ACCOUNTANCY PLAYBOOKS

OUTSOURCING WITHOUT THE STRESS

ALEXIS KINGSBURY & PADDY MANN &

QX
ACCOUNTING
SERVICES

Market Leaders in Outsourcing

Playbooks for accountancies

This playbook is for accountancy leaders who want to grow a successful accountancy, <u>and</u> enjoy the journey.

We want to help you:

- Create systems in your practice that ensure things are done the way you want them to be done — so your practice's unique personality and value shines through.

- Remove your team's reliance on you — so you can work sensible hours and focus on the tasks that matter most.

- Scale an accountancy that you, your team, and your clients love.

To support this, we're creating playbooks that cover the biggest challenges that every accountancy faces as they scale.

Like how to recruit, onboard, and support great team members; how to succeed with sales and marketing without relying on partners; and how to deliver an consistently amazing service to your client.

If you have any questions or feedback about this or any of our playbooks, please contact <u>alexis.kingsbury@airmanual.co</u>

If you'd like to learn more about best practices relating to documenting processes and solving your biggest problems, check out <u>www.airmanual.co/resources</u>

This playbook on outsourcing has been created in collaboration with <u>QX Accounting Services</u>, a top 100 outsourcing provider that delivers solutions in audit, accounting, tax, payroll, and automation to 350+ accounting firms, including PE-backed clients, through a team of 1,100 specialists and a global workforce of 3,000+ across four countries, backed by Long Ridge Equity Partners with work underpinned by ISO, GDPR, and Great Place to Work accreditations.

Contents

"[Outsourcing] completely changed how we operate, helping us move from a reactive to a proactive approach. The transition took effort, but the results have been worth it — we've significantly improved efficiency and scalability, setting us up for long-term growth.

Outsourcing isn't just about saving money. It's about building a stronger, more adaptable business that serves clients better and supports our team's development."

Peter Ellington, CEO of <u>Triple Bottom Line Accounting</u>, using <u>QX Accounting Services</u>

Executive summary

When outsourcing client services, your practice may encounter issues like:

- Miscommunication and inconsistent work quality, leading to rework and client dissatisfaction

- Over-reliance on senior team members to manage external workflows, putting strain on resources

- Difficulty aligning the outsourced team with your practice's culture and standards, impacting service delivery

- Missed opportunities to improve efficiency and keep costs under control

The solution is to implement a structured, well-documented outsourcing process that includes:

- A clear onboarding and integration process to familiarize the outsourced team with your systems, standards, and expectations

- High-level steps to support clear communication and avoid overlap or missed steps, with detailed guidance where needed to deliver what makes you special

- Quality checks and a feedback loop to identify and address issues early, ensuring consistent, high-quality results

By implementing these, you can maintain high service standards without having to 'give up on outsourcing' when problems arise. Instead you can update the processes to continuously improve and prevent these in future.

The following pages include a lot of detail and step-by-step process templates you and your team can use as a starting point… but if you'd like to take the fast track or just want a little help, please reach out to us.

All the best,

Alexis & Paddy
Hosts of the De-stress Your Business podcast and Founders of AirManual

Why effective outsourcing matters

When done well, outsourcing can transform your practice by helping you scale efficiently, focus on high-value tasks, and deliver exceptional service — including specialist services like audit, that you might not normally be able to offer!

However, when it's poorly managed, outsourcing amplifies inconsistencies, wasted time, and leads to frustrated clients. Having a clear and well-structured outsourcing process is essential to avoid these issues and achieve the best results.

When outsourcing is managed effectively, you can:

- Deliver consistent, high-quality work by ensuring that your outsourced team meets your standards on every project. Without clear expectations, outsourced work can vary in quality, potentially leading to rework or client dissatisfaction.

- Improve efficiency across your team by offloading routine tasks and freeing up your in-house team to focus on complex, client-facing work. This shift reduces tax season bottlenecks, makes the workday more rewarding for your team and increases their capacity for high-impact projects.

- Scale your practice sustainably by adding resources as needed without the commitment of hiring permanent staff. Outsourcing allows you to adjust support based on demand, helping you manage workloads smoothly, even during peak periods.

- Lower operational costs by moving repetitive and time-consuming tasks to an external team. Effective outsourcing reduces overheads, providing flexibility and cost predictability without sacrificing quality.

- Respond to evolving client needs by accessing specialized expertise. A strong outsourcing partner brings additional skills and resources such as complex audit processes, making it easier to adapt to client demands and stay competitive.

To make outsourcing work well, invest in setting up the right processes, defining clear roles, and keeping communication consistent. A well-structured outsourcing process ensures that your external team works as a seamless extension of your practice, enhancing service rather than complicating it.

"Outsourcing has been a fantastic experience for us. We were able to get super-qualified resources who have delivered a very high standard of work. The resources are very efficient and responsive and a delight to work with. We now look at QX to not only provide us with outsourced accounting services but to be our IT partner to provide us with the skills we need to embrace all the accounting systems in the UK."

Mike Senior,

Partner, Bright Partnership LLP

Common mistakes to avoid

We reviewed outsourcing experiences from over 20 practices, and certain mistakes come up time and again.

These can hinder the effectiveness of your outsourced team and prevent you from getting the best results. Avoiding these common mistakes will help you create a strong, reliable outsourcing partnership that works seamlessly with your team and elevates your client service.

The most common mistakes are:

- Failing to get clear on your values and preferred ways of working first so that you can train your outsourced team on these.

- Lack of a structured team onboarding process so the outsourced team struggle to meet your expectations or align with your practice's values.

- Not defining roles and responsibilities clearly leading to duplicated efforts or tasks falling through the cracks.

- Holding back on telling clients about your outsourced team, rather than sharing the benefits they get from your chosen approach.

- Lacking a consistent communication routine so the outsourced team miss important details, misinterpret priorities, or fail to adapt to evolving client needs.

- Ignoring quality control and feedback loops leading to recurring mistakes, lower service quality, and missed opportunities for improvement.

- Not setting up an escalation process for issues so minor and major issues go unresolved or become a bigger problem.

- Neglecting performance reviews and continuous improvement, missing the chance to address challenges early, recognize achievements, and refine processes to support long-term growth.

Any of these mistakes can create inefficiencies, lower service quality, or add unnecessary strain on your team. When you identify one of these issues, it's important to act swiftly to prevent it from happening again.

When you spot a mistake that is being made by your outsourced team, you'll want to stop it from happening again in future.

So you might:

- Ask the outsourced team to remember not to make the mistake again

- Or decide to do it in-house next time (because you're not convinced the outsourced team will get it right)

- Or do nothing (because you're not convinced the outsourced team will get it right, but realize that you and your in-house team don't have time to take it on yourself!)

Unfortunately, none of these actions will prevent mistakes from reoccurring, and will erode the benefit your outsourcing partnership can deliver.

Your feedback to the team might help them to avoid one type of mistake, but they'll make others. It's not realistic to expect every team member to remember the 20+ things that need to be done in a specific order. It's human nature to forget.

If you decide to do it yourself, you'll be holding the business back in other ways. You'll become a bottleneck, slowing down the process, holding back career development for your team, and causing all sorts of issues when you get sick or need a holiday.

The solution is to provide documented process that anyone in your outsourced team can follow. Once the process is documented, you can make sure it includes steps and guidance to avoid mistakes.

Set up a great outsourcing partnership

So, how do you go about setting up a great outsourcing arrangement?

We want to create a series of processes that delivers results that your clients love, your team loves, and you love. They need to:

- Be streamlined and efficient.

- Make mistakes rare and stop them from happening twice.

- Provide a smooth experience thats in line with your values and unique selling point.

- Continuously improve over time.

This sounds difficult, but it doesn't need to be. You don't need a big team, you don't need to hire experts, and it doesn't need to take months before you start to get the benefits.

In fact, using the steps below you can create and begin to set up an outsourcing arrangement for your own practice in just a few hours.

Here's what to do:

1. Review our best practice template (page 25 or <u>online</u>). You can use it as starting point for your own process, or as inspiration.

2. Create your own process by copying the template or starting from scratch:

   - The steps need to reflect the way you want to implement outsourcing in your practice.

   - Include guidance to help your team avoid costly mistakes (including the ones listed in the previous section!)

- Consider how you can add some "Wow factor" — see page 16 for ideas.

- Don't worry about making it perfect — just having the high level steps documented is way better than nothing.

- Include steps in the process for both the client and the team to provide feedback — you can make improve the process in future using their input.

3. Review it with your team and chosen outsourcer confirm that nothing's been forgotten and that it's easy to use. If you spot issues, then simply make tweaks!

4. Follow the checklist to implement a great outsourcing partnership!

"YOU CAN CREATE AND START TESTING A PROCESS FOR YOUR OWN PRACTICE IN JUST A FEW HOURS"

Where to document your processes

Choosing the right tool for documenting processes is essential for ensuring they are easy to find, follow, and update.

Practice management software is great for tracking interactions with clients, and their deadlines, but isn't the right tool for documenting the detailed guidance your team need for every process in your practice.

Screen capture tools like Scribe and Loom can be useful for demonstrating specific tasks, but are painful to update and tend not work well for parts of the process that don't involve technology.

You can document your process in Google Docs or Word, and these are a great place to start if you only have a few clients. However, as you scale up, it's worth investing in a Process Management Tool that allows you to combine:

- An interactive checklist, so you can track which steps have been completed and which have not

- Documentation, images and videos to support users in completing each step

- Form fields and file uploads, so your team can capture important information while using the checklist

- Management tools, so you can see the status of checklists and when tasks are overdue

- Automations, so the data you collect in your checklist can be passed to other tools (like Xero, or your Practice Management Software)

As the founders of AirManual, we're biased and recommend this platform. We believe it does the best job at removing the friction from getting processes documented and used; and it now provides a wide range of templates specially designed for accountancies. Alternative platforms include Process.St, Waybook and Whale.

AirManual users can take our best practice template and copy it directly into their workspace to get started.

Template highlights

Here are a few highlights from our template, which you can find on page 25 and online:
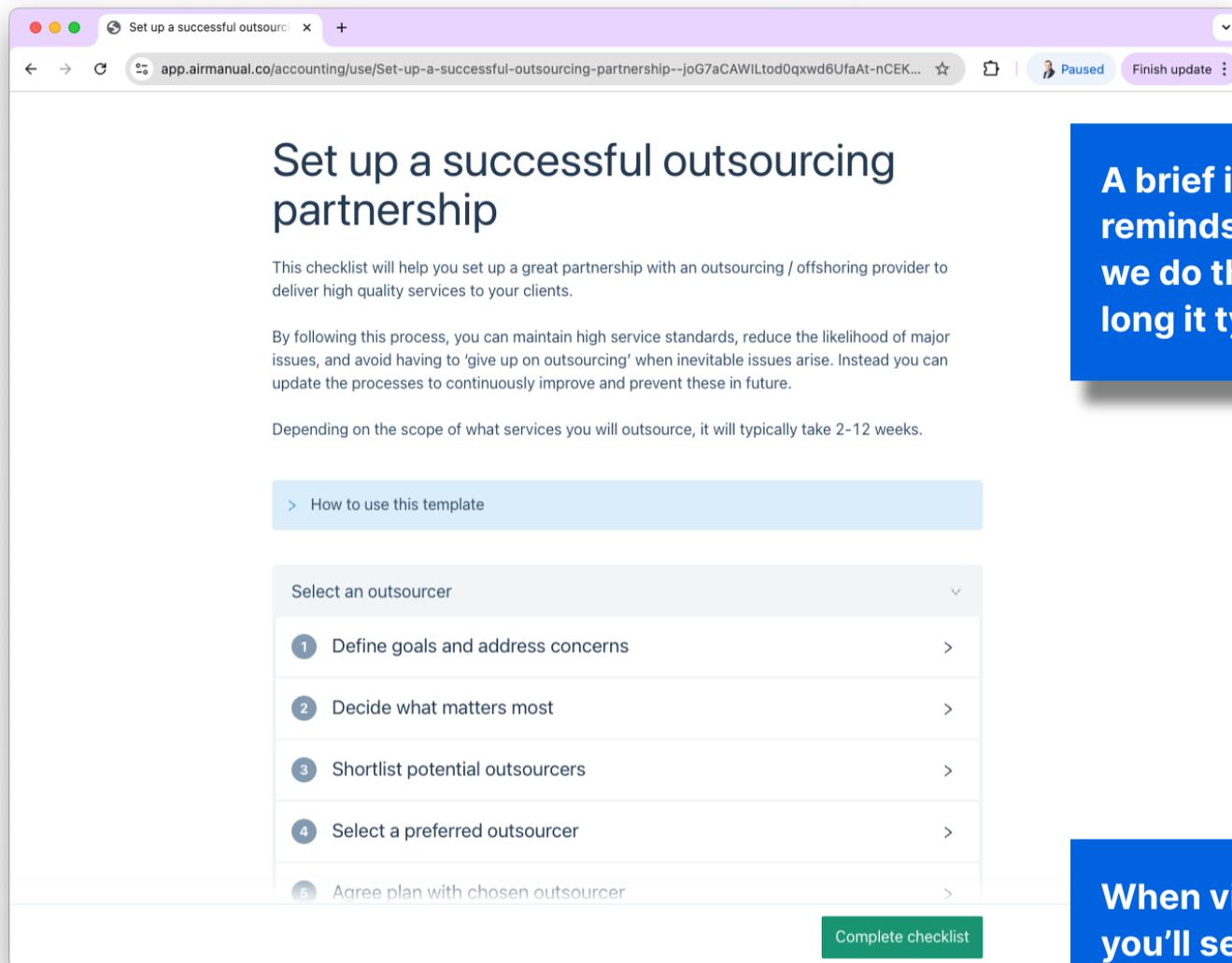
A brief introduction reminds the team why we do this, and how long it typically takes.

When viewed online, you'll see an overview of all the steps before clicking into individual ones. This makes the process feel easy-to-follow, rather than overwhelming.

Steps are checked off as you complete them, making it easy to manage or handover to a colleague.

Set up recruitment process for outsourced team

Set up onboarding process for outsourced team

4 Set up meeting rhythm

Set up a regular schedule for check-ins, including:
• Daily or weekly team huddles
• Monthly performance reviews
• Quarterly strategic updates

This reinforces rapport, ensures ongoing alignment, and enables quick resolutions to potential issues.

⌄ What should be covered in a performance review with the outsourcing partner?

Plan in advance how you will run "performance reviews" with your outsourcing partner.

This could include:
• Review progress against goals
• Celebrate achievements
• Get feedback from outsourcer to improve in-house ways of working
• Discuss and prioritize challenges
• Agree changes to processes and ways of working
• Share updates on future plans to align the partnership with your long-term business vision

You may want to align the process to your in-house performance management process. If you don't already have a process for this, you may want to check out our playbook for resolving unsatisfactory employee performance.

Complete checklist

Each step has just enough detail so that it's easy for you to follow, with additional tips and guidance available where needed.

Set up meeting rhythm

Set up issue resolution and escalation

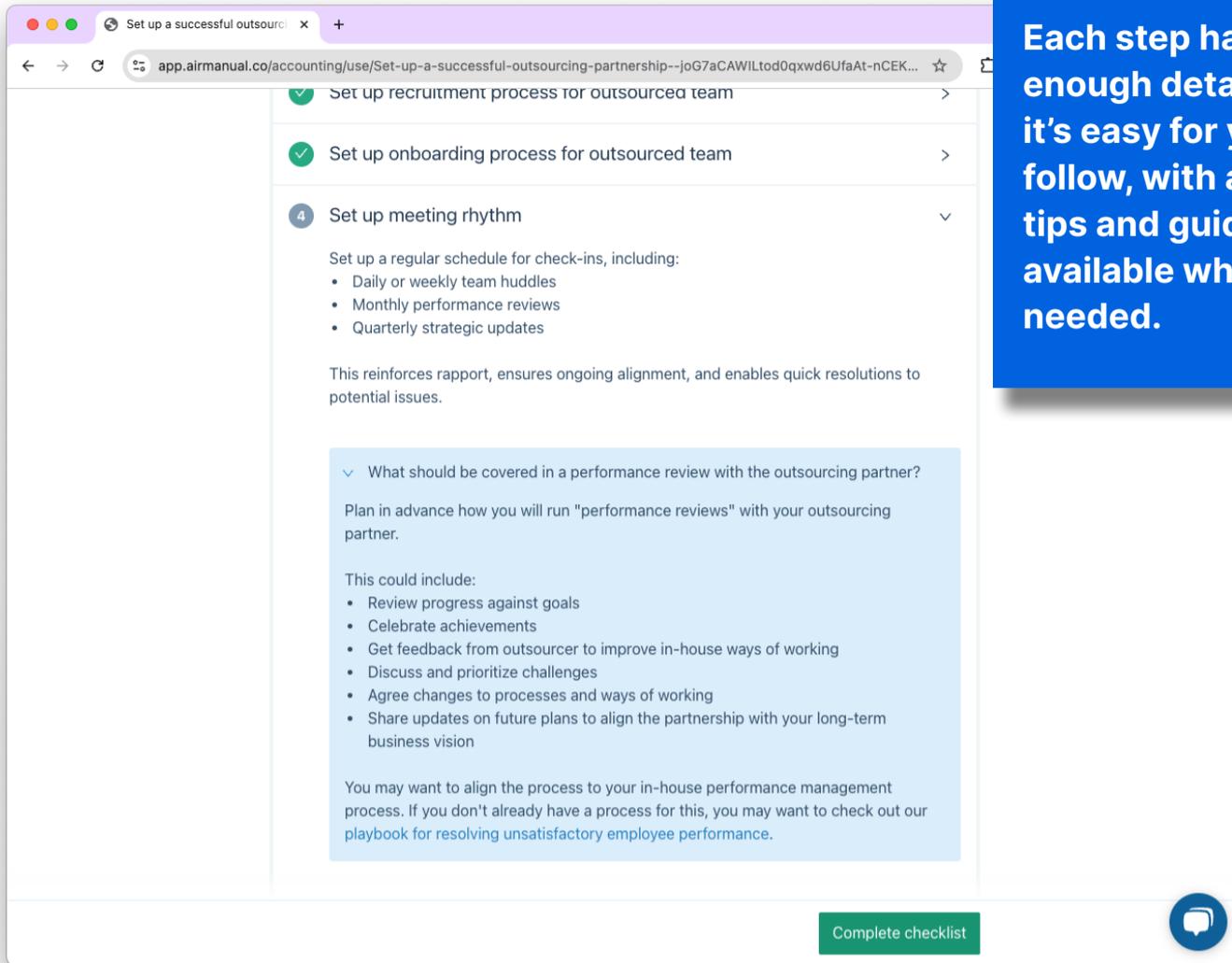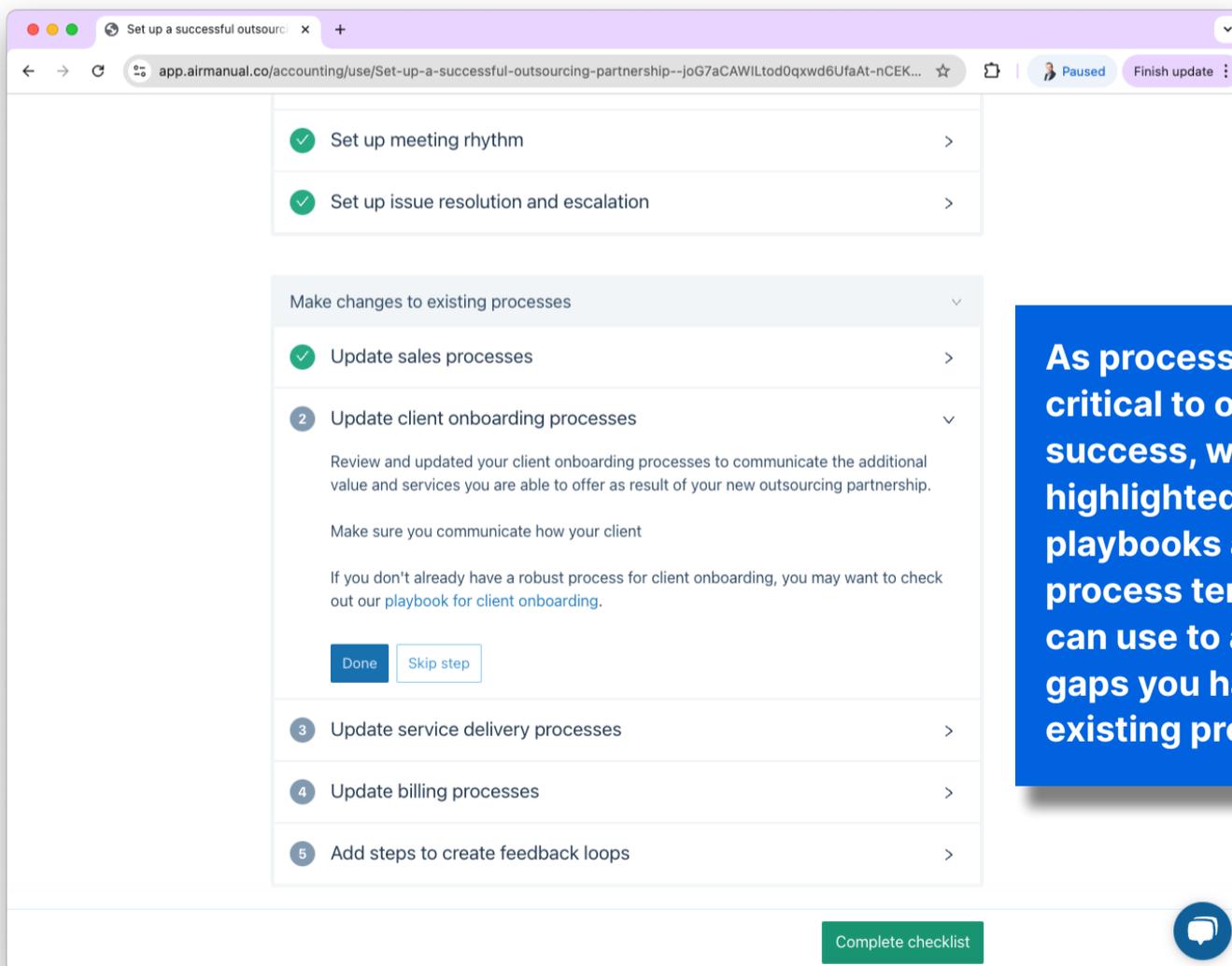Make changes to existing processes

Update sales processes

2 Update client onboarding processes

Review and updated your client onboarding processes to communicate the additional value and services you are able to offer as result of your new outsourcing partnership.

Make sure you communicate how your client

If you don't already have a robust process for client onboarding, you may want to check out our playbook for client onboarding.

Done   Skip step

3 Update service delivery processes

4 Update billing processes

5 Add steps to create feedback loops

Complete checklist

As processes are critical to outsourcing success, we've highlighted relevant playbooks and process templates you can use to address any gaps you have in your existing processes.

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Then identify what concerns various stakeholders might have:

- What are your concerns?
- What concerns might clients have?
- What about the wider team?
- What about anyone else that might be impacted?

⌄ Concerns people often raise about outsourcing

QX Accounting Services have helpfully provided a list of common concerns and responses to these as part of their guide to Getting started with outsourcing:

Skepticism	Reality
Outsourcing is going to take away jobs.	Outsourcing will only take away your tasks—those that are tedious, repetitive, or non-core. This shift allows you and your team to focus more on strategic initiatives, client relationships, and areas that drive firm growth and personal career advancement.
I will lose control over processes when I outsource.	You maintain control with structured guidelines and ongoing communication, ensuring that outsourcing acts as an extension of your team, not a replacement.
Outsourcing can put my clients' data at risk.	Reputable outsourcing firms adhere to strict international data security standards, often adopting more robust measures than many local firms.
Outsourced teams can't match in-house effectiveness.	Think again! Outsourced teams bring specific, often advanced, expertise that can elevate your firm's capabilities and complement your in-house efforts.
Will outsourcing be as effective as it is claimed to be?	Absolutely! When correctly implemented, outsourcing leads to improved efficiency and quality, leveraging advanced technologies and specialized skills that outsourced partners provide.
I might get low-quality services if I outsource.	Choosing wisely matters. Partner with reputable providers, and you'll see that the quality of services can meet, if not exceed, in-house standards.
Outsourcing is only for large-sized firms.	Not true! Outsourcing provides scalable solutions ideal for any size firm, enhancing flexibility and access to global talent regardless of your company's scale.
The time-zone differences can delay turnaround.	On the contrary, different time zones can enable faster turnaround times by facilitating continuous work cycles—your night is their day!
It might take too long to set up my outsourced team.	Not necessarily. With the right partner, you can build your dream team often in just a few weeks, tailored to your specific needs.

Complete checklist

Some steps include useful guidance from outsourcers, to help with common challenges they experience when supporting their clients.

✓ Decide what matters most ›

✓ Shortlist potential outsourcers ›

✓ Select a preferred outsourcer ⌄

For a shortlist of outsourcers who appear to meet your needs:
- ☑ Compare pricing information and service levels offered
- ☑ Review contract terms, particularly for extra fees or long term commitments
- ☑ Review case studies
- ☑ Speak to their past clients and check online for negative experiences
- ☐ Consider a pilot or test to check what it's like to work with them

Notes

Oursourcer ABC is 8% cheaper but the reviews are not as strong.
We prefer outsourcer XYZ because their services most closely fit with our needs, and although the price is higher, the feedback we've had from their other clients has been incredibly positive.

Mark incomplete

5 Agree plan with chosen outsourcer ›

6 Share and amend plan with in-house team ›

Complete checklist

Checkboxes and text input fields within steps make it difficult to forget important steps.

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Add the "Wow" factor

Outsourcing is an opportunity to enhance your client service in unexpected ways.

By freeing up your in-house team from routine tasks, outsourcing gives you more capacity to go above and beyond for clients, creating moments that truly "Wow" them. This leads to stronger client relationships and sets your firm apart.

If you want to make a lasting impression, here are some ways to add the "Wow" factor with outsourcing:

- Start with solid foundations by creating a structured process that integrates smoothly with your team's workflow and ensures quality. A reliable, efficient outsourcing setup means fewer delays or errors, leaving clients with a seamless experience.

- Introduce a single point of contact to manage outsourced work, so your clients always know who to reach out to. This helps build rapport and avoid any confusion about the status of tasks.

- Use the extra time from outsourcing to engage clients proactively. Regular check-ins or quick updates on project progress show clients that you're attentive and focused on their needs.

- Reflect your brand's personality in every client interaction (outsourced or not). If you pride yourself on being a friendly, supportive practice, use every touchpoint to convey this—whether through personalized emails, proactive updates, or friendly calls to discuss goals and needs.

- Set timelines that clients will appreciate, and aim to exceed them. For example, if a project is due in a week, deliver it a day early to impress clients with your efficiency.

- Be transparent about how you use outsourcing to benefit your clients.

- Invest in high-quality templates, making your communications, forms, and resources easy to navigate and visually appealing to avoid having a two-tier perception of quality depending on what you do in-house vs. outsourced.

- Use an outsourcing provider that offers certifications and services that you'd otherwise be unable to offer, such as Cyber Essentials, ISO 27001 for Data Security, ISO 9001 for Quality management, and ISO 27701 for Privacy Management.

You don't need to do everything on this list. Even a few of these touches can help you use outsourcing to elevate client experiences, setting your practice apart and keeping clients loyal over the long term.

Keep the focus on what matters — the desired result is a client who feels truly cared for and values your firm's unique approach.

Increase service quality

Outsourcing isn't just about cutting costs—it's one of the best ways to support sustainable growth and ensure high service standards as you scale.

The best way to use outsourcing to both grow and enhance quality is by focusing on:

- Streamlining your team's workload, so they can concentrate on high-value, client-facing tasks

- Building flexibility and scalability into your resourcing, so you can handle more clients without overstretching your team

- Maintaining consistent quality standards, with clear benchmarks for both your in-house and outsourced teams

When team members are regularly pulled into routine tasks, or processes can't flex during peak seasons, it's easy to end up with burnout, slower turnaround times, or inconsistent service.

But, with the right approach, outsourcing can become the backbone of scalable, high-quality service.

Of course, creating this scalability with outsourcing doesn't have to mean making drastic changes right away!

Start with a few core processes, monitor the results, and gradually build out your outsourcing approach to support growth while keeping quality at the heart of your service.

Roll it out to the team

Simply documenting your processes won't get results.

Your outsourced team need to deliver with all the clarity, passion and attention to detail that you'd expect from you in-house team.

To achieve this:

- Make sure a process has been reviewed by the team and tested end-to-end before you hand it over — so anything that causes confusion or other issues can be tweaked.

- Create a process to train team members. This could include steps to review the appropriate checklists, watch recordings, and do role plays.

- Hold your in-house and outsourced teams accountable for using and improving the processes. It needs to be clear that not following the process is not an option — instead, identifying issues and suggesting improvements to the process is part of everyone's job.

- Make sure outsourced and in-house teams have a way to share challenges, and that these are reviewed in a timely manner. We recommend tracking issues in a document, and prioritizing and tackling the biggest issues in regular team meetings.

- Treat every issue as a process issue — not a people issue. When something goes wrong, it's almost always a symptom of something that could be improved in your processes or your training.

Review the impact

The long-term impact of a well-managed outsourcing process can be transformational for your practice:

- Build stronger relationships with clients by consistently delivering high-quality work on time, strengthening their trust in your firm.

- Improve client satisfaction and retention by allowing your in-house team to focus on client-facing activities and higher-value projects.

- Scale your practice more effectively by adding capacity when needed without committing to permanent hires or risking last-minute resource shortages.

- Reduce operational costs by outsourcing routine tasks, allowing your practice to reduce overheads and achieve more predictable costs.

- Empower your team by freeing them from repetitive tasks, increasing their job satisfaction and allowing them to contribute to more meaningful work.

- Increase your practice's efficiency and capacity, ensuring your in-house team can handle more clients and projects as your firm grows.

You should aim for these benefits over time, though some of them may be difficult to measure immediately.

To review the impact from the client's perspective, consider using an NPS survey at the end of each quarter or project phase. This simple survey includes two questions: the first asks clients to rate how likely they are to recommend your firm to others, and the second gathers feedback on what would improve their rating in the future.

Tracking these scores over time will give you insights into the success of your outsourcing process, helping you identify opportunities for improvement or areas where standards may have slipped.

Build on this further by setting up regular quality reviews with your outsourcing partner. This helps ensure alignment with your standards, and gives you insights on where to fine-tune processes to improve service quality over time.

Get help from experts

Once you've started documenting and optimizing processes across your business, a lot of the suggestions in this playbook will feel second nature.

But when you're doing it the first time, it can feel daunting and you might be unclear on how much time is worth investing into each step.

An expert can help you to:

- Clearly define the end goal

- Plan how to achieve it, and what to prioritize first

- Leverage best practice templates and tailor them to your practice

- Move quickly and build momentum

- Spot possible issues early on

- Answer any questions

Getting help from experts is part of the package at AirManual — if you arrange a demo and planning call at www.airmanual.co/call, the team will share the included workshops and support you can expect.

In addition, reach out to an outsourcing provider, such as QX Accounting Services, who helped write this playbook!

About the authors

Alexis Kingsbury

Alexis always wanted to be either a comedian, or a business owner like his childhood hero, Richard Branson. After being booed offstage when telling jokes at a school talent show, Alexis started his first business aged 12 — four years earlier than Branson!

It hasn't been an easy journey. From that first business at 12, it took Alexis a further six businesses (!) and two decades to work out how to scale up without working long hours, struggling with hires, and constant stress.

Fast-forward to today, and Alexis is an award winning entrepreneur, with two software businesses and a consulting practice, serving over 600 organizations around the world including brands such as 3M, Asahi, Fitness First, Google, Pepsi, Sony, and Swarovski.

The best bit is he's enjoying the journey. He's completely removed himself from the day-to-day operations so he can spend his time on the activities he loves doing. And when he takes his regular 4–6 week family road trips, the businesses continue to thrive.

Alexis is passionate about helping other business leaders to free up their own time, so they can spend it on what matters most. As a founder at AirManual, Alexis has helped 100s of businesses to free up 1,000s of hours of leadership time (each!), helping them to scale faster and with less stress.

Paddy Mann

Paddy Mann is the co-founder of Spidergap and AirManual, two innovative businesses designed to help teams and individuals work smarter and more efficiently.

Building on his passion for simplifying complex processes, he co-founded AirManual, a platform that helps teams document and optimize their workflows, making it easier for businesses to onboard, train, and grow without necessary friction.

QX Accounting Services

QX Accounting Services (QXAS) is a global leader in business process outsourcing, providing audit, accounting, tax, bookkeeping, payroll and automation services to accounting firms worldwide.

Part of QX Global Group, QXAS has 1,100 dedicated staff solely focused on delivering tailored solutions to over 350 accounting firms, including PE-backed clients. With a global workforce of 3,000+ across India, Mexico, the USA, and the UK, they offer high-quality FTE services, and advanced automation.

Special thanks

Our own work is built on the shoulders of giants. We'd like to give special thanks to:

- Ian and Samantha Morgan, owners of MBS Accountants

- Duncan Lloyd, owner of Cloud Accountants

- Paul Miller, owner of Cornish Accounting

- Elaine Cromwell, partner and head of outsourced finance at Thomson Cooper

- Lisa Herbert, outsourcing manager at Morris Crocker

- Wayne Harris, owner of Clarity Through Numbers

- Lee Rogers and Jade Brooker, at Assure UK

Alexis Kingsbury & Paddy Mann

Hosts of De-stress Your Business podcast: www.destressyourbusiness.com

Alexis is available to speak at events, visit www.alexiskingsbury.com for more information or other media queries.

THE BEST PRACTICE TEMPLATE

SET UP A SUCCESSFUL OUTSOURCING PARTNERSHIP

This template was created in AirManual. You can find it
online: https://airmanual.link/playbook/set-up-outsourcing-partnership

We are happy for you to copy this template into any format you wish
to use to support your own business's outsourcing process.

Set up a successful outsourcing partnership

This checklist will help you set up a great partnership with an outsourcing / offshoring provider to deliver high quality services to your clients.

By following this process, you can maintain high service standards, reduce the likelihood of major issues, and avoid having to 'give up on outsourcing' when inevitable issues arise. Instead you can update the processes to continuously improve and prevent these in future.

Depending on the scope of what services you will outsource, it will typically take 2-12 weeks.

Select an outsourcer

1 Define goals and address concerns

Start by identifying your goals:
- What do you and your team want from an outsourcing arrangement?
- How will it benefit your clients?
- How will it benefit your team?
- How will it support practice growth?

Goals for outsourcing

Then identify what concerns various stakeholders might have:
- What are your concerns?
- What concerns might clients have?
- What about the wider team?
- What about anyone else that might be impacted?

Concerns people often raise about outsourcing

QX Accounting Services have helpfully provided a list of common concerns and responses to these as part of their guide to Getting started with outsourcing:

Skepticism	Reality
Outsourcing is going to take away jobs.	Outsourcing will only take away your tasks—those that are tedious, repetitive, or non-core. This shift allows you and your team to focus more on strategic initiatives, client relationships, and areas that drive firm growth and personal career advancement.
I will lose control over processes when I outsource.	You maintain control with structured guidelines and ongoing communication, ensuring that outsourcing acts as an extension of your team, not a replacement.
Outsourcing can put my clients' data at risk.	Reputable outsourcing firms adhere to strict international data security standards, often adopting more robust measures than many local firms.
Outsourced teams can't match in-house effectiveness.	Think again! Outsourced teams bring specific, often advanced, expertise that can elevate your firm's capabilities and complement your in-house efforts.
Will outsourcing be as effective as it is claimed to be?	Absolutely! When correctly implemented, outsourcing leads to improved efficiency and quality, leveraging advanced technologies and specialized skills that outsourced partners provide.
I might get low-quality services if I outsource.	Choosing wisely matters. Partner with reputable providers, and you'll see that the quality of services can meet, if not exceed, in-house standards.
Outsourcing is only for large-sized firms.	Not true! Outsourcing provides scalable solutions ideal for any size firm, enhancing flexibility and access to global talent regardless of your company's scale.
The time-zone differences can delay turnaround.	On the contrary, different time zones can enable faster turnaround times by facilitating continuous work cycles—your night is their day!
It might take too long to set up my outsourced team.	Not necessarily. With the right partner, you can build your dream team often in just a few weeks, tailored to your specific needs.

Concerns we need to overcome, and how

2 Decide what matters most

Plan the scope of what you want to outsource, and what matters most:

What tasks do you want to outsource?

What matters most to you, your business, and your clients?

[   ]

3 Shortlist potential outsourcers

☐ Reach out to potential outsourcing firms

> Unsure which outsourcers to review?
>
> Perhaps try these:
> - QX Accounting Services
> - TOA Global
> - Frontline Accounting
> - R.E.P.R.E.S.E.N.T
>
> They've all spoken to Alexis at some point, seem like very nice people, and have got great reviews!

☐ Review at least three outsourcers and whittle them down to a shortlist (2-3)

> Unsure what to evaluate the outsourcing providers on?
>
> To evaluate the oursourcers:
> - Take a look their reviews, reputation, expertise and experience
> - Evaluate whether they offer the services you require
> - Check if they provide customized solutions tailored to your needs
> - Review what technology and communication tools they use
> - Check they have robust data security and data handling measures and processes (and relevant certifications such as ISO 27001)
> - Verify their compliance with relevant industry standards and regulations
> - Review their customer support response times / SLAs
> - Ensure their business culture aligns to your firm's values

Notes

4 Select a preferred outsourcer

For a shortlist of outsourcers who appear to meet your needs:

- ☐ Compare pricing information, service levels, and certifications offered
- ☐ Review contract terms, particularly for extra fees or long term commitments
- ☐ Review case studies
- ☐ Speak to their past clients and check online for negative experiences
- ☐ Consider a pilot or test to check what it's like to work with them

Notes

5 Agree plan with chosen outsourcer

Chosen outsourcer:

- ☐ Agree an initial plan to begin working together (starting with a trial period or small project)
- ☐ Evaluate their performance during the trial
- ☐ Provide feedback on what's gone well / not so well
- ☐ Evaluate their approach to client communication, collaboration, and response to feedback
- ☐ Agree wider roll-out plan

Notes

6 Share and amend plan with in-house team

Review your plan with the in-house team and overcome any concerns.

7 Sign Service Agreement and other legal requirements

Once happy, sign a service level agreement and any other legal documentation required to begin your relationship with the outsourcer.

Make sure that any critically important metrics, goals or responsibilities are explicitly set out in your agreement with the outsourcer.

Set up new processes

1 Agree key changes to ways of working

Review how you will need to change your processes and others ways of working.

This may include:
- Client onboarding
- Client support
- Business-As-Usual processes
- Billing
- ... and other processes and areas of your business that will be impacted by the outsourcing arrangement.

2 Set up recruitment process for outsourced team

Agree a recruitment process that will be followed to shortlist and select candidates to join your outsourced team.

This should include:
- How you will assess them against your practice values
- What technical expertise they will need (rather than what they will receive via training)
- What skills they need to demonstrate

If you don't already have a process for employee onboarding, you may want to check out our playbook for attracting and recruiting A-players.

3   Set up onboarding process for outsourced team

Prepare an onboarding process that can be followed by each member of your outsourced team to get up-to-speed.

This should start with your practice values, goals, and who you work with. Ensure they understand your standards for quality, communication, and deadlines to align with your goals from the outset.

If you don't already have a process for employee onboarding, you may want to check out our playbook for employee onboarding.

4   Set up meeting rhythm

Set up a regular schedule for check-ins, including:
- Daily or weekly team huddles
- Monthly performance reviews
- Quarterly strategic updates

This reinforces rapport, ensures ongoing alignment, and enables quick resolutions to potential issues.

> **What should be covered in a performance review with the outsourcing partner?**
>
> Plan in advance how you will run "performance reviews" with your outsourcing partner.
>
> This could include:
> - Review progress against goals
> - Celebrate achievements
> - Get feedback from outsourcer to improve in-house ways of working
> - Discuss and prioritize challenges
> - Agree changes to processes and ways of working
> - Share updates on future plans to align the partnership with your long-term business vision
>
> You may want to align the process to your in-house performance management process. If you don't already have a process for this, you may want to check out our playbook for resolving unsatisfactory employee performance.

5 Set up issue resolution and escalation

Agree on a clear escalation process for urgent issues, such as missed deadlines or miscommunications.

This should include steps for reporting, investigating, and resolving problems swiftly to avoid further complications.

Make changes to existing processes

1 Update sales processes

Review and updated your marketing and sales processes and materials to communicate the additional value and services you are able to offer as result of your new outsourcing partnership.

If you don't already have robust marketing and sales processes, you may want to check out our playbook for acquiring more ideal clients.

2 Update client onboarding processes

Review and updated your client onboarding processes to communicate the additional value and services you are able to offer as result of your new outsourcing partnership.

Make sure you communicate how your client

If you don't already have a robust process for client onboarding, you may want to check out our playbook for client onboarding.

3 Update service delivery processes

Review and updated your operational processes to provide a seamless service in partnership with your new outsourced team.

You may need to utilize a shared project tracker or task management tool to assign and monitor tasks clearly.

Ensure everyone — both in-house and outsourced — understands responsibilities, timelines, processes, and task priorities. This maintains alignment and prevents miscommunication.

If you don't already have a robust process for operational tasks such as gathering client files and preparing tax returns, you may want to check out our playbook for gathering client documentation for tax filing.

4 Update billing processes

Review and updated your billing processes to deliver seamless invoicing in partnership with your new outsourced team.

5 Add steps to create feedback loops

Make sure you have implemented steps in the processes above for quality checks to maintain high standards.

Set up processes to review work and gather feedback from clients and your team regularly, feeding any errors and insights for continual improvement into your meeting rhythm.

Get outsourced team ready

1 Complete any required security checks and training

Take your outsourced provider through any security checks or training they need to complete to meet your relevant regulations, certifications and policies.

2 Give system access to the outsourced team

Give access required access for the outsourced team to these systems:
- [ ] ...
- [ ] ...
- [ ] ...

3 Complete onboarding and any further training

Kick-off onboarding of members of the outsourced team.

Support them through the process, improving the guidance as you go along.

Migrate customers to new approach

1 **Trial new way of working with small group of customers**

As per your plan with the outsourcer, kick off the trial of your new ways of working with a small group of clients.

Be open in communication, acknowledging you don't expect everything to be perfect at first, so you'll be looking for feedback to help improve as you go along.

- [ ] Identify who will be part of the trial
- [ ] Plan client communication
- [ ] Plan team communication
- [ ] Re-review processes and meeting rhythm to make sure everything is in place for the trial
- [ ] Agree other tasks needed, owners and deadlines

Issues / feedback to address

_____

2 **Amend processes to address any issues**

Review all the feedback and make changes to processes and ways of working to address any issues.

After making changes, update the team and seek further feedback on whether the action taken is now having the desired impact.

3 **Plan wider roll out**

Once the trial is working successfully, plan wider roll out (perhaps splitting the customers into cohorts by industry, size, or services provided).

- [ ] Identify how to phase the roll out
- [ ] Plan client communication

- ☐ Plan team communication
- ☐ Re-review processes and meeting rhythm to make sure everything is in place for wider roll out
- ☐ Agree other tasks needed, owners and deadlines

④ **Implement wider rollout**

Implement roll out and collect feedback to help further improve ways of working.

Feedback / issues to address based on wider roll out

⑤ **Review impact and prioritize further improvements**

Review all the feedback and make changes to processes and ways of working to address any issues.

After making changes, update the team and seek further feedback on whether the action taken is now having the desired impact.

Where changes cannot be made quickly, capture longer term improvements, and agree how these will be explored.