

How BrokerEngine Manages Their **Work-From-Home** Teams Efficiently



A CASE STUDY BY



Exceptional Offshore
Staffing Solutions

Executive Summary

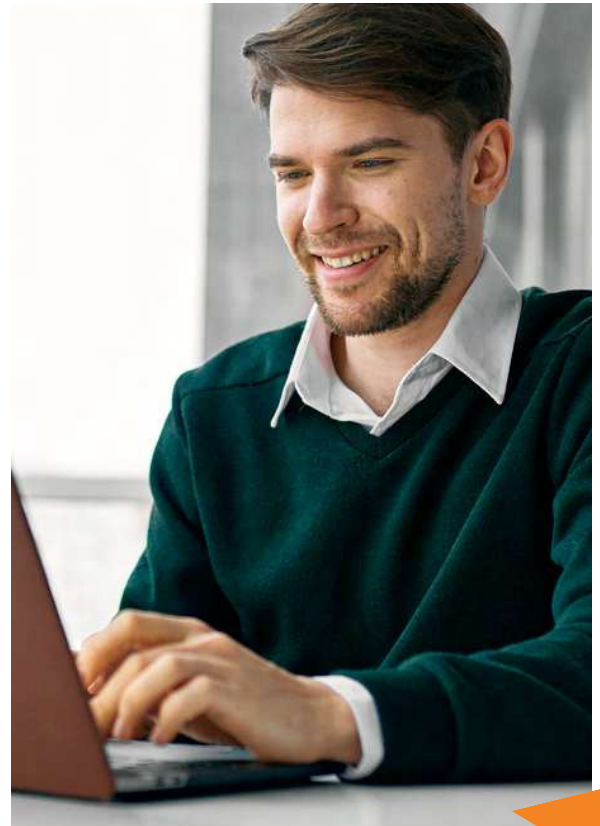
Australia-based BrokerEngine, a customer relationship management software for mortgage brokers, finds a cost-effective and efficient solution for scaling their business by outsourcing Work-From-Home Teams in the Philippines through PeoplePartners.

About BrokerEngine

BrokerEngine is a customer relationship management (CRM) software for mortgage brokers. It provides push-button automation that helps brokers streamline their processes so they can focus on their high-value activities.

Designed by a top-performing mortgage broker in Australia, BrokerEngine features the following:

- Streamlined BID compliance
- Workflows and automation
- Error-proof systems
- Real-time visibility



It has a dashboard that brokers can customise based on their existing operations and business needs. The BrokerEngine dashboard also allows them to see Deal Status at a glance, use the Client Portal to save hours collecting client information, and build a customisable checklist to reduce errors and shorten processing time.

Business Challenges

Mortgage broking is a highly regulated sector in Australia. This explains why mortgage brokers emphasise labour law compliance and business information security. Additionally, mortgage broking is process-driven and has a lot of moving parts.



BrokerEngine is a software development company that provides a platform to support mortgage brokers. Their platform aids collaboration between mortgage brokers and their team, plus helps streamline applications and review processes to help them scale to serve more clients.

However, finding and retaining a team of front-end and back-end developers, admin support, and QA testers can be challenging. It is also challenging to maintain governance when you do a direct work-from-home employment relationship. That's because some risk is associated with engaging with a random person and sending money monthly via PayPal.



Having an existing offshore team in Manila for the past five years, BrokerEngine recognizes the benefits of employing work-from-home talents. However, they need help with managing their offshore team. They need a solution wherein monitoring their team's productivity and processing their monthly salary is secure and sustainable.

Required Solution



BrokerEngine required an all-in-one solution that could help them accomplish the following:

- Recruiting and onboarding work from-home talents
- Monitoring their productivity
- Making sure that they are adequately compensated
- Ensuring tax and labour law compliance
- Putting in place an information security system

BrokerEngine needed an outsourcing company experienced in finding, training, and retaining software developers, admin support, and QA testers. The BPO company must know how to carefully integrate its processes and workflows with associated on-site and off-site roles.

In addition, the company must be well-versed in Australian and Philippine labour laws. This ensures that BrokerEngine is compliant and that their offshore team receives appropriate compensation, HMO, and other government-mandated benefits. Doing so provides a sustainable and scalable workforce for BrokerEngine.



Lastly, the mortgage broking industry in Australia is stringent in areas of risk. Hence, they need an outsourcing partner with experience in implementing IT-driven solutions. This includes cyber security, risk mitigation, and remote collaboration that offers visibility and management over their work-from-home employees.

Solution Implementation

Dedicated HR Support

PeoplePartners provides full-time HR support to BrokerEngine. They are involved in putting the job ads, screening the candidates, setting up interviews, and onboarding new employees.

The dedicated HR support also oversees BrokerEngine employees' health care insurance (HMO), other employee benefits, and compliance with the Philippines' tax laws.

Remote @Home Solution

PeoplePartners manages BrokerEngine's day-to-day HR matters. This includes recruiting, screening, and onboarding employees with the stipulations that all BrokerEngine employees can work within the comforts of their homes.

As Will Swayne, co-founder and Head of Growth at BrokerEngine pointed out:

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"Our employees have always been work-from-home. With COVID, many employees did go to a work-from-home environment. And more and more employees found that they enjoyed it. Especially with the Manila traffic, some save 3 – 4 hours a day on a commute. We find it to be a very good tool in the hiring process."



Hence, they availed the Remote @Home Solution. This enables them to hire outsourced work-from-home employees and ensure that tax compliance and statutory obligations are met.

On the other hand, the Remote @Home Solution makes an employment opportunity more enticing for their offshore talents. That's because it eliminates the need to travel to and from work. This is evident in BrokerEngine's access to the 'cream of the talent crop' and the hiring of skilled and experienced talents.

Enterprise-grade IT Security Protocols

To put BrokerEngine's mind at ease, PeoplePartners provides enterprise-grade IT security protocols to monitor their offshore team's productivity. This includes the following:

- Computer screen, application, and idle tracking
- Data security and loss-prevention protocols
- Internet redundancy

Dedicated Finance and Payroll Staff

PeoplePartners' finance and payroll staff ensure that all time, attendance, leave management, government-mandated benefits, HMO, and payroll is sorted. BrokerEngine receives just one monthly invoice for all their staff and doesn't have to worry about offshore jurisdictional headaches.



Results and Benefits



Working with PeoplePartners allows BrokerEngine to efficiently manage a work-from-home team of developers, admin, and QA. This includes ensuring that employees are adequately compensated, that statutory obligations are met, and that they comply with the labour laws in Australia and the Philippines.

In addition, PeoplePartners' solutions allow them to hire top talents with their Remote @Home Solution. That's because being able to work from home makes employment opportunities more enticing. It also allows employees to save at least four hours of commute.

PeoplePartners also provides dedicated HR support, finance, and payroll staff that helps BrokerEngine firm up on cyber security and other people management business functions.



Grow Your Business with PeoplePartners

With the help of PeoplePartners, BrokerEngine can recruit and retain a team of software developers and other IT-related roles. The outsourcing company provides dedicated HR support, Remote @Home Solution, enterprise-grade IT security protocols, and finance and payroll staff.

This enables BrokerEngine to work with skilled work-from-home talents and ensure that they provide a robust CRM platform for mortgage brokers in Australia. As a result, mortgage brokers can process loan applications efficiently and cater to more clients.

In addition, BrokerEngine can meet the following because of PeoplePartners:

- Having a sustainable workforce
- Visibility and management over their work-from-home employees
- Making sure that their offshore team is adequately compensated
- Ensuring that they comply with Australian and Philippine labour laws
- Having an IT-driven solution in place



Ultimately, outsourcing allows BrokerEngine to provide better services to their clients and close areas of risk involved in operating within the Australian mortgage broking sector.

About PeoplePartners

PeoplePartners specialises in aiding Australian mortgage broking businesses to source talent and develop high-performing, aligned teams.

Guided by our brand purpose, "Partnering with Leaders to Scale Profitable and Efficient Organisations," we strive beyond just talent sourcing. We ensure alignment with your operational, branding, and cultural benchmarks, facilitating excellent customer services and driving profitability and efficiency in your organisation.



Grow your business by accessing specialised and talented people in the Philippines



- ✓ Specialist, dedicated people assigned exclusively to your business
- ✓ Lower cost resources across specialist skill sets
- ✓ Customised skills testing and training to suit your business and function
- ✓ Technology aligned with your requirements
- ✓ Build expertise in a new business area or expand support for your existing operations



Learn More with these Resources



PeoplePartners Mortgage Broking

<https://peoplepartnersbpo.com/resources/brochures/mortgage-broking/>



PeoplePartners Why Outsource in PH


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