

CASE STUDY

MAKOSI PARTNERS WITH CBIZ MARKS PANETH TO TRANSFORM ITS EBP SERVICES



5-star rating

CBIZ Marks Paneth extended its contract due to exceptional performance.



12 pensions

Makosi's team processed 12 pensions in a tight deadline.



0 fines

CBIZ Marks Paneth met its deadlines with the support from the Makosi team. High quality EBP audit work was completed and needed little to no rework. Avoiding penalties from missed deadlines.

THE CHALLENGE

CBIZ Marks Paneth had recently merged which meant that teams were facing a learning curve with new software, new systems and the goal of creating a better EBP product. The company needed hands-on support to ensure that its team could meet these challenges and improve both capability and revenue. CBIZ Marks Paneth reached out to Makosi towards the end of 2022 with a very clear objective – to collaborate as a team in the Employee Benefits Division and help overcome some ongoing challenges. The CBIZ Marks Paneth wanted to give its full-time employees an opportunity to catch their breath after time consuming Assurance busy season and asked Makosi to step in and support the team by removing a lot of the pressure and giving them time off to spend with their families and find the true meaning of work-life balance.

As Hope Goldstein, Managing Partner at CBIZ Marks Paneth, explained, it was a new initiative with Makosi that needed a more direct skillset and that would allow for the development of a more sustainable team around the EBP specialty.

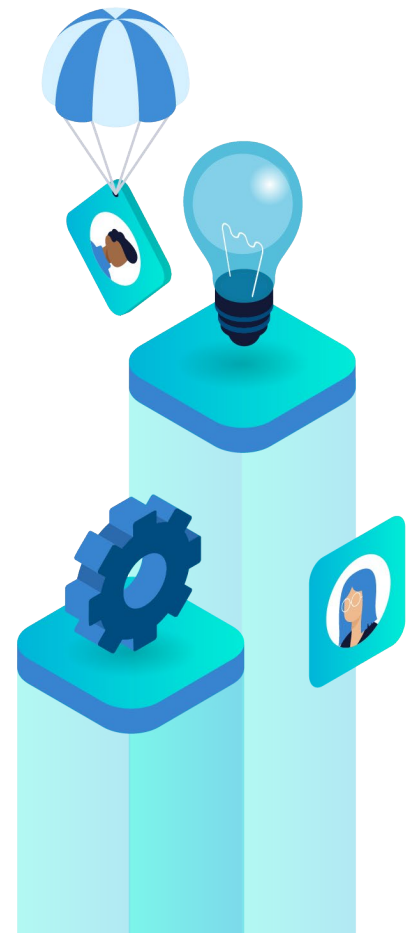
THE SOLUTION

Makosi selected five highly skilled EBP professionals to go into the division and provide their dedicated expertise. As a result, the team achieved far more than CBIZ Marks Paneth were expecting.

The team joined CBIZ Marks Paneth at the start of 2023 and, by April, had **helped the company meet its April 18th audit deadline across 12 pensions.**

The relationship was extended for a further six months beyond the initial contract. Now, the team can add further value by immersing themselves in the CBIZ Marks Paneth environment to provide rich support throughout the busy season and is expected to take on up to 70 pensions over the next few months.

Moving ahead, Makosi will continue to shape its offering to meet the needs of CBIZ Marks Paneth across multiple departments, from EBP, NGH (Not-for-profit, Government and Healthcare) through to Real Estate and their Commercial Business requirements.



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Makosi's people came to us with the skillsets we were looking for and are helping us develop a bigger team around this particular specialty and it has been a win-win all round. This experience has not only helped us shift our KPIs but reinforced the quality of who they are. They came to the table with the desire to make this happen, as if hitting the bottom line for us is as important to them as it is for us. They are 100% quality – they want to learn, they're flexible, they ask the right questions, they want to know more about the client and how they can be more helpful to the team. It's the whole package.

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– Hope Goldstein, Managing Partner at CBIZ Marks Paneth.