

# **10 Must-Have Workflows Before You Onboard an Offshore Team**

1. Task Intake & Assignment Workflow – System for task entry, priorities, owners, and deadlines.
2. Communication Workflow – Channels, cadence, and response-time expectations.
3. File Management & Documentation Workflow – Storage rules, naming conventions, version control.
4. Quality Review (QC) Workflow – Review steps, checklists, approvals.
5. Onboarding & Training Workflow – Orientation, tool access, SOP walkthroughs.
6. Accounting Tools & Software Workflow – Access levels, usage rules, automation standards.
7. Client Communication Workflow – Interaction boundaries, scripts, handoff rules.
8. SLA & Turnaround Time Workflow – Deadlines for monthly close, reconciliations, weekly tasks.
9. Escalation & Issue-Resolution Workflow – Blocker handling, escalation contacts, timelines.
10. Performance Tracking & Reporting Workflow – KPIs, dashboards, reporting cadence.