FreeUp:

How to Effectively Manage Freelancers

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Who Are We?

Garrett German

Director of Business
Development

Mackenzie Lepretre

Director of Client Experience

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What is FreeUp?

What is FreeUp?

Top 1% of Freelancers in the World

- Pre-vetted freelancers
- Thorough interview process
- Hand picked for each job ticket

When should you hire a freelancer?

Two Types of Projects:

Repeated Tasks vs. High Level Projects

When to Hire a Freelancer:

1. Repeated Tasks: There is a process that is repeated every day, week or month that can easily be predicted (Answering Emails, Data Entry, Audits).

2. High-Level Tasks: There is a higher level task or project you don't have the skills to fulfill yourself, but you have a good idea of what you want/need (Graphic Design, Web Development, PPC)

Repeated Tasks

(Basic Level and Mid Level Freelancers)

Repeated Tasks: Examples

Customer Service Positions:

- Emails
- Phone Calls
- Live Chat

Data Entry:

- Spreadsheet Management
- Order Placing
- CRM Entries
- Audits

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Repeated Tasks: Titles

Virtual Assistants

Customer Service Representative

Data Entry Specialist

Sales Representative

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Repeated Tasks: Creating SOPs

Standard Operating Procedures (SOPs):

Break it into 3 categories:

1. Section 1: "Timing and Reporting"
2. Section 2: "Instructions"
3. Section 3: "Additional Resources + Points of Contact"

Goal: Organize as much information as possible into 1 area for freelancers to reference.

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SOPs: Timing and Reporting

SOPs: Timing and Reporting

What to Include

1. What are the KPIs for this project?

    a. How much should be completed per hour worked

2. How often should the freelancer send a "Report"?

    a. Daily

    b. Weekly

    c. Monthly

3. What should the report include?

    a. Hours Worked

    b. How much was completed in this time period

    c. Any roadblocks they ran into

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FreeUp*: CRM Data Entry

This position is responsible for entry new client data into the CRM system

KPIs and Reporting	
KPIs:	30 entries made per hour billed
Reporting:	This person is to send a **weekly** report via email to the team leader with the following information: 1. Total number of hours worked per day 2. Total number of entries made per day 3. Any trends seen throughout the week

SOPs: Task Instructions
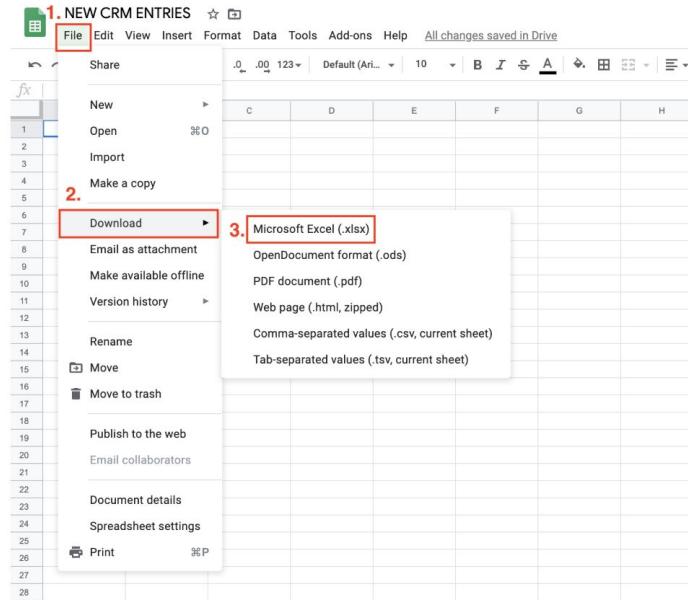
SOPs: Task Instructions

What to Include

1. A step by step guideline of how to complete the task
   a. Include full screenshots of where things are located
   b. Open the image and highlight/outline where specific things are located
2. A screenshare video of you doing the task
   a. We recommend using Loom.com
3. Frequently Asked Questions

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Instructions:	
Loom Video:	

1. Open New Leads Spreadsheet
2. At the top left, download the spreadsheet:
   a. File
   b. Download
   c. Microsoft Excel

3. Open CRM System Data Importer: CRM Data Importer
4. Click "Import Leads and Data"

SOPs: Additional Resources

SOPs: Additional Resources

What to Include

1. Links to any additional resources they may need so everything is located in one place.
    a. Canned responses
    b. Specific webpages they'll need access to
    c. Any login information they need/applications to use
2. Points of contact for the company/project
    a. If you're offline and they need help, they need to know who to reach out to in order to keep working.

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Additional Resources	
Points of Contact	Mackenzie Lepretre: Mackenzie@FreeeUp.com - Please escalate any major issues to Mackenzie Jane Osiana: Support@FreeeUp.com - Jane can help you with daily questions on the system. - Send weekly report to Jane.
Important Links:	- CRM Training Doc - Daily Tracking Spreadsheet - FreeUp Knowledge Base - Important Keyboard Shortcuts

Team Leaders

Team Leaders

Management Structure

1. 4+ Freelancers working on tasks? Assign a Team Leader!

2. Here's what they can help with:

    a. Check Ins

    b. Audits

    c. Questions

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Higher–Level Project Management

(Mid Level and Expert Level Freelancers)

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Higher-Level Project Management

Examples of Higher-Level Projects

1. Web Development

2. PPC

3. SEO

4. Graphic Designers

5. Audio + Video Production

6. Any type of "Consulting" or "Management"

    a. Sales Consultant

    b. Project Manager

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Higher Level Project Management

Initial Research

1. Have a general understanding of the terminology for what you are wanting to hire for

2. Ask others for advice on their experience and what to look for

3. Schedule a consultation with the FreeUp Team, we can help with submitting your ticket!

   a. FreeUp.net/meet

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Higher Level Project Management

Quotes and Time Frame:

1. Request a quote and time frame during the interview
   a. Set up and document milestones based on what your business needs and what the freelancer knows they can accomplish
2. Some consultants will need time to do research, be open to paying for an initial consultation period
3. Receive all quotes/expectations <u>in writing</u> so they can always be referenced in the future

How to Stay Organized

Project Management Platforms

What They're Used For:

1. Setting deadlines and goals

2. Communicating about specific projects and tasks

3. Managing recurring tasks

Examples:

1. Asana.com

2. Trello.com

3. Monday.com

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Communication

When in doubt, over-communicate!

1. Make sure all discussions about KPIs, requirements and pay are done/finalized <u>in writing</u>

2. Check in with your freelancers daily/weekly to see how they are doing

   a. Build a genuine relationship with them and build trust

   b. Ask for feedback on processes (how can we do this better?)

   c. Make sure they have all the resources they need

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Questions?

Schedule a Free Consultation:

FreeUp.net/meet

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