OPUS

Salesforce Collaboration Portal for a Large Remittance House

Client Overview

The client is one of the world's largest money transfer companies with 500,000+ Agent locations in more than 200 countries, facilitating movement of over $400B annually.

The Challenge

For a large remittance company, it is very hard to manage the agents and their operators, given their diverse geographic and cultural distribution. Consistent training for the agent operators is vital to keep up with the compliance regulations for seamless operations. The lack of a central portal for agent communication was a big problem, and the client approached Opus for help.

The Solution

Opus leveraged the 18 year long proficiency with remittance solutions to understand the real business challenges and put a plan to resolve this. A self-service platform for network management and information dissemination was a key deliverable. Opus also assisted with several other deliverables:

☑ *Tools for training and enablement were created.*

☑ *Multilingual broadcast based on operator language preference for geographically distributed users was put in place.*

☑ *Tools to easily monitor the training related SLAs were built.*

☑ *On-boarding and management of new operators, and gamification among the operators to improve adoption was rolled out.*

☑ *Bulk and synchronous process updates for large agent networks*

☑ *Community support and reporting were built for better oversight*

Benefits Delivered

Implementing the solution using Salesforce was a good choice given the cloud readiness of the application. Leveraging the cost-effective community licenses of Salesforce eliminated the need for additional workforce and enabled a multi-channel solution with quick implementation. It delivered several key benefits:

○ Improved agent compliance over diverse geographies

□ Availability of easy & comprehensive reports & dashboards helped the customer and agents with better oversight and collaboration

🕐 Significantly reduced on-boarding time per operator because of uniform and transparent processes

$ Reduced effective cost of publishing & data sharing across agent locations

The client also wanted a resolution which easily extends any financial institution's needs. Opus rolled out quite a few out-of-the box Salesforce features such as Chatter to make the solution resourceful.