



# Assist Group:

A Case Study on Outsourcing  
with D&V Philippines



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## EXECUTIVE SUMMARY

After a negative outsourcing experience more than two decades ago, James Aldridge, the owner of the HR health solutions company Assist Group, decided to give outsourcing another try.

He wanted to find a business process outsourcing (BPO) company that specialises in bookkeeping and accounting functions and meets his specific business needs. Scalability, digital competence and a robust business continuity plan are among his key requirements.

In 2013, he visited Manila as part of Mike O'Hagan's "Mike's Manila Tours" to meet with prospective accounting outsourcing companies. This was where he came across D&V Philippines.

*Since then, he began to see outsourcing in a positive light.*

Nearly ten years after the outsourcing engagement began, D&V Philippines continues to help Assist Group in reducing operational costs and improving business processes.

## ABOUT ASSIST GROUP

Assist Group is an Australian-based company that provides occupational health and HR services to various organisations — from conducting pre-employment medical assessments to performing ergonomic assessments.

They usually work with organisations belonging to industries with workplace safety concerns such as mining, construction, and shipping, to name a few. They also offer services for blue-collar workers which aim to satisfy the regulatory medical components that go with hiring and medical maintenance of staff.

Majority of Assist Group's clients come from Australia's capital cities and regional areas in the West. They also get minor traffic from New Zealand, Singapore and Indonesia.

## |CHALLENGES

### A “Sour” Taste of Outsourcing

Assist Group made its first attempt to outsource its accounting functions in 2002. Back then, there was only one active firm in Australia which they tried for six months. However, according to James, the said firm did not think through how the business runs its books. The accounting firm even set up a program that customers should adapt to without giving the latter a chance to calibrate or modify the service according to their needs.

On top of that, their books were completely messed up, causing them a substantial financial burden to correct all errors, especially when tax time arrived. Due to this experience, they felt discouraged to try outsourcing again.



“... customer does not have the chance to calibrate or modify the service according to their business needs.”

- James Aldrige, Owner

### Customising Solutions According to Business Needs

James wanted to find an accounting outsourcing service provider that delivers customisable and scalable solutions to fit his business needs.

He also wished to have a team that is eager to learn the Australian culture and understand the nature of Australian businesses, tax laws, payroll structures, benefits, incentives, severance pays and other essential processes. Since many Australian businesses were making the switch from MYOB to Xero, he required the team to be knowledgeable in using both software to assist the business with the migration process.

Given the volatile demands of his business, the outsourcing company must always be ready to scale as fast as possible.

## **The Brick Wall Approach**

James also pointed out that some outsourcing companies provide only one key contact without any backup plan in place. He said that many business owners tend to overlook this aspect. If the key contact suddenly leaves the company, it will take a while to train a new employee and the cycle will just go on.

It is important for him to know that the outsourcing company has a robust business continuity plan in place to carry out tasks without any disruption should the key contact be unavailable for whatever reason.

## | HOW D&V HELPED

### Alignment of Values

When James visited the Philippines in 2013, he got a chance to talk with the D&V Philippines' team. "I met the prospective team, we had a great robust conversation about how D&V did things differently, and this has independently convinced me that the reasons why I left (*previous outsourcing firm*) were the reasons why D&V was winning customers. There was great alignment with how we kind of adjusted our business culture, how we felt, and how we did things. It gave me a lot of confidence to 'give it another

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crack' as the Aussies say." This encounter has sparked a meaningful and long-term business relationship that created a significant impact on both parties.

When asked what he liked most about D&V, his answer was "The team was very reliable, very predictable, very respectful, and very professional. I enjoyed the welcoming nature of D&V that was something like 'Come here, come to our office and spend some time with our staff as much as possible. Visit us, treat our place like yours, the team is an extension of your company.'" He also commended on the staff's willingness to learn about his culture, as well as the tax laws and technicalities on Australian accounting processes. James regarded this as a key success factor of D&V's differentiation in the market.

Aside from that, he stated that D&V's "Niche" category in outsourcing has proven their expertise on the subject matter of Finance and Accounting, prioritizing staff training and competence in various cloud accounting software. Quoting what James said, "They completely nailed the finance outsourcing industry."



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## Calibration

During the early stage of the outsourcing engagement back in 2013, the team from D&V Philippines has already showed its determination in adapting to the specific business requirements of Assist Group.

Back then, D&V Philippines has not used MYOB yet. But because Assist Group needed someone who's knowledgeable in using this software, both sides agreed to train the outsourced team in using this software, including the migration process to Xero. This undertaking has given birth to one of D&V Philippines' specializations to date.

Upon onboarding, Assist Group also did their part in understanding the Filipino culture and establishing a nice cultural rapport. They immersed their Filipino team in using specific accounting jargons used in Australia.

“...nobody at D&V knew how to work with MYOB...D&V and James agreed to train key staff for MYOB, as well as the migration process to Xero. This undertaking has become one of D&V's specializations to date.”



James also shared that it is imperative for businesses to invest time in their outsourced staff as they would in an in-house employee. Despite being in a separate location, he made sure to train them about everything they needed to know about the business through videoconferencing. He also added that businesses should not expect outsourcing to work as if things are magically going to happen.

“Invest more time for proper training and induction to make your outsourcing venture a success,” he emphasised.



## Humanizing the Experience

Assist Group's great rapport with D&V Philippines' accountants was the main reason why James was enticed to work with the company.

"I met the prospective team, and for me, that is really important as opposed to having a faceless BPO where the staff felt robotic. The other outsourcing firm never initiated videoconferencing, but D&V Philippines did. D&V Philippines encouraged more face-to-face contact to humanize the experience. You listened, you were prepared to adapt, change, and calibrate to the market."

"The other outsourcing firm did not use Skype, but D&V did. D&V encouraged more face to face contact to humanize the experience. You listened, you were prepared to adapt, change, and calibrate to the market"

James pointed out that proper and constant communication should be of utmost priority, for the success of this outsourcing venture. This is to make sure that you are on the same page and avoid misunderstandings that often happen through email correspondence.

## Flexibility in Pricing

D&V Philippines also offered flexible pricing to Assist Group to allow the latter in scaling quickly whenever needed. “Sticking to budget is important. This flexibility is crucial as it gave us a sense of security, a safety net,” James said.

## Continuous Training Program

D&V Philippines facilitates a real “skill-building” approach, which helps in adding more breadth and depth to the services it delivers to clients. “When staff gets quicker and more competent, we add more to their plate. We train, make sure they’re competent, and add the next skill.”

## Business Continuity

D&V Philippines has a backup plan in place, a standardised understudy approach that aims to reduce or eliminate downtime whenever the key contact of the client leaves for whatever reason.

James calls this “a great safety net”. It gives him peace of mind, knowing that he doesn’t have to start from scratch whenever the tasks for his business are turned over to someone else other than his key contact. It also serves as an assurance that D&V Philippines is a great partner for the long haul.

## RESULTS

James gave a positive remark regarding the results of Assist Group's partnership with D&V Philippines. "D&V has led us to achieve real time books, numbers, accounting. We are now able to see the business in real time, and make real time analysis over our finances. We're not waiting another month to figure out what happened three months ago." As a result, Assist Group can make more timely decisions and become more agile, especially with the competition. It also allowed them to adjust costs right away. "D&V Philippines enabled that process, a real competitive advantage in the marketplace, James said."

He also mentioned that D&V has helped them meet their deadlines very well. "We never have to worry about D&V taking too long or timeframes blown out. Everything has happened when they said it will be done. This is a rare gift!"

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James also stated that D&V allowed them to add more to the company rather than replace. "We did not make anybody redundant, in fact, it even freed up our time to work on higher level problems and have more accurate financial projections." He even said that with D&V's professional services, they are able to see the way clearer because they are not bogged down with the details. "D&V allowed us to spend more time working ON the business rather than IN the business. It also bought us back a bit more freedom and time to spend somewhere else, rather than being chained to a desk." According to James, this is the most precious result that he has gained with his partnership with D&V.

## RECOMMENDATIONS

“D&V is the right partner, our outsourcing success story,” says James. However, he also recommended some things that D&V would might want to improve on or implement more. Firstly, he stated that some of the staff should never be intimidated with the clients and should never be too scared to ask questions about anything unclear to them. “Communication is vital in outsourcing. Be comfortable to ask questions freely without fear of being judged. Get face to face. Mixed messages is the biggest area of accidental relationship breakdown and that is what we want to avoid.”

“D&V is the right partner, our outsourcing success story.”

He also recommended that companies should walk their staff through the whole process not once, but twice or thrice, as if training somebody sitting next to them. Afterall, outsourcing is a two-way street.

To address this issue, D&V Philippines conducts regular in-depth training for email and online communications. Aside from this, D&V Philippines also encourages clients to visit their team in Manila for face-to-face interactions and training. By doing so, they can break the barrier of being intimidated to talk and ask questions.

Second, James recommended D&V Philippines to invest a little bit more on training for Australian payroll. He said that everyone should be well-informed so as not to make any assumptions before proceeding.

The management of D&V Philippines immediately acted. In 2016, the company onboarded an Australian payroll specialist to promulgate knowledge on the said area to the team. As a result, the team’s familiarity with Australian payroll processes has increased considerably.

Lastly, James recommended that D&V Philippines should be quicker in getting a second line of failure on standby. He is aware of D&V Philippines’ backup strategy, but he would like this to be more prominent in case of more urgent needs.

Considering this recommendation, D&V Philippines continuously reinforces its ‘understudy approach’ by assigning a certain group apart from the key contact to be fully informed about how a specific client runs their books. On top of this, the company’s “Excellence Teams” assure that all employees get intensive training on various accounting software so that they can immediately adapt when required for backup.

## **|ABOUT D&V**

D&V Philippines is a business process outsourcing (BPO) firm specializing in finance and accounting, audit, and admin support for chief financial officers (CFOs) and professional services firms worldwide.

Led by a CFO and managed by accountants, we assure our clients that we can meet their needs, no matter how complex.

Our services are ideal for Corporate CFOs and professional services firms that are looking for scalable, flexible and customisable accounting outsourcing solutions.

We have a talent base of about 1,000 professionals consists of experienced certified public accountants (CPA) and auditors with prior audit experience from the Big 4 Firms. They are geared with broad accounting expertise and reinforced with regular training to keep them at par with the latest industry standards.

This gives our network of 350 clients and partners across Australia, Asia-Pacific, Canada, Europe, the United States, and the United Kingdom the confidence of outsourcing their F&A functions to us.

Upon onboarding, we assign a dedicated team to handle our clients — regardless of their business size. We assure our clients that our experts are always ready to take on the tasks, even during unforeseen circumstances.

## **| Our Service Approach**

D&V Philippines operates under a hybrid working arrangement. Our people are fully equipped with resources such as company-issued devices, protected by a bulletproof data security system that protects our clients' confidential data. We have our IT Department working at the back end for technical support and ensuring that all our networks are running smoothly.

Meanwhile our Quality Assurance Team monitors the performance of our experts and ensures that our clients are receiving top-notch services.

Our offices are crucial pieces of our service delivery. Located in the business districts of Makati and Alabang, our office spaces accommodate the growing number of employees we have on board. We have spacious workstations that are entirely conducive to our people's productivity, plus facilities that help our people to work efficiently with their colleagues and clients.

Aside from our physical resources, we further strengthen our working approach through our back up continuity measures. We have a standard backup procedure that we initiate when a client's main contact is not available or decides to move on from the company. Should this happen, a reserve staff is prepared to take on the account and continue the job as usual, with minimal turnaround time and eliminates the need for retraining.

Take advantage of D&V Philippines' scalable, flexible, and customisable accounting outsourcing solutions. Get in touch with our experts today to find out how we can assist in improving your accounting processes.

## |D&V Philippines Outsourcing Inc.

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