

invest to outperform



THE WINNING COMBINATION

As one company offering premium-quality, unparalleled value, international reach and leading-edge technology, eTelecare Global Solutions combines the best elements of onshore and offshore. Instead of wondering what they'll have to trade off, our clients know they can choose a solution, not a location.

CUSTOMERS

- Programs include high-end electronics support, wireless phone sales and support, mutual fund brokerage and transaction services that require NASD Series 6 and Series 7 licensing, inbound and outbound B2B and B2C sales, and customer service
- Single-source provider for 50% of our clients
- Consistent record of growth from new and existing client relationships

SERVICE RECORD

- 87% average first-time resolution on technical support programs
- Less than 2% average abandonment rate
- 96% average customer satisfaction rate, based on more than 5,000 surveys per week

PEOPLE PROFILE

- Rigorous recruiting processes ensure our employees are highly educated and highly motivated
- Foundation skills training emphasizes structured communication, active listening and dispute resolution
- Promotion and enthusiasm programs limit employee turnover while building experienced leadership teams

TECHNOLOGY

- Four independent U.S. data centers and 11 call centers in the U.S. and the Philippines, all linked by a toll-quality, private, fully redundant and highly secure network
- Avaya CTI, data and CRM platforms fully integrated with custom-developed solutions
- Stratasoft predictive dialers

AWARDS AND ACHIEVEMENTS

- 2004, 2003, 2002 & 2001 Best of Show at International Call Center Management, for Best Outsourcer
- 2004 Top 50 Award – International/Inbound & International/Outbound from *Customer Inter@ction Solutions Magazine*
- 2004, 2003 & 2002 CRM Excellence Award from *Customer Inter@ction Solutions Magazine*
- 2003, 2002 & 2001 Gold MVP Quality Award from *Customer Inter@ction Solutions Magazine*
- 2003 Best in Show at STI Knowledge Symposium
- 2002 Customer Care Leadership Award, for Best Agent
- 2002 Customer Care Leadership Award, for Best Business Partner
- 2002 Best of Show at International Call Center Management, for Best Offshore Solutions Provider
- 2002 Best of Show at Call Center and CRM Solutions, for Best Outsourcer
- 2001 Best In Class from JD Power & Associates, awarded to a client we served
- Featured on CNN, *The Wall Street Journal*, *CC News*, *Call Center Magazine* and *Call Center World*, among others

OVERVIEW AND HISTORY

- Founded in 1999 by alumni of the Call Center Practice of McKinsey & Co.
- Acquired Phase 2 Solutions, a leading U.S. service provider, in May 2004
- Headquarters in Los Angeles, four call centers in the Philippines and seven in the U.S.; more than 5,500 employees on two continents



2004 ICCM
Best of Show



2004 Inbound/Outbound



2003 Best Outsourcer



2001 Gold Award
Inbound Business-to-
Consumer Services



2002 Best Agent &
Best Business Partner



2002 Best Offshore Solutions
Provider & Best Outsourcer



2002-2004 Excellence in
Customer Relations Management



2002 Best Outsourcer



2001 Gold Award
Inbound Business-to-
Consumer Services

COMPANY INTRODUCTION

ONE COMPANY

A WORLD OF OPTIONS

Now that the leading call center company in the Philippines, eTelecare International, has acquired a top U.S. call center company, Phase 2 Solutions, the possibilities are endless. Both companies are known for a relentless focus on quality and customer satisfaction, a focus that has won them more than a dozen industry awards. Both are highly-rated by their clients, and both are known for delivering outstanding value by using quality to deliver lower overall costs-per-solution. Moving forward as one company, eTelecare Global Solutions offers an unparalleled range of cost and location options across a broad range of services and industries. Here, the whole really is greater than the sum of its parts.

eTelecare Global Solutions is now the largest call center based in Asia, offering recognized expertise on programs that range from basic customer service to enterprise-level technical support to licensed mutual funds brokerage transactions. Together, 5,500 people in 11 call centers on two continents are poised to provide seamless solutions onshore, offshore, or both, all while delivering exceptional quality and superior value.

CURRENT SERVICES

TECHNICAL SUPPORT
CUSTOMER SERVICE
CUSTOMER RETENTION AND LOYALTY
SALES
WARRANTY
MARKET AND CLIENT SURVEYS

CURRENT INDUSTRIES

CONSUMER ELECTRONICS
WIRELESS COMMUNICATIONS
TELECOMMUNICATIONS PROVIDERS
FINANCIAL SERVICES
TRAVEL & HOSPITALITY
MEDIA



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OFFSHORE VALUE WITH AMERICAN QUALITY

eTelecare Global Solutions hosts its offshore programs in four world-class call centers in the Philippines. From there, we offer an experienced, college-educated, English-speaking workforce managed by a McKinsey-trained executive staff and connected to the U.S. by a fully-redundant voice and data network. Our call centers are open around the clock and are located in secure office parks, with redundant power and telecommunications infrastructures.



English is the official language of business and higher education in the Philippines, and local accents sound neutral to American ears. eTelecare Global Solutions only recruits the top graduates of the country's leading four-year universities, and we use a rigorous six-step screening process that sees us hire fewer than 2% of all applicants. Our new employees receive extensive instruction on call center skills, including American culture and idioms, sales techniques and customer service, before they train on client programs. As a result, eTelecare Global Solutions' employees are capable of handling even the most complex programs or demanding customers.

Our four-step Performance Management System creates a work culture focused on quality and high performance. It uses specific performance targets, weekly performance evaluations and continual coaching by expert supervisors to drive continuous improvement. eTelecare Global Solutions has low ratios of supervisors to customer service associates and a separate quality-monitoring group that records and evaluates a minimum of 20 transactions per associate per month. The process has been praised as world-class by clients who have built their reputations on excellent customer service. Today, quality monitoring for our U.S. and offshore call centers is handled out of our offices in Manila and Cebu.

By raising the bar on performance, eTelecare Global Solutions creates value for our clients. We offer increased first-call resolutions – our average on technical support is 87% – and customer satisfaction rates – our average is 96% across all programs – while reducing average handle times by an average of more than 20%. The sum total of these numbers is superior service with overall costs-per-solution that can be as little as 40% of the cost of an internal call center.



ONSHORE SERVICE AND SALES EXCELLENCE

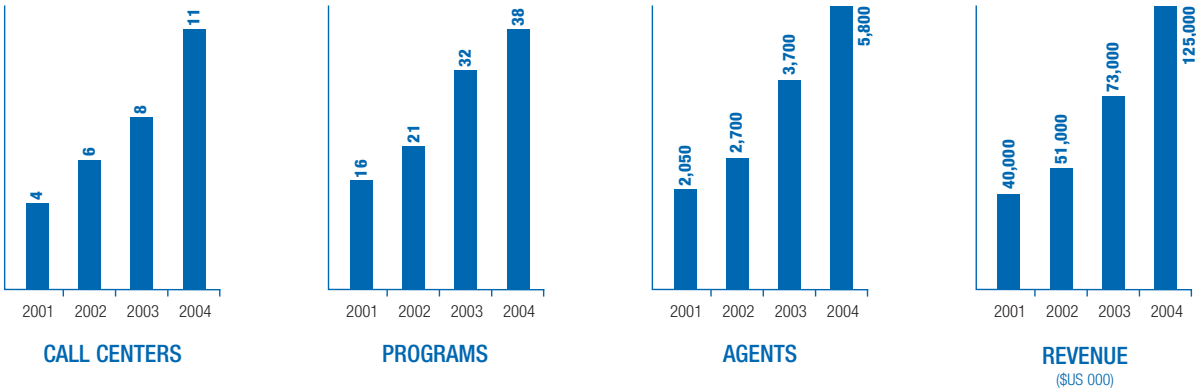
In the U.S., eTelecare Global Solutions serves its clients from seven onshore call centers in the Midwest and Southwest. Our U.S. assets, formerly known as Phase 2 Solutions, started as a successful wireless reseller and grew into an outsourcer that handles customer service, sales and technical support for some of the largest telecommunications providers in the country. Today, these centers also host programs such as warranty service and customer loyalty, with clients that include media companies and government agencies.

Just as it does in the Philippines, eTelecare Global Solutions attracts top U.S. call center talent with competitive compensation, personal development training and opportunities for advancement. Here, we make offers to less than 5% of all candidates, looking for intelligent, team players who can control calls and represent our clients courteously. A morale-building environment based on performance bonuses, recognition programs and strong support helps keep turnover low, while ongoing training and testing keep employee proficiency high.

The technology and processes that both companies developed give eTelecare Global Solutions a highly flexible network that will offer seamlessly global business continuity options. Our network is built from leased domestic and international lines and is exclusive to eTelecare Global Solutions. Because it is our network, we can determine traffic on it and ensure your calls get priority. Our clients get remote access to call recordings, unlimited service observation, extensive real-time and historic reporting, and state-of-the-art CRM software backed by an IT staff that has received multiple awards for CRM excellence. Our networks, and your data, are secured from inside and out by highly-restricted, individually-administered passwords, dual firewalls and regular security audits.



GROWTH IN CALL CENTERS, CSAS AND PROGRAMS FOR ETELECARE GLOBAL SOLUTIONS (2001–2004)



THE RIGHT PROGRAM FOR YOUR CUSTOMERS

CREATING VALUE BY FOCUSING ON QUALITY

As a global outsourcing leader, eTelecare Global Solutions serves a broad range of industries with an even broader range of programs. Our experience includes customer service, technical support, sales, customer retention, loyalty programs, data gathering and warranty service. Through our unique, value-driven approach, eTelecare Global Solutions has consistently lowered costs on its client programs by an average of 20%, while improving quality and delivering more efficient service.

CUSTOMER SERVICE

eTelecare Global Solutions can handle transactions as simple as a friendly reply to a balance inquiry or as complex as mutual funds brokerage requiring Series 6 and Series 7 licensing from the National Association of Securities Dealers. We know what it takes to make your customers happy, and our 96% average shows it. So does our background in customer service, which includes more than a dozen programs for market-leading companies. eTelecare Global Solutions helps their callers with order taking, service provisioning and tracking, dealer locations and service eligibility evaluations.

CURRENT INDUSTRIES:

CONSUMER ELECTRONICS • WIRELESS COMMUNICATION • TELECOMMUNICATIONS PROVIDERS • FINANCIAL SERVICES
TRAVEL AND HOSPITALITY • MEDIA

TECHNICAL SUPPORT

We know that your customers are looking for two things when they dial technical support: They want the right answer, and they want it quickly. eTelecare Global Solutions is expert at both, with first-call resolution rates that are 30% higher than our competitors' and average handle times that are 16% lower. Our experienced agent queues have reduced handle times by as much as 25%. We've returned these results while still cutting costs by 20% to 40% on programs for high-end consumer electronics, wireless handsets, home networking devices and Internet service providers.

Our success starts with careful hiring and extensive training. Our continuous improvement coaching and performance-based bonus programs ensure excellent service to your customers, while our detailed knowledge bases make finding the right answer a snap. The result is service so efficient that if some of our hardware support competitors charged \$0.00 per hour for their agent time, eTelecare Global Solutions would still have a lower overall cost. Quality isn't expensive – it's cheaper than the alternative.

CURRENT INDUSTRIES:

CONSUMER ELECTRONICS • WIRELESS COMMUNICATION

SALES

As the leader in telecom sales and a pioneer in outsourcing sales in the Philippines, eTelecare Global Solutions has some of the highest conversion rates in the industry.

- On four outbound wireless and long distance programs, our inbound conversion rates approach 80% and our outbound conversion rate is almost 40%.
- For inbound electronics sales, our close rate was 20% higher than our nearest competitor and our average upsell was 114% over the base price.



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We've returned similar results for consumer electronics manufacturers, Internet service providers and media power houses, all while cutting their costs by 30%.

eTelecare Global Solutions sees every customer contact as a unique opportunity to build a lasting relationship. With more than 1,900 agents working independently from our customer care and technical support arms, eTelecare Global Solutions has the experience to handle the unique challenges of inbound and outbound sales and a history of delivering outstanding results.

CURRENT INDUSTRIES:

CONSUMER ELECTRONICS • WIRELESS COMMUNICATION • TELECOMMUNICATIONS PROVIDERS
FINANCIAL SERVICES • TRAVEL AND HOSPITALITY • MEDIA



CUSTOMER RETENTION AND LOYALTY

eTelecare Global Solutions specializes in customer outreach programs that can be tailored to any industry. We become your personal marketing and customer service partner, working with you to develop the perfect retention program for your customer base. Over the past seven years, we have handled millions of inbound and outbound retention calls for some of the top wireless and landline carriers in the United States.

CURRENT INDUSTRIES:

WIRELESS COMMUNICATION • TELECOMMUNICATIONS PROVIDERS

MARKET AND CLIENT SURVEYS

eTelecare Global Solutions hosts outbound programs that gather crucial data for our clients. These range from validating the contact information of potential clients to conducting marketing surveys in advance of promotional campaigns. eTelecare Global Solutions currently hosts data gathering campaigns for clients that include telecommunications, high-speed Internet and wireless companies. For a leading credit agency, we easily surpassed the client's registrations-per-hour goals by 20%, with higher quality scores and 25% lower costs than the competition.

CURRENT INDUSTRIES:

FINANCIAL SERVICES • TELECOMMUNICATIONS • WIRELESS COMMUNICATION • INTERNET SERVICE PROVIDERS

WARRANTY SERVICE

The warranty claims process is full of complications and pitfalls, but eTelecare Global Solutions and its fulfillment partners have years of experience handling the process from one end to the other. From handling the troubleshooting call to receiving, repairing and shipping the service item, eTelecare Global Solutions currently supports more than 100,000 warranty calls per week for a leading wireless phone provider, cutting warranty replacement rates by more than 50%, from 19% to 9%, a rate unheard of in the industry. We also handle warranty calls for a top consumer electronics manufacturer, reducing dispatch rates by 25%, from 19.4% to 14.5%. At the same time, we increased first-call resolution rates from 75% to 80%.

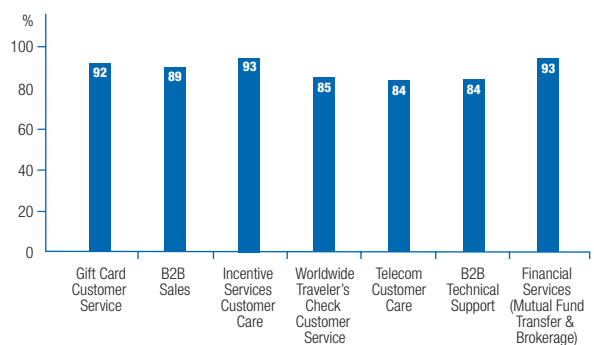
CURRENT INDUSTRIES:

CONSUMER ELECTRONICS • WIRELESS COMMUNICATION

NEW APPLICATIONS

As eTelecare Global Solutions continues to set higher standards for its performance on existing programs, we will continue to take on new types of programs where our value-focused approach can have a strong impact, such as enterprise-level help desk and travel reservations. We will also broaden our service offerings to existing clients, all with the goal of delivering the most comprehensive custom care in the industry.

ETELCARE GLOBAL SOLUTIONS AHT REDUCTION EXPERIENCE



eTelecare Global Solutions has substantially reduced average handle times across a broad range of programs and industries.

WHEN QUALITY COUNTS

ETELECARE GLOBAL SOLUTIONS DELIVERS RESULTS AND VALUE

eTelecare Global Solutions' value proposition of providing the best people, best processes and best technology at a lower overall cost-per-solution applies to any industry where the quality and efficiency of customer service are important. We serve a broad spectrum of industries, including:

- CONSUMER ELECTRONICS • WIRELESS COMMUNICATIONS • TELECOMMUNICATIONS PROVIDERS
- FINANCIAL SERVICES • TRAVEL & HOSPITALITY • MEDIA



CONSUMER ELECTRONICS

eTelecare Global Solutions provides technical support and sales programs for clients that include a leading manufacturer of consumer electronics and a manufacturer of home-networking equipment.

On the support side, our careful hiring, extensive training, continuous improvement coaching and performance-based bonus programs ensure excellent service while reducing total costs by up to 40%. Our continuous improvement methodology of stretch goals, call monitoring, rigorous evaluation and thorough coaching has been praised as world-class by Fortune 100 companies whose reputation depends on excellent service. On the sales side, the knowledgeable and friendly staff of our inbound consumer electronics program consistently beats both client sales targets and the competition. Our close rates are 20% better, and our average upsell is 114%. The McKinsey-based experience of our executive team helps us tie these advantages together into an unbeatable service offering.

CURRENT APPLICATIONS

TECHNICAL SUPPORT • SALES • CUSTOMER SERVICE

WIRELESS COMMUNICATIONS

eTelecare Global Solutions is the leading provider of customer service and sales solutions for the U.S. wireless market. Our management team knows the sector's challenges and opportunities, and our veteran staff knows how to deliver quality on every type of program, from the initial sale to customer retention and warranty service. We've posted conversion rates of up to 52% on customer win-back, up to 47% on outbound migration and retention, and up to 82% on inbound migration and retention programs.

This experience is also reflected in proprietary tools, such as a solutions knowledge base that enables our agents to solve almost any handset question in three clicks of a mouse. Our combination of knowledge and experience helps eTelecare Global Solutions deliver smoother call flows, increased first-call resolution and reduced average handle times. You'll see the benefit in lower costs-per-solution, but to your customers, it's just great service.

CURRENT APPLICATIONS

SALES • TECHNICAL SUPPORT • CUSTOMER SERVICE • CUSTOMER LOYALTY/RETENTION • WARRANTY SERVICE

TELECOMMUNICATIONS PROVIDERS

eTelecare Global Solutions knows how to build successful partnerships and help our clients meet their financial goals. We've handled telecommunications sales, customer retention and customer service, and in each case, we've delivered superior results while lowering costs. For example, we've reduced average handle times by 20% while delivering a 96% customer satisfaction rate. We've also exceeded client sales targets – and our competitors – by 50% or more, while consistently reducing costs by 20% to 40%.

We draw on our clients' best practices, adopting them to our McKinsey-based continuous improvement culture. We staff our programs with highly-trained agents backed by weekly coaching. Online reporting and a single point of management contact will keep you up to date on the program at every stage. In addition, our program teams will continuously seek out ways to add value, whether it's revising



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a cumbersome sales script or recommending new retention approaches. For sales and service, eTelecare Global Solutions delivers results that will be apparent to your customers and to your bottom line.

CURRENT APPLICATIONS

SALES • TECHNICAL SUPPORT • CUSTOMER SERVICE • CUSTOMER LOYALTY/RETENTION

FINANCIAL SERVICES

In the highly competitive financial services market, eTelecare Global Solutions takes a best-practices approach to handle your customers securely, efficiently and effectively. We carefully screen applicant pools to find candidates with strong communication skills and a knack for details, and each new hire's credit history and police records are investigated by a former CIA officer. We protect your data with dual firewalls, continuously updated anti-virus software and router-to-router encryption over a private network. Our financial services areas are physically separated, video-monitored and protected by security guards, and our fully-redundant infrastructure ensures that your program and data will be fully available at all times.

eTelecare Global Solutions' continuous improvement approach includes monitoring, coaching and performance bonuses. As a result, we regularly surpass all client metrics on financial programs while reducing average handle times by 35% and overall costs by an average of 46%. Our commitment to excellence has made us one of the fastest-growing financial services outsourcers in the world, with programs for NASD-licensed mutual funds transactions, travelers' checks and co-branded stored value cards.

CURRENT APPLICATIONS

CUSTOMER SERVICE • SALES • DATA GATHERING



TRAVEL & HOSPITALITY

Customers expect unrivaled service from their travel service providers. eTelecare Global Solutions meets those expectations by focusing on excellence, efficiency and a genuinely helpful approach to customer care. Our customers include two of the largest players in the travel business: a properties-holding giant that brokers condo time-shares and the leading issuer of travelers' checks.

eTelecare Global Solutions seeks out candidates who can quickly discern customer needs and organize service priorities. We currently support operations in Japanese, Mandarin, Cantonese, Korean, German and Spanish, and we can recruit for other languages as needed. Our programs are backed by a fully-redundant physical network that connects call centers on two continents and will be there when your callers pick up the phone, making eTelecare Global Solutions your go-to support destination.

CURRENT APPLICATIONS

SALES • CUSTOMER SERVICE • RESERVATIONS

MEDIA

The voice on the phone is often the consumers' only direct connection with the media companies they use on a daily basis. eTelecare Global Solutions has handled customer contact needs for a newspaper chain, a television network and an Internet service provider, among others, hosting outbound sales, inbound sales and technical support programs. eTelecare Global Solutions' excellent and efficient service lowers their overall cost-per-solution, making us a value worth headlines.

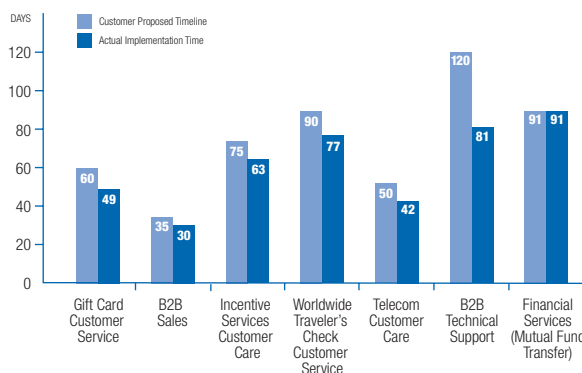
CURRENT APPLICATIONS

SALES

OPENING NEW VERTICALS

At eTelecare Global Solutions, we believe our value proposition can be applied wherever the quality and efficiency of customer care are important. As we continue to grow within established verticals, we will look for opportunities to apply our value proposition into new industries, particularly health care, automotive and retailing.

RAPID PROGRAM IMPLEMENTATIONS



eTelecare Global Solutions has met or exceeded client expectations on program-implementation timelines for all programs.

TURNING CUSTOMERS INTO RELATIONSHIPS

A PROACTIVE APPROACH TO CUSTOMER RETENTION

It costs five times as much to win a new customer than to retain an existing one, yet the average service organization will lose 10% to 40% of its customer base each year. With growing competition, these costs can only go higher. If you're not sure where to turn, start with eTelecare Global Solutions.

We specialize in the proactive customer outreach programs that can be tailored to any industry. We become your personal marketing and customer service partner, working with you to develop the perfect retention program for your given situation. Over the past seven years, eTelecare Global Solutions has handled millions of inbound and outbound retention calls for some of the top wireless and landline carriers in the United States. We've also returned results like a success rate of up to 52% on win-back programs, up to 47% on outbound migration and retention campaigns, and up to 82% on inbound.



eTelecare Global Solutions will help you identify problem areas in your customer life cycle and attack them. Through inbound and outbound programs, we will build relationships with your customers, ensuring that their questions and concerns are addressed, that they have the right product or service, and that they are truly satisfied. We aim to increase the return on your customer acquisition investment by creating customers for life.

PERFORMANCE HIGHLIGHTS VS. COMPETITION

- Increased inbound contract renewal conversion rate by 12%
- Increased outbound contract renewal conversion rate by 15%
- Reduced inbound cost-per-contract renewal by \$9
- Reduced outbound cost per contract renewal by \$53
- Reduced average handle time (AHT) by four (4) minutes
- Reduced average abandonment rate by 18%
- Reduced employee attrition on the program to less than 1%
- Reduced overall Cost of Acquisition by more than \$17 by implementing automation capabilities such as IVR and OCR scanning
- Flexibility to handle multiple program launches in a single week
- Ramped up to 350 seats within six months (now over 600)
- Increased total overall number of contract renewals within the first six months by 324,000 (from 555,000 to 879,000), with 150 less representatives than the incumbent vendor

CURRENT FUNCTIONS

WELCOME / EDUCATION CALLS
 POINT OF CUSTOMER CHURN CALLS
 CONTRACT RENEWAL CALLS
 CALLING PLAN UPGRADE CALLS
 MIGRATION CALLS
 FEATURE UPGRADE CALLS
 SERVICE / PRODUCT / HANDSET ADD ON CALLS
 NOTIFICATION CALLS
 WIN BACK / SAVE CALLS
 CUSTOMER SERVICE FOLLOW UP CALLS
 CUSTOMER LIFE CYCLE MANAGEMENT CALLS
 FIRST PARTY RETENTION / COLLECTION CALLS

CURRENT INDUSTRIES

WIRELESS COMMUNICATION
 TELECOMMUNICATIONS PROVIDERS
 MEDIA



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CASE HISTORIES

CUSTOM CAMPAIGNS ACHIEVE OUTSTANDING RESULTS

INCREASING POST-CONTRACT CUSTOMER RETENTION

One of the largest wireless carriers in the U.S. hired eTelecare Global Solutions to stem the tide of customers who were leaving the company after their contracts expired, while reducing their overall costs. The client already had an outsourcer, but they thought eTelecare Global Solutions could be more efficient and bring both more technical and personnel expertise to the program.

The client sent as many as 500,000 customer retention mailers and emails per day. Starting with 50 representatives, eTelecare Global Solutions delivered strong results, as shown in our list of performance highlights. Today, the program has more than 600 representatives, and we estimate that to date we have generated an additional \$12.9 million in revenue for the client while still cutting their overall costs by \$14 million.

TARGETING CUSTOMERS BY CHURN PROFILE

This client serves several million voice and data customers across the United States and provides cellular/PCS service in 42 of the top 50 markets nationwide. The client was churning 3.7% of its customer base monthly and had identified several segments that comprised 56% of their voluntary churn. eTelecare Global Solutions created several outbound custom telemarketing campaigns to secure them.

The first called all over/under users of their rate plans and the customers who were on outdated plans, with an application that automatically suggested a more appropriate plan based on their last three months of usage. The application also offered comparisons and illustrated savings forecast per month and per year. The second campaign suggested new features for customers with old phones and the third targeted callers with customer service issues.

The initial concentrated effort reduced the monthly churn rate from 3.7% to just over 2.6%, and eTelecare Global Solutions was able to commit 78% of the customer base to contracts of at least one year.

INCREASING DIVESTITURE VALUE

The client is a large wireless carrier with over 2.3 million subscribers, ranging from analog emergency users who paid a \$9.95 monthly access fee to high usage customers with regular monthly bills as high as \$800. This carrier contracted eTelecare Global Solutions in the initial stages of divesting their customer base to one of the largest carriers in the nation. The sale was based on average rate plan use and the percentage of clients under contract, but the large number of low usage users was reducing the value of the package. eTelecare Global Solutions created an outbound telemarketing campaign to migrate the low volume users to at least a \$19.95 per month plan. Of the 644,000 customers fitting this profile, eTelecare Global Solutions converted 315,560 to the higher rate, which generated an additional \$3,786,720 in monthly revenues. Every customer migrated was re-committed to a 12-month contract, increasing the total number of customers under contract from 1,058,000 to 1,373,560. By increasing average usage from \$34.18 to \$35.83, and raising the ratio of customers under contract from 46% to 60%, eTelecare Global Solutions increased the total price paid for the customer base by more than \$80 million.

MULTIMEDIA RETENTION PROGRAMS

This client was churning at the rate of 6.2% per month and wanted a multimedia campaign that sent a business reply envelope to the customer and created a follow-up calling campaign. The robust functionality of our customer handling systems enabled us to handle five tasks:

1. Create the custom form letters
2. Transfer the files to eTelecare Global Solutions' mail/print vendor
3. Take inbound calls and screen-pop offer based on DNIS recognition
4. Automatically pull inbound call records from the outbound effort
5. Used segmented drops to achieve 80% list penetration within 72-hours, focusing on reaching customers while they still had the mailed offer in-hand

Between the inbound/outbound calling and the processing of mail replies, eTelecare Global Solutions' cost per renewal for this client was less than \$14 per extended contract. Within the first 90-days of the campaign, eTelecare Global Solutions took the ratio of clients under contract from 38% to more than 61%.



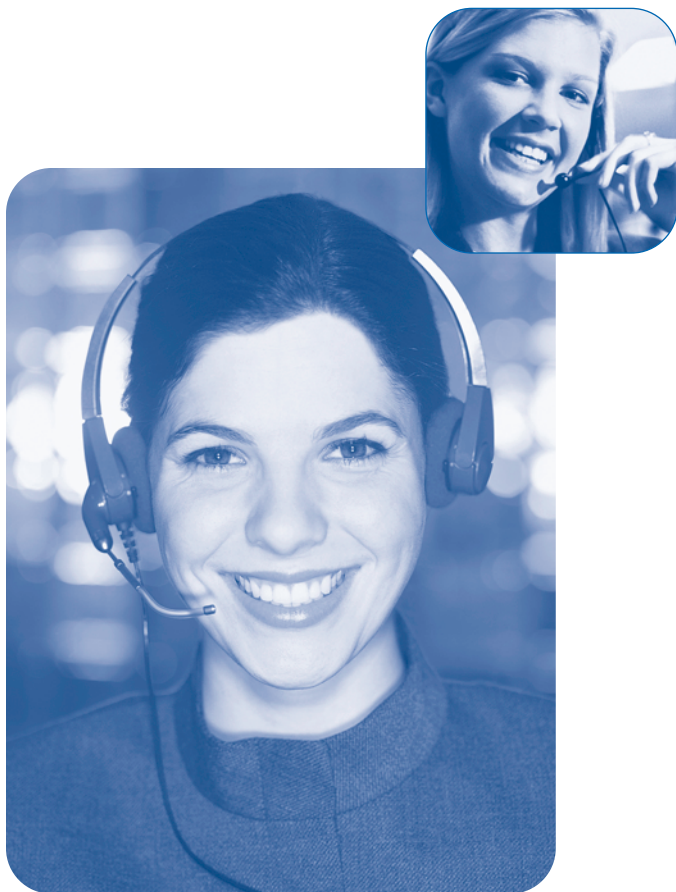
THE CUSTOMER SATISFACTION DIFFERENCE

SERVICE IS THE KEY TO BUILDING AND KEEPING A CUSTOMER BASE

Lower average handle times translate directly into lower costs. Add to that the benefits of extraordinary customer satisfaction ratings, such as happy, loyal customers, and you can see what our efficient, excellent service can offer.

eTelecare Global Solutions has cut costs in half on a wide range of customer service programs while delivering a 20% average reduction in call handling times and a 97% average customer satisfaction rating. We've done it on programs as basic as order tracking and as complex as NASD licensed mutual funds brokerage. In each case, the value we deliver comes directly from our never-ending focus on quality.

We start with an analysis of our client's methods, drawing on their best practices and adopting them to our McKinsey-based continuous improvement culture. We staff our programs with experienced customer service agents backed by weekly coaching. Online reporting and a single point of management contact ensure you will stay up-to-date on the program's design, implementation and ongoing results. Above and beyond the results we typically provide, our management and analysis teams will seek out and recommend program improvements that can deliver additional value to both your customers and your bottom line.



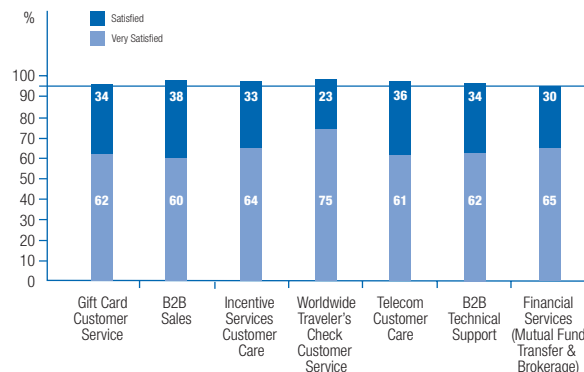
CURRENT FUNCTIONS

ORDER TAKING
SERVICE PROVISIONING AND TRACKING
DEALER LOCATORS
FRAUD PREVENTION

CURRENT INDUSTRIES

CONSUMER ELECTRONICS
WIRELESS COMMUNICATION
TELECOMMUNICATIONS PROVIDERS
FINANCIAL SERVICES
TRAVEL AND HOSPITALITY
MEDIA

CUSTOMER SATISFACTION



eTelecare Global Solutions' goal is 95% customer satisfaction on every program.

eTelecare Global Solutions has reached 97% average customer satisfaction on all programs, with 67% of customers being very satisfied.



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CASE HISTORIES

SAVING MILLIONS WHILE IMPROVING CUSTOMER SATISFACTION

MUTUAL FUNDS

eTelecare Global Solutions' well-trained workforce helped a leading financial services company enhance the quality of their mutual funds transactions, decreasing their call center costs. All agents must pass National Association of Securities Dealers Series 6 exams to qualify for the program. Preparing for the exam requires expensive training and prior to working with eTelecare Global Solutions, the client's failure rate was 24%. On top of that, the client experienced high turnover rates from the agents that passed. Our selective recruiting practices created an agent team that achieved a 100% pass rate and signed contracts committing to stay with the company for at least one year. In addition, we created a secure area within our call centers that is separated by glass walls and patrolled by video cameras and guards. Today, the program is performing above client targets for accuracy, schedule adherence and average handle time. Thanks to our lower pricing structure, eTelecare Global Solutions is saving the client up to \$10.2 million per year.

INCENTIVE SALES

eTelecare Global Solutions helped a major international financial services company build sophisticated customer relationships by developing and implementing a full-featured customer relationship management application at a minimal cost in less than four weeks. By providing a repository for the history of each customer relationship, the system made our agents more efficient. The average number of calls required to place an order has fallen from 2.1 to 1.6. Repeat orders have grown from 30% to 50%, and we are better able to handle the volume fluctuations that come with the holiday season. We also increased service levels from 83% to 95%. Due to eTelecare Global Solutions' lower pricing structure, the client reduced their costs by almost 50%, saving close to \$1.7 million per year.

TRAVELERS' CHECKS

eTelecare Global Solutions used a diversely-skilled workforce and the latest technologies to help a leading financial services company handle complex calls from around the world while lowering costs. We ramped up our multilingual workforce in the Philippines, adding Japanese, Mandarin, Cantonese, Korean, German, Spanish and other language speakers to provide truly global support. eTelecare Global Solutions implemented the program in just 49 days, 11 days ahead of schedule. We reduced average handle times by 38%, increased service levels to 92% and currently average a 98% customer satisfaction rating. This enabled the client to trim its U.S. operations and close its two other global sites, saving the client 40%, or \$2.9 million per year.

STORED-VALUE CARDS

For a credit card company that issues stored-value retail cards in conjunction with more than two dozen retailers, eTelecare Global Solutions stabilized service levels, applied consistent quality standards and managed two successive holiday season ramp-ups that briefly quadrupled the size of the program from 200 agents to more than 800. Due to our lower pricing structure, call quality that surpassed client specifications by 30%, and a 32% reduction in average handle times, eTelecare Global Solutions has cut the client's costs by almost 50%, a savings of \$1.2 million per year.



BUILDING THE CUSTOMER CONNECTION

LET US TAKE THE LEAD – AND WE’LL TURN IT INTO A SALE

Converting a lead list to a customer list is one of the hardest jobs in business, so give it to the best in the business: eTelecare Global Solutions. We have recorded some of the highest conversion rates in the industry, exceeding client sales targets – and our competitors – by 50% or more, while cutting acquisition costs by 30% or more. By combining a highly trained sales staff with continuous improvement techniques, eTelecare Global Solutions delivers value to you and your callers every day.



eTelecare Global Solutions sees every customer contact as a unique opportunity to build a lasting relationship. In addition to driving sales, we also know how to connect with customers in ways that boost retention rates well beyond the initial transaction. This knowledge comes from experience: eTelecare Global Solutions has more than 1,000 U.S. sales reps, and we led the outsourcing of sales to the Philippines. Our sales training emphasizes dispute resolution and creative problem solving, and is backed by daily monitoring. We reward performance with generous bonuses and build an experienced staff by offering career paths to top employees.

On inbound programs, the eTelecare Global Solutions approach helps us beat a consumer electronics client's goals for cross-sales by 37% and upsell accessories to 114% of the base price. On outbound, whether the programs are cold-call or relationship sales, focused on businesses or consumers, we consistently surpass client targets for sales-per-hour by 30% or more.

We believe in our quality-focused approach and we put our money on the line, making performance-based bonuses and credits a standard part of our contracts. Overall, eTelecare Global Solutions' work on sales programs has returned consistently high customer satisfaction ratings and expanded business from our clients. Let us prove what our approach can mean to your customer base and your sales rates.

COST OF ACQUISITION, CLIENT WIRELESS INBOUND AND OUTBOUND SALES CAMPAIGNS



CURRENT FUNCTIONS

INBOUND SALES
OUTBOUND SALES
LEAD GENERATION

CURRENT INDUSTRIES

CONSUMER ELECTRONICS
WIRELESS COMMUNICATION
TELECOMMUNICATIONS PROVIDERS
FINANCIAL SERVICES
TRAVEL AND HOSPITALITY
MEDIA



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CASE HISTORIES

SURPASSING EXPECTATIONS WHILE REDUCING COSTS

eTelecare Global Solutions provides its clients with the maximum number of sales per lead list, the lowest cost per sale and the best return on their investment. Whether your objective is to maximize top line revenue or to increase profitability, eTelecare Global Solutions will help you achieve both goals.

TELECOMMUNICATIONS COMPANY

eTelecare Global Solutions is one of six agencies acquiring new customers for the company, and two of our competitors are among the five largest outbound agencies. We produced 0.36 sales per hour (SPH) and a 4.47% conversion rate while the average for all agencies (including eTelecare Global Solutions) was only 0.14 SPH and a 1.00% conversation rate.

TELECOMMUNICATIONS PROVIDER

On this program, eTelecare Global Solutions competes against one of the top 50 outbound telemarketing agencies selling DSL and Internet service to a client's existing customer base. We have consistently outperformed our competitor, with 0.28 SPH and 5.86% conversion rates compared to their 0.14 SPH and 1.81% conversion rates.

CONSUMER ELECTRONICS MANUFACTURER

On an inbound consumer electronics sales program, eTelecare Global Solutions' 25% close rates exceeded our nearest competitor by almost 20%, our sales of warranty service exceeded contractual goals by up to 37%, our financing contract goals were met or surpassed for more than 18 consecutive weeks, and we achieved an average up-sell of 114% over the base price of a standard item.

LONG DISTANCE SERVICE

For this outbound program, eTelecare Global Solutions quickly reached 0.3 SPH, surpassing the client target of 0.2. We offer greater productivity than all but one of the client's eight other outsourcers, and our 0.12% customer complaint rate is half that of any other outsourcer. The program now handles 30% of the client's sales volume and SPH has increased with each new batch of employees, reaching 0.35.

BROADBAND INTERNET SERVICES

eTelecare Global Solutions sells broadband Internet service to the existing customer base of a top consumer electronics manufacturer. We used our expertise in sales training and our understanding of the competitive marketplace to develop a highly effective sales program that saw us meet client targets almost immediately. From there, we used extensive demographic and geographic analyses of the client's lead list to tailor our calling hours, call scripts and promotional offers. Thanks to these efforts, our close rate of 3% is 50% more than our nearest competitor's.

TELECOMMUNICATIONS SERVICES

On an outbound consumer program that sells long distance services, eTelecare Global Solutions' 0.4 SPH are 50% more than our nearest competitor's. While our competitors take 30 minutes to change a lead list, we take five minutes. We have an average 99% confirmation rate on sales and a 97% long-term customer retention rate. eTelecare Global Solutions is the lowest total cost vendor on the program by a 20% margin, saving the client about \$500,000 annually.



CHEAPER THAN FREE

A RELENTLESS FOCUS ON PROBLEM RESOLUTION IMPROVES CUSTOMER SERVICE WHILE CUTTING COSTS

eTelecare Global Solutions has become one of the leading outsourcers for technical support programs in the world because we create value for our clients through a focus on quality. Careful hiring, extensive training, continuous improvement coaching and performance-based bonus programs ensure excellent service to your customers while reducing total costs. In fact, if some of our hardware support competitors charged \$0.00 per hour for their agent time, eTelecare Global Solutions' low handle times, low dispatch rates and high first-call resolution rates would still result in a lower overall cost-per-resolution. Quality isn't expensive – it's cheaper than the alternative.

Our continuous improvement methodology of stretch goals, rigorous call monitoring and evaluation, and thorough coaching has been praised as world-class by industry leading companies. On the technology front, eTelecare Global Solutions' fully redundant, toll-quality network offers a seamless integration of voice and data over secure, private lines. The McKinsey-based experience of our executive team helps us tie these advantages together into an unbeatable service package.

eTelecare Global Solutions' first-call resolution rates are 30% higher, on average, than our competitors', with dispatch rates that are 20% less and average handle times that are 25% shorter. Our agents are trained to manage calls efficiently and we have built extensive knowledge bases on our client's products. This knowledge is so extensive that eTelecare Global Solutions has been asked to share it with other program outsourcers and our clients' technical staffs. Together, these factors cut our average cost-per resolution to 20%-40% less than our competitors'.

As described below, our experience includes technical support programs for consumer electronics, wireless handsets, home networking devices and Internet service providers. A case history detailing our results for a consumer electronics manufacturer follows:

FUNCTIONS

LEVEL 1 AND LEVEL 2 CONSUMER ELECTRONICS TECHNICAL SUPPORT

LEVEL 1 AND LEVEL 2 HOME NETWORKING SUPPORT

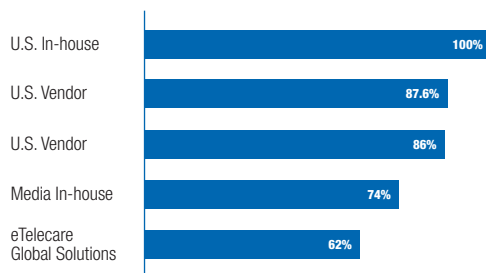
WIRELESS HANDSET SUPPORT

INDUSTRIES

CONSUMER ELECTRONICS

WIRELESS COMMUNICATION

RELATIVE COSTS OF TECH SUPPORT SOLUTIONS



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CASE HISTORY

CONSUMER ELECTRONICS MANUFACTURER

eTelecare Global Solutions currently provides Level 1 and Level 2 technical support to two lines of the client's high-end consumer electronics products with more than 950 agents. We estimate that we handle about two-thirds of the client's inbound support queues for home and business users.

Our focus has been on increasing first-call resolution rates and reducing parts-dispatch rates. We estimate that every percentage point we can increase the first time dispatch fix rate, we save the client \$13 million. In the past year alone, eTelecare Global Solutions has improved the first-time dispatch fix rate from 85% to 90%. Our other results include:

- FIRST CALL RESOLUTION RATES OF MORE THAN 80%
- CUSTOMER SATISFACTION RATES OF 97%
- COST SAVINGS OF MORE THAN 50%



For a look at the financial impact of our performance, please refer to the table. From a 30-person pilot in December 2001, the program has grown to more than 950 agents. Soon, we will host the client's premium support queue. On other programs, we've returned similar results:

• INTERNET SERVICE PROVIDER:

Our average handle time was 309 seconds under the client goal, saving them an average of \$153,000 per month.

• TELECOMMUNICATIONS:

The client's current vendor was 38,000 calls per month short of the contractual 85% first call resolution rate. We met the client's goals, saving them an average of \$188,000 per month.

On these programs, and many others, our customer satisfaction ratings were far in excess of what the client could deliver internally.

COST PER SOLUTION CALCULATOR

	eTelecare Global Solutions	India Internal	U.S. Outsourcer 1	U.S. Outsourcer 2	Example Other Low Cost Outsourcer
CALL HANDLING COST					
Cost per minute	\$0.45	\$0.31	\$0.45	\$0.55	\$0.30
Average Handle Time (min.)	17	20	20	20	20
Cost per call	\$7.65	\$6.32	\$9.18	\$11.22	\$6.12
COST OF REPEAT CALLS					
First Time Resolution	80%	75%	74%	70%	73%
Cost of repeat calls	\$1.53	\$1.58	\$2.39	\$3.37	\$1.65
COST OF DISPATCHES					
Dispatch rate	14.5%	19.4%	22.0%	25.5%	22.3%
Cost per dispatch	\$150.00	\$150.00	\$150.00	\$150.00	\$150.00
Cost of dispatches	\$21.75	\$29.10	\$33.00	\$38.25	\$33.45
COST OF DISSATISFACTION					
Percent dissatisfied	5.0%	7.4%	13.3%	18.1%	12.9%
Percent of dissatisfied that do not repeat	50.0%	50.0%	50.0%	50.0%	50.0%
Margin on repeat purchase	\$400.00	\$400.00	\$400.00	\$400.00	\$400.00
Life time value (2x)	\$800.00	\$800.00	\$800.00	\$800.00	\$800.00
Cost of lost business	\$20.00	\$29.60	\$53.20	\$72.40	\$51.73
TOTAL COST/SOLUTION	\$50.93	\$66.61	\$97.77	\$125.24	\$92.96
PERCENT ETELECARE GLOBAL SOLUTIONS IS LESS EXPENSIVE		24%	48%	59%	45%



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