





Panelists



Mary Joy Quino, VP of Global Operations



Lyseen Echalas, Director, Client Focused (Audit Support Services)



Monart Raian Flores, Director, Client Focused (Audit Support Services)



Kasi Scarcella, MBA, Workforce Planning Supervisor, Marcum LLP



Stefan Vermeulen, Founder, Chief Executive Officer, D&V Philippines



Ronald Storch, CPA, Partner, Chief Operating Officer, Marcum LLP





- A BPO specializing in finance and accounting (audit, admin assurance) managed by accountants.
- Solutions for Corporate CFOs and to Professional services firms, including accounting firms, audit firms and part-time CFO firms.
- 350 clients
- Close to 1,000 people based in Makati City
- Management and Account Managers composed of accountants with 10+ years industry experience.









Close to

1000

F&A PROFESSIONALS onboard

95% CPAS
73% Big-4 experienced

Auditors

Strong knowledge-sharing culture with Excellence Teams providing continuous training (e.g. Xero, QuickBooks, MYOB, Assurance Excellence Team).





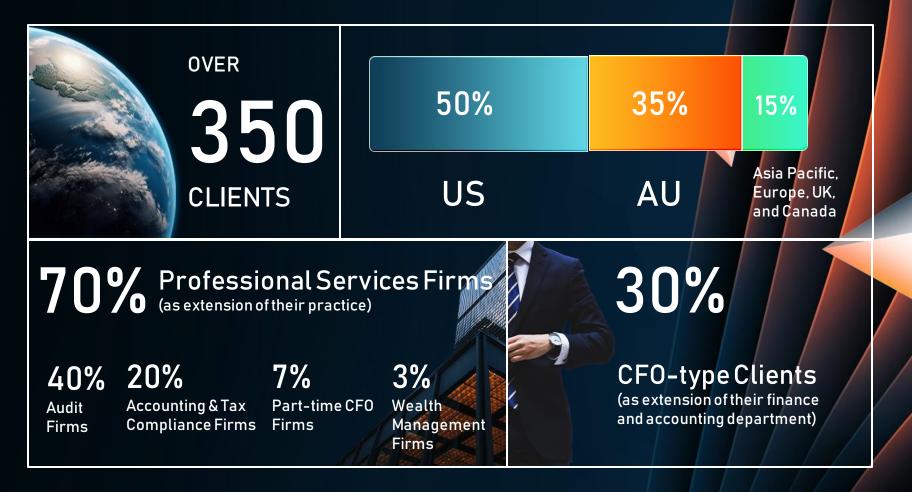
Recognized **Employer Program** (REP) Partner

















US AUDIT CLIENTS

Location

Client Size

Size of Team

Solutions Provided

CLIENT A

Utah

115 employees

8 FTEs (6 Audit, 2 Tax)

Audit, Review, FS Preparation, Tax Return Preparation **CLIENT B**

Boston

140 employees

6 FTEs (5 Audit, 1 Tax)

Audit, Review, Compilation and Tax

CLIENTC

New York

200 employees

6 FTEs (3 Audit, 2 Accounting, 1 Accountant for admin)

Audit, Review, Compilation, Personal FS Compilation, Agreed upon procedures, and Type checking, General Accounting, Billing Specialist









US - CANADA AUDIT CLIENTS

CLIENT D

Location

Client Size

Size of Team

Solutions Provided

California

5 employees

1FTE

General Bookkeeping & Accounting

CLIENTE

Manitoba

<100 employees

7 FTEs (Audit)

Audit, Review and Compilation

CLIENTF

Montreal

200 employees

5 FTEs (Audit)

Audit, Review and Compilation





EU-ASIA AUDIT CLIENTS

Location

Client Size

Size of Team

Solutions Provided

CLIENT G

Singapore

20 employees

5 FTEs (Audit), recruiting 2 add'l FTEs

Audit

CLIENTH

London

100 employees

3 FTEs

Audit & Accounting

CLIENTI

Netherlands

42 employees

2 FTEs (Audit)

Audit





OUTSOURCING BEST PRACTICES

- ✓ Outsource readiness
- ✓ Ambassador/Contact Person within the company
- ✓ Training, Communication and Relationship
- ✓ Collaboration, Coordination, Skills Development
- ✓ Cultural Sensitivity
- ✓ Face to face meetings (training)
- ✓ Face to face meetings on a regular basis client location and PH
- ✓ Sense of belonging (feeling part of the client practice)

**Results In High Success Rate **





MOST COMMON OUTSOURCING MISTAKES

- Lack of people focus for the team in Manila
- Lack of communication (no regular feedback)
- No long-term thinking (not a quick win)
- No clear expectations regarding output and role
- No proper procedures / process with the client side onshore
- No proper training
- Outsourced members are treated differently and too strict on deliverables and without attention to members welfare

**Results In High Failure Rate **







Ron, Kasi

Marcum





The Challenges

Considering Outsourcing





Choosing The Right Partner

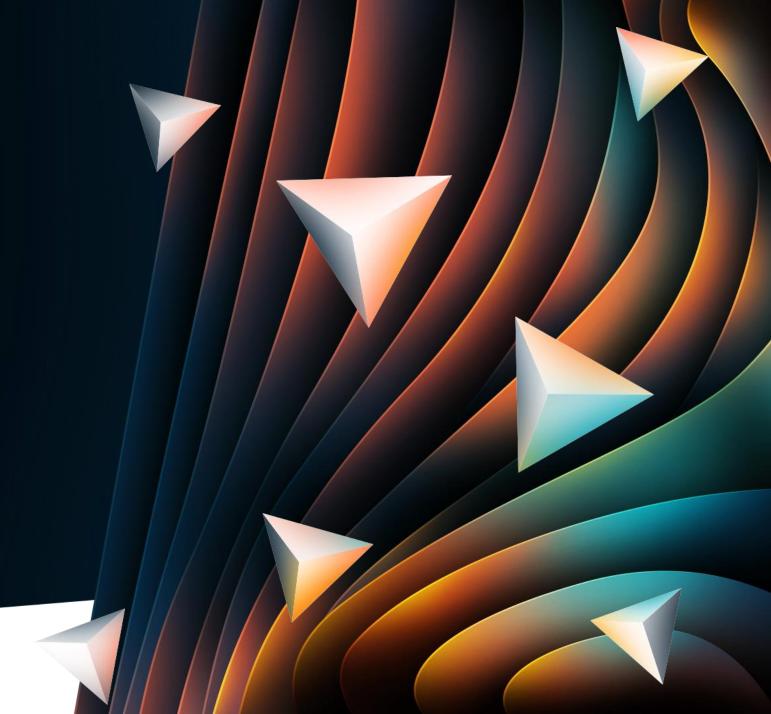
Extension of practice







Marcum's Cyber Security Requirements Data Security







Finding the right Talent

Extension of practice







Challenges and Solutions







Joy, Lyseen, Monart

D&V Philippines







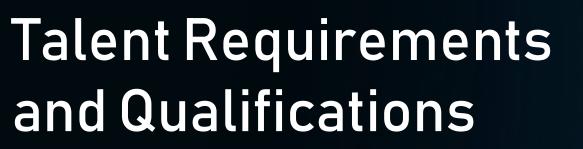
Major Concerns:

- > Data Security
- > Quality and Service Delivery









D&V - Your Talent Sourcing Partner





Partnership Growth D&V Philippines x Marcum





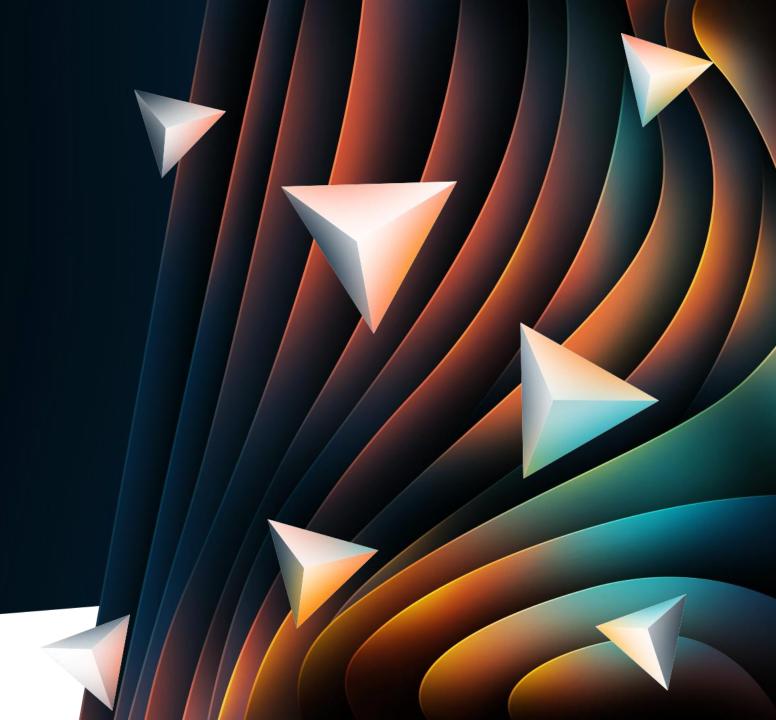


Pioneer Team

Training, Onboarding, Expansion







Challenges and Solutions

SERVICE DELIVERY & ENGAGEMENT









