



INSURANCE/FINANCE

Brokerage firm ensures output quality and increases staff satisfaction.



**microsourcing**  
A probe CX COMPANY



# The company

An award-winning brokerage firm, this company entered the industry nearly 20 years ago with a vision of developing an offering that added value to brokers' businesses without taking away their freedom or profits. It has since established itself as an industry leader and trusted provider in the Australian mortgage broking space.

## The challenge

The company had initially set up an offshore team with another provider based in India but experienced challenges with output and quality. They were keen to engage with a provider who would allow them to have full operational control over their people and processes to ensure quality outcomes.

## Our solution

The company partnered with MicroSourcing in mid-2019 and we delivered a full-time dedicated team based in the Philippines. The team operated within their systems and reported into an onshore manager, all while being managed operationally by a manager in the Philippines. The outsourced roles include

- Compliance Administration Support
- Broker Onboarding Specialist
- Commission Administration Processor
- Accreditations Processor
- Product Support Processor
- Marketing Automations Specialist
- Mercury Helpdesk Officer
- Front-End Dev/Software Engineer
- QAT Analyst
- Dynamics 365 Engineer.

In addition to these core offshore roles, to assist their marketing team with short-term projects, the company has also engaged the services of MicroSourcing for graphic design, content writing, motion graphics and WordPress website development.

## 🏆 The results

Having started with **12 outsourced recruits in 2019, the company now has 31 full-time employees**. Attrition rates have been consistently low, with MicroSourcing committed to strong performance management measures and continuous improvement.

Client satisfaction surveys reveal the company is overwhelmingly pleased with the partnership across all departments including Human Resources, Talent Acquisition, Information Technology, Operations and Facilities. Each department has a quality working relationship with its Operational Point of Contact and is comfortable liaising with senior management as required.



**Having an offshore team has allowed us to scale easily to meet demand all while delivering quality outcomes for our customers.**

**- SENIOR MANAGER**

## The conclusion

By building a full time, dedicated outsourced team in partnership with MicroSourcing, the client has managed to exceed the expectations of its own clients at an affordable cost while maintaining high levels of staff satisfaction. Low attrition rates have ensured consistency for both customers and employees and reduced the need for unnecessary onboarding and training.

Like many organisations, the company has learned that outsourcing to the Philippines is a flexible and scalable resourcing solution that allows it to dedicate more time to growing its market share. The potential for offshore business models has also been enhanced in recent times by an unprecedented surge in remote working on the back of the COVID-19 pandemic.

**For more information, please visit  
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