



ABOUT OPTIX

MetLife Foundation and BFA created the OPTIX program to help people on low incomes access a range of financial products and tools that improve their financial health. Since 2015, the OPTIX program worked with four socially-driven microfinance institutions and cooperatives in Bangladesh, Vietnam, Mexico, and Colombia, to better understand the lives of their low-income customers and create appropriate and future-proof solutions to serve them. Over three years, the program reached over 1 million customers in these four countries, helping them build resilience, gain control over their financial lives and increase trust in financial service providers.



FUTURE-PROOFING INSTITUTIONS TO IMPROVE FINANCIAL HEALTH

Through OPTIX, the institutional partners embraced change to optimize operational efficiency, develop better portfolios of products, build trusted relationships with customers and improve customers' financial lives by:



01



Extending Digital Innovation to the Last Mile

OPTIX helped brick-and-mortar institutions future-proof for the digital age. Leveraging data analytics and technology to enhance operations and bring down costs, institutions developed dashboards to track business metrics, mobile money distribution channels, and digital apps for onboarding customers.

02



Personalizing Services through Customer-centric Design

OPTIX helped institutions put the customer at the center of their strategies. By leveraging user research data, human-centered design, and behavioral interventions, OPTIX designed solutions that boost customers' financial health, such as financial service advisory apps to customize savings plans.

03



Combining Products providing one-stop-shop Solutions

OPTIX helped institutions develop diverse portfolios of financial offerings with a strong business case. By combining products, such as credit, savings, and investments, and by forming partnerships with fintech startups, institutions can sustain a broad set of financial products while creating value for customers.





OPTIX RESULTS AT A GLANCE

~1.1M 

Clients who will be directly reached at scale

~800k 

Active customers accessing savings products

8 

Redesigned and new financial services offerings

6 

Financial tools to improve customers' financial health

220 

Gigabytes of data crunched

119 

Skills trainings offered to staff

12 

Digital tools to improve internal processes

5 

New/improved delivery channels developed

4 

New partnerships with fintech companies

8 

peer-to-peer global and regional events to share learnings

OPTIX TOOLS & PUBLICATIONS



Learn about the OPTIX Digital Tools and solutions

bfa.works/OPTIX-Demo-Videos



Read about the OPTIX journey with the four financial institutions

bfa.works/optix-project-blog



Watch the "Quant Guy" in action

bfa.works/OPTIX-animation-video



Watch the OPTIX Impact Story

bfa.works/OPTIX-Impact-Videos

ABOUT BFA

BFA is a global consulting firm specializing in using finance and technology to create solutions for low-income people. They partner with cutting-edge organizations that touch the lives of low-income consumers including financial institutions, fintech companies, and information providers to build a more equitable future.

