

Subject: Entegrity Referral - [REDACTED]
Date: Friday, September 25, 2020 at 1:31:16 PM Eastern Daylight Time
From: [REDACTED]
To: [REDACTED]
CC: [REDACTED]
Attachments: image001.png, image002.jpg, image003.png

Hi [REDACTED]

I wanted to get you a quick email before the weekend to help put your mind at ease. When [REDACTED] first started to look at Entegrity [REDACTED] we were contacted by Chris and had quite a few conversations with him over quite a few months. We were (very) skeptical and fearful to say the least.

After speaking with Chris (and meeting with him in LA), speaking with Dharam and Valay at their headquarters, getting a virtual tour of the facility, etc. we decided to move forward and give it a shot (fingers crossed). We started working with Entegrity Jan 2018.

We started with a few tax pros, maybe 3 I think.

We quickly grew to about 6-7 tax pros and 3 bookkeepers.

We have an entire full-time team over there now and it is amazing.

I could write for another hour, but here are the bullets:

- The quality of the work is above-average to excellent
- Their attitudes are simply amazing! No complaints, no arguing, no excuses. They simply want to turn out great work and keep us happy.
- The remote staff all seem to love their jobs and are very grateful for the opportunity to serve others
- The back-end support is fantastic (thanks Mukund)
- There was one security breach and it was quickly dealt with (on both sides). No harm done. It just freaked everybody out a bit. It was a warning shot to make sure everyone has water-tight IT security systems and protocols in place. We are not sure where it originated, but the timing was coincidental.
- Our office is now "open" 24 hours a day. Meaning, our remote staff gets to work about 11:00 pm our time and wraps up about 10:00 our time. So, we can assign work at the end of the day and it is "magically" completed by the time we wake up.
- Skype calls are the key to interview your staff and get them trained. Once they ramp up, the calls drop way off. When we speak to our teams now, it is really only just to say hi and talk to them personally. They really do feel like family. We genuinely care for them and their families. Most coaching is now by email.
- We have on-demand tax and bookkeeping help at our disposal. (We are looking to take on 2 new large bookkeeping clients and may hire another bookkeeper just to handle that workflow. It's that easy)
- When interviewing our remote staff, mastery of the English language is key for us. Our remote staff do not speak to our clients (but they do email them every day), but our local office needs to be able to speak to them and understand them easily. We look for skill level first, then English proficiency second. We have passed on some highly-skilled workers who we could not understand. That was a shame. But the team we have now is

great and most candidates speak English fairly well.

- PS – the Indian culture and remote staff is very Westernized. This was a pleasant surprise. They are all very aware what is happening over here in the US, on top of social trends, etc. We all watch Netflix shows at the same time, etc. and talk about that.
- PPS – they all have a GREAT sense of humor. Another very pleasant surprise. That makes it even more fun. We laugh a lot. Mukund is just crazy and funny as h-ll. We love that guy. He tells me when I am looking tired or fat on our Skype calls. We laugh our @sses off over here.
- PPPS – [redacted] is owned by me and my wife [redacted] [redacted] heads up our tax division. She handles all the onboarding and training of the tax pros, the majority of which are males. We expected some issues from the men taking orders from a woman. That never happened!!! The level of respect and professionalism is simply outstanding. Besides the skill level, that was the factor that put Tiffany over the top and make her a true believer.

We only interviewed one (high-end) remote candidate who was an egotistical ass. He ended up taking a job with another firm but we were not going to offer the position to him anyway. But to be fair, he was simply an ass to everyone. It had nothing to do with Tiffany. He acted like he was from Jersey (too cool for school, gold chains, rings on every finger, no eye contact, etc.). It was very out of place, but kind of funny.

Note: we have invested tons of our own time training our remote staff to help them be better at their jobs. We also have systems and protocols for them to follow. All tools are in the cloud. This is one reason we have them all full-time. We do not want to see all of our hard work and training benefit some other company who might hire them away from us if they are on part-time contracts. This happened once already and we were quite upset about it.

Some CPA firms only use 1 or 2 remote staff members, but for us, it has completely changed our business model. We keep about 7 full-timers now with both tax and bookkeeping team leaders. The quality of work, responsiveness, attitudes, etc. are all quite impressive. Plus, it brought back so much balance for our office and re-structured the workload of our local staff. We still have 8 of us here full-time. And they all very much appreciate the back-end support our remote staff provides. We can now work 9-10 hour days instead of 12-14 at reduced stress levels.

To give you an idea of the costs, we have paid the following (just to be transparent):

- [redacted]
- [redacted]
- The costs are dependent on part-time vs full-time, education / skill level
- You can customize your remote workforce

We hope that helps.

Have a great weekend.

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]