

FRAMEWORK B.A.S.E.

Checklist for preparing a remote customer support role in LATAM

Review 15 critical decisions before posting the vacancy, interviewing candidates, or starting onboarding.

REVIEW DETAILS**Company****Role or area****Internal owner****Country / market****Date****HOW TO USE IT****1**

Check a box only when the decision is truly defined.

2

Note evidence, owner, or pending adjustment at the end of each section.

3

Add up the checked boxes and complete the diagnosis and action plan on the last page.

Need and objective

Confirm why the role exists and what problem it must solve.

**POINT 01**

The operational or financial problem the role must solve is clearly defined.

**POINT 02**

The volume of tickets, contacts, or time slots to be covered is known.

**POINT 03**

There is one primary success metric: SLA, response, CSAT, resolution, or another.

**POINT 04**

An internal owner is assigned for decisions and support.

EVIDENCE OR PENDING ADJUSTMENT**Adjustment owner****Target date**

Role and outcomes

Turn the need into a concrete, measurable, publishable scope.



POINT 05

Recurring tasks are clearly defined and do not combine three different roles.



POINT 06

First-month KPIs and criteria are clearly visible.



POINT 07

Schedule, coverage, and overlap with Spain are defined.



POINT 08

Must-have requirements are separated from desirable skills.

EVIDENCE OR PENDING ADJUSTMENT

Adjustment owner

Target date

Model and compliance

Review the model fit before starting the search or formalizing agreements.



POINT 09

The company has chosen a preliminary model aligned with autonomy and structure.



POINT 10

Autonomy, supervision, exclusivity, and control are documented.



POINT 11

International billing, taxation, and applicable obligations were reviewed.



POINT 12

Data access, privacy, and cross-border processing are defined.

EVIDENCE OR PENDING ADJUSTMENT

Adjustment owner

Target date

Onboarding and continuity

Ensure the person can onboard, perform, and receive support from day one.

**POINT 13**

Tools, permissions, documentation, and training are ready.

**POINT 14**

A follow-up plan exists for the first 30 days.

**POINT 15**

The company knows how to cover absences, replacements, or workload peaks.

EVIDENCE OR PENDING ADJUSTMENT**Adjustment owner****Target date**

Turn the review into next steps

Summarize the diagnosis, prioritize gaps, and define the first expected outcome.

1. Select your total score

SCORE

13-15
Ready to move forward

9-12
Needs adjustments

0-8
Do not post yet

2. Mark the diagnosis that best represents your situation

☒ Ready to move forward

☐ Needs adjustments

☐ Do not post yet

3. Prioritize the gaps

Priority	Pending action	Owner	Date
-			
-			
-			

4. Define the goal for the first 30 days

Expected operational outcome

Main KPI

Target

Review frequency

Notice: informational tool; does not replace legal, employment, tax, or data advice.

Learn more: hirewithbase.com/es/contratar-atencion-al-cliente-latam-espana-legalmente/