

OFFSHORING PARTNER VETTING SCORECARD 1/2

Use this scorecard to compare offshoring partners side-by-side. Score each row from 1 to 5 and capture evidence in the notes.

Legend: 1 = Weak / Unclear / High risk; 2 = Below standard / Gaps likely; 3 = Acceptable minimum; 4 = Strong / Low risk; 5 = Best-in-class / Proven & scalable.

#	Criteria	What to look for	Partner A Score (1–5) + notes	Partner B Score (1–5) + notes	Partner C Score (1–5) + notes
1	Clarity fit (role + outcomes)	Pushes for clear 30/60/90 outcomes, tasks, tools, access and KPIs before proposing a solution.			
2	Track record	Repeatable success in similar roles; can share specific examples and numbers.			
3	Client referral rate	High % of new clients from referrals by existing clients (strong satisfaction signal).			
4	Retention & tenure	Stable teams; low churn; clear retention strategy.			
5	Compliance & data security	Documented controls (MFA, device policies, confidentiality) and a clear governance approach.			
6	Access management	Role-based access / least privilege; structured onboarding and offboarding (access removed promptly).			
7	Communication rhythm	Clear cadence (daily/weekly), reporting, and escalation paths.			
8	Cultural alignment support	Coaches clarity, feedback loops and working norms to prevent silent guessing.			
9	Service scope	Inclusions/exclusions are clear and written (recruitment, HR, payroll, IT, performance support).			
10	SLAs & responsiveness	Defined response times, support hours, escalation rules			



OFFSHORING PARTNER VETTING SCORECARD 2/2

Tip: Ask each provider for their client referral rate (what % of new clients come from existing-client referrals).

Legend: 1 = Weak / Unclear / High risk; 2 = Below standard / Gaps likely; 3 = Acceptable minimum; 4 = Strong / Low risk; 5 = Best-in-class / Proven & scalable.

#	Criteria	What to look for	Partner A Score (1–5) + notes	Partner B Score (1–5) + notes	Partner C Score (1–5) + notes
11	Replacement & continuity	Clear plan if someone resigns or it's not a fit; handover and continuity coverage.			
12	Pricing transparency	Easy to explain and compare; no surprises (setup, monthly, add-ons, annual increases).			
13	Proof (case studies)	13 Proof (case studies) Relevant case studies tied to measurable outcomes.			
14	Proof (references)	Reference calls available; references validate reliability and support.			
15	Onboarding & training	Repeatable 2–4 week onboarding plan; SOP capture; KPI setup; QA during ramp.			
16	Performance management	Ongoing measurement, reporting, coaching and improvement.			
17	Scalability	Can grow from 1 to 3–10+ without chaos; clear process to add seats.			
18	Local support / account management	Named owner, regular check-ins, fast escalation and accountability.			
19	Red flags risk	Few red flags: no vagueness, no overpromising, no churn patterns, no moving pricing goalposts.			

Decision note: If a provider scores weak across multiple categories (especially security, scope/SLAs, retention, and onboarding), keep looking.

