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**8 Actionable  
Recommendation on  
Integrating Onshore &  
Offshore staff and  
build One Team**



To help your local team concentrate more on strategic projects, you've hired fantastically talented and well-educated English-speaking staff as your offshore team. It's time to get the offshore and local teams together on the same page to invest in the firm's vision and work for one objective that's the firm's success.

Note that failing to properly onboard and incorporate the offshore team into the firm and integrate the current local team would result in communication breakdowns and massive inefficiencies. Local employees should be on board for this plan to succeed, as they will begin to question what offshoring means for their own jobs. In this e-book, we'll talk about how to Integrate your onshore and offshore staff and build one team. Make no mistake-these actionable recommendations are even more important when dealing with the offshore resource.

## **8 ACTIONABLE RECOMMENDATION ON INTEGRATING ONSHORE & OFFSHORE STAFF AND BUILD ONE TEAM**

### **1. Convey the Vision - Eliminate myth & Concerns - Bring Team on the Same Page**

There should be clear communication from the top management to support offshore Staff. It's critical to start by ensuring that all leaders are on the same page and fully committed. When working with distributed team members (local & Offshore), It becomes more important to clearly communicate your ideas, your vision, and your culture. To be successful you want people to really believe and become invested in your vision. Explain that you are turning to global outsourcing as a growth strategy, not a cost-cutting strategy, to reassure your local team that their jobs are safe. This isn't about saving money.

In-house team members who are currently stuck in front of a screen doing process-driven work will be able to devote more time to tasks that are strategic and client-facing.

If your local team doesn't know why you're turning to build offshore teams, they may be skeptical and anxious. There should be clear communication from the top management towards building an offshore team. 3 points must be included in your plan to communicate about offshoring to your team.

- a. How the world is moving in this direction.*
- b. Larger Vision of firm and How Offshoring is to be Integrated into that larger vision.*
- c. Dispel the myth of Job Insecurity for the Onshore Team. Convey the value of offshore hiring, that it is more for the team's help, reduce their workload, have more time to do things which are important and client-facing and lastly to have better work-life balance.*

## **2. Culture is Core**

Given the backgrounds and experience of the staff, cultural differences are understandable. Socially linking the teams provides stability and ease of understanding. Even if this isn't the case, leaders must promote regular interaction among team members to reinforce relations, clear cultural misunderstandings, and form close-knit, cross-functional teams. Whether you work with local, collocated resources or with an offshore team, it is always imperative to create a culture of belonging. Creating a unified culture of belonging across borders, time zones and statuses is important.

**5 points** must be included in your plan to unify offshore and onshore team culture.

- a. The offshore Team shall be treated as an integral part of the firm. To communicate the vision of the firm, goals, future growth, expectation from their role, etc.*
- b. Whatever your cultural rituals are – keep doing them! And keep them the same for both the teams.*
- c. Regular and frequent meetings are important to bring the whole team on the same platform.*
  - Giving equal opportunity to everyone to be heard.*
  - Giving equal opportunity to everyone to perform and grow.*
  - Giving equal opportunity to everyone for their feedback and ideas.*
- d. Building an environment wherein everyone feels secure & and at the same time committed to performing. Neither onshore nor offshore team members should be under a hanging sword of job insecurity.*
- e. Build and communicate Do's and Don't of your firm's culture.*

*“Our client is the largest Outsourced Accounting firm and CFO Service provider in Orlando. They have built a team of 4 offshore staff with us. For the last 3 years every Christmas they send Gifts/Goodies that they buy for their onshore team, for their offshore team also. The value of the gift is not too much, In Fact, the cost of sending those gifts through International shipping is much higher than the value of the gift inside. However, this gesture has a far-reaching positive impact on the teams.”*

### **3. Manage Team Health**

If you're collaborating with offshore Staff or contemplating it, you and your onshore team are almost certainly planning or imagining what the everyday speed of work would be like. It's a widespread worry, and if not handled correctly, it can easily lead to anxiety and a communication gap. It would be best if you took care of your team's professional health that these concerns should be properly handled well before they arise.

- a. Proactively communicate.*
- b. Encourage them to ask questions and share their concerns.*
- c. Communicate any change before it happens.*

### **4. Involve and Empower Onshore Team with Offshore**

Command-and-control methods of operation are no longer successful. To get the best out of the team these days, it's all about fostering an agile culture and versatile management. Management models that are based on command and control can be damaging to companies all the way down the line, from onshore to offshore staff. you need to involve your onshore team with the decision of offshoring and communicate the benefits that they will get from offshore staff.

*“Offshore hiring is replacing onshore staff is a myth. In our client firms, we have seen an 11% increase in their Onshore team hiring once they have integrated offshoring in their firms. And we have seen an 18% average reduction in the workload of the onshore team also. Offshoring hiring has fast-tracked the career of onshore staff, the offshore team picks up the lower-level work, which allows the local team to do the higher-level work. And because they’re not doing the lower-level work, they’re progressing a lot quicker.”*



**Mukund Bhalala**  
 Director Client Relations,  
 Entigrity

## 5. Create Buddy System

This is essential: you should “buddy” your offshore person with your onshore person (This includes an offshore buddy at least 50% time zone overlap with an onshore buddy). There are three key reasons why you should use the “Buddy System” in small teams involving offshore:

- a.** *When the nature of your work with your offshore team member can span a variety of different tasks, I absolutely recommend buddying up to your offshore team member with ONE person onshore. This is basically the same you would do if the person were sitting with you in the same physical office. This is essential to the success of the arrangement because, with irregular work, there are lots of questions. And if the offshore person doesn’t have someone directly to answer those questions, you can quickly waste the effort/money you’re spending.*
- b.** *The onshore team member will be held naturally responsible & accountable for not only the quality of the offshore person’s work but also their workflow (i.e. quantity of work they do). Not only will this require the onshore person to use the offshore person, but it will also teach them to be a force multiplier for your company - enabling you to save money and get more work done.*

- c. The buddy system promotes the progress of the relationship over time. Each buddy is motivated to understand the other since that will reduce confusion, make daily work smoother, and in general, make everyone happier. No one likes a contentious or uncomfortable working relationship (many studies support this), so each team member is intrinsically incentivized to cultivate a good working relationship. For managers, it promotes the ability to move other tasks to the offshore buddy and save costs, and when done right, it can make the onshore buddy a champion of the model*



## 6. Have Regular Meetings and Communications

As a manager, you wouldn't have a team in the next office that you didn't check in with regularly. Again, there should be no different with your offshore teammate. If you're having a regular team or group meetings, then make sure the offshore person is included; and it should be the same with all-company meetings.

For the buddy relationship between the offshore and onshore person, you'll want to meet daily initially. This daily interaction is critical for doing **3 key things**

- a. Clarifying workflow to ensure tasks are being done in the right order*
- b. Giving the offshore team member any supplemental training that may be needed as tasks are done (especially new ones)*
- c. Give both sides the chance to ask questions.*



**This third one** is where we see the most trouble between buddies happen - when it isn't happening. Let's face it, getting questions answered is the currency of closely working together. You probably ask your existing teammates a dozen questions in a day and not even realize it. This is probably where most customer concerns get resolved - one teammate driving the others to get answers to questions and resolve issues before they escalate.

But oddly enough this is one of the most common complaints when working with offshore "They just didn't understand." We can tell you from direct experience - culturally offshore won't necessarily ask you questions unless you give them the opportunity, and permission, to do so. You will get a lot better results when you do! So hold regular meetings so your teammate knows that they can get their questions answered and won't be afraid to do so. You'll get a lot of questions in the beginning, but that will wane over time. We've never seen offshore folks not want to learn, and getting questions answered is the primary way most of us learn.

Having virtual happy hours within the team is always fun. We're losing out on the personal interactions that allow productivity and foster good professional relationships because most of our employees now work from home. So hosting informal virtual meetings between teams is a great way to break communication barriers and build internal bonding.

We use the various resources to make connections and keep the team aligned – Zoom, loom, Slack, Skype, Teams, and email.

Using Videos to Give Quick Updates

*A regular Loom video or Zoom Video from Partners or Senior Leadership can be a great way to communicate for*

- a. Providing feedback much faster than typing it out.*
- b. Sending updates to team members.*
- c. Sending messages of support to clients.*
- d. Updating a client if you can't get them on the phone.*
- e. Recording marketing videos, and much more!*



## 7. What if Staffs still Resist?

Once you've communicated your vision and plans offshore, expect that some members of your team might be resistant to change. They're used to the routine, they may be proud of their expertise and fear being undermined if things change.

"They'll need your help to understand what's happening."

While there's always some level of disruption as you change to a new process, the way you approach change management will affect your outcomes. Few Tips on Change Management

- a. Be clear where your team members can go for answers and help.*
- b. Answer questions as they crop up, so people feel secure.*
- c. Remember that people react differently to change. Watch, listen, and support as necessary.*
- d. Give your team time to adjust to the change.*

## 8. Work closely with Account Manager:

An account manager will be your go-to person always. He would always be there to help you, guide you, and troubleshoot for you in any situation with the best interest at heart. We would advise any Non-routine or Non-regular or policy matter shall only be dealt with through the Account Manager and shall never be communicated directly to offshore staff. Account Managers are on the ground and are aware of the nitty gritty of the situation and understand the local environment and staff psyche better, so they are like your watchdog offshore. Following is the illustrative list of non-routine matters that shall be done through account managers are:

- Troubleshooting	- Shift Timings Changes
- Staff Feedback	- Price Revision
- Staff Management	- Billing Queries
- Staff Training	- Overtime
- Leaves	- Expansion/Reduction
- Bonus	- Any other Issues

For Example, We have seen that once Offshore staff gets onboarded and builds a certain level of rapport with the firm and their team, they will come to you with a request that I can change my shift timings. As they have to sit back till late timings can they adjust shift timings in such a way that they can leave early. And a firm in good faith approves.

But so you know, whenever these staffs are hired, explicitly we have taken undertakings about their shift timings. And this overlap is necessary for better integration of offshore and onshore teams and better productivity and work quality. And when the Account Manager asks Offshore Staff why they are not providing overlap and staying late, Offshore Staff mentions that it has been approved by the client.



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