

10 Step Outsourcing Readiness Checklist

Review the foundations for a successful offshore hire. Tick each box only when the statement is true today.

How to use it Add an owner or action beneath any item that needs work. Aim for clarity, not perfection.

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STEP 1

Document the role and its core processes

Write down responsibilities, recurring tasks, systems and decision points so the role has a clear reference.

Owner or action _____

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STEP 6

Confirm a steady full time workload

Map recurring responsibilities and make sure there is enough consistent work across the week.

Owner or action _____

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STEP 2

Confirm the work can be done remotely

Check that the role can operate through secure online systems without depending on physical presence.

Owner or action _____

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STEP 7

Set a realistic total budget

Include salary, equipment, workspace, support and management time, not salary alone.

Owner or action _____

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STEP 3

Make tools and information accessible

List the software, files, permissions and equipment needed. Plan secure access before day one.

Owner or action _____

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STEP 8

Prepare remote onboarding

Plan welcome meetings, training, system access, key contacts and useful first week tasks.

Owner or action _____

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STEP 4

Choose one clear manager

Nominate who will set priorities, answer questions, review output and hold regular check ins.

Owner or action _____

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STEP 9

Build reliable handovers

Make priorities, progress and blockers visible so work continues when someone is unavailable.

Owner or action _____

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STEP 5

Define success for the first 90 days

Set outcomes for days 30, 60 and 90, including quality standards and expected output.

Owner or action _____

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STEP 10

Agree on communication and overlap

Set working hours, shared time, response expectations, meeting rhythm and communication channels.

Owner or action _____