6 Top Tips for Outsourcing Success

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As Prime is growing more and more every day, we realised we needed more resources to be able to keep up our service standards to our clients. As a business, we thought we would try a new avenue and begin outsourcing some of our work.

Outsourcing has been a huge success for Prime.

Our Accounting Partners and affiliates have expressed vivid interest in learning about our experience in this new venture as it is something they are now looking at introducing to their own businesses.

I wanted to share from my experience, the best tips when introducing outsourcing to your firm.

1. **Try and Simplify Tasks as much as Possible**

If existing staff find it complicated then it will be **twice as hard** when you outsource it (different location, language & culture)

2. **6 Months for Fruition**

In our experience, we have seen progress around the **6 month mark.** Up until then, you will be utilising 2 resources to get the task completed.

3. **Allocate a Staff Member to Oversee the Outsourcing Project**

You need to have **dedicated staff** who are responsible for the weekly management and ongoing review of the outputs and service offerings.

4. **Workflow & Organisational Chart**

Ensure that you have set this up & it also highlights the **'escalation' path,** and where applicable who is responsible for reviewing and approving specific tasks

5. **Have a Contingency Plan**

Make sure that if you were to terminate your agreement with the outsourcer, that you have a **contingency plan** in place (always keep intel/staff in your office so that business can continue)

6. **Detailed Training Notes & Dedicated Staff to do this**

Where we seek to have simplicity in our notes, I have found it's the total opposite with the Outsource team. We strive for 'one pagers' for our staff but don't be too concerned if they turn these into 40 page documents **– as long as it works for them**

7. **Weekly Meetings via Video**

Really important, meet face to face when discussing errors & make sure they **understand the impact** of when errors occur. Use an error tracker and provide them with weekly %'s in the meeting. Managers & employees doing the task should both be in these meetings.

8. **Existing Staff Comfort**

Remember to remind existing staff that we want them focussing on more value added tasks.

It's important to embrace the outsourcing team as your own – they are part of "our" team just in a different location

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