The client is a small business financing platform based in Chicago that helps entrepreneurs find and apply for business loans.

The work is done remotely through Lendr’s proprietary software platform that allows agents to process loans in a secure environment. The team is divided into two sets of agents. One set is focused on submitting deals while the other is focused on processing factoring loans.

There are days when Team A has to submit so many deals that they pile up. This worsens when one of the agents get sick. The agents and the client tried to solve the problem by asking the Operations Manager (who was a previous team leader of Lendr’s agents) to help out. But, the deals kept piling up. So, the client asked if one of the members of the factoring loans team could help Team A, but that person was not trained to work on the submission process.

The current team leader had this brilliant idea to train all members of the factoring loans team. Vis-a-vis, the Fair Trade Outsourcing agents in the deals submission team should also learn the work of the other team.

This cross-training plan paid off! Whenever the deals kept piling up, one or two members of the factoring team are there to help and make sure all the deals are submitted. In return, whenever the factoring loans team is struggling, the deals team can lend a hand because they already know each other’s work.