories/ geographies/ vendors by creating 40+ views (*analysis*).
- Effectively implemented the entire solution across all 70+ business units in (*aligned with finance & procurement teams*).
- This included Source to Pay process priorities, identification of the 'size of the prize' and definition of global category playbooks



CAPABILITY TO DELIVER

- To ensure continued visibility, we developed user friendly, tailormade global spend & savings dashboards which were rolled out to key Procurement and Finance users.
- The organization was fully aligned behind a well-defined size of the prize supported by detailed plans to deliver immediately. The strategic roadmap was aligned and approved by the Executive Committee.



3. Tail Spend Management – Global Chemical Company



Customized dashboards offered actionable insights on the procurement of tail materials, facilitating decision-making across various levels of the organization. Additionally, end-to-end automation of data integration and visualization processes was implemented to enhance efficiency. The delivered insights and recommendations led to client savings of 8-10% through renegotiation and an 8-12% reduction in price differences between contracted and non-contracted suppliers, resulting in an overall savings of EUR 60Mn for the client in the first year.



Impressed by the professionalism and efficiency demonstrated by the STATXO team throughout the project. Their strategic recommendations significantly enhanced our procurement processes. The structured approach helped us to achieve savings.“

Director, Supply Chain

Q CASE FOR CHANGE

- A global chemical firm based in the UK with a presence in 40+ countries and EUR 7 Bn+ revenue wanted to gain better **control on the sourcing of tail materials** at the global level
- The client had ~10,000+ SKUs constituting approx. EUR 800Mn tail-spend. Tail-spend was managed in a fragmented way and **off-contract spending was very high**. Additionally, the business processes were non-standard, and process compliance was low. Lack of data linkages between systems & products and **no-vendor hierarchy** created significant challenges for the client and drove up their tail spend

🔗 SHARED VISION

- To **standardize data, streamline processes, identify & categorize tail spend**, and provide **market insights** and industry **best practices** for boosting efficiency and managing tail spend effectively. Our goal was to **drive savings, reduce complexity & supplier base, and drive additional TCO benefits**
- To carry out a thorough analysis & categorization of tail-spend, identify **tail-spend trends & drivers**, and perform a detailed supplier & specifications cleansing



📌 FEASIBLE PLAN

- **Integrate and standardize data** available from sources, such as ERP systems and card transactions. Standardization of missing information and cleansing of supplier level data into a database to make it analysis-ready
- Followed a **3-phased approach** to manage tail spend – firstly by **assessing** the tail spend problem thoroughly to enable analysis and classification of tail spend. Secondly, **preparing appropriate strategies** to tackle the problem, and lastly, **implementing** the solutions & tracking the improvement in tail-spend performance
- Bucket SKUs (~1,000+) into attractive bundles and map those into a 2*2 matrix to segment the strategic & tactical categories (*based on spend value, frequency, and other parameters*) for suppliers, and categorize tail-spend into typologies to design a **customized strategy**

✅ CAPABILITY TO DELIVER

- Developed a **series of customizable and interactive visual Tableau dashboards** containing actionable insights assisting in driving decisions across levels.
- End-to-end steps of **data integration and visualization** were automated to achieve efficiencies
- Delivered recommendations on the formulation of demand consolidation, supplier base optimization, purchase policy, and deep-down analysis & categorization of tail-spend, acting upon which the client achieved **savings of 8-10%** by renegotiating through reverse auctions, **8-12% price difference** between contracted and non-contracted supplier prices, an overall **savings of EUR 60 Mn** in the first year



4. Transforming Supplier Management - Industrial Goods Company



Developed outstanding market insights by enabling real-time supplier performance monitoring, enabling proactive issue identification and resolution, reducing order cycle times, and enhancing transparency. Achieved a 10% improvement in delivery time and a 30% reduction in delivery reject rates



STATXO's solutions have been instrumental in our operational success. Their real-time dashboard keeps us ahead of supply disruptions, improving order cycle times and supplier efficiency. We've also experienced better transparency and significant enhancements in delivery timeliness and quality."

VP, Head of Procurement, EMEA & APAC



CASE FOR CHANGE

- Client's operations faced several challenges, including non-standard processes, limited process compliance in supplier tracking, data inaccuracies, and low quality. The absence of continuous KPI monitoring and the financial instability of some suppliers further complicated matters.
- Additionally, holistic spend visibility remained limited. These multifaceted challenges necessitated a comprehensive solution for operational enhancements and ensuring supplier reliability



SHARED VISION

- To enhance supplier management and strategic sourcing. Our goals included implementing standardized processes, improving data accuracy, and establishing continuous KPI monitoring. By segmenting suppliers based on their strategic importance, we sought to foster better relationships and ensure supplier stability. Ultimately,
- The goal was to create a holistic and interactive system for tracking supplier performance, enabling early intervention and contingency planning while enhancing overall spend visibility



FEASIBLE PLAN

- STATXO established an end-to-end supplier monitoring process for a leading Industrial Goods company with a diverse global portfolio. The comprehensive solution began with accessing supplier data, integrating and enhancing it, and identifying category-specific KPIs. Over 20,000 suppliers were collated from various source systems, with data cleansing and KPI standardization.
- Performance assessment covered multiple parameters, enabling a holistic view. A two-tier methodology included Time-Based and Peer Analysis. Suppliers were categorized by priority risk for action. Regular, proactive performance reviews and an interactive dashboard for strategic suppliers were implemented to enhance supplier productivity and efficiency



CAPABILITY TO DELIVER

- To establish a streamlined supplier monitoring process that enhances productivity and risk management, offering real-time insights and categorization while fostering collaboration with suppliers. This approach empowers the client to make informed strategic sourcing decisions with confidence



5. Supplier Risk Assessment – European Automotive Company



Contingency plans were devised for high-risk groups, facilitating expedited response times in the face of unforeseen challenges. Furthermore, supplier operational issues are identified and rectified at an early stage to prevent them from escalating into significant obstacles. Additionally, end-to-end automation of data integration and visualization processes were implemented to enhance efficiency.

Will be adding benefit/outcome numbers

ATXO



The early detection and resolution of supplier operational issues by STATXO have been invaluable in maintaining the efficiency of our supply chain. Their commitment to transparency and swift response has instilled confidence in our collaboration, ensuring seamless operations even amidst challenging circumstances.”

VP, Operations

Q CASE FOR CHANGE

- A European automotive company wanted to assess its suppliers and continuously review their performance, particularly focusing on supplier risk and its potential impact
- The client encountered various challenges including:
 - issues with data accuracy & quality
 - lack of continuous monitoring
 - unclear organizational responsibilities
 - supplier financial instability
 - late deliveries
 - the dissemination of incorrect information

🚗 SHARED VISION

- Through a comprehensive assessment and **strategic intervention**, the objective was to mitigate these challenges effectively, ensuring a **resilient supplier network** and bolstering the client's overall operational efficiency and competitiveness
- Our goal included identifying and mitigating risks effectively through **strategic risk management** planning, ensuring both financial visibility and meticulous Capex and Opex planning
- To align supplier vision with organizational goals while conducting thorough **operational and sustainability analyses**

📊 FEASIBLE PLAN

- Top 1,000 suppliers were identified across diverse purchase categories based on their significant spending and strategic importance
- Multiple indicators were analyzed, including financials, operational efficiency, and sustainability parameters. Utilizing a **three-tier methodology** comprising **Time-Based Analysis, Peer Analysis, and Industry Analysis**, a comprehensive view of **vendor performance** was done
- Conducted **risk assessment** to gauge the potential severity of impact. Suppliers were categorized into **Low, Medium, and High-Risk tiers**. Priority risks were identified, prompting the formulation of **mitigation actions** or **contingency plans**
- **Near real-time news tracking** and continuous review of supplier performance on a monthly or quarterly basis were implemented to enhance risk assessment. An interactive dashboard was designed, providing **near real-time news feeds** specifically tailored for strategic vendors

✅ CAPABILITY TO DELIVER

- Early **identification and mitigation of potential supply disruptions**, along with the implementation of contingency plans for high-risk groups, enabled swift responses to emerging challenges, ensuring uninterrupted operations for client
- Proactive measures were taken to identify and address supplier **operational issues** before they escalate, fostering increased transparency across the supply chain. This approach not only **enhanced resiliency** but also **strengthened relationships** with suppliers, facilitating smoother collaboration and minimizing the impact of disruptions on business continuity



6. Supplier Risk Assessment - Financial, Operational, and Sustainability Health - Global Logistics Company



Effectively delivered valuable market insights by enhancing supplier risk management. Delivered risk assessments spanning finance, operations, and sustainability along with real-time global news analysis and regular risk alerts for key suppliers via an interactive dashboard.



Will be adding benefit/outcome numbers

Collaborating with STATXO has brought about significant positive changes for our company. Their implementation of a robust supplier assessment system has greatly improved our supplier monitoring and provided essential insights into sustainability initiatives and financial stability. STATXO's expertise and unwavering support have been pivotal in elevating our supplier relationships and overall operations."

VP, Global Procurement

CASE FOR CHANGE

- Client's primary concern revolved around assessing the financial stability, operational efficiency, and sustainability practices of its extensive vendor network. Continuous monitoring of supplier health, especially in operational and sustainability aspects, was lacking
- Additionally, there was limited visibility into supplier sustainability goals, initiatives, and overarching strategy. The issue of some suppliers' financial stability, compounded by instances of inaccurate data sharing, further complicated matters. These obstacles demanded a holistic solution to align the client's supplier base with their financial, operational, and sustainability criteria

SHARED VISION

- To establish a robust supplier assessment system that ensures continuous monitoring of supplier health, particularly in terms of operational and sustainability parameters. The solution will provide visibility into supplier sustainability initiatives, assess financial stability, and ensure accurate information sharing for over 2,300 strategic suppliers

FEASIBLE PLAN

- STATXO delivered an integrated solution encompassing **AI-driven news scraping from global portals, focusing on operational, financial, and ESG aspects**, along with data access from paid databases. This comprehensive data was then analyzed and visualized via dashboards to provide vendor risk ratings across various spend categories
- The process involved supplier segmentation, extensive parameter assessment, qualitative data scoring, and predictive analysis. Suppliers were categorized based on risk levels, and mitigation actions were identified, resulting in improved risk assessment through regular monitoring. A real-time news feed dashboard was designed for strategic vendors

CAPABILITY TO DELIVER

- STATXO's team of experienced Procurement Intelligence & Analytics professionals use their expertise to enhance supplier risk management by assessing & tracking the strategic suppliers on financial, operational, and sustainability parameters on real-time basis (*using AI & Machine Learning*)
- Provide real-time risk alerts – highlighting specific categories, suppliers, and regions that require immediate focus



7. Category Intelligence of Electricity & Gas – US Clothing Retailer



The insights supported the client to embark on several strategic initiatives. Firstly, they opted for demand pooling from energy suppliers, strategically leveraging the benefits of large volume discounts. Additionally, they tested a dual fuel package to explore avenues for cost savings, a move indicative of their proactive approach to efficiency. Notably, in the European market, the client secured ~15% savings on their initial energy bill by forging a long-term contract with a new supplier. This decision underscored their commitment to maximizing value and minimizing costs. Furthermore, they adapted their contract type to a Block Contract, a strategic shift aimed at potentially unlocking more favorable terms and conditions.



Extremely satisfied with the advisory services provided by STATXO. The data-driven insights from STATXO helped us to make informed strategic decisions, resulting in tangible cost savings, and enhanced procurement efficiency.”

Director, Procurement

Q CASE FOR CHANGE

- The client, a US-based clothing retailer, manages their stores across the US, Canada, UK, France, and Italy. The client procured electricity and gas for its stores and leveraged third parties to contract with suppliers
- The client faced significant challenges in **envisioning future price changes & pricing models, understanding & implementing competitive sourcing practices, and dealing with limited visibility into the supplier market**

🚲 SHARED VISION

- Support the client to cultivate robust supplier relationships, navigate effectively, and remain competitive in the industry
- Enhance the client's ability to **forecast future price changes accurately, adapt pricing models efficiently, and effectively implement competitive sourcing practices** by leveraging innovative approaches and cutting-edge technologies
- Further, to foster a **collaborative partnership** focused on conducting comprehensive market analyses, gaining deeper insights into the supplier market, and developing strategic foresight for anticipating industry shifts proactively



🚶 FEASIBLE PLAN

STATXO curated tailored insights to inform an effective **category intelligence and sourcing strategy**. These insights encompassed:

- Understanding the energy market structures in the US, Canada, and Europe
- Analyzing the energy value chain and buyer opportunities
- Identifying key drivers of energy consumption
- Developing preferred pricing and engagement models for cost savings
- Assessing regulatory impacts on energy supply and prices
- Recognizing consumer preferences in electricity and natural gas purchases
- Addressing sourcing risks with mitigation strategies
- Establishing key supplier Key Performance Indicators (KPIs) for performance monitoring
- New supplier identification

✅ CAPABILITY TO DELIVER

Developed a series of customizable and interactive visual Tableau dashboards containing actionable insights. Using our actionable insights, the client took the following steps:

- Client opted for **demand pooling option** from energy suppliers to get benefits of large volume discounts
- Tested **dual fuel package** for cost savings
- In Europe, the client was able to make **~20% savings on the first energy bill** (due to a long-term contract with a new supplier)
- Changed the contract type to **Block Contract**



8. Category Excellence & Commodity Price Tracking & Forecasting – F&B Company



Deep category & commodity insights enabled proactive sourcing decision making, which led to savings of approx. €500k in a commodity supplier negotiations. Achieved savings up-to 8-10% through external market intelligence & negotiation support in selected categories.

Accurate forecasting models helped in develop hedging strategies to manage price volatility

Please mention dissemination and delivery through STATXO Procurement Intelligence Platform



STATXO's support in providing regular category & commodity insights via tailored dashboards helped our sourcing team in data driven strategy building for multiple categories and effective negotiations with suppliers.

Also, the insights are not limited to a small section of the business, but globally accessed by respective sourcing managers.

Global VP Procurement, EMEA

CASE FOR CHANGE

Client's (a leading food & beverages company) procurement function was facing challenges in 2 broad areas:

- To keep track of market indicators on an on-going basis along with a fairly accurate forecast across 80+ essential commodities (such as Metal commodities like - Aluminum, Copper, Silver and others like Paper, Films, Carton/Corrugated Boards, etc.) which they contracted for. Client wanted insights on:
 - Volatile commodity market and validate price changes suggested by their suppliers on yearly price reviews
 - Potential price shocks to ensure client secure sufficient volume ahead of time
 - To remain updated on latest category insights & best practices, identify and assess suppliers across niche markets (Italy, Netherlands, UK and other Eastern European countries) by categories

SHARED VISION

- To enhance category & commodity management and strategic sourcing. Our goals included delivering regular insights – sourcing best practices, supplier intelligence & scorecards, price tracking & forecasting and establishing continuous KPI monitoring for suppliers. By segmenting suppliers based on their strategic importance, we sought to foster better relationships and ensure supplier stability. Ultimately,
- Objective was to create an interactive dashboard for tracking category & commodity insights, enabling early intervention and contingency planning for effective cost savings.

FEASIBLE PLAN

- Set-up a dedicated team (5 analysts) to support client on category excellence and commodity volatility management.
 - **Commodity Volatility Management:** Support sourcing team to validate any immediate price changes and take proactive measures for any potential price shocks
 - Designed statistical models to forecast prices of 80+ commodities on regular basis
 - Formulated a robust inflation forecasting tool/ web-based dashboard to provide spend visibility and support contract negotiations
 - **Category Excellence:** Targeted insights to category managers
 - Supply Market Insights
 - Contracting Analysis
 - Sourcing Best Practices
 - Supplier Analysis & Scorecards

CAPABILITY TO DELIVER

- Insights delivered via user-friendly dashboard with category excellence and commodity prices & forecasting insights updated at regular intervals (monthly/ quarterly). For regular updates/ alerts, utilized data extraction algorithms to improve operational efficiency.
- Used integrated research approach (secondary + primary + expert consultations + AI enabled monitoring) provided customized category intelligence for defining sourcing strategy on a some high spend categories



9. Vendor Identification and Evaluation for E-Cataloguing - Leading Construction Company



Our strategic 2x2 matrix helped the client identify 3-4 potential vendors for their E-catalogue solution based on services and technology capabilities. This enabled the client to partner with the most suitable provider. After implementing the solution, both global and regional teams enjoyed an Amazon-like experience for tail-spend items, streamlining the procurement process. Additionally, within the first six months, the client witnessed a 5-6% savings in its tail spend.



Partnering with STATXO led to a streamlined sourcing process through the strategic use of a 2x2 matrix. This enabled us to select the most suitable E-catalogue solution provider, resulting in an Amazon-like experience for our global and regional teams. Within six months, we achieved a significant 5-6% reduction in the tail spend. We're thrilled with the outcomes and look forward to future collaborations."

CPO, Global Operations

Q CASE FOR CHANGE

- A European construction company was **struggling with managing its tail-spend items**, such as stationary, sundry IT items, courier services, etc., each costing below USD 10 K. These smaller purchases added up to a significant amount, with the client spending USD 5.9 Million on those in FY2022
- Further, the client's systems **didn't allow them to easily share a list of these items along with their prices** with their teams working in different regions on a real-time basis. This lack of coordination made it difficult for teams in various locations to access the necessary items at the right prices efficiently and effectively in a time-bound manner

🚒 SHARED VISION

- To facilitate the client in sourcing a technological solution offering a centralized E-cataloguing solution for various tail-spend items for its global and regional teams. Our goal included the **identification of 3-4 potential vendors with the capability to offer a technology solution to cater to the client's global operations across 15+ countries**
- To create detailed profiles of these vendors for thoroughly evaluating and benchmarking their capabilities. This included assessing factors, such as their client base, range of services, technological expertise, pricing models, minimum contract requirements, partnerships, and coverage across different geographical regions

📏 FEASIBLE PLAN

- To conduct extensive secondary research and primary research to gain in-depth insights into the capabilities of potential vendors
- To ensure accuracy and relevance, we conducted extensive primary research interviews with key vendors identified. These interviews **provided first-hand insights into each vendor's capabilities**
- Formulated a 2x2 matrix** to assess each vendor's relative position. This matrix considered the depth of the services offered, including tool features, tail-spend item management, customer support, and secure external connections, as well as the breadth of their services, such as their client base, geographical coverage, partnerships, and any awards or recognitions

✅ CAPABILITY TO DELIVER

- Guided the client through a strategic process using a **2x2 matrix to identify 3-4 potential vendors based on their services and technology capabilities**. Through this process, the client was able to partner with the most suitable E-catalogue solution provider
- Further, the global and regional teams were able to experience an **in-house Amazon-like experience for tail-spend items**
- The client was able to track the various teams' requirements and spending at global and regional levels and witnessed a **5-6% savings in tail-spend** in the first six months after implementing the solution



11. Efficient Contract Alignment for a Multinational Conglomerate: Overcoming Data Disparity with Advanced NLP Automation to Minimize Revenue Leakage and Ensure Compliance



Statxo's innovative contract management solution seamlessly bridges the gap between customer agreements and sales/ERP systems. Achieved unprecedented revenue precision and enhanced compliance, all while streamlining operational efficiency. This strategy maximizes revenue potential and brings coherence to contract management, significantly reducing revenue leakage



STATXO's solution for our contract management challenges exceeded our expectations. They tackled the issues of contract discrepancies with precision. We reduced revenue loss, achieved better compliance, and streamlined our processes. Their team executed flawlessly, causing minimal disruption. We're highly satisfied with STATXO's expertise and innovative approach, which significantly improved our operations. “

Global Head of Treasury



CASE FOR CHANGE

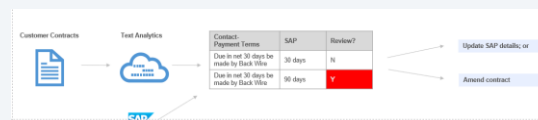
To address the issue of disparate data sources, requiring a robust strategy to integrate and centralize customer contracts. Additionally, to automate contract analysis, the challenge lay in harnessing cutting-edge NLP technology, which demanded substantial expertise and resources.

Moreover, to ensure accuracy and alignment, the company needed to create a seamless process for manual reviews by the legal and finance teams. Finally, to achieve these objectives, the challenge was to implement this solution without causing disruptions to existing operations, necessitating meticulous planning and execution



SHARED VISION

To eliminate revenue leakage by aligning contract terms with the data in the sales/ERP system, to enhance compliance by ensuring that contracts accurately represented the agreed-upon terms and conditions, and to improve operational efficiency by automating the contract review process.



FEASIBLE PLAN

Their Contract Lifecycle Management (CLM) system, integrated with our sales/ERP platform, harnessed Text and SAP analytics, utilizing NLP for automatic extraction of vital contract data. This data seamlessly merged with SAP information. The reconciliation process ensured alignment between contract details and the sales system, flagging discrepancies for review. High-probability exceptions were automatically addressed, while borderline cases underwent manual review and adjustment by our customer/sales team.

Ultimately, achieving a remarkable reduction in contract-to-system mismatches, significantly enhancing billing accuracy, regulatory compliance, and customer satisfaction



CAPABILITY TO DELIVER

To centralize contract management, all customer contracts were digitized. Next, to ensure precision, the company harnessed an NLP-powered system to automatically analyze and extract essential contract terms and conditions.

Additionally, to harmonize contract terms with sales/ERP system data, the system diligently flagged inconsistencies for manual review.

Lastly, to secure alignment, the legal and finance teams undertook these reviews, guaranteeing that contract terms accurately mirrored the system data

Advanced Analytics & Automation



1. Item Master Data Management – Global Industrial Automation Company [1/2]



The client successfully reduced the Item Master size, improved data quality by 95%, achieved data/brand transparency with a single source of truth, gained better analytics insights, enhanced Item quality, transparency, and compliance, improved operational efficiency, and automated data management processes. These advancements resulted in streamlined operations, better decision-making, and increased business efficiency across departments.



STATXO’s team helped us achieve significant improvement in item management, reducing the Item Master size, and boosting data quality by 95%. This has led to improved data transparency, better analytics insights, streamlined operations, and enhanced our overall business efficiency.”

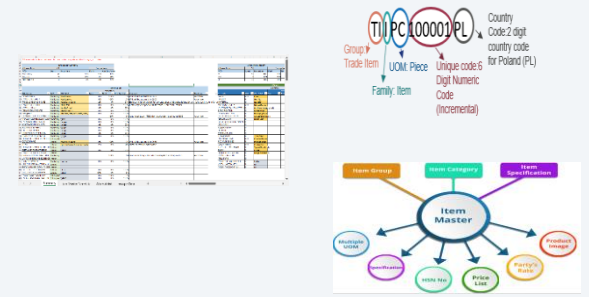
VP, Procurement

Q CASE FOR CHANGE

- A global industrial automation company, with an expenditure exceeding EUR 2 Bn and a diverse portfolio featuring over 100 brands sought to explore the digitalization of its operations. The client was dealing with multiple challenges in item management
 - Lack of a defined Item Master due to multiple ERP systems
 - Approx. 5.5K SKUs, ~EUR 200 Mn spend in scope, and 5 different source systems
 - Absence of a global process for new item creation
 - No centralized Global Item Repository
 - Lack of a standard format for Item Nomenclature
 - Presence of inaccurate, untrusted, isolated, and duplicated information
 - Data inconsistency and inaccuracy
 - Limited data sharing and collaboration

🚲 SHARED VISION

- To **embrace digitalization** in managing spend, identifying tail spend, tracking savings, and striving for continuous improvement through automation
- Our goal was to establish a **robust data management system** that encompasses the handling of interchangeable items, centralized data storage, and efficient data sharing of data from different source systems



👤 FEASIBLE PLAN

- Set up a step-by-step approach to create the clean Master Item Data along with the process of creating further items globally:
- **Data Collection:** Gather accurate data from diverse internal legacy systems
 - **Data Quality Enhancement:** Improve data quality with Artificial Intelligence (AI) and Machine Learning (ML)
 - **Flagging Interchangeable Items:** Associate interchangeable items, disregarding descriptions or codes
 - **Centralized Repository:** Implement D365 as a centralized data repository
 - **Efficient Data Sharing:** Enable smooth data sharing across entities, addressing nomenclature differences
 - **Syndication Across Channels:** Consistently syndicate product data across multiple channels
 - **Data Quality Rules:** Establish standardized rules for maintaining data quality
 - **Integration and Consolidation:** Integrate and consolidate data from various sources

✅ CAPABILITY TO DELIVER

- **Reduced the size of the Item Master** by removing redundant and duplicate items.
- **Improved Data Quality** by 95% with accurate, consistent, and complete reference data to ensure that data is properly classified and can be used effectively across the organization
- **Improved data integration** to ensure that the data can be integrated across different systems and platforms
- **Achieved data/brand transparency** with a single, trusted source of truth having complete reference data for both analytical and operational use cases
- **Better analytics insights and data-driven decisions** leading to improved strategic and operational decisions
- **Improved item quality** by preserving precise and full item data to define an item uniquely, improve item features, and increase item quality
- **Improved transparency and compliance** to support mergers and acquisitions with a streamlined process for merging and reconciling multiple data assets
- **Enhanced overall operational efficiency** due to improved data integration, data sharing, and collaboration across departments and streamlined business processes
- **Improved business efficiency** by automating data profiling, discovery, cleansing, standardizing, enriching, matching, and merging in a single central repository

Use Case 1: Item Master Data Management – Global Industrial Automation Company [2/2]



Key Challenges with Data

- ✓ Direct Items identified as identical in Central Datawarehouse but not in local systems
- ✓ Direct Items identical but with different codes and descriptions to reflect different sourcing/ supplier choices
- ✓ Indirect Items requiring to reflect buying channels (*which recurring items need to be created - items going in a catalog even if recurring would not need to be created*)



3 Phased Approach



Phase 1: Data Deep Dive

Identify and Analyze

- Identify and consolidate the Spend data from different source systems
- Identify In-Scope data set
- Define and analyze all “Grey” areas from the data set
- Propose category mapping based on defined criteria
- Leverage D&B information Propose mapping based on defined criteria to minimize manual mapping of vendors
- Define process and tool to ensure mapping is validated by the Client teams



Phase 2: Understand ERP Requirements and Gaps

Prepare for Appropriate Strategies

- Validate the Item MD template provided by the Client and Run maturity analysis per site and check gap versus To Be
- Critical analysis of the quality of the extracts - Define criteria to assess relevant live items and the size of the gaps versus defined standards
- Prioritise drivers of gaps (*e.g., missing units of measures*). Identify interchangeable items for Direct (*either flagged or not flagged as such*)



Phase 3: Prepare and Transition

Implement & Track

- Define process and approach to close gaps and missing data fields
- Fill up gaps, Collect & Consolidate data, Establish quality checks
- Define cleansed Item master DB to upload
- Create the User Manual for Global Item Mast Data Management
- Defining how to create and delete any item
- Defining Attributes, Nomenclature, and Category Mapping of each item

2. Demand Forecasting and Assortment Optimization for a Fashion Retail Chain



Established unparalleled market intelligence by facilitating regular SKU tracking and optimized stock levels, STATXO's custom Cloud platform enables proactive ordering. Achieving ~90% demand forecasting accuracy, it enhances distribution planning and process efficiency.



STATXO's expertise has brought a remarkable shift in our operations and planning. They understood our challenges and delivered tailored strategies to optimize our assortment and reduce inventory costs. Their approach to addressing intermittent demand and assortment instability has streamlined our inventory management and boosted sales. We appreciate their partnership and the positive impact on our business.”

Senior Manager, Head of Sales EMEA



CASE FOR CHANGE

To address operational and planning challenges, the fashion retail chain aimed to optimize assortment and minimize inventory costs. Challenges included manual data extraction, lack of forecasting tools, and SKU-level demand assessment difficulties. They sought real-time insights for category managers and solutions for intermittent demand and assortment instability, aiming for efficient inventory management and sales maximization



SHARED VISION

To revolutionize demand planning and inventory management with STATXO's Cloud Analytics platform. The objective was to empower Category and Product Managers with real-time insights, enabling optimization of stock levels, informed decision-making, and enhanced sales performance. This journey aims to minimize inventory costs, maximize sales, and achieve operational excellence for the fashion retail chain



FEASIBLE PLAN

To support Category Managers and Product Managers, STATXO developed a Cloud Analytics platform for Demand and Inventory Planning. This platform empowered them to optimize stock levels, plan distribution, and track crucial product sales KPIs.

STATXO proposed six key types of analysis, including Demand & Supply Pattern Analysis, Product Lifecycle Analysis, Product Affinity Analysis, Store Segmentation, Demand Forecasting, and Inventory Planning & Optimization. This comprehensive solution enabled proactive order placement, efficient stock management, and data-driven decision-making



CAPABILITY TO DELIVER

Engaged with industry experts to gain insights into addressing the fashion retail chain's demand forecasting and assortment optimization challenges. Conducted a comprehensive analysis of the vast sales and inventory data, followed by the development of a cloud-based analytics platform to provide forward-looking insights.

Assessed demand patterns, product lifecycles, and store characteristics through six distinct types of analysis. This approach ensured a holistic understanding of the retail landscape, paving the way for an optimized solution

3a. Decision-making in the Personal Care Industry through Data-Driven Insights and Simulation Models



Enabled improved data access and security, developed simplified data exploration with Power BI dashboards, optimized inventory management, and enabled data-driven decision-making leading to cost reduction and informed strategies



Collaborating with STATXO on our data transformation project has been nothing short of exceptional. STATXO's ability to understand our intricate data needs and translate them into actionable solutions has truly elevated our business. The structured database, insightful dashboards, and regression models have significantly streamlined our operations and decision-making processes. STATXO's expertise and dedication have made a significant impact on our business, and we look forward to continued collaboration."

VP, Head of Global Data Analytics



CASE FOR CHANGE

The client was having difficulty in handling extensive, diverse data generated across six business segments in the personal care industry. Their process entails SQL database creation, data management, and blending using SQL and Python, followed by data analysis in Power BI. Insights on Customer Value, Delivery, and Order Profiles inform tables and reports.

Machine Learning and regression models are then applied to optimize costs, improve demand planning, and automate processes. This complex data handling and analysis process presented significant challenges to the client



SHARED VISION

To streamline and optimize the management of extensive, diverse data generated across six business segments in the personal care industry, enabling the creation of a unified SQL database, data blending, and analysis. This initiative seeks to extract actionable insights, enhance decision-making, and automate processes through machine learning and regression models while improving cost optimization and demand planning



FEASIBLE PLAN

We established a structured database and data warehouse, seamlessly integrated with Power BI for user-friendly access and custom filtering. We crafted specific Power BI dashboards for various global regions. Our efforts included generating insightful analysis reports for Customer Value Lists, Delivery Schedules, Order Schedules, and Order Profiles.

We conducted hypothesis testing and built regression models to forecast cost and volume trends, delivering the solution in four phases: database creation and preprocessing, data management and enrichment, data analytics and summarization, and advanced forecasting and simulation



CAPABILITY TO DELIVER

To create SQL databases for distinct business departments, mastering data through SQL and Python, and utilizing Power BI to extract meaningful insights, such as Customer Value Lists, Delivery Schedules, and Order Profiles.

Furthermore, the aim was to develop customized regression models using Machine Learning, optimizing costs, enhancing demand planning, and streamlining decision-making processes

3b. MI/CI Platform – Beauty Care Company



Client achieved an impressive 90% accuracy in oil classification and calculation, our insights have been instrumental in shaping their market strategies. Deep visibility into retail sales and oil market estimation provided invaluable insights, while a user-friendly Qlik Sense dashboard empowered to make informed decisions swiftly. With structured data and consistent segmentation, the client's analytical capabilities were elevated

Another version of previous use case



STATXO's accuracy in oil classification, deep insights into retail sales, and effective segmentation strategies have been invaluable. Their user-friendly dashboard streamlined decision-making, while their structured data approach ensured ongoing analysis

Director, Strategy

Q CASE FOR CHANGE

- The Beauty Care company sought comprehensive insights into the Retail and Oil market sizes, aiming for a deep understanding backed by diverse data sources, their goal was to attain complete visibility, accompanied by detailed analytics, to inform strategic decisions and enhance their market position
- The client encountered several key challenges, including dealing with disparate data sources with varying structures, lack of standardization in internal insights from sales and marketing teams, overlapping coverage between NPD, Kantar, & Euromonitor data; and complications arising from currency conversion issues during analysis. These challenges hindered efficient data management, analysis, and decision-making processes, highlighting the need for streamlined and standardized data practices

🚲 SHARED VISION

- To enable better visibility into the market, our goals included enhancing retail sales visibility, estimating oil market size accurately, implementing process improvements for efficiency, and developing an interactive dashboard/platform providing regular internal and market insights
- Empower the client to optimize decision-making and operational processes, fostering growth and competitiveness in both retail and oil markets, through standardized procedures and accessible data visualization

Source 1 Sales (USD)	Source 2 Sales (USD)	Source 3 Sales (USD)	Source 1 Quantity	Source 2 Quantity	# Key Customers	# Brand Variants	# Brand Groups	# Suppliers
14.39B	61.00B	3.1B	711.6M	537.5M	384	2606	869	8
Total Oil Sales @ 2.1B	Average Oil Sale Price (EST) 97.08	Average Oil Usage % (EST) 13.35%	# Key Customers 384	# Brand Variants 2087	# Brand Groups 869	# Suppliers 8		

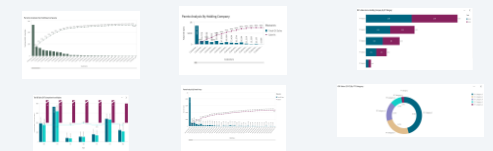


📌 FEASIBLE PLAN

- Integrated data from various external sources into one master dataset containing over 100K transactions and 75+ variables
- Restructured sales data from Euromonitor and Kantar at brand group, brand variant, country, and sub-region levels for enhanced visibility
- Conducted data sanitization and enrichment processes to address gaps and inconsistencies
- Enriched master data according to client taxonomy, filling gaps at different levels
- Created a web-based template for gathering internal insights and developed an oil market size estimation model using both bottom-up and top-down approaches
- Designed interactive Qlik Sense dashboards for retail sales and oil market estimation

✅ CAPABILITY TO DELIVER

- Data Accuracy:** Achieved 90% accuracy in oil classification and calculation
- Data Management Excellence:** Created structured data for ongoing analysis and dashboard updates, ensuring data integrity and accessibility
- Comprehensive Market Insights:** Provided deep visibility into retail sales and oil market estimation
- Enhanced Segmentation Strategies:** Improving and consistently segmenting categories at market segment, FF Category, supplier, and division/brand group levels
- User-Friendly Tools:** Implemented a user-friendly Qlik Sense dashboard for streamlined decision-making



4. Enhancing Risk Management with AI-Powered Predictive Models - Leading Financial Institution



A notable reduction in payment defaulters was achieved by implementing the data-driven solution, which utilized advanced AI models to assess customer risk accurately, enabling timely interventions and enhancing overall financial stability



STATXO's assistance has made a significant difference in our financial institution's performance. We've experienced positive outcomes and better credit assessment processes. We are genuinely grateful for STATXO's partnership and look forward to continuing this successful collaboration."

Global Head of Treasury

CASE FOR CHANGE

A leading financial institution faced mounting challenges in managing late payments and loan defaults. The manual assessment of customer creditworthiness was time-consuming and often ineffective. Increasing default rates were impacting profitability and customer satisfaction

SHARED VISION

To improve the accuracy of identifying customers at risk of late payments or defaulting on debt. Implementing AI-powered predictive models aimed to streamline decision-making, reduce risks, and enhance financial stability. The institution sought to minimize losses while maintaining a positive customer experience

FEASIBLE PLAN

In collaboration with client, an AI-powered solution was devised to identify customers at risk of late payments or loan defaults. STATXO played a crucial role in data collection, preparation, and model development. Extensive historical customer data, including transaction histories, credit scores, and demographic details, was gathered and processed.

Utilizing advanced machine learning techniques, STATXO created AI models for precise creditworthiness assessment. These models were seamlessly integrated into existing systems, with real-time data feeds ensuring adaptability to evolving customer behaviors. A user-friendly dashboard was implemented to provide actionable insights for decision-makers

CAPABILITY TO DELIVER

To collect and prepare the historical customer data and financial indicators. Subsequently, AI models were meticulously developed for customer risk classification, utilizing a combination of supervised and unsupervised learning techniques. These models seamlessly integrated into existing systems and processes, facilitating real-time data updates.

To maintain ongoing accuracy and relevance, a robust system for regular model monitoring and periodic retraining was implemented. This approach ensured the adaptability of models to evolving customer behaviors, securing their long-term effectiveness."

