

# CLIENT FAQ's



# General Information:

## 1. Where is The Back Room located?

*The door to The Back Room is in Wanaka, New Zealand, but the actual room itself is in Clark, in the Philippines.*

## 2. Why the Philippines?

*The Back Room gains expertise because of an abundance of skilled labor in the Philippines. They have a strong education system producing an intelligent and skilled workforce that has little access to professional work. We work from the Philippines because this creates a win-win situation where our staff have access to well-paid work, good working conditions and the opportunity to apply their degrees in a professional environment.*

## 3. What are the work conditions like for The Back Room staff?

*Our staff are based in professional offices in Clark, Philippines. The working conditions are not too dissimilar to work conditions in Western countries. We visit our staff regularly and speak with them daily to manage morale, culture and well-being. Given the remote nature of the work force we have developed an ethics policy to ensure we uphold safe and professional working conditions, provide fair remuneration and exceed local standards of employment. Our goal is to provide a better life for our staff in the Philippines by providing them professional work.*

# General Information:

## 4. What is your security like?

*We take security seriously! Our staff work in a secure, safe environment. Not only are they safe, but your information is also kept confidential and safe too! There's physical security to enter the building.*

## 5. How about your online security?

*Our systems have extra layers of safety. Our offshore staff do not have access to external passwords; we provide them with access through our highly secure systems. We have software installed to oversee activity and ensure a record of operations is in place at all times. The facility in which we work in the Philippines has an additional layer of spyware and virus protection.*

# SALES QUERIES

# Sales Queries:

## 1. What will happen after I sign the proposal?

*Our Recruitment team will schedule an intake call and request completion of the Personnel Requisition Form to officially initiate the recruitment process.*

## 2. Who will be our Point of Contact?

*In the welcome email, our sales team will provide you with an introduction of your Account Manager, who will be your designated Point of Contact.*

## 3. How long is the duration of the contract?

*The agreement spans one year and is subject to renewal annually, provided there are no alterations.*



# Sales Queries:

## 4. What is the set-up fee?

*A one-off setup fee is charged for each staff member at the time that they are initially assigned. This covers recruitment, hardware and other set-up costs.*

## 5. What are the additional fees that we get charged for?

**Monthly Personnel Fee** - covers overseeing your team, HR and security and all other employee costs such as wages, allowances, health insurance coverage, CPD costs, etc

**Monthly Graduate or Kickstart Program Fee** will reflect for the initial 3 months when you start with us. This varies on the preferred training program,

# Sales Queries:

## Additional Fees

Description	Frequency	Computation
<p>Travel Subsidy / Accommodation Subsidy</p> <p>To be added to your monthly invoice if employee is required to report in the office. Amount will be determined based on the proximity of their residence to the office. If residing outside the region, Accommodation subsidy will apply (for onsite/hybrid).</p>	Monthly	\$30-\$100 NZD
<p>HMO For Employee Dependents</p> <p>This fee will kick in as an incentive upon year 2 of the employee. Employees are entitled up to 2 free dependents; There will be instances that this may be offered earlier to staff / amount may vary, on a case-to case basis under the special agreement between client and staff</p>	Monthly	\$50-\$230 NZD
<p>Paid Study Leave</p> <p>Graduate employees preparing for the CPA exam are entitled to a four-week paid study leave, in addition to their 20 annual leave credits. This leave will be covered by the client, and its duration is linked to the two-year bond outlined in their employment contract with TBR, which begins upon completion of the graduate program.</p> <p>Regular non-CPA employees preparing for the CPA exam are eligible for a four-week paid study leave in addition to their 20 annual leave credits. Payment during this leave will be subject to client discretion, with the Account Manager discussing the arrangement with the client before finalization. This benefit is subject to a study leave bond, the duration of which will depend on the associated costs.</p>	One-Off	Equivalent to 1 month of employee's wage
<p>Subsidized Amount for CMA Exam</p> <p>A potential fee if the employee is interested in taking the CMA exam. Communication shall be liaised to the client by the Account Manager and upon client approval. A negotiated amount, if approved by the client will be apaid in lieu of a minimum 2-year bond with the employee considering the high cost of the CMA exam.</p>	One-Off	Amount varies per negotiation and approval
<p>CPA Certification Salary Adjustment</p> <p>If an employee successfully passes the Certified Public Accountant (CPA) examination during their employment under this agree ment, their salary will be adjusted in line with the company's established salary structure and policies. Any additional salary cost resulting from this adjustment will be the responsibility of the client and will take effect within the same month the employee obtains CPA certification.</p>	Monthly	Amount varies

GRADUATE PROGRAMME EMPLOYEE INCENTIVES (PAID BY THE BACK ROOM)

Description	Frequency	Computation
Subsidized Amount for CPA Board Exam Upon employee’s 9th month, The Back Room will be covering a subsidized amount should your staff decide to take the CPA board exam. No cost shall be charged to the client.	One-Off	Amount Varies
Subsidized Processing and Issuance of CPA License Costs that will be incurred for the processing of the CPA License of the employee are paid by The Back Room. No costs shall be charged to the client.	One-Off	Amount Varies
Non-Accounting related Certificate renewals The Back Room will subsidize the first NZD \$120 for renewal of any non-accounting related certifications. Amount exceeding the subsidized amount may be covered by the client, as negotiated and approved. This will be discussed to you by your Account Manager before anything is finalized.	Annual	\$120



# RECRUITMENT QUERIES

# Recruitment Queries:

## 1. How long does it typically take for you to fill in a role?

*On average, it takes us 45 days to fill a certain role, however, this may vary per difficulty of each role*

## 2. How do you handle salary negotiations?

*We act as a bridge between you and the candidate, ensuring that both parties arrive at a mutually beneficial agreement.*

## 3. How do you source and select candidates for a role?

*We use a combination of our internal database, job boards, BHR, LinkedIn, and industry-specific networks. Every candidate undergoes a thorough screening process including interviews and skills assessment*

# IT QUERIES

# IT Queries:

## **1. What equipment does TBR provide to the staff? What are the specs?**

*TBR provides a desktop or a laptop, headset, monitor and a mouse.*

## **2. Can I request for a laptop for my staff? How much do I pay for it?**

For laptops, there is an additional charge, the exact amount will depend on the staff's tenure.

## **3. Who do I contact for IT concerns?**

*You may contact your Account Manager so that they can connect you with our IT team.*

## **4. How long does it take to setup the equipment and install all the logins, software and apps?**

*This takes just one day for as long as you have provided the required log-in credential of the staff.*

# IT Queries:

## **5. If an employee resigns, or we choose to disengage, what will happen to the equipment?**

*As stated in the agreement the equipment will be a property of The Back Room unless you hire for a replacement who will use the device and would waive the set-up.*

## **6. For TBR issued devices for home use – who is responsible for patching/updating these and how often does this occur?**

*Even when gadgets are used for work from home, the Back Room IT department is responsible for their maintenance and security. This involves patching, upgrading, and ensuring that the devices remain compliant with security regulations.*

*This is done on a monthly basis, or more regularly for significant security solutions. The particular schedule is set and based on the threat landscape and the criticality of the updates.*

## **7. Who is considered the data owner of information provided by us to our TBR team members?**

*In line with this, TBR don't copy and save data, we only process the client's Data.*

## **8. How do we ensure data privacy and security for WFH and Hybrid Employees?**

*We have a policy that requires us to utilize only TBR-issued devices for our clients' work and data, all personal mobile devices attempting to connect to the Back Room and clients data shall be inspected by Back Room Offshoring Inc.'s IT department.*



# IT Queries:

## 9. What are TBR's IT and Security Measures?

*IT & DATA SECURITY In the office, we manage to have this set up: Firewalls Malware detection Sandboxing Network mapping and visibility Endpoint security Network Access Control Traffic analysis*

*These are the security measures that we set for our teams' computer Working from home: Firewalls and Website Blockings. ESET Endpoint Antivirus managed by the IT Department. Automated threats and behavioral threats auto detection. We are using ActivTrak installed on our team's computer to monitor their activities and daily productivity with Live Monitoring on our team's computer. Flash drive and USB devices are disabled and if someone plugged in USB device, It would automatically notify us via email us. All Windows 10 OS Pro (up to date) Monthly Patching. We are using TeamViewer Premium account to remote our team members computer when there is an issue. Multi Factor Authenticator is required. If client doesn't have any MFA we can provide*

*In addition to this, we are currently implementing Microsoft Azure Intune to our all client, this is additional security to monitor and control our work environment. If you have inhouse policy on your end, we can apply the policy on our staff's end. Upon request, give you a copy of our IT Policy, network policy and Cybersecurity Training that our staff are taking upon their Onboarding.*



# FINANCE QUERIES

# Billing Queries :

## 1. How do your fees work?

*The Back Room pricing is made up of our fee (we call this BPO (Business Process Outsourcing) Fee) plus actual wages for employees. Find out more details on our pricing [page](#).*

## 2. What is the breakdown of the salary cost per employee?

- *Allowances*
  - a. Rice*
  - b. Laundry*
  - c. Clothing*
  - d. Awards*
  - e. Gifts*
- *Government Contributions – Employer Share*
  - a. SSS (Social Security System)*
  - b. SSS WISP (Worker's Investment and Savings Program)*
  - c. SSS Employees' Compensation (EC)*
  - d. HDMF (HOME DEVELOPMENT MUTUAL FUND)*
  - e. Philhealth (Philippine Health Insurance Corporation)*



# Billing Queries :

- **Other benefits – Employer Share**

- a. Service Incentive leaves (20 days), Birthday leave & Bereavement leave (3 days)*

- b. 13th month*

- c. HMO (Maxicare)*

- d. New Staff Benefits (Includes weekly treats, merchandise, events, etc.)*

- e. Birthday Gift*

- f. Anniversary Gift*

# Billing Queries :

## **3. When do I receive my invoices?**

*We will bill you on the 1<sup>st</sup> or the 15<sup>th</sup> of the month depending on which region you're located with payment due date 7 days after invoice date.*

## **4. Are my payments prepaid or in arrears?**

*We invoice on the 1<sup>st</sup> or the 15<sup>th</sup> of the month for the month ahead. (i.e., For June 2023, we will invoice on the 1<sup>st</sup> of May. The due date will be the 8th of May. By billing early, it ensures we have funds to cover wages on the 5<sup>th</sup>.*

## **5. What if I hire a staff member before the 1<sup>st</sup> of the month after?**

*For outsourced staff starting in the middle of the month, the fees are pro-rated and billed at least five (5) days before the start of the handover date.*

## **6. How do I pay my invoice?**

*Our preferred payment method is GoCardless (Direct Debit) and we will arrange this for you.*

## **7. What is Go Cardless?**

*This is nearly identical to direct debit but offers additional benefits which I outlined in my prior email. This is now the standard payment method we use for billing.*

## **8. How do I register for GoCardless?**

*Just contact your dedicated Account Manager to assist you with the registration process.*



# Billing Queries :

## 3. What are the factors /reason for the recent price increase?

*The factors below are the primary reasons for the TBR's price increase effective last August 01, 2023.*

- 1. Increase in government-mandated employee benefits: Increased costs for mandated employee benefits not only affect the direct cost of these benefits (Social Security, PhilHealth and HMO) but also the associated taxes and contributions required by law.*
- 2. Inflation - cost of living has risen significantly: This rise has affected various aspects of our operations, including essential expenses such as rent, software and utilities.*
- 3. Additional staff benefits for both onsite and work-from-home staff: We strongly believe in investing in our employees' well-being and engagement. As part of our commitment to providing a supportive work environment, we have introduced enhanced benefits to our staff. These measures include additional HMO dependents, subsidized meals, housing, transportation (for onsite employees), and more team engagement events and incentives.*

# TRAINING QUERIES

# Training Queries :

1. What are the training programs that TBR offers? How long does the training take?

## TRAINING PROGRAMS

*We provide progressive educational structure to transition qualified, professional staff into your practice.*

### Grad Program

- Bring a graduate accountant into your business supported with progressive tools and training for 3 months.
- Three months of intensive Accounting training that consists of theoretical discussions, case studies, and practical assessments.

### Kick Start Program

- Ensure new TBR staff's holistic training and development needs are met in their first 90 days
- Support new TBR staff on their learning journey during their probationary period

# Training Queries :

## 1. What are the training programs that TBR offers? How long does the training take?

*We offer the Kickstart Program from experienced employees and the Graduate Program for the newly grads from universities.*

- **Graduate Program** - The intention of the Graduate programme is to bring a graduate accountant into your NZ business supported with progressive tools and training over a 3-month period. 1<sup>st</sup> month of theoretical training and hands on application on the 2<sup>nd</sup> and 3<sup>rd</sup> month wherein they start directly working for the clients.

The Graduate programme is designed to give your graduate employee a solid head start of Accounting background in your country. The cost of the Internship Program is \$1,000 per month per grad for the first three months of onboarding.



# Training Queries :

## 1. What are the training programs that TBR offers? How long does the training take?

*We offer the Kickstart Program from experienced employees and the Graduate Program for the newly grads from universities.*

- **Graduate Program** - The intention of the Graduate programme is to bring a graduate accountant into your NZ business supported with progressive tools and training over a 3-month period. 1<sup>st</sup> month of theoretical training and hands on application on the 2<sup>nd</sup> and 3<sup>rd</sup> month wherein they start directly working for the clients.

The Graduate programme is designed to give your graduate employee a solid head start of Accounting background in your country. The cost of the Internship Program is \$1,000 per month per grad for the first three months of onboarding.

### Stages of the Grad Programme:

**Stage 1: 1<sup>st</sup> Month** Purely theoretical training of Accounting modules. Classroom-based discussions

**Stage 2: 2<sup>nd</sup> Month** At this stage, the client will be assigning practice job sets or actual/live jobs that are not too time sensitive. Additionally, Job Coaching Sessions with the TBR coaches are mandatory

**Stage 3: 3<sup>rd</sup> Month** - At this stage, client there will still be actual jobs for the grads, however, we want the them to practice confidence in dealing with the jobs, reason why Job Coaching Sessions are no longer mandatory. The grads however, can still book a Quick Help session with their TBR coaches.



# Training Queries :

## 1. What are the training programs that TBR offers? How long does the training take?

**Kickstart Program** - The Back Room that upskills Accounting, Bookkeeping, and Non-Accounting Roles. The cost of the KickStart Program is \$750 per month /\$2,250 for 3 months per employee, payment spread for 3 months. This covers soft and technical skills to upskill your Employee in their early months of Onboarding.

### Typical Kicstart Onboarding Schedule:

- Day 1: whole day of HR Orientation discussion – Orientation modules are self-paced training.
- Day 2-14 working days: Kickstart Orientation & Skills training on the following and endorsement with the client:
  -
- Day 15 working day: Formal start with the client
- Days 2-90: Completion of his mandatory trainings to be taken self-paced on his first 90 days.

You may also refer to the a PDF file sent along with their onboarding schedule as a guide to see all the training modules as part of the Kickstart Program including the estimated time to finish.

Our training team will also be sending a training progress reports of your staff's second and third month as they monitor the courses that he/she completes.





# Training Queries :

## 2. What additional support does TBR offers once the staff completed their 90 day training?

*TBR provides Continuous Professional Development (CPD) trainings, webinars, and various training sessions held periodically. Participants also have the flexibility to review relevant courses aligned with their roles on our training platform. Additionally, they have the opportunity to participate in these sessions.*

## 3. What support does TBR provides if I chose to exclude them from the training programs?

*Your staff members still have the option to utilize Quick Help and attend webinars and training sessions that TBR offers from time to time.*

## 4. What happens if my staff is not performing well.

*We provide assistance through our Triage Program, where individuals can engage in the Skills Triage program for technical aspects, facilitated by the training team, and HR Triage for behavior-related concerns over a 30-day period. Progress reports are typically supplied.*

# HR QUERIES

# HR Queries:

## 1. How many leave credits are employees entitled for?

***Service Incentive Leave*** — is awarded to staff after what is called regularization - the successful completion of a six month probationary period. This is a total of twenty (20) days per annum, including sick leave and emergency leave.

***Birthday Leave*** — 1 paid working day off, equivalent to 8 hours.

***Bereavement Leave*** — 3 paid working days off, equivalent to 24 hours.

***Maternity Leave*** — The Republic Act No. 11210 provides for a total of one hundred five (105) days of paid maternity leave - given to all female employees regardless of their employment status - with an option to extend it another thirty (30) days without pay.

# HR Queries:

## 2. How is the leave filing process?

*In accordance with the policy of TBR, employees with less than six (6) months of tenure do not have Service Incentive Leave (SIL) credits but are eligible with Birthday and Bereavement Leave. Any instances of absence during this initial period will be considered unpaid, unless the client agrees to cover the absence with payment. Once these employees complete their probationary period and are officially employed beyond six months, they will receive prorated leave credits at a rate of 1.67 days per month until December. However, regular employees are entitled to 20 days of Service Incentive Leave (SIL) or Annual Leave Credits, which can be utilized for purposes such as vacation, sickness, and emergencies.*

*The decision to approve leave requests rests with the client. In cases where employees have enough leave balance and the leave is approved, they will file for leave in our timekeeping system and provide documentation of the client's approval. For employees without sufficient leave credits, they will need to send an email requesting approval, and this request will then be forwarded to the HR team for proper documentation.*

# HR Queries:

## 3. How frequent is the Performance Review?

*These are sent at least a month prior to the clients.*

- *3<sup>rd</sup> Month -*
- *6<sup>th</sup> Month*
- *Annual*

*For effective feedbacks, we conduct 3rd-, 6th-, and Annual Performance Evaluations to maintain good services for both clients and employees*

*Salary Increase: If you answered yes on the salary uplift question in the evaluation form, our HR team will be providing a salary recommendation based on TBR's salary table.*

# HR Queries:

## 4. How many holidays do you have?Who pays for the holidays

*We have a total of 19 Philippine Holidays, these do not include local holidays and further declarations coming from the Office of the President. If a staff works on a holiday, they have the option to swap/offset to a different day upon your approval; Otherwise, the additional premium will be covered by the client.*

➤

Date	Day	Holiday
Jan-01	Monday	New Year's Day
Jan-02	Tuesday	New Year's Day
Feb-10	Saturday	Chinese New Year
Feb-25	Sunday	EDSA Revolution Anniversary
Mar-28	Thursday	Maundy Thursday
Mar-29	Friday	Good Friday
Mar-30	Saturday	Black Saturday
Apr-09	Tuesday	Day of Valor
Apr-10	Wednesday	Eidul Fitr
May-01	Wednesday	Labor Day
Jun-12	Wednesday	Independence Day
Jun-16	Sunday	Eidul Adha
Aug-21	Wednesday	Ninoy Aquino Day
Aug-26	Monday	National Heroes Day
Nov-01	Friday	All Saints' Day
Nov-30	Saturday	Bonifacio Day
Dec-08	Sunday	Immaculate Conception
Dec-25	Wednesday	Christmas Day
Dec-30	Monday	Rizal Day
Dec-31	Tuesday	New Year's Eve

# HR Queries:

## 5. What other payments do I need to know?

- *Holiday Pay* – *19 Philippine Holidays - if employees worked on a holiday.*
- *Overtime Pay* – *beyond 8 hrs*
- *Night Differential* – *20 % of basic hourly rate*
- *13<sup>th</sup> Month Pay* – *1/12 of basic salary*
- *Separation Pay* – *termination due to authorized causes*  
*½ month pay for every year of service*

## 6. How many days is the notice period if we disengage an employee?

*The notice period should be 30 days and clients should pay all necessary charges including 30 days after the disengagement date and additional payment such as leave encashment and separation pay.*



# HR Queries:

## 5. What other payments do I need to know?

- *Holiday Pay* – *19 Philippine Holidays - if employees worked on a holiday.*
- *Overtime Pay* – *beyond 8 hrs*
- *Night Differential* – *20 % of basic hourly rate*
- *13<sup>th</sup> Month Pay* – *1/12 of basic salary*
- *Separation Pay* – *termination due to authorized causes*  
*½ month pay for every year of service*

## 6. What if I want to terminate my staff? How many days is the notice period if we disengage an employee?

*We aim to make a prudent effort to address the situation through the 30-day Triage Program. However, if immediate action is desired, we must adhere to the proper procedures outlined in accordance with Philippine labor law. In the event of employee disengagement, a 30-day notice period is required, and clients are responsible for covering all associated fees, including charges extending 30 days beyond the disengagement date. Additional payments, such as leave encashment and separation pay, should also be settled. Nevertheless, if urgency dictates, alternative options can be explored.*



# ACCOUNT MANAGEMENT QUERIES

# Account Management Queries:

## 1. How is the entire onboarding process?



# Account Management Queries:

## 1. What happens next after the onboarding?

*We would continuously provide assistance by regular catch-ups and constant monitoring through ActivTrak. We would also be providing 3rd 6th month evaluations and Annual evaluations.*

3RD MONTH EVALUATION		6TH & 12TH MONTH EVALUATION	
<b>PROCESS</b> HubSpot Performance Evaluation Form is sent by Account Manager	<b>EXPECTED TIMEFRAME</b> 90th day of Client Onboarding	<b>PROCESS</b> HubSpot Performance Evaluation Form is sent by Account Manager	<b>EXPECTED TIMEFRAME</b> When employee reaches 6th month, then annually thereafter
<b>PROCESS</b> Account Manager to schedule Zoom catch up with Client	<b>EXPECTED TIMEFRAME</b> 1 day after Form Completion	<b>PROCESS</b> Account Manager to schedule Zoom catch up with Client	<b>EXPECTED TIMEFRAME</b> 1 day after Form Completion

# Account Management Queries:

## 2. How do we monitor the staff’s productivity/performance?

***Catch-up Calls** - regularly, we hold follow-up sessions with both clients and staff to address any issues and assess the ongoing work performance of employees, along with evaluating their communication with clients.*

***ActivTrak** – We utilize monitoring software to assess productivity efficiency and track productive hours. Quarterly productivity reports are then sent to our clients.*

CLIENT CATCH UP	
<b>PROCESS</b> Fornightly Catch Up – 2 week wrap-ups by Account Manager for new clients	<b>EXPECTED TIMEFRAME</b> Every 2 weeks in the first 30 days of Client Onboarding
<b>PROCESS</b> Monthly Catch Up – scheduled by Account Manager, with standard Agenda and feedback form to go right after	<b>EXPECTED TIMEFRAME</b> Every month after successful 90 days of Client Onboarding



# Account Management Queries:

**4 . Is there an orientation before the employee gets endorsed for lateral transfer?**

*At the moment they start directly with their client, but if the client asks for additional training support for the staff members we usually coordinate with the training team to check on the best option for support.*

THANK YOU!

**NURTURE | GROW | DELIGHT**