Getting Started with Offshore Development
Susan R. Jacobs and George Flanagan
Capital One Financial Services, Richmond, Virginia USA
sr@eworksfss.com, gf@eworksfss.com
A short pre-project checklist

Part 1. Vendor selection

- Will the vendor [be able to] send a number of people to your site? How many?
- Will you [be able to | need to] send people to the vendor’s site? What facilities does the vendor have to support your visits? Spare office? Phones? Hotels? Security?
- What airport connectivity and logistics are in the vendor’s city? (this applies to their travel as well as your own).
- Have you talked with any of the vendor’s previous clients? Did any of them have work done that is similar to your own?
- How does the vendor go about hiring and retaining its employees?
- Do you have a contract? Does the contract cover scope, estimates, rates, confidentiality and non-solicitation, who owns what at the end of the project, liability including where the litigation will take place, SLAs, NDAs, cancellation, etc.?
- If you are planning to do more than one offshore project, do you have a spectrum of vendors and geographies to spread the risk?

Part 2. Personal logistics (due diligence, vendor site visits)

- Do you have the appropriate visas, inoculations, etc? Do you know how to get medical attention in the offshore country?
- Is your travel being arranged by someone familiar with the vendor’s area?
- Do you have proper clothing for the destination when you arrive?
- Are you well informed about the cultural differences between your country and the vendor’s country? Do you know where the nearest home embassy is in the offshore country?
- Do you have the ability to make phone calls home?
- Do you have all your prescription medications? Do you have over the counter medications that might not be available at the destination?

Part 3. Professional logistics (development processes)

- Whatever the methodology, do you have a process that cuts the project into well defined parts? Have you decided which parts you will always own? Which parts might you never own?
Do you have a worked out agreement about what the documents will look like? What is in them? Who wrote them? Who will read them?

Do you have a clear idea of how project status will be communicated, how often, and by what media? Do you have a clear idea of what is going to be in a status report?

Do you know what you are going to do if the project goes awry?

Part 4: Project logistics

Is this project large enough to make it worthwhile to do offshore? Does it fit within the vendor’s capacity and skill set?

Do you have a dedicated staff to handle the communication with the offshore facility? Are all these people up to date with everything they need in case travel is required?

Have you identified the places where parallel activity (you and the vendor) will take place? Do you have a strategy to keep this work synchronized?

Do you know how to tell when the project is complete? Do you have a transition plan in place for putting the system into production if the vendor is not also providing production support?

If this is the first project, has it been chosen so that there is a limited exposure for both the vendor and you?

Does the vendor have the same concept of milestones, schedule, and quality that you do?