

How OBT Accounting Solved Capacity Challenges & Built a Stronger Team

Client Profile

Firm: OBT Accounting

Location: Lockyer Valley, QLD

Team: 25–30 staff across QLD

Services: tax, accounting, financial planning & business advisory

Client Base: Regional small businesses, high-net-worth individuals, & a large global entity

The Challenge

OBT wasn't short on opportunity – they were short on skilled people to deliver it.

Like many regional firms, they were facing:

- Severe capacity constraints
- Difficulty attracting and retaining skilled staff
- Workflow bottlenecks
- Long hours and staff burnout
- Reactive client service, not proactive delivery

Senior leaders under pressure, “we were being reactive. Clients were chasing us for updates before we'd even started their work,”. “Morale was impacted. Decision fatigue was real. And we knew it wasn't sustainable.”

The Solution

After trialling other providers Rachel and the team at OBT partnered with Offshore Synergy.

What stood out?

- A personalised, people-first approach
- David's shared understanding of regional challenges
- Rosanna's hands-on role in sourcing and interviewing candidates
- A thoughtful onboarding process with full integration into OBT's workflows

“It wasn't just transactional,” Rachel noted. “Rosanna genuinely took the time to understand what we needed – not just now, but long-term.”

“Offshore Synergy has been a godsend. The team are capable, responsive, and eager to learn. Rosanna is amazing – nothing is too hard. They're not just offshore staff. They're part of our team.

– Rachel Bichel, OBT



The Results

Fast, seamless onboarding

New team members hit the ground running. One started work on tax jobs by 3:00 pm on day one.

Improved turnaround times

Jobs are turned around in 1–2 days, with review feedback actioned quickly and accurately.

Enhanced team capacity & morale

Offshore team are fully embedded in workflows, freeing up senior staff and reducing burnout.

Tangible efficiency gains

Client managers now delegate directly to offshore staff – just like local team members. And the whole team benefits from reduced bottlenecks and better service delivery.

Stronger team culture

Offshore and onshore teams participate together in weekly social events like “Fun Friday.” Communication is proactive, friendly, and consistent.

Trusted, long-term partnership

With the offshore model now proven, OBT plans to grow its team again in the next 3–6 months.

Financial Savings

| Role | Number of staff | Savings/year | Total savings/year |
|--------------|-----------------|--------------|----------------------|
| Intermediate | 2 | \$40,000 | \$80,000 |
| Senior | 2 | \$50,000 | \$100,000 |
| | | | \$180,000 AUD |

Looking Ahead

With smoother operations and a solid team in place, OBT is preparing to take on new clients and tackle the next stage of growth – with Offshore Synergy right alongside them.

Ready to grow and save?

Book a free call to talk about what a high-performing offshore accountant could do for your business

