



CASE STUDY

Triumph Amidst Challenges:

How a Top Accounting Firm Reshaped Their Offshore Office

INTRODUCTION

A mid-sized CPA firm established an office in India to support its U.S.-focused practice. Like so many firms in the profession, this firm was responding to the relative shortage of accounting talent in the U.S. by tapping into the well-educated and capable resources available in India. After a couple of tax filing seasons, the India office was not producing to the level of quality the firm was seeking to achieve.

The firm tried a variety of in-house training solutions ranging from virtual programs to sending a U.S.-based

partner to the India office to train the staff. Despite these significant investments in training, the firm was continuing to struggle with data errors and improper documentation. Many in the U.S. practice offices felt like they were working harder to correct problems with the incoming files than they would have had to if they simply did the work themselves. Leadership was questioning the viability of their offshore offices when they reached out to 20-20 Services to implement a higher level of professional training that would deliver the results they needed.

The viability of their offshore offices was in question when they reached out to 20-20 Services to implement a higher level of professional training that would deliver the results they needed.



THE CHALLENGE

As we noted in [Unlocking Global Potential: 3 Compelling Reasons to Outsource Offshore Accounting Staff Training](#), the key challenges that face any U.S.-based accounting firm trying to develop staff in India are:

- Significant differences in the time zones
- Lack of technology resources, specifically bandwidth
- And most important, teaching the students soft skills

This client faced all these challenges and more, particularly after having gone through a few years of tax filing seasons with less than satisfactory results. **The firm wanted to build a base of knowledge among its India professionals that made handoffs much smoother and effective** when processed files were transitioned to U.S. teams each day.

THE SOLUTION

The first step in solving this client’s problem was realizing that simply assigning teaching responsibilities to the U.S.-based personnel was not setting the firm up for success. Effective programs require dedicated instructors who combine an extensive knowledge of the subject matter with a passion for teaching in order to create classroom environments—online or in-person—that engage students.



20-20 Services works to optimize the effectiveness of training programs for the global community—including hiring professionals with local experience, and even offering virtual programs from various locations that can reduce the sometimes large separation of time zones.

20-20 Services also worked with the client so that students had access to the same classroom technology, including cameras on computers, high-speed Wi-Fi internet access capable of supporting a dozen or more participants, and the convenience of portable laptops to be able to easily move from room to room.

As for the translation of soft skills, **our staff of professional accounting trainers includes resources who grew up in India and understand the culture** and colloquialisms that help students relate much more effectively to the training materials.

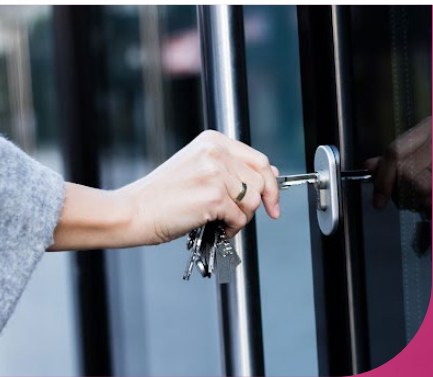
With global teams playing such a critical role in the support of U.S. accounting practices, acknowledging, understanding and overcoming the inherent challenges is key to establishing and maintaining offshore offices.

THE RESULTS

The end result was a highly customized training experience that brought the entire program full circle in delivering a seamless handoff between teams that the firm had envisioned.

20-20 Services has generated considerable success for this client by developing top-notch professional training programs and creative solutions for the triple challenges of time zones, technology, and soft-skill management.

With global teams playing such a critical role in the support of U.S. accounting practices, acknowledging, understanding and overcoming the inherent challenges is key to establishing and maintaining offshore offices.



Learn more about how 20-20 Services' unique accounting training solutions can help your firm overcome offshore training challenges.

READ POST