

Business Process Outsourcing (BPO) Evaluation Checklist

Prepare your Project for a BPO Estimate: A good prospective Business Process Outsourcing (BPO) provider will want to discuss your project in detail first. A solid cost estimate will be based on the actual features of your project. You should expect a qualified BPO partner to address the following key items before providing an estimate:

Project Scope

1) Summary of the project and objectives: _____

2) The specific tasks that need to be outsourced are as follows: _____

3) This outsourced project is important to our business because: _____

Volume and Scale

1) Estimated volume: _____

2) Expected future growth (if applicable): _____

Key Performance Metrics

1) The required metrics for this project are: (e.g., 98% accuracy, 30-second turnaround) _____



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Project Duration/Time Zones

1) Discuss any critical periods or time zones that need special attention, including coverage for specific times of day or for 24/7 coverage.

2) My project is (select one):

☐ One-time Project ☐ Ongoing project

I need support during the following days, in the following time zones (if applicable): _____

Technology Requirements

1) Below is a list of project-required technology or tools: _____

2) Below are my firm's preferred communication channels (e.g., email, SLACK, Microsoft Teams, phone, etc.): _____

Share a Sample

1) Attached are the relevant process documents and a completed sample of the project to provide a clear understanding of our expectations.

2) Below are the specific formats that we require for the deliverables: _____

Data Sharing Preferences

1) We prefer to share data via: (e.g., FTP, email, share drives, etc.)



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Budget

1) We have the below budget constraints or limitations: _____

2) Below are our preferred pricing models: _____

Data Security and Confidentiality

1) Our project/industry requires compliance with the following:

Client Information

- Company Name: _____
- Contact Person: _____
- Position: _____
- Email: _____
- Phone: _____



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