

# Inside<sup>+</sup> **OUTSOURCING**<sup>®</sup>







The newsletter for forward-thinking professionals

## Burning questions

Practice leaders might think outsourcing and offshoring is all about the bottom line, but how are team members and clients impacted? Advancetrack provides the answers...

[www.advancetrack.com](http://www.advancetrack.com)

## Practice Compliance Outsourcing

Final accounts production  Personal tax returns  Corporation tax returns  Management accounts  
HMRC-recognised iXBRL tagging services  Payroll  Cloud bookkeeping  Dedicated offshoring

# FAQ: What do I tell my team about outsourcing accounting, and what it will mean for them?

Any internal communications regarding outsourcing or offshoring require sensitivity and timing. None more so than when going through a change project.



COMMUNICATION AROUND [outsourcing accounting](#) and [offshoring accounting](#) requires careful consideration. It is, after all, a change management project – and change can be disruptive.

The most successful [outsourcing and offshoring migration projects](#) have all been guided by some of these key points:

**1. ENSURE YOU HAVE A CLEAR ACCOUNTING MIGRATION STRATEGY**  
While it may seem obvious, the first communications about outsourcing to those impacted must be before rollout. However, timing is a sensitive matter. The firm's leaders must be clear in their minds that, strategically,



“Pick ‘champions’ within the firm to both support project management and relay information up and down the chain.”

outsourcing or offshoring is going to work for them. Too many ‘voices’ too early in the decision-making process will make it difficult to build a consensus. Check out our [ultimate guide to building a successful outsourcing strategy for accountancy and tax practices](#).

## 2. COMMUNICATE ANY TEAM RESTRUCTURING CHANGES CLEARLY

Jobs will be impacted by the introduction of outsourcing or offshoring, though in our experience these changes are generally for the better – and it is rare that people lose jobs because of such a strategy. Therefore, communicating that jobs are safe is critical in initial discussions with the wider business.

## 3. SELECT ‘CHAMPIONS’ TO SUPPORT YOUR ACCOUNTANCY MIGRATION PROJECT

The next vital step in communication involves

picking ‘champions’ within the firm to both support project management and relay information up and down the chain. Again, your choices here are important – we have seen ‘naysayers’ picked as champions, and it is important to have some representation of viewpoints (alongside distinct roles or responsibilities).

Subsequently, it is important that the people feel genuinely involved. We genuinely think that the vast majority of outsourcing and offshoring projects enhance the working lives of people impacted by the change. It might not always be appreciated by those involved, but there is a communication hurdle to clear in terms of the focus not just being on cost-savings – roles will develop and that should create opportunities and a ‘better’ or more interesting working environment to be within. For example, perhaps the hours worked will be lower and more consistent.

Ultimately, the benefits of outsourcing and offshoring should be clear, but bear in mind that change can be disruptive to working patterns and can therefore be seen as unwelcome and resisted. Approach the communication aspect of change as clearly as appreciating and desiring the benefits. ■



**advancetrack**

# Audit Support Services

Firms looking to manage their audit resource this coming season, get in touch for quality staff on an Outsourced or Offshored basis

[Click here for more](#)

ICAEW CHARTERED ACCOUNTANTS | bsi | xero CERTIFIED ADVISOR

[www.advancetrack.com](http://www.advancetrack.com)



# FAQ: What do my accounting practice's end clients need to know about Advancetrack?

Where do accounting practices' end clients fit into the outsourcing and offshoring picture?

THE VAST MAJORITY OF questions relating to Advancetrack are in context of the processes and relationship we have between us and accounting practices. But every now and again, we are asked about the most important party of all: the end clients.

## DOES ADVANCETRACK HAVE CONTACT WITH MY END CLIENTS?

As a matter of course, the answer is no. But there can be exceptions, particularly where we have team members dedicated to a firm through an offshoring agreement.

## COULD ADVANCETRACK TRY AND POACH MY CLIENTS?

No. We offer a series of top-level accountancy, tax, and audit-processing services, but we're not a full-service accounting firm.

## SHOULD WE TELL OUR CLIENTS ABOUT OUR RELATIONSHIP WITH ADVANCETRACK?

This is an interesting question. We would argue that there's absolutely nothing to hide in your working relationship between us. However, clients don't necessarily need to 'see all the moving parts'.

This means that, in essence, it comes down to how you and your accounting firm communicate your operations with end clients. Some practitioners are very open about the work we do together, and how that positively impacts the results that end clients see and the high level of service they receive.

But some practices don't talk about outsourcing or offshoring to end clients. As

we always say (and often touch upon, most recently in our ['We're only human' blog](#)), we see strong communication between us and our accounting practice clients as critical in supporting them to provide a great service.

The amount of information provided to end clients about our work is up to the practices themselves to decide but note that there is an obligation under GDPR for the client to authorise access to third parties. The level of disclosure is dependent on a number of factors, which we have discussed in our [FAQ: Does outsourcing to India mean 'GDPR compliance'?](#) ■



If you're keen to learn more about our services, [book a call today](#) with the Advancetrack team today.



# Advancetrack's team on its travels... again!

Singapore and Malaysia were the destinations for Advancetrack's latest travelling team, as founder and MD Vipul Sheth recalls.

IT WAS WITH THE greatest pleasure and pride that Advancetrack was able to take 25 of its staff away on holiday; a fantastic trip to Singapore and Malaysia.

These long-serving team members had served more than five years with us, and only five had ever stepped outside of India before. They followed the 37 who came away to [Dubai last year](#) (a trip that had been delayed for a long time because of the pandemic).

The latest journey took the team from the Marina Bay Sands Tower, Singapore's

'Little India', to the Petronas Towers in Malaysia's Kuala Lumpur and beyond.

There is a simple question I've been asked a few times about the two trips: why do it? The answer is also simple: our slogan is that 'accountants can change lives in the work they do', and therefore we should change lives here too.

It's also a terrific morale booster. The people travelling are clearly excited, but so are their colleagues too – particularly if their tenure is nearing five years!



And, on that point, we will look at other ways of rewarding our team. There are 'employee of the month' and 'of the year' awards and prizes, but as Advancetrack develops so do our people. Their working lives are evolving with the changing needs of our accountancy practice partners, and so how we recognise our people will continue to change too.

You can find out more about the latest trip on my LinkedIn posts [here](#), [here](#) and also [here](#). ■



University of Warwick Science Park, Sir Williams Lyons Road, CV4 7EZ, UK

+44 (0) 24 7601 6308

[advice@advancetrack.com](mailto:advice@advancetrack.com)

[www.advancetrack.com](http://www.advancetrack.com)

[@AdvanceTrack](#)

