

entigrity



*Hiring Offshore  
**Executive Assistant**  
or **Client Services**  
**Associate** for  
your firm?*

## **HIRING OFFSHORE EXECUTIVE ASSISTANT OR CLIENT SERVICES ASSOCIATE FOR YOUR FIRM?**

Accounting firms are increasingly recruiting extra offshore staff from other countries to address capacity issues. And for most businesses, recruiting qualified accountants and CPAs to support their core accounting functions is an excellent place to start. It's now normal for accounting firms to solve their capacity issues by hiring extra staff offshore.

Firms are gradually introducing non-accounting positions to their offshore teams to understand the accounting offshoring environment better.

### **OFFSHORE EXECUTIVE ASSISTANT**

#### **Why do you need An Offshore Executive Assistant?**

Too many accounting professionals are prevented from billing their potential because of low-value administrative work. Tasks such as email management, calendar management, and reporting tend to get in the way of much more exciting, valuable, and lucrative activities.

As this is the busiest time of the year, you tend to engage with countless meetings while juggling hectic workloads. It is the perfect time to hire a virtual assistant, also known as an offshore executive assistant. Executive assistants can remotely assist with any business-related activities. They can provide excellent support that will surely exceed the expectations of businesses. Moreover, they specialize in administrative work so that they can multitask to support business.



## What would an Executive Assistant to a Manager or Partner do?

An **Executive Assistant** is someone working at a more involved level – someone capable of acting proactively, scheduling meetings, using sound business judgment, and anticipating the executive's needs, keeping ten steps ahead.

Having an offshore executive assistant, significantly beyond the tax season, is undeniably favorable to you and your business. Here are only a few of the areas where offshore executive assistants can assist you.

- 1. Acts as a customer service representative:** Customers are more likely to reach out at this time whether to buy or merely to inquire. It would be ideal to have someone such as a virtual assistant who will gladly assist customers with their questions, concerns and even to get what they need.
- 2. Helps with Marketing Processes:** Virtual assistants can also aid with some of the marketing processes. An example is by promoting products and services through social media and other platforms available. This keeps you on top of the competition.
- 3. Responds to Emails Immediately:** Reading and responding to emails can be a tedious task that can take up a lot of time. Fortunately, an executive assistant can take over. They can reply to emails, create an organized mailing system, and instantly respond to clients' inquiries.
- 4. Prepares Business Communications:** An Executive Assistant can help type, edit, and proofread manuscripts, correspondence, and other business communications. This can help save more time.
- 5. Organizes Files Digitally:** The technology keeps on innovating that allows businesses today to store files online. As a result, more accessible to data anytime and anywhere in the world. For companies using digital storage but have no time to organize all the files correctly, hire an executive assistant. They can get things sorted quickly and easily.

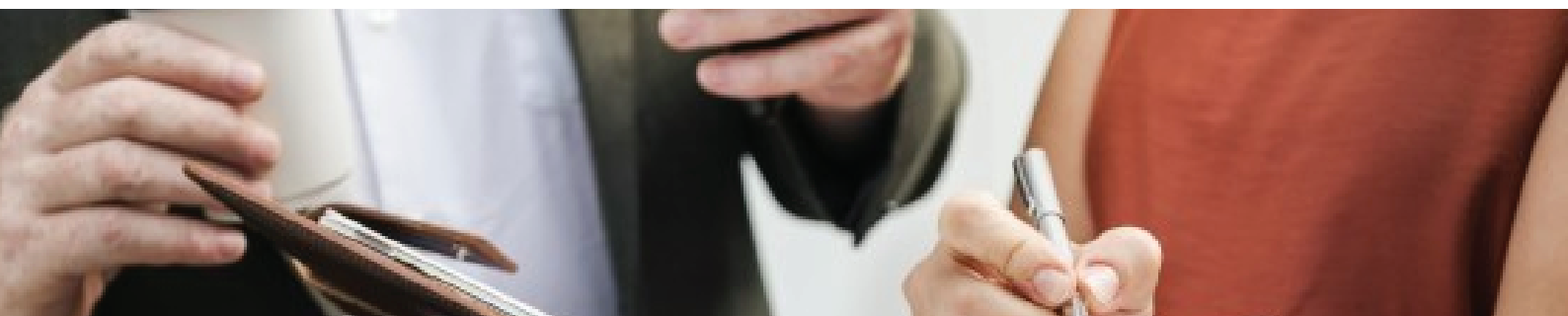
**6. Manages Year-End Tasks:** A new year brings opportunities for growth and goal-setting to businesses. This is an ideal time to outsource an offshore staff to delegate year-end tasks and allows you to concentrate on creating business plans. They can also function as a sounding board or a brainstormer ready to give fresh and unique ideas to help the business thrive.

**7. Takes Care of Bills, Accounts Payable, and Bookkeeping:** Businesses can also rely on an executive assistant for accounting functions. Most of them know how to process these and prepare the accounting paperwork properly.

**8. Manages Your Calendar:** Tax season is a hectic time. If you can't keep track of your calendar, an executive assistant can do it for you. They can manage your schedule, emails, and plans for the meetings. They can book your flights, prepare your meeting schedules, reserve a table at your favorite restaurant, and send you reminders for upcoming events, among other things.

**9. Internal and External Follow-up:** They act as the point of contact between internal or external parties of the firm. Internally they follow up with employees and partners for work, while they also do follow-ups with clients in getting documents or sending reports etc.

**10. Making Meetings Productive:** An EA Schedules meetings, circulates the agenda before the meeting to all the attendees, takes the dictation and minutes of the meetings. They make the meetings more productive by sharing the minutes of the meeting (MOM) and assigning the duties thereafter.





## CLIENT SERVICES ASSOCIATE

### Why do you need a Client Service Associate?

Accounting firms that employ client service associates typically earn twice as much as non-dedicated client teams and earn more overall. And this figure once again demonstrates the rise of client service Associates in accounting.

A Client Services Associate may be the perfect solution to many problems. This role is typically responsible for tasks such as:

- 1. Following up client information*
- 2. Organizing/managing appointments*
- 3. Scheduling proactive reviews*
- 4. Resurfacing dormant sales opportunities*



### What would a Client Service Associate in a firm do?

Client service associates are often the glue that holds an advisory business for Accounting firms together. Client service associates can carry out many different tasks. But all of them generally serve the same purpose: strengthening advisor-client relationships to ensure that clients are satisfied. They may perform administrative duties and essential financial functions, but their primary role is to assist clients. They may answer client inquiries, set up meetings between clients and advisors, and contact clients regarding their accounts or investments. With that in mind, here's a list of things that might be expected of a client service associate:

## 1. Assist Clients:

The main responsibility of a Client Service Associate is to assist an organization's clients. This will vary depending on the type of business, but it is not unusual for a Client Service Associate to regularly contact clients through electronic means or on the telephone. They may discuss the client's account with them, answer questions or arrange meetings. Client Service Associates may also handle client complaints and provide resolutions.

## 2. Handle Documents:

Client Service Associates are often asked to update, maintain or access client accounts, transactions, or documents. They may ensure all necessary paperwork (digitally) has been received by the client and is filed properly. They may even walk a client through the document itself, so there is no confusion on correctly filling it out. They may help with the scanning and saving of documents, and they may access accounts to provide clients with updates or information regarding their latest transactions.

## 3. Perform Administrative Duties:

The Client Service Associate is also called upon to carry out administrative tasks that keep the Accounting group operating smoothly. They may book conference rooms, arrange meetings, send reports and materials, and any other jobs asked of them. Some Client Service Associates may also be called upon to assist with human resources tasks, such as payroll services and budget issues.

## 4. Client service:

CSA must be a self-motivated, proactive self-starter who prioritizes the needs of the client. They must be well-organized and deadline-driven. They must also manage your client deadline, deliverable, and a monthly report is met on time.



## 5. Relationship building:

Their top priority is to look after a client portfolio and ensure that these businesses are satisfied. They will be the one who initiates one-on-one meetings, the one who picks up the phone to answer questions, and the team member who cultivates client relationships for long-term growth.

## 6. Advisory and Resolves Queries :

A large part of the CSA's role is to provide sound advice. Knowing the challenges of clients, listening to their concerns, and assisting them in resolving them is essential to the position.

## 7. Delivering Client Superior Value and Experience:

Client value is considered central to acquire competitive advantage and long-term success of the Firm. The secret to a good experience isn't only delivering the services but to provide extra comfort while offering that service. A client's experience begins well before they start working with us. The client service associate makes sure that the client gets adequate attention and a better experience.

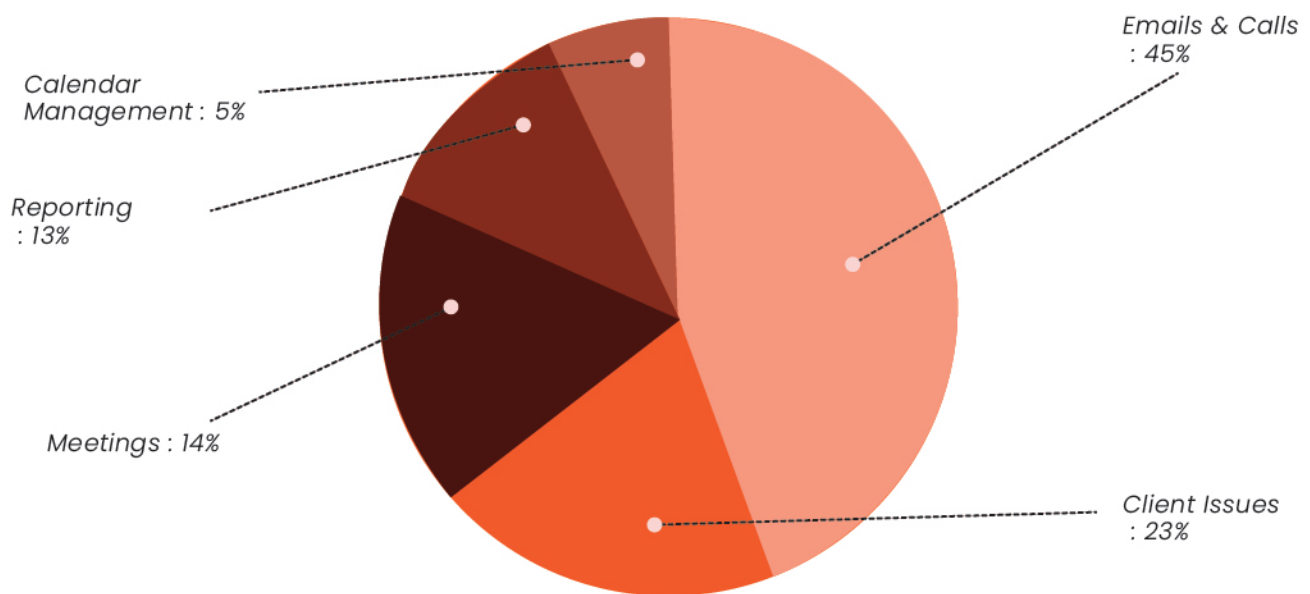
## In smaller firms EA or CSA role is

- either non-existent
- Or combined with responsibilities of Manager and Accountant
- Or respective partners and managers are managing their calendars and clients.

## Why are EA or CSA, or both are essential in Your firm?

The majority of senior accountants fail to be as active as they should be:

- According to the most common concerns, email and correspondence take up way too much time (Often 1.5 to 2 hours per day).
- Low-value busywork and administration squeeze out high-value work.
- Extended hours are required of partners and managers.
- This means there's even less time for technical, family, and business growth.



## What's the ROI?

Hiring an offshore Executive Assistant, especially in India, offers accounting professionals a rare combination of talent and cost savings. An EA's salary in India is a fraction of what it would cost to hire one locally. You can save money on items like office space, supplies, and other services in your local area.

Local Annual Salary

**\$63,718**


Indian Annual Salary

**\$13,450**

Hiring an executive assistant or client service associate is like getting numerous staff for different roles all at once. They undeniably wear many hats, which is beneficial to businesses, especially in terms of cost savings. If you are a business owner in need of offshoring in India, now is the time to hire an executive assistant or CSA. Get in touch with us, and we will gladly provide you with a professional executive assistant/CSAs perfect for your business needs.



As the leader in offshore staffing, Entigrity is trusted by 550+ CPAs, accounting & tax firms nationwide to hire qualified and experienced accounting professionals starting at \$9/hour. With Entigrity, you can hire seasonal/temp/part-time staff for the upcoming tax season 2021 with flexible hiring options  
10 | 20 | 30 | 40 hours/week



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