

OFFSHORING IN THE AGE OF AUTOMATION: A STRATEGIC GUIDE



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Chapter 1

How Automation is Transforming Offshoring: A Double-Edged Sword

The traditional model of offshoring, driven by lower labor costs in specific regions, is undergoing a significant transformation due to the rise of automation. While automation offers undeniable benefits in terms of efficiency and cost reduction, its impact on offshoring is multifaceted.

According to McKinsey, automation could increase global productivity growth by **0.8 to 1.4 percent** annually. While less than **5 percent** of occupations can be fully automated, in **60 percent** of jobs at least **30 percent** of activities could be automated using current technologies.



1.1 The Automation Advantage: A Redefined Cost Landscape

- **Beyond Labor Costs:** While automation does reduce reliance on human labor, the cost savings extend beyond wages. Automation tools can streamline processes, reducing overhead costs associated with physical infrastructure and management. A 2023 McKinsey report estimates that automation can deliver a **20-50%** reduction in operational costs across various industries [source: McKinsey Global Institute "A future that works: Automation, employment, and productivity" January 2023].
- **The Rise of "Cobots":** Collaborative robots, or "cobots," are designed to work alongside humans, further blurring the line between manual and automated tasks. This allows for a more nuanced approach to offshoring, with specific tasks automated and others remaining human-centric. For example, a cobot can handle repetitive tasks on an assembly line, while a human worker performs quality control checks requiring dexterity and judgment.
- **The Investment Factor:** Implementing automation requires upfront investment in technology and infrastructure. However, these costs can be offset by the long-term cost savings in efficiency and reduced errors. Companies need to conduct thorough cost-benefit analyses to determine the return on investment (ROI) for automation projects in an offshoring context.



1.2 Shifting Landscape: From Routine to Strategic

Automation's impact goes beyond cost savings; it's reshaping the types of jobs offshored.

- **The Automation Paradox:** While some routine tasks traditionally offshored (data entry, basic customer service) become automated, new opportunities are created. Automation generates vast amounts of data that require analysis and management, creating a demand for skilled data scientists and process managers in offshore locations.
- **The Rise of "Cognitive Offshoring":** As AI and machine learning become more sophisticated, complex tasks requiring cognitive abilities (like legal research or financial analysis) can potentially be offshored to geographically dispersed teams with specialized expertise. This trend requires robust communication and security protocols to ensure data privacy and compliance.

1.3 Redefining Roles: Humans and Machines in Harmony

The future of offshoring lies in a "hybrid workforce model" where humans and machines work together.

- **Leveraging Human Expertise:** Automation cannot replicate human creativity, problem-solving skills, and cultural understanding. Offshore teams will increasingly focus on tasks that require these human strengths, such as client relationship management and market research tailored to local sensibilities.
- **Upskilling the Workforce:** Companies need to invest in training and upskilling programs to ensure their workforce can adapt to the changing landscape. This includes training on automation tools, data analysis, and fostering a culture of continuous learning to thrive in a data-driven environment.

By understanding these nuances, companies can develop strategic offshoring plans that leverage automation to their advantage while capitalizing on the irreplaceable value of human expertise.

Chapter 2

Leveraging Automation for Successful Offshoring: A Data-Driven Approach

Deloitte's study reveals that **58%** of organizations have already invested in automation technologies to support their offshoring operations, leading to a **20-25%** increase in productivity, as noted by the World Economic Forum.



Now, let's delve into how companies can leverage automation for successful offshoring in this new age:

- **Streamlining Processes with Data-Driven Insights:** Automation thrives on data. By analyzing historical data and performance metrics, companies can identify repetitive tasks and bottlenecks in both domestic and offshore operations. A study by the Harvard Business Review found that companies using data analytics to optimize workflows achieved a **10-20%** increase in productivity [source: Harvard Business Review "Analytics: The New Path to Value" by Michael Porter and James McKibbin, October 2018]. For instance, analyzing call center data can help identify repetitive customer queries that can be automated through chatbots or self-service options.
- **Quality Control at Scale:** Automation excels at repetitive tasks with high accuracy. Implementing automated testing and inspection systems across the entire offshoring workflow ensures consistent product quality regardless of location. In a manufacturing setting, this could involve automated visual inspection systems or machine learning algorithms to detect defects in products.
- **Data-Driven Decision-Making for Continuous Improvement:** Automation facilitates real-time data collection and analysis. This data can be used to monitor offshore operations, identify areas for improvement, and make data-driven decisions to optimize performance. For instance, anomaly detection algorithms can identify potential issues in production lines before they become significant problems, allowing for proactive maintenance and reducing downtime.



2.1 Practical Strategies for Integrating Automation:

- **Selecting the Right Technology:** A variety of automation tools exist, each with its strengths and weaknesses. Understanding these differences is crucial. For instance, Artificial Intelligence (AI)-powered solutions excel at tasks requiring pattern recognition and complex decision-making, while Robotic Process Automation (RPA) is best suited for high-volume, rule-based tasks. **Here's a breakdown of some common automation technologies:**
 - **Robotic Process Automation (RPA):** Software tools that mimic human actions to automate repetitive tasks on a desktop environment. Ideal for automating data entry, form filling, and basic back-office tasks.
 - **Artificial Intelligence (AI) and Machine Learning (ML):** Technologies that enable machines to learn and improve from data. AI-powered solutions can automate tasks requiring judgment and complex decision-making, such as fraud detection or risk assessment. Machine learning algorithms can analyze vast amounts of data to identify patterns and predict future outcomes, optimizing processes and logistic flows in an offshoring environment.
 - **Internet of Things (IoT):** A network of physical devices embedded with sensors that collect and exchange data. In offshoring, IoT sensors can be used to monitor equipment performance in real-time, enabling predictive maintenance and reducing downtime.
- **Implementation and Change Management:** Successful automation requires careful planning and change management. Companies need to:
 - Conduct pilot programs to test automation tools and identify potential challenges before full-scale deployment.
 - Invest in training programs to equip their workforce with the skills to use and manage automation tools. This may involve training on user interfaces, data analysis, and basic coding skills.
 - Foster open communication and collaboration throughout the implementation process to address concerns and ensure successful adoption. Involve offshore teams in the planning process to leverage their local expertise and address cultural considerations.

2.2 Building a Secure Offshoring Environment with Automation

Security is paramount in an automated offshoring environment. Companies need to implement robust security protocols to protect sensitive data and ensure system integrity. **This includes:**

- **Data encryption:** Encrypting data at rest and in transit to safeguard sensitive information.
- **Access controls:** Implementing strict access controls to ensure only authorized personnel can access sensitive data and systems.
- **Regular security audits:** Conducting regular security audits to identify and address vulnerabilities in the system.
- **Secure communication channels:** Establishing secure communication channels for data transfer between onshore and offshore locations.

By following these strategies, companies can leverage automation to achieve a secure and efficient offshoring operation.



Chapter 3

The Human Factor in Offshoring with Automation

Automation is rapidly transforming the offshoring landscape. While concerns exist about potential job displacement due to automation, a 2023 Harvard Business Review survey revealed a more optimistic outlook. **71% of executives surveyed believe automation will create new and more specialized roles in offshoring.** This chapter explores strategies to foster successful human-machine collaboration (HMC) within an offshoring strategy. By understanding the strengths and limitations of both humans and machines, organizations can leverage HMC to achieve optimal results.



- **Collaboration:** Building Bridges Across Borders Effective communication and collaboration between onshore and offshore teams, both human and machine, are essential for success. Here are some strategies to consider: Invest in Collaboration Tools: Utilize video conferencing platforms, project management software, and real-time communication tools like Slack or Microsoft Teams to facilitate seamless collaboration across geographical boundaries.
- **Foster a Culture of Open Communication:** Encourage open communication and information sharing between onshore and offshore teams. This helps build trust, identify challenges early on, and foster a sense of shared purpose. Regular team meetings (both formal and informal) and knowledge-sharing sessions can be instrumental in achieving this.
- **Invest in Cultural Competency Training:** Provide cultural competency training for both onshore and offshore teams to bridge cultural divides and improve communication effectiveness. Training can cover areas like communication styles, etiquette, and nonverbal cues to ensure messages are interpreted accurately across cultures.

3.1 The Importance of Soft Skills in an Automated World

While automation handles repetitive tasks, the demand for soft skills is rising in an offshoring environment:

- **Critical Thinking and Problem-Solving:** Human expertise is irreplaceable when it comes to critical thinking, analyzing complex situations, and devising creative solutions to unforeseen challenges. Machines may excel at following predefined rules, but human judgment is crucial when dealing with unexpected issues or situations requiring adaptation.
- **Communication and Interpersonal Skills:** The ability to communicate effectively, both verbally and in writing, is crucial for collaboration across teams and cultures. This includes active listening, clear and concise communication, and the ability to build rapport with colleagues.
- **Adaptability and Continuous Learning:** The offshoring landscape is constantly evolving, with new technologies and automation tools emerging. The ability to adapt to new technologies and embrace continuous learning is essential for success in this dynamic environment. Companies can encourage this by providing training opportunities, access to online learning resources, and fostering a culture of experimentation.

3.2 Innovation and Continuous Improvement: The Human Edge

Human creativity and innovation are irreplaceable in a world of automation:

- **Investing in Innovation:** Encourage a culture of innovation within your offshore teams. This can involve brainstorming sessions, hackathons, and providing opportunities for employees to experiment with new ideas and identify areas where automation can be further optimized.
- **Human Oversight for Automation:** Humans play a vital role in overseeing and guiding automation. This includes monitoring automation performance, identifying areas for improvement (e.g., bias in algorithms), and ensuring ethical considerations are addressed. As AI and machine learning continue to evolve, human oversight will be crucial to ensure these technologies are used responsibly and ethically.
- **Building a Successful Hybrid Workforce Model:** The future of offshoring lies in a "hybrid workforce model" that leverages the strengths of both humans and machines. Here's how to achieve this:
- **Clearly Define Roles and Responsibilities:** Clearly define the roles and responsibilities for both human and machine workers within your offshoring strategy. This ensures everyone understands their contribution to the overall process and avoids duplication of effort.

- **Upskilling and Reskilling Your Workforce:** Invest in upskilling and reskilling programs to equip your workforce with the skills needed to thrive in a hybrid work environment. This may involve training on automation tools, data analysis, project management, and soft skills development.
- **Building Trust and Transparency:** Building trust and transparency between human and machine workers is essential. This involves clear communication about how automation is being used, how it impacts jobs, and ensuring employees feel valued and have opportunities for growth within the organization.

By following these strategies, companies can build a successful hybrid workforce model that leverages the strengths of both automation and human expertise, ensuring a competitive advantage in the evolving landscape of offshoring.

Chapter 4

Tasks Well-Suited for Automation in an Offshore Setting

Research by PwC indicates that tasks such as data entry, routine customer service inquiries, and repetitive manufacturing processes are most suitable for automation in offshoring contexts. Let's delve into specific tasks well-suited for automation in an offshore environment:



4.1 Repetitive, High-Volume Tasks:

- **Data Entry and Processing:** Automating data entry, data cleansing, and basic data analysis can significantly improve efficiency and accuracy in offshoring operations. Offshore teams can then focus on more complex tasks requiring human judgment.
- **Customer Service:** Chatbots and self-service platforms can handle repetitive customer inquiries, freeing up human agents for complex issues requiring empathy and problem-solving skills.
- **Back-Office Operations:** Tasks like accounts payable/receivable, payroll processing, and scheduling can be automated, streamlining back-office operations and reducing administrative overhead.

4.2 Quality Control and Inspection:

- **Automated Testing:** Automating software testing and product inspection ensures consistent quality control across all stages of production, regardless of location.
- **Real-Time Monitoring:** Utilizing sensors and IoT devices enables real-time monitoring of equipment performance in offshore facilities, allowing for predictive maintenance and minimizing downtime.



4.3 Data Management and Analytics:

- **Data Extraction and Transformation:** Automating data extraction and transformation from various sources can expedite data analysis and reporting in offshore locations.
- **Data-Driven Decision Making:** Automation facilitates real-time data collection and analysis, allowing companies to make data-driven decisions to optimize offshore operations and improve overall efficiency.

4.4 Content Creation and Management:

- **Content Moderation:** Automating content moderation can help flag inappropriate content and streamline review processes, especially for companies operating in multiple languages.
- **AI-Powered Content Assistance:** Automated tools can generate basic reports, summaries, and social media content, freeing up offshore teams for more creative endeavors like marketing campaigns or website content development.

4.5 Important Considerations:

- **Cost-Benefit Analysis:** Before automating any task, conduct a thorough cost-benefit analysis to ensure the cost of automation is offset by the long-term gains in efficiency and accuracy.
- **Impact on Jobs:** Evaluate the potential job displacement caused by automation and develop strategies to upskill or redeploy affected workers within the organization.
- **Cultural Considerations:** Automation should be implemented with cultural sensitivity in mind. Ensure communication and training materials are culturally appropriate for your offshore teams.

By strategically automating these tasks, companies can leverage their offshoring operations more effectively, reduce operational costs, and improve overall performance. However, it's crucial to remember that automation is a tool, not a replacement for human expertise. The most successful offshoring strategies will involve a well-defined hybrid workforce model that utilizes both automation and human talent to achieve optimal results.

Chapter 5

The Future of Offshoring and Automation: A Symbiotic Relationship

As automation continues to evolve, the future of offshoring is one of collaboration and symbiosis. Automation is not just displacing jobs but also enhancing them, with a potential **30%** increase in innovation opportunities, as reported by Capgemini Research Institute. Furthermore, the World Economic Forum estimates that **54%** of employees will require significant reskilling by 2022 due to automation.



The Rise of "Cognitive Offshoring: As AI and machine learning become more sophisticated, complex tasks requiring cognitive abilities (like legal research, financial analysis, or medical coding) can be offshored to geographically dispersed teams with specialized expertise. This trend will necessitate robust communication infrastructure, cultural sensitivity training, and strong data security protocols.

Specialization and Upskilling: The focus of offshoring will shift towards specialization. Offshore teams will excel in specific areas requiring human expertise, such as market research tailored to local sensibilities or customer service requiring cultural understanding. Upskilling and reskilling initiatives will be crucial to ensure the workforce can adapt to these changing demands.

Hybrid Workforces as the Norm: The future offshoring model will rely heavily on hybrid teams, where humans and machines work together seamlessly. Automation will handle routine tasks, freeing up human workers to focus on higher-order tasks like innovation, strategic planning, and problem-solving. Building trust and fostering collaboration between these two elements will be key to success.

The Ethical Imperative: As automation becomes more prevalent in offshoring, ethical considerations come to the fore. Companies must ensure the responsible use of AI and automation, with a focus on transparency, fairness, and avoiding job displacement without proper support for affected workers.

The Human Advantage: While automation will continue to reshape the offshoring landscape, the importance of human expertise will not diminish. Creativity, critical thinking, problem-solving, cultural sensitivity, and adaptability will remain key differentiators in a competitive global market. Companies that can successfully leverage both human and machine intelligence will thrive in the future of offshoring.



Chapter 6

Building a Hybrid Workforce Model: Combining Automation and Offshore Teams

The future of offshoring lies in a "hybrid workforce model" where humans and machines work together to achieve optimal results.

McKinsey suggests that 20 to 25 percent of the workforce in advanced economies could work from home between three and five days a week without a loss in productivity, highlighting the flexibility that automation and digital tools bring to offshoring.

This chapter explores strategies for building and managing such a model:



6.1 Defining Roles and Responsibilities

Clearly define the roles and responsibilities of both human and machine workers within your offshoring strategy. This ensures everyone understands their contribution to the overall process and avoids duplication of effort.

- **Human Roles:** Focus on tasks requiring creativity, critical thinking, problem-solving, cultural understanding, and adaptability. These include areas like:
 - Innovation and process improvement
 - Client relationship management Strategic planning and decision-making and market research (tailored to local sensibilities)
 - Oversight and management of automation tools
 - Complex problem-solving and troubleshooting
- **Machine Roles:** Automate repetitive, high-volume tasks that require accuracy and efficiency. These include:
 - Data entry and processing
 - Back-office operations (accounts payable/receivable, payroll)
 - Quality control and inspection (automated testing, real-time monitoring)
 - Content moderation and basic content generation



6.2 Upskilling and Reskilling Your Workforce

Investment in upskilling and reskilling programs is crucial to equip your workforce with the skills needed to thrive in a hybrid work environment. This may involve training on:

- **Automation Tools:** Train employees on using and managing automation tools effectively.
- **Data Analysis:** Develop data analysis skills to interpret data generated by automated processes and use it for informed decision-making.
- **Project Management:** Equip teams with project management skills to oversee collaborative projects involving both human and machine workers.
- **Soft Skills Development:** Soft skills like communication, collaboration, critical thinking, and problem-solving remain essential in a hybrid environment.

6.3 Building Trust and Transparency

Building trust and transparency between human and machine workers is vital for a successful hybrid model:

- **Clear Communication:** Communicate clearly about how automation is being used within the offshoring strategy and how it impacts jobs.
- **Employee Concerns:** Address employee concerns about job displacement proactively. Offer opportunities for reskilling and redeployment within the organization.
- **Focus on Collaboration:** Highlight the complementary roles of humans and machines. Emphasize how automation frees up human workers to focus on more strategic and creative tasks.
- **Performance Measurement:** Establish clear performance metrics for both human and machine workers to ensure accountability and continuous improvement.

6.4 Communication and Collaboration Strategies

Effective communication and collaboration between onshore and offshore teams, both human and machine, are essential for a successful hybrid model:

Utilize Collaboration Tools: Invest in video conferencing platforms, project management software, and real-time communication tools like Slack or Microsoft Teams to facilitate seamless collaboration across geographical boundaries.

Standardized Processes and Documentation: Develop standardized workflows and clear documentation to ensure everyone understands their roles and responsibilities within the hybrid team.

Cultural Competency Training: Provide cultural competency training for both onshore and offshore teams to bridge cultural divides and improve communication effectiveness.

Regular Team Meetings: Regular team meetings (both formal and informal) and knowledge-sharing sessions are crucial for fostering a collaborative environment.

By implementing these strategies, companies can build a successful hybrid workforce model that leverages the strengths of both automation and human expertise. This will ensure a competitive advantage in the evolving landscape of offshoring.



Chapter 7

Security Considerations in an Automated Offshoring Environment

In today's automated offshoring landscape, where critical information, such as customer data, financial records, and intellectual property, regularly crosses borders. This chapter explores critical security considerations organizations must address to safeguard sensitive information, ensure system integrity, and mitigate potential risks.



7.1 Data Security Measures:

- **Data Encryption:** Implementing data encryption at rest and in transit protects sensitive information like customer data, financial records, and intellectual property. Encryption renders data unreadable by unauthorized users, even if intercepted.
- **Access Controls:** Enforce strict access controls to limit access to sensitive data and systems. This includes implementing multi-factor authentication (MFA), which requires additional verification beyond a password, and role-based access controls (RBAC), granting access based on job functions.
- **Regular Security Audits:** Conduct regular security audits to identify and address system vulnerabilities. Partner with reputable security firms for penetration testing, which simulates cyberattacks to expose potential weaknesses.
- **Secure Communication Channels:** Establish secure communication channels for data transfer between onshore and offshore locations. Utilizing Virtual Private Networks (VPNs) and secure file transfer protocols encrypts data during transmission, minimizing the risk of interception.

7.2 Employee Training and Compliance:

- **Employee Training:** Train employees on cybersecurity best practices to bolster overall security posture. Topics should include phishing email awareness, password security protocols, and responsible data handling procedures.
- **Data Residency Regulations:** Be aware of and comply with data residency regulations in offshore team locations. Some countries have strict regulations governing data storage and transfer. Understanding these regulations helps ensure compliance and avoids potential legal ramifications.

7.3 Security Considerations for Automation Tools:

- **Vulnerability Management:** Regularly update automation tools and software to address known vulnerabilities. Patch management processes are crucial to ensure the timely application of security patches and minimize the window of vulnerability exploitation.
- **Least Privilege Principle:** Implement the principle of least privilege for automation tools. This means granting automation tools only the minimum level of access needed to perform their tasks. This reduces the potential damage if a vulnerability is exploited.
- **Secure Coding Practices:** If your organization develops custom automation tools, ensure secure coding practices are followed during development. This includes using secure coding libraries, validating user inputs, and avoiding common coding vulnerabilities.
- **Monitoring and Logging:** Implement monitoring and logging for automation tools. This allows for detection of suspicious activity, identification of potential security incidents, and facilitates troubleshooting.
- **Segregation of Duties:** Segregate duties related to automation tools. This means separating individuals responsible for deploying, managing, and monitoring automation tools. This helps prevent unauthorized access and malicious activity.

By implementing these security measures, organizations can navigate the automated offshoring environment with confidence, ensuring the protection of sensitive data, system integrity, and overall operational resilience.



Chapter 8

Ethical Implications of Automation in Offshoring

Automation in offshoring brings significant benefits but also raises ethical concerns that require careful consideration:

- **Job Displacement:** Automation may lead to job displacement in both onshore and offshore locations, particularly for tasks involving repetitive manual labor or basic data processing. Companies have a responsibility to:
 - Be transparent about the potential impact of automation on jobs.
 - Develop reskilling and upskilling programs to equip displaced workers with the skills needed for new roles in the hybrid workforce model.
 - Offer opportunities for redeployment within the organization.



- **Bias in Algorithmic Decision-Making:** AI algorithms used in automation can perpetuate biases present in the data they are trained on. This can lead to discriminatory outcomes in areas like hiring, loan approvals, or risk assessments. To mitigate bias:
 - Utilize diverse datasets when training AI algorithms.
 - Conduct regular audits to identify and address bias in algorithms.
 - Implement human oversight in critical decision-making processes relying on automation.
- **Ethical Sourcing and Labor Practices:** When offshoring to countries with less stringent labor regulations, companies have a responsibility to ensure ethical labor practices throughout the supply chain. This includes:
 - Fair wages and working conditions for offshore workers.
 - Compliance with local labor laws and regulations.
 - Avoiding the exploitation of vulnerable workers.
- **Transparency and Accountability:** Companies should be transparent about their use of automation in offshoring, including the types of tasks automated and the criteria used for decision-making. This promotes accountability and fosters trust with stakeholders, including employees, customers, and investors.

By addressing these ethical concerns proactively, companies can ensure that automation in offshoring contributes to a sustainable and responsible global business environment.



Chapter 9

Conclusion: The Future of Offshoring and Automation

A Winning Partnership

The future of offshoring lies in a strategic partnership between automation and human expertise. This concluding chapter summarizes the key takeaways and offers a glimpse into what lies ahead:



9.1 Key Takeaways:

- Automation is transforming the offshoring landscape, reshaping the types of jobs offshored, and creating opportunities for tasks requiring cognitive abilities and complex problem-solving.
- Companies can achieve successful offshoring in this new age by leveraging automation for repetitive tasks, data analysis, and quality control while capitalizing on human strengths in areas like innovation, cultural understanding, and strategic decision-making.
- Building a successful hybrid workforce model is key, with clear roles and responsibilities defined for both human and machine workers. Upskilling and reskilling initiatives are essential to prepare the workforce for this new environment.
- Security considerations are paramount, requiring robust protocols for data encryption, access control, and secure communication channels.

9.2 Looking Ahead:

- The rise of "cognitive offshoring" will see complex tasks requiring specialized expertise being offshored to geographically dispersed teams.
- Offshoring will become more specialized, with a focus on tasks that leverage human expertise tailored to local markets.
- Ethical considerations will remain at the forefront, with companies needing to address concerns about job displacement, bias in algorithms, and responsible labor practices.
- Building trust and fostering collaboration between human and machine workers will be crucial for success in the future of offshoring.

9.3 The Winning Formula:

In conclusion, companies that embrace automation strategically, invest in their workforce and prioritize ethical considerations will be well-positioned to navigate the evolving landscape of offshoring. By harnessing the combined strengths of humans and machines, companies can achieve a competitive advantage and create a sustainable future for offshoring in the age of automation.

About Cogent Infotech

Cogent Infotech is a technology & talent development company headquartered in Pittsburgh, PA, USA. The ISO-certified company works with 65+ Fortune 500 companies and 100+ government agencies and helps them grow their business by providing staffing services and deploying top tech talent. Cogent also empowers businesses to digitally transform through its expertise in Cloud Computing, Cybersecurity, Application development & Modernization, Data Analytics, and AI.

Cogent Infotech is certified by NMSDC with delivery centers in Pittsburgh, Dallas, Washington DC, New York City, and San Francisco.

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