



Client onboarding guide

At TOA Global, coming on board as a client is easy!
We're here to guide you every step of the way so you'll be
on your way to growing your team before you know it.

Getting started

Step 1

An initial introduction or discovery call, followed up with more information about our dedicated service model in the Philippines and time frame to get a customised resource plan for your firm.

Step 2

A one-hour online meeting with one of our local outsourcing specialists. In this meeting, we'll take a deeper dive into your goals and requirements, the service model, and the onboarding process.

Step 3

We prepare your agreement.

Step 4

Enjoy exclusive access to our Offshore Best Practice course. A step-by-step online course that gives you the skills and knowledge to fast-track the successful onboarding of an offshore team.

Step 5

Meet and brief your local Talent Delivery Manager on the specific technical skills and cultural fit you need for your firm.

Step 6

Hiring commences for your firm. Tap into one of our Accelerator* talent pools or your Talent Delivery Manager will recruit specifically based on your job descriptions and requirements.

Recruitment and onboarding

At this point, the recruitment and onboarding process begins!

Phase 1: Week 1

Recruitment activities begin.

Phase 2: Weeks 2-3

We endorse candidates to you, and provide you with their resumes and supplemental information, such as test scores. You choose who you would like to interview, and we book those interviews. This phase can take 10-15 days to complete.

Phase 3: Week 4

If you choose to hire any of the candidates you've interviewed, we'll make them an offer. If they accept, we'll confirm their start date and the candidate serves their notice period.

Phase 4: Weeks 5-8

Now it's time for a kickstart meeting with your local account manager and client experience manager.

Two weeks prior to your team member(s)' start date, we'll confirm their IT and/or training requirements with you.

Then a week before your team member(s) start, you'll join your account manager and client experience manager in a "Pre-Go Live" meeting to make sure everything is ready to go for your new hire(s).

You will have completed your Offshore Best Practice course and received your certification.

Onboarding made easy

To help maximize your success, you'll have free access to a unique course, designed specifically for firms in the accounting industry to help them fast-track the successful setup of an offshore team, **Offshore Best Practice: Managing a Successful Offshore Team**.

Your team members will be set up for success, as well, through their Professional Development Plans (PDPs). The PDPs will feature international qualifications and short courses your team members will have access to through our Ab² Institute of Accounting, to meet your needs, industry needs, and to fill any skills gaps.

Best wishes for your success!

*Accelerator talent pools are available in Australia for commencement in August 2021. US will have access to Accelerator talent from September for a November 2021 commencement.