



For Your Success

The **Three Steps to Onboarding your Offshore Team** and Integrating them with your Local Team

This is article 4 of Beepo's 5 part **Education Series**

At this stage in your offshoring journey, you have learnt how to effectively recruit your offshore team and you're well on the way to reaping transformational rewards for your business. Now it's time to merge both your current and new teams together. One of the biggest mistakes we see business owners make is failing to adequately onboard their offshore team and integrate them into their existing local team. This can lead to massive inefficiencies, failures in communication, and other negative impacts on your own business.

To combat this, this article will:

1. Explain how to develop a training plan and key performance areas for your offshore team.
2. Provide some hints and tips on how to inject your business culture into your offshore team.
3. Give you a suggested plan on how to effectively integrate both your offshore and onshore teams to ensure you realise the transformational business growth you are aiming for.



Front facade of Beepo office

Step One: How to develop a training plan and key results areas for your offshore team members

One of the most important things to do when hiring an offshore staff member is to engage with them straight away. Ensure you have a plan ready to go from day 1 that will outline exactly how they will be trained to do the jobs you require of them. There is nothing worse for a new staff member than to turn up on the first day and have nothing to do; it makes them feel isolated and unwelcome, and creates a poor first impression.

A training plan can easily solve this problem, and can be as simple as a spreadsheet outlining the following:

- The training topic
- The date and time as to when the training will be conducted
- A link or description as to what training material is required
- How will the training be delivered and by who (if relevant)



Remember to use Beepo's Training Plan Template that you downloaded with this article

Remote Training vs Onsite

We often get asked by clients for recommendations on whether they should come to the Beepo office to deliver training to their offshore team face-to-face, or if they should do it remotely via communication portals like Skype. There are many benefits to visiting your offshore team in person to deliver training, but due to the nature of the computer-based tasks they will be performing, it is definitely a legitimate to deliver training remotely too - we have seen this be successful time and time again. If you are trying to create a training plan for remote delivery, revisit article two in this series, [How To Create Your Process Library In Three Steps To Benefit Most From Offshoring Solutions](#), and refresh your understanding of the tools we have seen work well for this purpose (e.g. SnagIT, Skype or Zoom).



Key Results Areas (KRAs)

Key results areas are the outputs or outcomes you would expect from a specific role in your business. Basically, they are the quantitative or qualitative results of the tasks and responsibilities of each role; found in the job description. To identify what the KRAs are for each of your offshore team members, look at their individual tasks and responsibilities, and then work out what your expectation would be in terms of productivity for a given period of time. For example: process 40 quotations per day, develop creative designs in line with corporate brand guidelines, etc.

It's good practise to document these KRAs down as a reference in your business' process library. The KRA document for each role does not have to be complicated; it simply needs to include the service delivery requirements of the role, i.e the tasks and then the output. These can be listed in a two column spreadsheet.

When KRAs are in place, everyone knows the expectations of the role. Sometimes with onshore staff, KRAs are not used or believed to be that important. This is generally because you or your managers are onsite and physically monitoring staff performance. When it comes to managing remote teams, KRAs can be incredibly useful in ensuring you and your offshore team understand what is required in the role at all times. Once KRAs are set up, it is good practise to monitor performance, and provide regular feedback and assistance to your staff.

Recommendation: Because most offshore work is computer-based, it is generally simple to develop staff performance reporting. Most systems these days have audit and productivity reporting included in them, which makes monitoring staff easy. On the flipside, if your offshore team is responsible for more technical work such as software development or design, it is useful to have a project management system to monitor progress, such as Trello, JIRA and so on.



Remember to use Beepo's Key Results Area Template that you downloaded with this article

Step Two: Hints and tips on how to inject your business culture into your offshore team

By this stage of your offshoring journey, all of your onshore staff should be familiar and comfortable with the idea of having an offshore team. If the process outlined in article one of this series was executed correctly, then your onshore team will understand the benefits of this decision for both them and the organisation, and will therefore be supporters of your offshoring project. However, sometimes at this point in time, some nervous uncertainty may return to your onshore team. It is vitally important to address this as soon as possible, as negative sentiment within your team can make the whole process much harder. Luckily, it's very easy to manage this.

The most effective way is to make your onshore team personally responsible for training and managing your offshore staff. This is effective because your onshore team will become invested with ownership of the whole process, and will very quickly understand the capability of the offshore team, realising how this is going to make their life much easier.

Bring your offshore team into your office with technology

With today's technology, offshoring has become extremely easy, so you need to get familiar with it and use it well to get the most out of your offshoring solution. Set up a large LED TV with Skype or Zoom (or any other video/web conferencing platform you prefer), and have the connection permanently open in your main onshore work area, directly connecting your offshore staff and office. This creates an active portal at all times between both locations, and will encourage both teams to talk to each other, discuss issues and help each other out. If you do not think your onshore team is ready for this step, then ensure all relevant staff have Skype open on their desktops and make themselves available to answer instant messages or quick video calls from your offshore team. At the end of the day you are trying to create the sense that everyone is in the same physical space.

IP phone systems

If you currently have an IP phone system in your business, it may have the capability to have remote call groups. This basically means that your offshore team can be setup with IP phone handsets (either hard or soft phones), with a phone number within your allocated number range, and a corresponding extension number. This brings both offices closer together, as your onshore staff can then speak to your offshore staff via their IP phone simply by calling the appropriate local extension, with no call cost associated with it. Furthermore, if your offshore team members are required to make outbound calls to customers, suppliers, prospects, and so on, they can also do this through your own domestic phone system.

If your IP phone system does not have the appropriate capability or you do not have this type of phone system, there is an abundance of high quality, cost effective VOIP solutions that will deliver very similar functionality. Beepo can assist you with these requirements - simply let us know as soon as possible of this requirement so we can ensure we have a solution ready for you when your offshore team starts.



Beepo's 2nd Anniversary

Recommendation: If you are interested in investigating this setup further, it is highly recommended that you discuss it with your telecommunications provider or phone technician to ensure your system has the appropriate capability.

Why not send your onshore team to the Philippines?

As discussed above, whether or not you send people over to the Philippines to personally meet, train and bond with your offshore team is really dependent on your individual business' needs.

However, aside from training, it shouldn't come as a surprise that flying some staff over offers a great opportunity for your onshore team to develop an in depth understanding of the cross-cultural issues at play, build a strong working relationship from the beginning with your offshore team, and meet both the Beepo management and your Client Experience Manager - both of whom are there to ensure you have absolutely everything you need to ensure your offshore team are achieving goals for your business.

Recommendation: If you do want to visit Beepo as a customer, or even as a potential customer, then email info@beepo.com.au and we can provide you with all the information you need to seriously consider the trip.

Why not send your offshore team members to Australia to meet your onshore team and work with them for training?

This is also possible and will have very similar outcomes to sending your onshore team to the Philippines. Prior to considering this as an option, it is important to understand the following:

Due to the higher living costs, it will be more expensive to your business to bring a person to Australia (or any other Western country) as compared to sending your staff to the Philippines.

Given the price implications, it is important for you to be confident that you have recruited the right person into the right job. If you have followed the advice in the previous three articles to this point and worked closely with Beepo, you would have hired very well. However, when you're in the people business, things don't always work as well as planned. So, wait until your staff member has settled into their remote role for four weeks before bringing them to your office. This will ensure you are both comfortable with each other and you have time to develop a tailored training plan for their visit.

Recommendation: Let Beepo know as soon as possible once you have made the decision to invite your offshore staff member to your office. It is always good to allow 30 days for visa processing and make sure that during the job interview, you confirm they have a passport or let Beepo know your plans so we can confirm this.

Step Three: How Beepo can help you with all of this

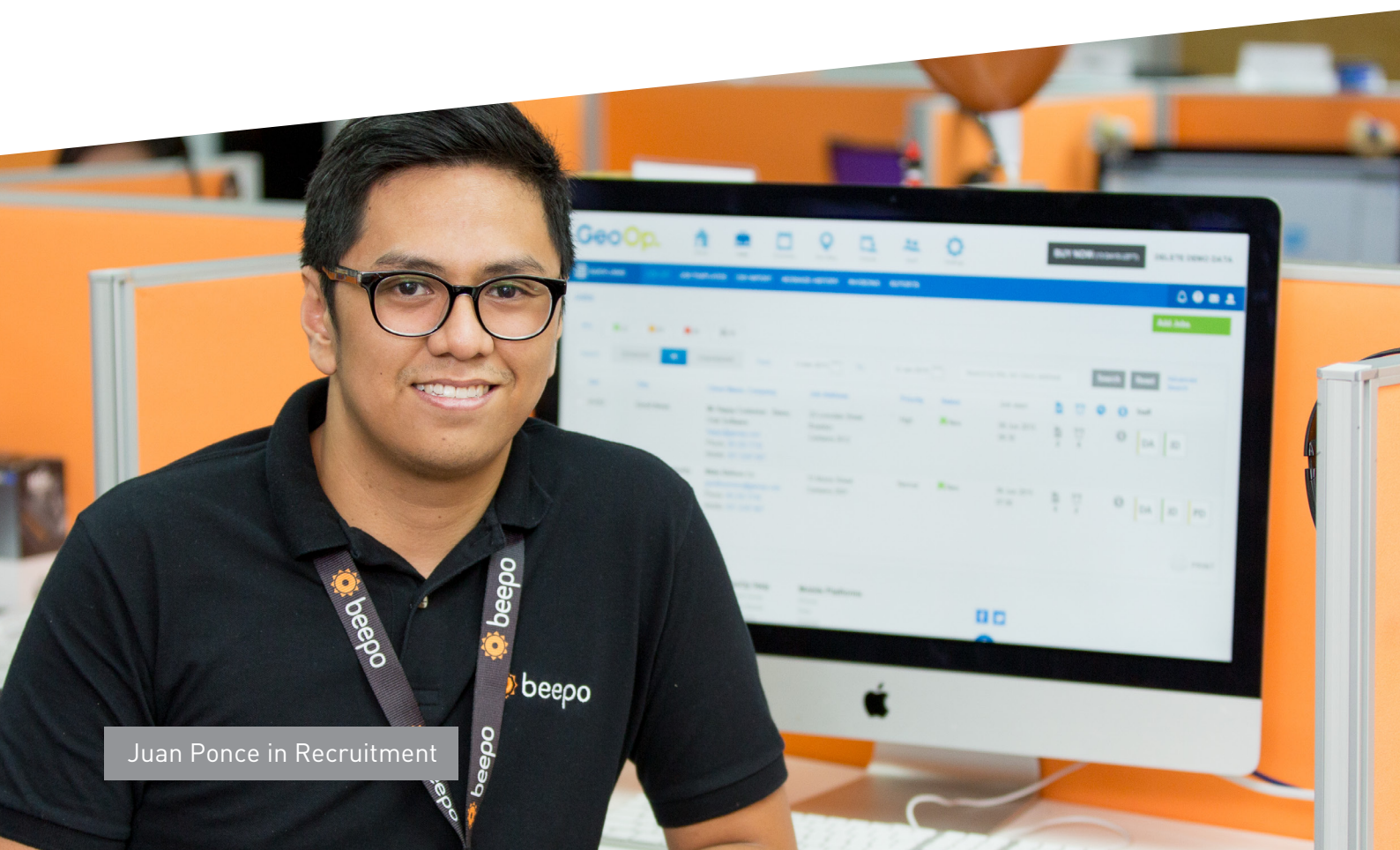
At Beepo, we understand that every business is different, and integrating remote teams across borders can have its challenges. However, you can rest assured knowing that we've done this whole process for well over 70 clients in the past, and have learned a lot from encountering almost every scenario. So let us know your plans and ideas from the beginning, and we will be happy to guide you through to ensure you achieve fantastic success in your offshoring initiative. After all, everything we do is for your success!

We offer all interested businesses the opportunity to talk to our team, obligation-free, so we can discuss the options available to you, and find the best solution to see your business grow.

Where to from here?

Now you have learnt some highly effective strategies on how to best onboard your offshore staff and integrate them into your existing team, you are well on your way to leveraging incredible growth potential within your organisation and building a sustainable competitive advantage, positioning you as a frontrunner in your industry.

Stay tuned for the next article; which, will teach you how to successfully manage remote teams, as well as the important cross-cultural management elements you need to know to achieve optimum success.



Juan Ponce in Recruitment

GET IN TOUCH TODAY FOR A FREE BUSINESS CONSULTATION

Let us help identify the best way for you to get started.



1300 553 080



info@beepo.com.au



www.beepo.com.au