

Outsourced Support Decision Worksheet

Decide Outsource vs Hybrid vs Insource in 10 minutes.

How to use this (fast)

1. **DEFINE:** project, deadline, success metric.
2. **SCORE:** check one box per row below.
3. **TALLY:** count checks by column.
4. **DECIDE:** highest column suggests Outsource, Hybrid, or Insource.

DEFINE

Describe the situation and project: *A short description of what is being done, the drivers, and the teams involved.*

Describe the outcome desired: *State the specific result you want, how you will measure success (KPIs), the deadline, and how many stakeholders need to align to get it done.*

Budget & Time Constraints: *Are there sufficient dollars and time, could dollars or priorities be shifted, or are there limits preventing flexibility?*

SCORE (Check ONE box per row based on your reality today. Do not average, pick the closest match.)

Organizational factor	Early-stage	Emerging	Established	Embedded
Outcomes clarity	<input type="checkbox"/> Goals are vague or shifting. KPIs are not defined or not tracked. Decisions are reactive.	<input type="checkbox"/> Desired outcomes are mostly clear. Some KPIs exist but tracking and decision use are inconsistent.	<input type="checkbox"/> KPIs and success criteria are clear. Tracking exists and informs most decisions. Owners are defined.	<input type="checkbox"/> Outcomes and KPIs are embedded. Performance is reviewed regularly and drives priorities and tradeoffs.
Staff skills	<input type="checkbox"/> Limited internal expertise. Work depends on generalists or external help. Quality is inconsistent.	<input type="checkbox"/> Basic skills exist, but senior expertise is missing. Team can execute with direction and templates.	<input type="checkbox"/> Strong internal capability. Clear roles and playbooks. Team can plan and execute with minimal help.	<input type="checkbox"/> Deep bench and redundancy. Specialists exist. Knowledge is institutionalized and transferable.
Capacity	<input type="checkbox"/> Team is overloaded. No meaningful bandwidth. Work will displace critical priorities.	<input type="checkbox"/> Some bandwidth, but inconsistent. Peaks cause delays. Work competes with other initiatives.	<input type="checkbox"/> Sufficient capacity. Work can be owned internally with predictable cycles and accountability.	<input type="checkbox"/> Excess capacity or dedicated resources. Team can absorb new work without destabilizing operations.
Duration and strategic importance	<input type="checkbox"/> One-off or experimental. Short horizon. Not worth building internal capability yet.	<input type="checkbox"/> Time-bound but important. Needs fast progress over weeks to a few months.	<input type="checkbox"/> Ongoing and strategically important. Repeats quarterly or annually. Worth building internal muscle.	<input type="checkbox"/> Core operating capability. Ongoing and central to mission delivery. Should be owned in-house.

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TALLY + RESULT (Count how many boxes you checked in each column. The highest count is your default approach.)

Early-stage	Emerging	Established	Embedded
Count: ____	Count: ____	Count: ____	Count: ____

DECIDE

(Count how many boxes you checked in each column. The highest count is your default approach.)

- **Default: highest count wins.**
- If Early-stage is highest score, strongly consider **Outsource model**. Use drop-in agency support to execute quickly, include light skill transfer.
- If Emerging is highest score then **Hybrid model**. Outsource senior direction and system setup, insource weekly execution.
- If Established is highest score use **Insource** with targeted support. Keep ownership internal, use agency for surge or specialty.
- If Embedded is highest score leverage **Insource**. Use outside help for temporary capacity spikes or independent review only.

Tie-breakers (use in this order):

- **Capacity breaks ties.** If Capacity is Early-stage or Emerging, lean Outsource or Hybrid.
- **Duration breaks ties next.** If this is core and ongoing (Established or Embedded), lean Insource or Hybrid.
- **Outcomes clarity breaks ties last.** If KPIs are unclear (Early-stage), lean Outsource or Hybrid to define and structure first.

Overrides:

- **Urgent deadline (under 4 weeks) and Capacity is not Established or Embedded:** Outsource.
- **High-stakes stakeholder alignment or brand risk and Staff skills are not Established or Embedded:** Hybrid or Outsource.
- **Fixed minimal budget and Staff skills are Established or Embedded:** Insource.