



Immigration is Important to this Data Analytics Company's Business Strategy

TOP CHALLENGES:

- Setting up an in-house counsel for immigration was costly and other immigration law firms charged by the hour
- Manual immigration took up a lot of HR's time
- Employee anxiety was high when they often did not have transparency into their case or access to an attorney to ask questions

ABOUT THE COMPANY:

Yodlee is a data aggregation and data analytics platform powering dynamic, cloud-based innovation for digital financial services. Yodlee partners with more than 1,100 financial institutions and fintech innovators, including 13 of the top 20 U.S. banks. The organization has employees around the globe in the U.S., the U.K., Australia and India. About one-fifth of their employees are international, meaning immigration is a part of recruiting and keeping top-level talent.



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Preeti Gajja, HR Program Manager at Yodlee, manages immigration for the organization. She says Yodlee needs to allow for employee mobility between countries. That employee mobility includes Preeti, who used to work in India and is currently in Yodlee's California office.

"Because we cover markets from those regions ... and we have products that are being sold out there, it makes the most sense to have employees on the ground regionally who can market and partner with local financial institutions," Preeti says.

Getting the best talent for a job often involves going beyond borders. This is an especially important business strategy for Yodlee. However, the immigration process is a major hurdle with its complexities and time-frame. Fortunately, Yodlee found a way to simplify it and make it more efficient through technology.



IMMIGRATION IS KEY, BUT IN-HOUSE LEGAL COUNSEL IS COSTLY

Most companies, Yodlee included, have some kind of in-house legal counsel. However, investing in in-house legal counsel who specialize in immigration can be extremely expensive and may not make sense for the organization's bottom line, even if immigration is key to the company's talent development.

"We needed the immigration process handled effectively, but setting up a full in-house legal counsel specializing in immigration is expensive," says Preeti.

Outside immigration law firms also tended to bill by the hour, making cost a concern. This was especially true in the event a case became more complex or an employee had many questions.

Yodlee sends U.S. employees abroad and brings foreign national employees to the U.S., making it essential to have a partner with a strong understanding of immigration law and the nuances of the immigration process. Also important is their ability to scale and adapt to a rapidly-growing company.



MAKING HR'S JOB EASIER AND FASTER WHEN IT COMES TO DEALING WITH IMMIGRATION CASES

Immigration is complicated, tedious and confusing. Finding a way to make the immigration process more transparent step-by-step is key. Yodlee found that in Envoy Global.

Envoy made the complicated immigration system easier to understand for non-lawyers, including HR professionals and the employees that needed to provide information for their immigration cases.

"The best part is the platform," Preeti says. "It makes it easier for us to track the progress on where the case is moving, where it is going, and whether we have everything that we need for documentation. If not, we will get a notification."

The transparency and easy-to-use platform also saves time, allowing the company to focus on other opportunities and areas for business development.

"[Envoy's] platform is user-friendly and easy enough for anybody who is coming along for their first time. That makes this process easier," Preeti says. "Otherwise, if you want to enter into a new platform, we sometimes need to provide them some initial training so that they understand how to get into it."

In addition to being guided through the process, Preeti says that employees have more peace of mind. Employees can use the platform to ask the attorney about their case with any legal questions they may have and expect to receive answers promptly.

"The anxiety level for our employees is reduced," Preeti says. "That makes it much better for them and helps them be more productive."