# FREELANCERS: THE SECRET SAUCE TO SCALABLE SUPPORT OPERATIONS

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Working with freelancers is a hands-on approach to outsourcing that offers you agency, flexibility, and the potential to make great hires from a pool of folks who have on-the-job-training at your company.

## WORKSHEET

Here are some questions you'll want to answer in order to bring freelancers into your organization. Once you've answered these questions and implemented your decisions, you'll have the infrastructure for a freelancers program that can be scaled up and down as your business flexes.

**1. What is your desired outcome of outsourcing to freelancers?**

**2. What's the scope of work?**

- What ticket types would the freelancers support? (eg basic/tier 1 lets you route easy stuff to freelancers, leaving higher impact work to in-house staff)
- What channel(s) will they support? (eg email, phone, live chat)
- What would you want to escalate to your in-house team?

**3. When do you need help?**

- Do you want to work with freelancers long term, or temporarily?
- How long would you want freelancers to work on this project? (eg, 1-3 months? 3-6 months?)
- How many hours per week would you want freelancers to work?
- When do you need the freelancers to be fully trained and in the queue?
- How long will it take to train them?
- Work backwards to determine start dates.

**4. Who do you want to work with?**

- Who is your desired candidate? Think mindset, expected skills, pay range, time zone/location, when you want them to work, how many hours a week you'll need them to work. You'll use these qualities to write a job description.

- How will you evaluate candidates? eg resume review, interview questions, writing assignment with support questions.
- What will your contract agreement look like? Will it be open-ended, or will it have an end date? Do you need an NDA? Will you write performance expectations into the agreement (recommended)? Ask for help from legal team if available.
- Where will you find freelancers? (eg Upwork, Fiverr, Toptal, Hubstaff, and others) Do you want a platform that pre-screens talent which you then sign off on? Do you want a platform that handles invoicing and payments? Do you want to search for freelancers and handle invoicing yourself?

## 5. How will you support freelancers?

- Who will review freelancers' tickets, efficiency, and efficacy?
- What will the ticket review process look like?
- How will you communicate with freelancers? Eg for bugs, product updates, gathering customer insights or ticket trends
- How will you recognize and reward high performers?
- How/when will you handle performance evaluations, rate adjustments, and terminations?

## 6. What will be required behind the scenes?

- What security measures do you need to put in place?
- Does a queue already exist for this work?
- Do training materials exist for this work?
- What tools or access levels will freelancers need?
- What will the escalation process look like, both in terms of instructions and routing?
- When will individual freelancers be expected to work, and how will that be set and communicated? (eg, will you schedule them? Set standard work hours? Something else?)

## 7. What does success look like?

- How will you know if your work with freelancers is working?
- What will you measure?

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