



MOS

Management  
Outsourcing  
Services

BROCHURE

[www.worldwidemos.com](http://www.worldwidemos.com)





# YOUR PROFITS AND EFFICIENCY JUST BECAME OUR FOCUS.

---

Our consultants are changing the face of outsourcing by designing a tech driven solution specifically for your company, and focusing on the key activities that will truly give your operations an edge.



# INDEX

<b>What we do</b>	4
· Our pillars	6
<b>Our methodology</b>	8
· Phase 1	9
· Phase 2	12
<b>Our Services</b>	15
· Accounting	16
· Finance	20
· Tenant & Occupancy	22
· Human Resources	23
· Software Engineering & Technology	26
<b>Notice of Privacy</b>	27
<b>Contact</b>	28

# WHAT WE DO



—

Management Outsourcing Services is a back office multinational company which decentralizes administrative, financial, accounting and marketing activities for entities of all types and sizes, through efficient Business Process Outsourcing (BPO).

We aim to truly simplify and to enhance back office responsibilities of property management companies by creating a cost reduction strategy that will allow you to conduct a larger volume of operations in less time and with a better quality. This strategy is tailored to your needs and requests, and will allow you to concentrate on what truly matters: your clients and your long term vision.

Thanks to over ten years of experience in the consulting industry in areas such as continuous process improvement, business diagnostics, and competitive analysis, we can generate a deep understanding of our clients' operations and create a unique decentralization plan to fit their specific needs. This allows us to not only take on your daily time consuming tasks in a structured manner and with greater efficiency, but also detect the potential improvement opportunities that exist in your current processes.

Let us take care of the inconveniences and expenses involved in managing your office operations such as staffing, training, supervision, office space and equipment, and pay instead only for what you use so that you can concentrate on new business developments at the pace and magnitude that is most convenient to you.

*“Simplify and enhance back office responsibilities by creating a cost reduction strategy that will allow you to conduct a larger volume of operations in less time and with a better quality.”*



# OUR PILARS

---

Focusing on these key points allows us to deliver real value service that exceeds expectations:

## EFFICIENCY

---

The overall goal and the most noticeable improvement is focused on the efficiency of your back office operations which will allow you to address significant future growth opportunities. By decentralizing and automating part of your back office activities you will experience a significant decrease in costs and time; this will let you allocate these resources where the value and growth of your company really is. Implementing your long-term vision, keeping up with market trends, and expanding your property list just became way easier.

## QUALITY

---

Delivering great end-results is useless if our client is dissatisfied with the process. This is why we give emphasis on delivering a quality service that will please every step of the way. What sets us apart, is the dedication we put into understanding what our clients want and need: this is not just as a business relation for us; it is a partnership where if you benefit and grow, we benefit as well. That is why we make sure that through our capacitated workforce, our modern data platforms and tools, and our experience in the industry, we constantly aim to generate a greater value in our service that will translate into a greater delivered quality to your clients.



## IMPROVEMENT

---

To achieve greater growth and competitiveness in your company, constant improvement is needed. This is why we use our consulting knowledge to continuously look for areas of opportunity within your business in order to make improvements and / or adapt to changes within the industry, especially the technological related ones. Not only do we aim to take on your daily tasks, but also to be your trusted and experienced advisors.

## RELIANCE

---

Given our line of work, we believe generating a solid trust with our clients is the main pillar for a successful business relationship. We understand that this trust cannot be built overnight, which is why we let our work speak for itself in order to grow responsibilities at a pace that you feel is appropriate through an adequate integration plan of desired activities. We also aim to learn and grow along with our clients through to the constructive feedback that we seek to obtain every step of the way.



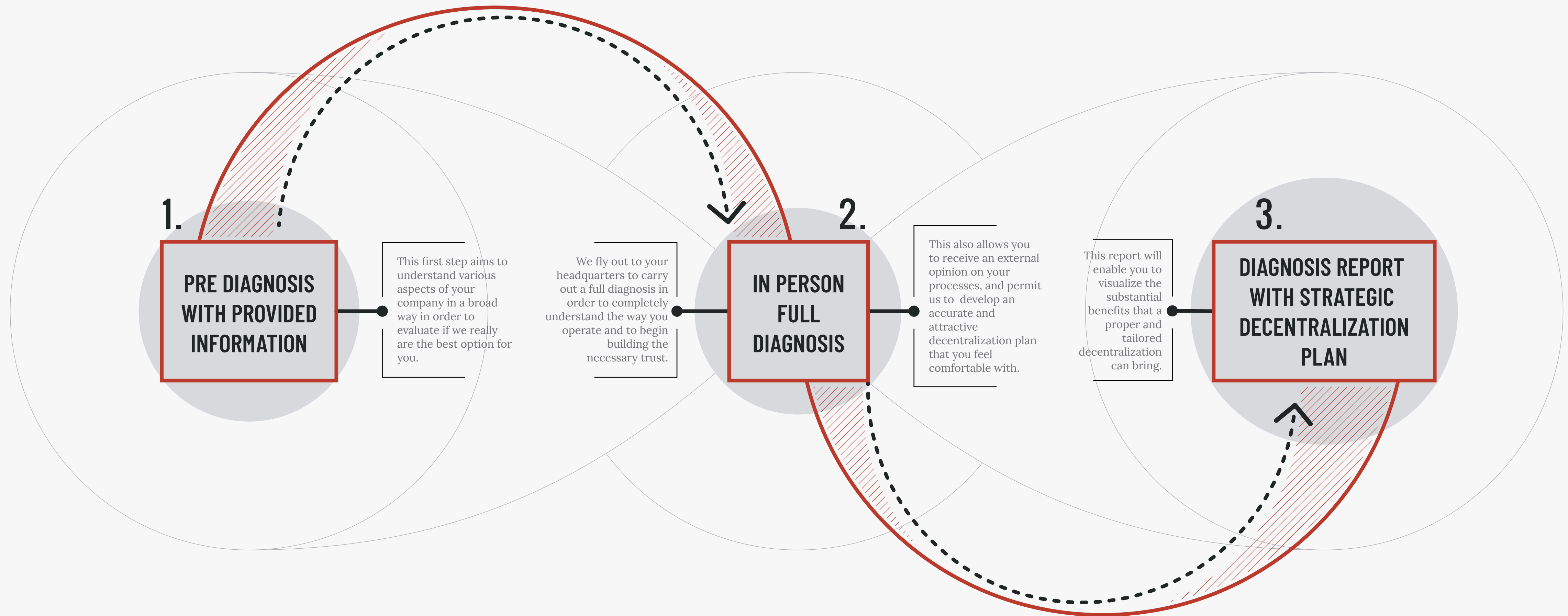
# OUR METHODOLOGY



Based on years of consulting experience in organizational diagnostics and process improvements, we have developed a well structured method that permits an effective decentralization plan allowing us to understand the full picture and the right fundamentals of your company.



## PHASE 1: DIAGNOSIS AND STRATEGIC WORK PLAN





## PHASE 1: DIAGNOSIS AND STRATEGIC WORK PLAN

### STAGE 1.1: PRE-DIAGNOSIS

---

To begin this business relation, and before conducting a full assessment, a simple diagnosis or pre-diagnosis will be made in order to allow our team to get a general idea on some operative aspects of your business and, more importantly, to evaluate if we really are the best option for your organization. We never start providing our services if we do not believe we will truly add value to our client's business.

This step will allow us to start generating the basis and preparations for the full diagnosis using the information provided by an executive or an employee from your operations department (or anyone that can give us general information). Not a lot of your team members will be involved during this part.

### STAGE 1.2: IN-PERSON FULL DIAGNOSIS

---

The second stage of our services begins when we apply our knowledge acquired from years of experience in the

property management and consulting industries, making an accurate full diagnosis of your business in terms of its operations and structure. After all preparations are complete with the pre-diagnosis, the next step requires our team to visit your office. This is because we like to meet our clients in person in order to begin building trust, as well as to be able to properly gather and understand all the information necessary regarding your operations and methods, thereby allowing us to make an appropriate diagnostic of your company.

This consists of a full assessment that will permit us to analyze your methodologies and have a better understanding of your preferences when doing business. In this diagnosis stage, we will focus on the concerns that were the primary reason for your interest in our BOP services, but this evaluation will also allow us to detect any other opportunity areas in your business where a greater efficiency and value can be created.

The main goals of this stage are the following four: first, that your meet part of our team members in person so



that you see how we work, thereby creating the type of trust required in these type of services; second, that you deeply understand your operations; third, that you get an external opinion of your processes where the positive and negative aspects will be pointed out according to our consulting experience and our knowledge; and lastly, that we correctly understand your operations so that we can create a plan and strategy that can fulfill your business needs, and which will provide you a greater competitive edge for you to reach your desired future goals.

### **STAGE 1.3: DIAGNOSIS REPORT AND STRATEGIC WORK PLAN** ---

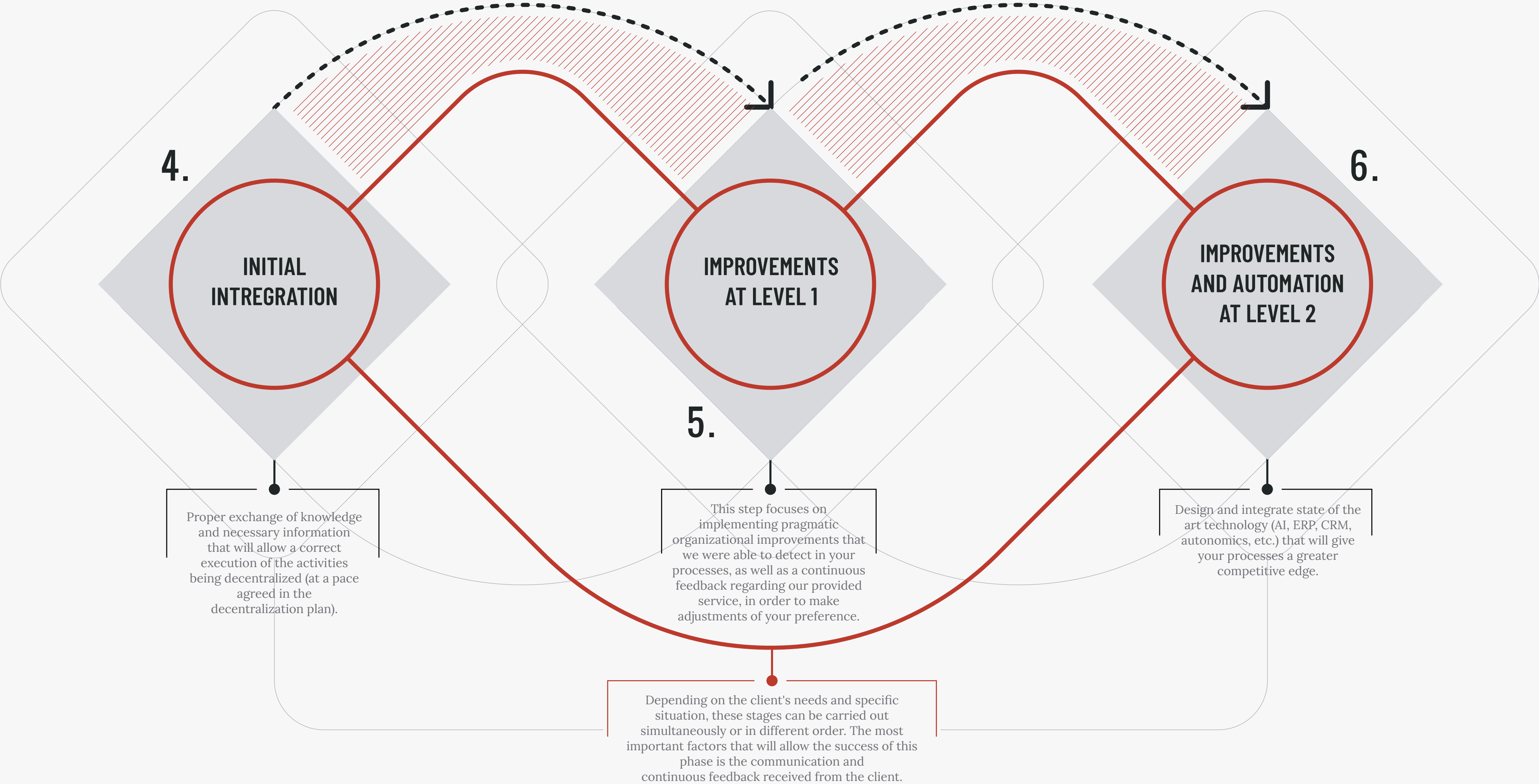
This stage is concluded with the presentation of a detailed report, which includes the aforementioned analysis and plan, pointing out how the positive aspects detected can be augmented and how the negative ones can be reduced or eliminated. For some of these primary issues or interests, we will show how they can be solved through a correct decentralization of specific processes, as well as any other areas of opportunities that we may have detected.

pace at which different aspects of the decentralization plan will be conducted. According to your requests and our recommendations, objectives and timeframes will be set. This will allow the integration of your activities into our company in a way that it does not create any disruptions in your processes.

The objective of the report and presentations is for you to visualize the structure that we would recommend and the benefits this would bring in terms of cost and resource efficiency, as well as to get a clear idea of how a smooth integration of our service solutions would be applied to your business. Furthermore, it will be clarified why letting us take over some of your time-consuming tasks will add strategic value and / or generate revenue to your company, and how this will allow you to focus on your company's vision and strategy



● ————— PHASE 2: DECENTRALIZATION AND CONTINUOUS IMPROVEMENT ————— ●





## PHASE 2: DECENTRALIZATION AND CONTINUOUS IMPROVEMENT

### STAGE 2.1: INITIAL INTEGRATION

---

After discussing the initial plan and having made the proper adjustments, we can begin with the decentralization stage by providing more detail on the methods and tools that will be used to make the transition. One of these essential details is creating the proper lines of communication with the appropriate people within your company that will permit us to efficiently carry out the proposed plan; some of these will be established for the long term and some may just be needed for the integration stage. It is very important that we define these long-term connections because MOS does not only look for a greater efficiency in our clients' operations but also increased effectiveness.

We strive for quality in the provided services through these well-established lines of communication that allow feedback and a tailored service. During this stage, these established connections will allow the proper transfer of knowledge and key information from your personnel to

ours in order to correctly decentralize the activities according to your preferences. This will also enable us replicate the selected operations at a steady pace, thereby ensuring us that each part of your process being correctly decentralized.

The lines of communication will include continuous meetings to discuss the detail of these processes, to deal with any concerns, adjustments, and suggestions, as well as to discuss our overall decentralization progress. This last point will be possible thanks to the correct metrics detected in the diagnostic stage, and will be discussed with the personnel in order to create milestones or adjustments in any of the objectives previously set. Moreover, this will permit a proper decentralization of the activities into our operations.

There will also be periodic reports that will show top executives or other personnel the objectives you wish to inform. Once our operations and lines of communication are more integrated and automatized, these meetings can become less continuous.



## STAGE 2.2: CONTINUOUS IMPROVEMENTS —————

We do not just aim to be another BPO company where you will experience the benefits of outsourcing time-consuming activities, we also strive for putting all of our capabilities and resources to your benefit in order to add more significant value to this partnership. This is why, once we have fully understood and replicated your relevant processes, our consulting and BPO experience will enable us to constantly detect improvements and opportunity areas within those operations.

We allocate a lot of our resources into improving various key competitive areas, especially those related to our technological and autonomies capabilities. Therefore, we give great importance in developing our IT department with competent software engineers that give us the ability and flexibility for creating software tools and platforms that serve both our clients and our internal needs. This allows a better integration, an even greater efficiency and quality in the processes, along with a better information gathering and flow.

Besides from the significant capabilities that technology provides, we search for other areas of opportunity to generate value for our clients: solid insurance for your money, effective training to your employees, SOP tools, strategic planning, corporate consulting for specific areas or issues, control indicators, trends in the industry, among others.

Management Outsourcing Services is a company that is always looking for opportunity areas that will benefit you. This is why we never stop reinventing and adapting our services to the different needs of each client; we are always open to discuss and examine different activities that you would like or that we detect would be convenient for us to decentralize.



# OUR SERVICES

---

At Management Outsourcing Services, we focus on the services that we know will give property management companies the greatest value and performance. Every service is adapted to the client's needs and requests, which is why we never stop reinventing or improving them.

We have enlisted the general activities that are covered by Management Outsourcing Services in order to provide you an overall guide.



# ACCOUNTING

---

## ACCOUNTS PAYABLE

---

*Efficient processing of payable invoices into the system.*

An effective management of all the properties' invoices can be one of the most time consuming tasks for your company; furthermore, making sure all invoices are correctly booked is critical to the daily operation. Our operating goal is to be as efficient as possible and to have the right standards and methodologies in the process that allow eliminating errors.

**Invoice reception.** Recieve or retrieve all invoices using integrated software and control methodologies. These are organized in a way that will allow their correct processing.

**Data entry and processing.** Precise data capture with the greatest attention to detail and the integration of software and artificial intelligence that allows a more efficient process with less human errors; this is also supported by specific security protocols.

Our experience allows us to work with the platform of your preference such as ResMan, Real Page, Estrato, Yardi, Updater, Quickbook, or any other you wish for us to learn to work with. We can also recommend the one that better fits your needs.

**Invoice output.** Invoice elaboration and sending to corresponding clients.

## COMPTROLLER AND PAYMENTS

---

*On-time payments to all the necessary players of the value chain.*

The process of making the payments to utilities, vendors, suppliers, payroll, owner distributions, management fee, mortgages or any other operational expenses you may have, is something that a capacitated trusted individual needs to be in charge of. As mentioned, trust is a core value that we give emphasis to, earned with the quality of our work, and in this case with drastic security measures in order to give our clients the tranquility that their money is being moved securely and correctly.



**Payment approvals.** Previous to each payment, the expense must receive the appropriate approval, where it is analyzed according to different methodologies, such as an strategical cash flow inquiry (including current expenses and future estimated expenses), assistance from software such as Python and R. A priority scale, to determine if the available cash should be allocated to other expenses depending on the type of expense or according to its due date, is also used

**Comptroller and Payment transactions.** Once the payments have been analyzed and approved we double check that every expense has the correct data and proceed with the payment.

We currently work with major banking platforms, but with the objective of making the process even more secure and effective, we can work directly with the financial entities in order to coordinate a better design for the platform. Any other platform from regional or local banks, as well as different payment systems, could be incorporated in our process.

**35% - 60%** *Annual savings*

*The total savings we can generate for your company taking into consideration expenses and investments (direct and indirect) that you would require for your employees, taking into consideration your annual growth.*

**Rigorous security measures.** In pursuance to ensure security and reliability in your transactions, we have a series of protocols that go from a rigorous hiring process, an organizational structure with different access and authorization levels, (allowing similar control systems to those used in the banking system), a daily account reconciliation, an isolated workspace from the other collaborators with cameras 24 hours as well as a specialized spyware and firewall in the system that controls and monitors suspicious behavior. Additionally, we count with different insurance coverages with Chubb company that back up a variety of potential losses. If these different filters do not meet your requirements we are always open to design more options.



## RECONCILIATION

---

*Having your accounts reconciled daily can be time-consuming.*

Making sure that every cent that is emitted by the company booked and backed up with evidence is crucial to the financial health of any business, which is why an organized and structured methodology for the reconciliation of all accounts is necessary for any successful entity. We take care of your entire financial reconciliation needs. These activities include:

**Bank reconciliation.** Daily and updated reconciliation of all accounts with biweekly cuts along with special reports to summarize the bank movements and assure the correct processing of all reconciled transactions. This process has been integrated with middleware and other tools to allow greater efficiency and compatibility with the utilized banking platforms.

**Statement management.** Obtainment of any necessary statement, such as mortgage, bank or other financial and accountant statements from owners, financial entities or anyone involved. We take care of their organization and

process them in a way that allows a suitable access to information for the day to day operations ensuring better control over their payment status.

**Data entry and missing receipts.** Efficient coordination and follow up with property managers or anyone involved for the obtainment of all the missing receipts and financial information that is necessary to carry out a complete reconciliation.

**Purchase Orders.** We manage and monitor all purchase orders that are carried out by the property managers. In this part of the process, we serve as a solid filter for approval or denial of the purchases according to a set of standards previously defined, and we perform a financial analysis to determine the viability of the purchase according to cash funds. An appropriate follow up is then carried out to assure the purchase was finalized correctly.

## FINANCIAL DRAWS

---

*Be assured that your managed properties always count with sufficient funds for their different needs as well as that they are in line with the bank's paperwork requirements.*



Always counting with sufficient funds to cover all your properties' operations and construction needs is essential to allow the continuity of your activities. We make sure that you will always count with enough cash to cover all costs and expenses involved in construction, maintenance, and operations, all through a correct planning of your draw funds and operating cash flow, as well as an organized tracking of all movements and expenses that permits being in line with all the bank's requirements. Our activities in this process include:

**444%** *Increase in overall labor efficiency.*

*The overall increase in the capacity or workload that each of our client's employees (from the accounting department) are able to take on in terms of the total units managed.*

**Cash flow planning and management.** Detailed planning of future and current cash flow needs to always count with the necessary funds to cover construction activities, maintenance expenses, and other daily or unexpected expenses. We assure a correct handling and management of the draw funds whether they may be for reserve, repair, escrow, capex or any other type that may correspond to each property.

**Paperwork.** Gathering of all the necessary documentation and receipts that are required by the financial institutions in their specified format, which also includes collecting the signatures and paperwork from owners, in order to retrieve money from the corresponding fund. After correctly sending these documents, a follow up is done to know if the request for funds was approved or if anything needs to be changed or added in the paperwork.

## **VENDOR ORGANIZATION**

*Having an effective overview of your vendors will transform to smarter decisions.*

As your property list increases, the information regarding all of your vendors, such as who they are, what is the consumption of each one or what size the transactions are, it all begins to get unorganized or piled up in a way that is almost useless or ineffective for decision making. The functionality of having this information organized all in one place, and reported with effective metrics and tendencies, becomes very clear once it is used to make decisions.



**Centralized knowledge.** Having all the relevant data from your vendors in one place is highly practical in terms of organization and management, this is why we find it necessary to develop an online portal that allows this and more. By centralizing all of your properties' vendors information in this platform and, by counting with the updated list, you can have an effective overview that gives you a much better control since you will be able to access this information in an organized and structured way. This portal also facilitates the payment process for your vendors, since they will be able to upload their invoices, view their invoices, payment status, history log, and other relevant information, thus allowing an easier management.

**Economies of scale.** Apart from placing the complete vendor information at the palm of your hand, we can further process it to give you what is vital and allow easy and quick decision making. For this, we carry out an analysis regarding factors such as consumption levels and transaction history in order to give you a better perspective of what is happening with each vendor in a structured report that allows you to negotiate better prices with them.

# FINANCE

---

## FINANCIAL ANALYSIS

---

*Analysis of investment opportunities by taking into account all the necessary factors that will give an accurate value and ROI.*

Being able to correctly analyze all financial statements is necessary to visualize the health of an investment, as well as its predicted future behavior, This allows you and your clients to make the right strategic decisions that will be backed up with a numerical reasoning. Our activities include:

**Operating forecasts.** The analysis is done by our financial experts regarding all financial statements and relevant documents (offering memorandums, rent rolls, etc.) to correctly elaborate a correct financial forecast of current or potential investments, taking into consideration all the relevant factors to determine appropriate future growth rates and a more exact ROI.



**Cash position.** Analysis of the properties cash positions in order to determine the properties’ capabilities of covering essential payments, such as those of their mortgages, salaries, utilities, and the property manager's fee. The main goal is to determine which properties present liquidity issues and detect any other problems that they may have, allowing us to make recommendations about those properties’ operations.

**Market survey.** To have a complete analysis there must be an adequate understanding of the properties surroundings and factors that currently or in the future will influence the property. This helps determine the general behavior, threats, and opportunities that the investment could have and should be taken into consideration in its planning and strategy.

**FINANCIAL REPORTING** —————  
*Empower your clients with effective and strategic decisions by delivering quality reports built by professionals.*

Having all the financial information is useless if it is not understood or used correctly for decision making. Clients feel safe when they know their investments are being managed by professionals that understand how to get the best return and value out of them.

This doesn't just mean having all the financial information available in long balance sheets but instead, count with the specific information that is most relevant and important for them to make decisions, and support those decisions with a complete analysis done by experts.

**230%** *Process efficiency boost.*

*This calculation is taken from the major improvements that we made in various activities for our clients, in terms of time taken to execute those processes.*

**Expert advisors.** As mentioned in one of our pillars, trust is essential, and having the perspective of a financial expert makes the clients feel like their investment is in safe hands. In order to make this possible, we have financial analysts that will take on the task of not only simplifying these long financial statements of each property to the core information that is necessary for the client to know, but also provide a useful horizontal and vertical analysis that allows a different point of view to the property’s finance.



This analysis also allows our experts to come up with accurate conclusions and recommendations regarding the performance of the property, relevant financial trends, industry related information, and other relevant knowledge that allows your clients to get a 360-degree vision of their properties, as well as recommendations of future actions that could benefit their investments.

**Digestible reports.** Your clients, and basically everyone, sees a lot of value in receiving simplified and relevant information that will allow them to make smart decisions, and receiving advice from an expert makes that decision even easier. We aim to make our reports professional but in a digestible manner, this way you can deliver them to your client and know that every type of investor will benefit from them, instead of only providing them with long financial statements.

**Report customization.** We work alongside in order to make sure you are pleased with every aspect of the report, and change or add whatever feature or overall tone to which you know your clients are more accustomed to. This is worth mentioning since the reports form part of an end result that is delivered to the client and where property management companies can add value and differentiate from others.

# TENANT & OCCUPANCY

---

## GENERATION OF LEADS

---

*Obtainment of leads of potential tenants for vacant units.*

Having the highest occupancy rate possible is always a primary concern for any property manager, which is why an efficient process for the acquisition of tenants is essential in order to get the best return on investment possible.

In order to help you make this process easier, we handle the laborious part of searching for potential tenants and gathering their necessary information that will allow you to make the decision of who is best to occupy the unit. Our activities include:

**Leads.** We can correctly gather and organize all the necessary information of the properties’ available units in order to then make an efficient divulgation and obtainment of leads for the units requested through the right exposure and marketing of the vacant units.

**23,040** *hrs. of work decentralized annually.*

*The additional hours that would need to be worked by the employees of a client without MOS, considering the theoretical workforce needed to operate the current number of properties managed.*

**Vacancy follow up.** After filtering all leads to fit your requirements for the specific property, we direct them to the assigned property manager and provide an effective communication channel to allow a follow up on those requested units until they have successfully been occupied.

# HUMAN RESOURCES

## DIRECTOR ASSISTANCE

*We take on a lot of the daily workload that distracts your directors from the real issues.*

Part of our overall goal is to make the management and operation of your company easier by taking on a lot of the day to day workload that distracts you from more important matters. We detected that this involves a lot of the director’s tasks that should not require as much of his or her time as they currently do. This is why it’s essential to count with an assistant who will take on those time-consuming tasks and simplify the director’s role to a more strategic and decision making one.

If you do not currently count with this support, we can provide the strategic person that you require to do the following:



**Detailed understanding.** In order to provide an efficient and effective assistance, we must fully understand how the current director operates, all the way from his work methodologies and decision making to his general preferences. After understanding what his tasks consist of, as well as the organizational chart in relation to those tasks, we can detect where it would be best for us to assist and how we can together make the process and decision making a lot more efficient.

**Tailored execution.** After analyzing these preferences in decision making, we can categorize the type of tasks and their degree of importance to be able to prioritize them and delegate accordingly. In a broader terms, this will allow all of the flow of information and decisions to be made as the director wishes.

**Information filter.** One of the main goals for this assistant is to deliver the information to the hands of the director in a useful way in order to make decisions.

This means transforming long emails or voice messages into summarized information, or reports regarding the topics that the director asks for.

**Organization.** You will also be assisted with scheduling if it were to be necessary regarding the information that our assistant receives, and take care of any other time-consuming tasks that the director is able to delegate.

**Employee performance.** Understanding how your employees are working is very important to any director looking for competence and efficiency in their operations, but taking the time to properly assess them can be difficult; this is where our assistance comes in handy with different tools to evaluate the relevant personnel in order to assure a good performance or detect any deficiencies in the process.

## TALENT ATTRACTION

---

*Don't waste time making a general search for your job vacancies and instead receive a filtered list of strong potential candidates.*

The high rotation of personnel in key activities is definitely a concern that must be taken into consideration in this industry.

Specifically speaking of property managers, it can become a difficult or time-consuming task to obtain the right talent for the job, and with the specific qualities, you may be looking for. These filters are adapted to your needs, where you may want to give emphasis on obtaining high-quality talent or getting quick solutions to the high rotation positions. Our activities include:

**Vacancy fillings.** After an analysis of the organizational structure, job profiles, as well as future plans from the entity, we manage and analyze the needed job positions according to your situation or future plans, as well as any specific vacancy for position filling that you may request, proceeding to an efficient divulgation and obtainment of candidates for those needed positions.

**Effective filters.** Filtration of obtained candidates, through methodologies that allow the selection of quality applicants. After applying the filters, the client will receive a reduced list of candidates that were chosen to best fit their needs.

**Interviews.** Coordination of the interviews with the client if requested.



# SOFTWARE ENGINEERING & TECHNOLOGY

---

*A capacitated team of software engineers in order to fulfill your technological needs.*

Technology has become a fundamental base for the success of many companies in this industry, and a necessary tool for every property management company that wishes to be competitive.

Having technology tools integrated correctly into your processes is essential to achieving better efficiency in the flow of information and tasks, and overall of the company's operations. For this reason, we have built an IT department with specialized software engineers that can build solutions for all these necessities. The activities that we provide in this department include:

**System Advisory.** Advisory provided by our team, in terms of the technological improvements or changes you can make in your company's internal or external operations. The viability of integrating different platforms in your processes will be analyzed to determine if those changes will truly be beneficial or how they can be adapted through a proper software development.

**Software Development.** Our software engineers, with the help of our property management experts, have built specialized software tools and platforms that we know will make the managing of your properties easier and more efficient. Understanding your methodologies and desires also allows us to develop software tailor made to those needs.

## **NOTICE OF PRIVACY**

© Copyright Worldwide MOS SA de CV. All rights reserved. Private and confidential information. Any form of reproduction, distribution, public communication and transformation of this document without the written authorization of the holders of its intellectual property is prohibited. The reading of this document is only allowed for the people mentioned in the "General information" section of this document. Any person outside the aforementioned or who illegally uses it will incur practices contrary to Federal Copyright Law as well as Federal Intellectual Property Law and will be processed. This publication was developed exclusively for the purpose of offering specific guidelines on the proposal of services and professional relationship, so it should not be considered as professional advice.





# CONTACT

USA OFFICES: +1 (972) 588 4535

MX OFFICES: +52 (33) 2306 8719 / 20

Send us your request or comments:

[info@worldwidemos.com](mailto:info@worldwidemos.com)

[www.worldwidemos.com](http://www.worldwidemos.com)

## FOLLOW US

LI · FB · TI · G+ /WorldwideMOS

[linkedin.com/company/WorldwideMOS](https://www.linkedin.com/company/WorldwideMOS)

[facebook.com/WorldwideMOS](https://www.facebook.com/WorldwideMOS)

[twitter.com/WorldwideMOS](https://twitter.com/WorldwideMOS)

[plus.google.com/117976147619127296323](https://plus.google.com/117976147619127296323)