

A large, stylized geometric graphic composed of several overlapping triangles in shades of gray, red, and orange. The triangles are arranged to form a larger, irregular shape that dominates the center of the page.

10 BEST PRACTICES OF WORKING WITH OFFSHORE STAFF

E-BOOK
APRIL 2019

RECOMMENDED FOR:

CPAs | ACCOUNTING FIRMS | TAX PROFESSIONALS | EAs

INTRODUCTION

Offshore staffing is a new way of working. Just like capital, technology, enterprise, even talents are globally accessible.

Entegrity has revolutionized accounting community by its offshore staffing solution and has helped accounting firms accessing global talent. This white paper is attempt to articulate our experience of working with accounting firms and listing the best practices of working with a offshore staff.

2017 ACHIEVEMENTS



500+

**ACCOUNTING FIRMS
SERVED**



96%

CLIENT RETENTION



100+

**ONLINE REVIEWS &
TESTIMONIALS**



0

SECURITY BREACH

Entegrity Offshore Staffing exclusively works with Small and Mid-size Accounting Firms, CPA, EA and Tax Professionals. Today, we serve 500+ Accounting firms Nationwide, providing them with qualified and experienced accounting and tax professionals starting at \$9/hour. With Entegrity you can Hire Staff Accountants, Bookkeepers, Tax Associates or any other staff position, having the required skills and knowledge for 75% less salaries than in-office staff.

INTERVIEW AND TEST THE PERSON



Live video interviews are quite similar to an in-person interview, allowing the participants to speak fluidly with each other. It eliminates travel and in-office waiting time for candidates. On the other hand it allows a more streamlined scheduling process for busy accountants and other key stakeholders in the hiring process.

Before hiring a offshore staff, it is highly recommended to interview the candidates and if required take a test to determine how qualified is he/she for the position. You must not go for a blinder at this stage. This is where it is broadly defined if a person actually matches the requirements and suitable to be hired. You can have more than one candidates lined up for the position in context.

At Entigrity we first understand the job description in detail so that we can present you the best suited candidates for your evaluation. Of course there is no alternative to your assessment and the best way to do this is by conducting a video interview.

Today technology has opened up all geographical boundaries before you and allows you an access wider talent pool or one can say 'a Global Talent pool'. Through the video you not just interact with the candidate in real time but can also examine their body language, facial expressions, communication skills, personality, etc.

This could be followed by examining the candidates' technical expertise through an online test. At Entigrity, we always advise our clients to conduct an online test. It will give you the best idea of the applicant's knowledge level and practical understanding.

At Entigrity before presenting a candidate for interview, we conduct detailed background check and not only that we also submit relevant identity and qualification credentials to our clients. This helps you in knowing the candidate better, deciding who would be the best fit and finally having the best person on job. Not just that it also helps you determine the potential longevity of the particular staff in your firm.

The interview could well be used as the opportunity of describing your upcoming offshore staff about his role and responsibility (including his designation) at the firm, types of work the firm performs and the nature of clients to be working with. All these things mentioned in advance gives a clearer overall picture and helps him contribute better towards firm's growth.



LEVERAGE TIME ZONE DIFFERENCE

A offshore staff does not work physically from your office; rather he works from a remotely located office in a different time zone. This sometimes is considered as a limitation by accountants who may find it difficult to be able to interact with their offshore staff and get things resolved in real time. But seeing on a brighter side, your office keeps on working even while you were asleep. As a usual practice of working with offshore staff, you can assign him the task before leaving office and check in the morning how the task has been performed overnight.

Because of the time zone difference, the staff will accomplish the task even while you were not at office and when you get back to work you will eventually see that most of the task is completed. At Entigrity we always recommend to have three to four hours of overlap and regular online meetings in that duration as it all depends on how well you understand each other.

“ We could look at the brighter side as such that you assign the work in the evenings and find it complete when you come back in the morning. Your office keeps on working while you were asleep.”



WE'RE HAPPY THAT WE CAN HIRE SOMEBODY AT **\$9/HOUR** AND NEED NOT WORRY ABOUT **COMPLIANCE, PAYROLL TAXES, BENEFITS** AND DOZENS OF OTHER **HASSLES**.

JIM GOLDMAN, CPA AND PRESIDENT,
GOLDMAN & COMPANY

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KEEP MINIMUM OVERLAP OF 3-4 HOURS

An overlap could be defined as the common working hours when both you and your offshore staff are present at respective offices at the same time and work in coordination. Mornings in your part of the world mean late evenings in the Indian subcontinent. However, normally there could be an overlap time anywhere between 3-5 hours depending upon various geographies.

At Entigrity we always advise our clients to keep at least 3 to 4 hours of overlap time with their offshore staff. This will allow them to communicate, discuss and review the workflow. Depending upon client needs we provide offshore staff with overlap which could be anywhere between 3 hours to even a complete overlap.

The overlap time is the best and sometimes the only time to communicate with your offshore staff in a whole day and can be used to convey the task assignments with them. You could also review and discuss the previous day's work during this time.

The real time communication during the overlap hours is the opportunity to discuss work in detail and provide fair chance to the staff to obtain desired output.

"Effectiveness of real-time collaboration can never be replaced by static communication like exchanging emails. Managing your offshore teams with a no or minimal overlap means that there is no time available to communicate collaborate and coordinate with offshore staff."



WITH ENTIGRITY **WITHOUT** FACING ANY CHALLENGES WE HAVE HIRED **TEAM** OF 4 BOOKKEEPERS AND 2 ACCOUNT MANAGERS IN **INDIA**

SAM ROSENBERG, PARTNER & CPA
ROSENBERG CPAS AND CONSULTANTS

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EXPLAIN YOURSELF AND DEFINE EXPECTATIONS

Since your staff is not physically present before you at your office, so there will always be a limitation of not able to see him personally, understand his expression or body language or mindset. With this limitation, expressing your thoughts and articulating your work expectations become more critical.

So through the limited available windows of communication in form of audio or video calls you need to express the requirements more clearly. A better understanding of the work will make the staff more productive and deliver better.

Entigrity always advices our clients that although you might be communicating with your offshore staff over chat and emails but at least have a five minute audio/video call because lot of things get clarified and resolved in oral communication rather than written.



If there is a regular communication and explanation about necessary aspects, it helps the offshore staff understand their role effectively and be more productive. They can be more engaged with the company / team and have a more positive approach towards their work and their team.

You will have to explain to the offshore staff about the nature of tasks he/she has to perform, brief about clients, their nature of business, their way of work and of course, their expectations. The briefing might also include the frequency of the reports to be sent.

It usually needs a few minutes call (at times more than once in a day) but proves to be of great help in getting the thoughts clear into the staff's mind and help him deliver better.

COLLABORATION IS THE KEY:

Collaboration with the offshore staff is essential. The more you collaborate with him the more he will be able to expand his expertise towards his job. An efficient collaboration is necessary to make him understand his functions better and get his potentials utilized to an optimum. This will be ultimately be beneficial to your workflows and processes carried out efficiently.



REGULAR CALLS & MEETINGS ARE INEVITABLE

The more you maintain regularity in communication with your offshore staff, the better it motivates them. Staying in continuous touch with the offshore staff also keeps you informed about the status/progress of the assigned task.

As your offshore staff is aware that his work is constantly being monitored and appreciated by his superior(s) this will give him a sense of belongingness to the task at hand and will make them an integral part of the firm. It also helps things get reconciled and resolved as and when they occur. It keeps away the shocks of encountering long avoided errors in work done due to infrequent reviews. Hence, one less reason to worry in long term as well as a motivated team working under you.

Consistent communication, reviews and meetings helps you monitor if your offshore staff is actually following the policies and procedures of the firm, and take corrective measures if things are going downhill.

Regular calls and meetings are a great way to ensure if staff knowledge and practice are up to date and well-coordinated with if local staff is involved.

"It is important to learn that having consistent meetings where people can connect in both formal and informal ways is critical for fostering team cohesion. It's also important to be on the lookout for new collaboration tools."



OUTSOURCING DOESN'T WORK FOR ME
ENTIGRITY'S **OFFSHORE STAFFING** IS THE
BEST SOLUTION

RON ST CLAIR, PRESIDENT & CPA,
FIRPTA SOLUTIONS

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CHAT RESOLVES PROBLEMS IN REAL TIME

Online collaboration enables offshore teams to work together. Often chat is far more efficient than long, drawn-out email chains as it enables to communicate effectively, quickly and concisely. It allows to clearly convey your point within a few sentences becoming more interactive than all other modes of formal message exchange. Sometimes you may just need to ask a quick question, or give instructions, then chat is the best option to choose. It can be an effective tool to exchange work related messages in real time and get things done at relatively shorter waiting.

Every staff at Entigrity has a dedicated phone stationed with himself having US number. A client can conveniently dial and speak with his staff just the way one is used to call any other local staff, however live chats software such as skype or google hangouts are much more the most common communication modes that can facilitate chats besides audio / video calls at the same time and are supported over most platforms.

Chatting with someone in real time is much more interactive and there is ultimately less waiting around. In essence, it feels like you're actually having a real, human conversation with somebody.

Therefore, chatting with your offshore staff at Entigrity is as good as chatting to a local staff next door.

"Chat / text messages are a seamless way of communication and resolve queries in real time and you get immediate feedback on the subject as well. Chat keeps everything on the record and also hints what's important"



I **CONTROL** THE **WHOLE THING**, I GET **TIMESHEETS**, I GET **TASK TRACKING SHEETS**, ETC. SO I **KNOW** WHERE WE STAND

DUANE BISHOFF, CPA & PRESIDENT

BISHOFF + ASSOCIATES CPA

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OFFSHORE STAFFING IS LONG TERM SOLUTION AND NOT A ONE TIME ADVENTURE

Many accounting firms usually outsource their work to shed extra burden off their shoulders during tax seasons. At first it seems to be a cheaper option but at the same time making it nothing short of a one-time cost saving adventure as it also exposes to a risk of poorer work quality delivery. It usually degrades the quality of work and may potentially spoil rapport with existing clients. Even if things turn out just fine, still there is no guarantee if output will be fine if you outsource this task next time as neither you nor the person doing your task knows each other's way of working. He is virtually a ghost for you. Since he is not your staff who is doing your work, hence, there is no learning curve and familiarity to the task in case of outsourcing.

As your offshore staff matures, he gets more and more efficient and expert at the tasks he performs; he becomes integral part of the firm. This way like any other staff, a offshore staff too gets productive with time and by these virtues he inculcates the ability to do his own work besides managing few more people under him. Hence, hiring a offshore staff is overall a long term solution and not a one time or short term adventure. Your investment in offshore staff for a long term is a win-win situation for both, the employer and the staff.

"Issues are resolved faster with own hired staff while third party vendors could exaggerate their capabilities. Why outsource when you can hire your own resource"



Offshore Staffing is the **future**. It's how you can get the **work done**

Lee Weinstien,
Owner, LWM Financial, CA

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OFFSHORE STAFF ARE NOT INTERCHANGEABLE PARTS

No staff could be treated as interchangeable parts. A offshore staff becomes an integral part of the firm with time and gets better with the work. An outgoing staff leaves behind

- a. Cost of hiring a new staff
- b. Time and efforts involved in training the new staff
- c. Work delays, and
- d. Risk of incoming staff not being able to align with work too soon.

Adjustment to new work environment may take time and even after that it does not guarantee to match the level of output which the previous staff delivered.

This again makes it very important to judge the newly appointed person very well about his longevity, efficiency, quality, consistency and smoothness so that work should not suffer. Hence, it is always better to retain an efficient staff rather than thinking you could get a new and better person quite easily. It could be a costly mistake.



Long term employees have considerable knowledge of the company's culture and its services. Consequently they understand what works and what doesn't. In performing their job duties day after day, they develop a strong knowledge base, which results in higher productivity because fewer mistakes are made.

WEARING MANY HATS:

Just like the roles of local staff in small and mid size accounting firms are not limited to a specific task or department, a offshore staff too is capable of wearing multiple hats in a moment. Parallel to his primary task assignment he is very much able to perform other functions such as payroll, Sales Tax, workflow management, document management, W2 & 1099, client follow ups, client billing and other administrative tasks. The list is long.

The most essential thing for them is to understand the objective and the nature of the task so that he can relate, integrate and perform



THIS IS NOT A MAGIC WAND, INVOLVEMENT IS ESSENTIAL

It is important to note that a offshore staff is as good to work like an onsite/local staff but certainly not a machine or a software. You being the master of the tasks cannot expect everything to run on autopilot mode. He can not turn things on his own by doing superhuman jobs. It is simply not fair. He is as good as any other incoming staff to your firm who could work after taking clear guidelines from your side.

It may take time to train him on certain fronts, such as the usual software you use, other general protocols of the company and even making him familiar with the other staff in your firm with whom he is going to work. He will take some time to learn but rest assured he will quick to do that as he has already had some stint with similar task in past and has relevant experience. Few things that you might need to do is to train him/her about a few things or practices that you have in your firm and that are not very common with other accounting firms. In longer term it will only give you desired returns.

USAGE OF COMMUNICATION & PRODUCTIVITY TOOLS :

Communication over Skype is a convenient as well as effective mode of conveying your instructions to your offshore staff; as it gives you liberty to verbally as well as formally mention everything and allows sharing of files too. Likewise usage of CRM Document Management System, Workflow Management System, etc work as tools to enhance productivity, by helping you and your whole team keep track of the on going, upcoming as well as closed tasks. One can also post the latest updates phase by phase as the project progresses. So a great method to contribute to productivity.



THINGS WORK AS PER PLANS WHEN WE **WORK TOGETHER** WITH THE OFFSHORE STAFF. HE **LEARNS THINGS GRADUALLY** AND YIELDS DESIRED OUTPUT.

DAMON GAMBLE,
PRESIDENT, GAMBLE & ASSOCIATES

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TREAT YOUR NEW OFFSHORE STAFF AS YOUR NEW LOCAL STAFF

Whenever you recruit a new local staff you obviously give him some time to get used to and align with the guidelines, processes and protocols of the firm. It is necessary to allow him some breathing time so that he could figure out a lot of his responsibilities on his own as he is yet to adjust into the new environment he has been just introduced to. Even though the newly recruited staff is experienced, giving him some comfort to settle down will give him much needed motivation to start working in a favorable environment and make him more productive as a result.

Now it really doesn't need an explanation how great it is to have productive staff working for you, does it?



Learning by watching over the shoulder" method works only in a local environment. Educates your offshore staff about your company and the way that you do things. Do as much as you can to get them adjusted to your company and to learn how to perform in their role.

AMERICAN ACCENT IS NOT POSSIBLE :

English is the second most spoken language in India. This is one of the reason why numerous American corporations have found it easy to setup their offshore offices here as language barely acts as a barrier. However, the way English is spoken in India is different from the American English and so are several terminologies and the ways of conducting other things.

At Entigrity we have our own in house training facility to help our team understand American culture and get acquainted with American accent & terminologies so that whenever they communicate with a client they do not have any problem grasping the conversation. Many a times there are staff working for us who are already familiar because of their past experience in the field. Still, it is advisable to talk slow initially and keep asking questions what the staff understood. It is also advisable to tell the staff not to get nervous as he is not being judged by the accent he speaks.



ABOUT ENTIGRITY

Entigrity is a Offshore Staffing company headquartered in New York. Entigrity provides offshore staffing solutions in the areas of Accounting, Finance, Back Office, Admin, Tax etc. Through the unique offshore staff hiring models, Entigrity has helped accounting firms save over 70% cost involved in hiring staff.

Today Entigrity is serving 300+ small and mid-size accounting firms across North America. Entigrity conforms to high standards of data management and security guidelines as established by ISO 9001 and 27001 respectively.

Flexible Hiring Options:

Temporary | Permanent | Temp to Permanent | Project Based | Full-Time | Part-Time |

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