



# Role Planning Worksheet

A practical planning document for businesses defining remote roles, hiring priorities, onboarding needs, and support models before recruitment begins.

<b>Best used for</b>	Role scoping, team planning, approval discussions, and preparing for a smoother remote hiring process.
<b>Supports decisions on</b>	Role outcomes, team structure, hiring model, budget range, time-zone requirements, onboarding readiness, and performance expectations.

**Borderless Talent Hub** | Global remote talent, payroll support, and compliance coordination

## PLANNING FRAMEWORK

### Build a stronger hiring brief before recruitment begins

Clear role planning improves hiring quality, onboarding speed, budget accuracy, and day-to-day team integration. This worksheet helps businesses define what the role should achieve, how it will fit into the operating model, and what support structure will make execution easier.

- Clarify the business outcome the role or team is expected to support.
- Define responsibilities, reporting lines, tools, communication routines, and success measures.
- Choose the right support model for direct recruitment, Employer of Record support, dedicated remote teams, or project-based delivery.
- Reduce delays caused by unclear approvals, inconsistent hiring briefs, or incomplete onboarding planning.



## Role Planning Snapshot

<b>Business function</b>	_____
<b>Proposed role or team</b>	_____
<b>Preferred start timing</b>	_____
<b>Support model under consideration</b>	Remote recruitment / EOR support / Dedicated team / Project support

### 1. Business goals and hiring context

Planning area	Working notes
<b>What business objective will this role or team support?</b>	_____ _____ _____
<b>What problem, gap, or growth need are you addressing?</b>	_____ _____ _____
<b>What outcomes should be visible in the first 30, 60, and 90 days?</b>	_____ _____ _____
<b>Is this a new role, an expansion hire, a backfill, or a temporary support requirement?</b>	_____ _____ _____



## 2. Role scope and day-to-day ownership

Define the role around practical outputs rather than a generic job title. Stronger scope definition usually leads to better shortlisting and smoother onboarding.

Planning area	Working notes
<b>Working title or function</b>	<hr/> <hr/> <hr/>
<b>Core responsibilities and workflow ownership</b>	<hr/> <hr/> <hr/>
<b>Key tasks that must be handled daily, weekly, and monthly</b>	<hr/> <hr/> <hr/>
<b>Decisions the role can make independently</b>	<hr/> <hr/> <hr/>
<b>Internal teams, stakeholders, or clients the role will work with</b>	<hr/> <hr/> <hr/>

## 3. Skills, experience, and profile fit

Planning area	Working notes
<b>Must-have experience, skills, or certifications</b>	<hr/> <hr/> <hr/>



<b>Preferred background, sector knowledge, or systems experience</b>	<hr/> <hr/> <hr/>
<b>Communication standards, language requirements, or customer-facing expectations</b>	<hr/> <hr/> <hr/>
<b>Attributes that matter most for success in your environment</b>	<hr/> <hr/> <hr/>

#### 4. Choosing the right support model

Different hiring structures suit different commercial, operational, and compliance needs. Use the guide below to decide which option best fits the role you want to build.

Model	Best suited to	What to consider
<b>Remote talent acquisition</b>	When you want help sourcing and vetting talent but plan to manage the employment relationship directly.	Best for businesses with a clear operating model, internal management ownership, and an approved route for contracts and payroll.
<b>Employer of Record support</b>	When you want to hire in a new market without setting up a local entity first.	Helps simplify compliant employment support, payroll coordination, and local administration where appropriate.
<b>Dedicated remote team</b>	When the work is ongoing and the role or team needs to operate as an embedded extension of the business.	Useful when you want continuity, structured support, and room to scale beyond one hire.
<b>Project-based support</b>	When you need specialist capability for a defined project, migration, launch, or fixed-term requirement.	Best when deliverables, timing, and ownership can be scoped clearly from the start.



### 5. Working model, time-zone needs, and communication

Good remote role planning goes beyond the job description. It should also cover how the hire will work with the wider team, where decisions sit, and how communication will flow.

Planning area	Working notes
Required hours, time-zone overlap, or shift expectations	<hr/> <hr/> <hr/>
Primary tools, systems, and platforms used in the role	<hr/> <hr/> <hr/>
Who will manage the role day to day	<hr/> <hr/> <hr/>
How work will be assigned, reviewed, and prioritised	<hr/> <hr/> <hr/>
Meeting rhythm, reporting cadence, and escalation routes	<hr/> <hr/> <hr/>

### 6. Budget, timing, and onboarding readiness

Planning area	Working notes
Indicative budget range or commercial parameters	<hr/> <hr/> <hr/>



<b>Preferred start date and urgency level</b>	<hr/> <hr/> <hr/>
<b>Access, equipment, documentation, or setup needs before day one</b>	<hr/> <hr/> <hr/>
<b>Training, handover, or shadowing requirements during onboarding</b>	<hr/> <hr/> <hr/>
<b>Any seasonal deadlines, launches, or operational pressures affecting timing</b>	<hr/> <hr/> <hr/>

### 7. Success measures and performance expectations

A clearer definition of success makes the hiring brief stronger and helps the new hire become productive faster. Use the prompts below to define how progress will be reviewed after the role starts.

Timeframe	What success looks like	Notes and measures
<b>First 30 days</b>	<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>
<b>By 60 days</b>	<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>
<b>By 90 days</b>	<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>



	_____	_____
<b>Ongoing performance</b>	_____	_____
	_____	_____
	_____	_____

### 8. Readiness review before recruitment starts

Use this final review to confirm that the role is scoped clearly enough to move into shortlisting, hiring discussions, and onboarding planning.

<input type="checkbox"/>	The business objective for the role is clear.
<input type="checkbox"/>	Responsibilities, tools, and reporting lines are defined.
<input type="checkbox"/>	The preferred support model has been considered.
<input type="checkbox"/>	Budget range and start timing are realistic.
<input type="checkbox"/>	Management ownership and communication expectations are clear.
<input type="checkbox"/>	Onboarding requirements and access needs have been identified.
<input type="checkbox"/>	Success measures are defined for the first 90 days.
<input type="checkbox"/>	The role is ready to move into recruitment or discovery discussions.

**Next step:** Once this worksheet is completed, your business will have a clearer brief for role scoping, hiring decisions, onboarding preparation, and choosing the right Borderless Talent Hub support model.