Why Most Offshoring Initiatives Fail

The one-page version, for the partner who has heard this before

You have probably tried this. It probably failed. If your first instinct is scepticism, it is the correct instinct - and it is why this page exists. Below is what goes wrong, and what a delivery model must look like to avoid it.

The four failure patterns

What goes wrong	Why it happens
A pool, not a team. A different preparer each cycle; nobody who knows your clients.	The vendor optimizes for their utilization, not your continuity.
You never chose the people. Names appear on an invoice you did not approve.	Hiring is the vendor's decision, so the vendor's standard applies - not yours.
The review burden moves; it does not shrink. Work returns needing so much correction you would rather have done it.	Only the task was outsourced - nobody encoded *how your firm does the work*.
Compliance is assumed, not run. §7216 consent treated as a formality - or missed.	The vendor has no US tax practice and no professional standing to lose.

Every one of these is a design failure, not an execution failure. Which means they are avoidable by design.

What has to be true instead

- **A dedicated pod, not a pool.** The same people every cycle. They learn your clients and your workpapers - and that learning compounds instead of evaporating each January.
- **You approve every hire.** Recruited to your brief. If someone is not right we replace them - recruited again at our cost, and you do not pay for the seat while we do.
- **White-label, non-poaching both ways.** Your client stays your client. Under your brand, your review, your sign-off. We never approach a firm's clients - contractually.
- **§7216 run properly from day one.** Prior written consent, SSN masking, data protection - consistent with Circular 230 and the AICPA SSTS. We prepare; we never attest and never issue opinions.
- **The method gets encoded, not just the task.** We automated our own accounting and audit work first - statement preparation and review, audit planning packs, working papers. The pod arrives with the method in it.

Why us

We are the rare finance firm that also builds software - four production systems shipped in twelve to fourteen weeks, including the practice-management platform an advisory firm runs on today. We understand a practice from the inside because we engineered one. Led by a chartered accountant with 34 years, fourteen at KPMG and EY, and a technologist who built at Ericsson and Vodafone. Controls built on ISO 27001 and SOC 2 principles; certification is ahead of us, and we will not claim it before it is real.

The economics, and the ask

The economics work - comfortably below the equivalent hire, without the recruiting, the training or the February overtime. But cost is not why offshoring succeeds or fails. The operating model is; we will walk you through the numbers on the call.

Thirty minutes. No deck, no pitch. Bring one client problem - a return backlog, a board ask, a spreadsheet you hate - and we will tell you what we would do about it.