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Nearshore Team Configuration

Through the Stages

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In the very beginning of building your Nearshore team, it is important to understand the role that they will be playing within your organization. Most often I see them setup as testers, developers or software configuration experts. However, knowing what you expect for this group to be will help you identify what type of person you are looking to hire into the group.

Starting up a project, new branch or even a brand new company can be a daunting task. This can be immeasurably more difficult when you are doing this outside of your own country. Many things that are taken for granted, things that you traditionally just know, like labor laws and contracts.

This white paper doesn't address many of the start-up issues and logistics, but it looks at how you integrate your remote/Nearshore team into a project or system build situation. The importance of doing this correctly can increase the value of the team but also reduce the likelihood that you have a sunken investment.

Often times these investments can have the best preparation, but if they don't have follow through and dedication, it will crumble.

The First Thoughts

Let’s assume that at this point in time you have hired the people and they are ready to start their new career in your organization. The most effective way getting a team up to speed is a three-pronged approach:

- Training related to the specific job set they will be doing. As stated in my earlier blog, this could be testing, coding or configuring (or some combination of all of them).
- Identifying the team, the will be part of our supporting.
- Providing an expectation to their manager counterparts and the team themselves. This can be on an individual level or within a group setting.

Training should encompass onboarding to your organization, organizational culture and obviously, whatever application or developmental language/system they will be working on. In any organization it is recommended to sit with new team members and go through the do’s and don’ts of working with customers and other people inside the company.

This gives them the foundation and confidence for them to maneuver the corporate landscape.

> **The company should always think in the best way to constantly communicate with the team by taking advantage of the technology that we have in our days. It is recommended to have at least weekly meetings to keep in touch with the team, to inform them about the company's situation and projects and to check if there are any issues that could be discussed. A periodic visit it is always recommended.**

Once that crucial step is covered, have them take online and instructor-led training with testing feedback, so that they can have results in which to compare to.

When the team or team member/individual has gone through some training, we will look to what team they will be part of. This may have already been predetermined, but can be refined once there is a better understanding of the individual's capabilities and what was observed during the training and testing period.

Often times what you thought were a person's weaknesses may not be that bad at all. They may demonstrate key factors that you weren't originally looking for and slot very well into new and more challenging roles, or they could frankly stink, in which you should cut your losses early.

The last critical piece is setting the expectations of this individual or group. You should meet with the people so that they specifically know what their job role will be on that team and what is expected of them. It's always good to have the manager of that group either come on-site to the Nearshore location or have those individuals go to the customer site to meet the team. This helps establish a face to the person and a sense of belonging on the team.

Most importantly, it gives everyone an understanding of how to communicate with each other. In order for any Nearshore organization to be successful, there has to be a level of dedication to that team greater than just the start-up of the company. A Nearshore group cannot be successful until there is a dedicated leadership level team member to the group on a scheduled and consistent basis. In the beginning it is important to go through the identification and training piece, also make sure the commitment is there; it is here where most teams fail.

Nothing substitutes for a person being on-site and showing true commitment to the group. This happens for a couple reasons:

- Communication - By being on-site, the leader can see firs- hand if people are being utilized properly and are able to be part of a team. That they understand the expectations of them and are following through, that they can be heard by someone in leadership if there is a problem that exists within the team or set of deliverables they are responsible for.

- Commitment – If you show up once a year or have different individuals showing up at sporadic times, it conveys the message to your people that you truly don't have a commitment to them or the location.

> **The Nearshore team needs to have a clear understanding of what is expected from them. Every team member needs to be aware of the company's goals and objectives, and how they can contribute to achieve them.**

- Culture – Rather than have some haphazard culture be established, you will be able to establish the culture you embody in your entire company. This will help keep the right people on board and show your team the growth possibilities. By executing all these and a little more, our organization quadrupled in size in one year and we expect a similar growth in years to come. Also, hire a very good manager and give them the latitude they need to run the group.

DESIGN

Keep in mind that when this part of the project kicks in most of the team that represents your integrated group will not have had any experience with the customer or requirements team. When design starts, there is a fair amount of requirement documentation reading and transition that should occur.

The person in charge of the project, most likely the project manager, should go to the location where the Nearshore resources will be located. This will help in understanding any requirements that seem ambiguous and help integrate the team into the project. This is also a good time for the people who were on-site for requirements gathering, to present their findings.

Once the project manager is on-site and the findings have been presented, the team can get to the design stage, in any situation where there is design, architectural review will be critical. This is no different than with a Nearshore team. Work with the team to begin creating the design.

Leadership: If you do not have good leaders within your Nearshore team it is most likely that the company will not have success with this business. You need to have people that motivate, that provide the extra mile, that can trespass to the team the ideas that come from the headquarter office.

Often tasks shifted to Nearshore will be the ones related to coding, data transferring and manipulation, and reporting type. While the project manager is on-site with the team, this person should establish timelines and expectations based on the project plan, reviewing them and creating an effective bottom up communication plan.

In the communication plan an emphasis on problem assessment, escalation and resolution is paramount; many times people simply won't speak out when they are stuck. Once this is done, actual pen to paper can happen in the design.

Organizationally it is better if you can have a hybrid type of person, being the person who helped build part of the requirements, do the design. Since these breeds are few and far between, it is important to have design review sessions with the team to ensure they aren't too far off from expectations.

Once the design has been reviewed and is completed with architectural oversight, you will be ready to progress to the code/configuration stage. The biggest problem for the Nearshore design stage is simply making sure the customer has approved and agrees on what will be delivered. Since there is an element of distance and unfamiliarity, circle back to the importance of the communication plan to identify potential roadblocks.

CONFIGURATION AND TESTING

This stage is usually when you expand your team and add several additional resources from your Nearshore team. In doing this situation, the first thing you should have every team member do is read the SOW or set of contractually obligated items that the customer has requested. Once this has occurred, they should know and understand what they are legally obligated to do.

This is critical because in many cases there are gates to pass to the next level, and requirements/design is a gate to configure/test.

The leaders need to have a positive attitude always and need to incentive that feeling to their subordinates. Good leaders create confidence in the team and that originates a more efficient team.

When you pass a gate there is a sign off that occurs. If your new team members aren't careful they can get off track either by their own doing or the customer's and obligate you to complete not only what you contractually signed up for, but other items that customer requested and that they agreed to.

Once they have read the SOW, it's on to reading the requirements and then design. This will give the new team members a solid foundation of what they will be building and what the end user is trying to have the system do.

It is important to give the new team members access not only to the project management, but also members that have been part of the project in an ongoing basis. This should allow them to understand some of the key decisions made and why design may look the way it does. Also, make sure that the team has the capability to raise issues. What you see a lot from people is that they tend to either work very hard to figure out a problem themselves, often time taking much longer than the task is allotted or they are asking someone how to fix/configure something before they even give it a second thought.

These team members should understand what the expectation is and to whom they can reach out when they run into a problem that seems insurmountable. Once configuration is complete, the team will move onto testing phases, unit test being first. Testing in general gets less attention than it deserves and it is often used as a time shortening mechanism to bring project deadlines in.

The other big problem with unit testing is often the data used to test is absolute rubbish. People will mock up test cases without a true knowledge of what task they are trying to fix. Making sure that your team has a guide on how to conduct testing and formal process on what the layout of those testing will be. Add that to the fact Unit Testing is so tedious, most people neglect it in a really bad way. Having those guides and templates will get you through some of this, but having people to lean on in your team is paramount.

USER TESTING AND CUSTOMER INTERACTION

The User Testing stage is when a Nearshore team gets exposed to the end user, who can often be unrelenting to people from their own country and causes a lot of roadblocks. In some of the worst cases, offshore teams have deleted entire code base access and user logins.

To avoid these types of painful moments, you really need to make sure that the team is staffed accurately for the role expectations.

Usually by the time you get here you have weeded out team members that weren't a good fit for the project o rolled them off if they were underperforming.

Also by this time they have had a lot of interaction with the internal team and probably some interaction with the end user already. Expectations need to be set for their work hours, as they can get very hectic in a UAT period. Often you find yourself in crunch time with very little movement on the deadline, with go or no-go decisions coming up that could kill the project; teams that have been through it before they often understand what will be required of them. It is best to sit the team down as a project manager and let them know what will be tested according to plan and average defect rates.

It is also important to let them know what the time frame to correct any defects is and who should be alerted in regards to retesting those defects. UAT is typically a place where you would bring some of the remaining team members to the customer site or wherever the general team is located so that it is easier to work jointly.

HANDOVER AND MAINTENANCE

The beginning of the end or just the beginning?

Most of the reasons you have enlisted a Nearshore team is the cost and a lot of the times this handover will go to this team. So how do you do this in the best fashion? Well, it all comes down to how you hand over the items to the customer. Look at this topic as if we are either handing it to the Nearshore team or to a customer team. There are two groups that this could be going to, the end user group or to the system maintenance group. The user group should have experienced much of their handover during the UAT time period and learned some of the nuances of the system. This would have been to super users most likely. For the people who need to be trained, you will need a training plan and change management plan.

Handing over system maintenance on the other hand should be slightly less complicated. With this group of identified people, it is simply monitoring they system in many cases or handling suggestions and modifications from users. Often I find that once a system is stood up, users will ask for a lot of new reports. Having this type of skill in the maintenance group helps to keep the users happy and business functioning. So really what is there to it? First would be a run book guide.

This is documentation from the team that tells the people why things were built the way they were, the requirements, key decisions, and routine pieces. Once you give them the run book, there should be a period of shadowing, this will vary depending on size of project, sophistication of the group, and how plugged in they were during the project.

After a while the team will become very proficient and good at handling new requests. Again, as always you should -on a routine basis- have the teams meet together and put faces to people. In this case it will be end users meeting the Nearshore support team.

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Lanshore is a US based company with Nearshore operations in San Jose, Costa Rica. Lanshore has been doing Nearshore configuration, development and sales center for over four years. We provide services in mobile application development, sales call center, energy trade and sales performance management. As a company we have serviced small business in consulting services engagements to multi-billion dollar organizations looking to install business-shaping solutions.

About the author

Doug Erb is an accomplished entrepreneur who has guided multiple organizations to multimillion dollar profit. Starting out his consulting career at Anderson Consulting, Doug weaved his way through the last 15 years working with companies in implementing sales strategies and software that span multiple package types.

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