

Consolidating Offshore Vendors?

Don't Consolidate the Risk Too

Cutting a couple of vendors down to one or two only lowers risk if every partner you keep meets the same standard. This scorecard sets that standard. SOC 2 is one line on it, not the whole list.



The Consolidation Scorecard

Why Consolidations Stall

- Every vendor brings its own rules. Each regional partner arrives with different contract terms, SLAs, access practices, and reporting.
- A logo stands in for due diligence. Teams confirm a SOC 2 certification exists but never read what the report covers.
- No one owns performance after go-live. Old problems follow the team to the new vendor.

Criterion	What to Ask	Red Flag
Security Assurance	Request the SOC 2 Type II report itself. Check scope, examination period, controls tested, exceptions, and exclusions.	A logo on the website, but no report on request
Contract Terms	Price labor separately from recruiting, payroll, benefits, facilities, IT, and management. Split SLAs by function. Define exit terms upfront.	One bundled rate with no breakdown
Delivery Model Fit	Confirm who owns system access, KPIs, and training, and who owns HR, payroll, and facilities.	The vendor decides who gets into your systems
Data Residency	Map which records carry geographic restrictions before assigning teams to locations. Have legal and privacy validate.	Locations picked before data is mapped
Migration Risk	Sequence moves by contract end dates, notice periods, and critical roles. Name one internal transition owner.	Every vendor moved on the same date
Governance Cadence	Set the reporting rhythm, the escalation owner, and who manages performance between renewals.	Reports that count seats, not results

Where Co-Management Fits



You keep:

- Strategy and performance standards
- System access and security policy
- KPIs, training, and feedback

Connex supports:

- Recruiting, HR, payroll, and benefits
- IT, facilities, and compliance support
- In-country operations management



In practice: A U.S.-based managed service provider moved 28 team members from previous providers to Connex. A full-time Operations Manager took on daily coordination and employee engagement, and the team grew to 39 across the Philippines and Mexico.

98% client retention

200+ global clients

SOC 2 Type II certified

A team you manage together,
not one you manage alone.

Scoring a Consolidation? Talk to Connex First.

Walk through your current vendor mix and see how each partner measures up on all six criteria.
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