

# FreeUp:

**How To Protect Yourself And  
Your Business While Working  
With Freelancers**

# Who Are We?



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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



# How To Protect Yourself And Your Business While Working With Freelancers

# Scope of Work

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## What does it accomplish?

- First step in Managing your project effectively
- Sets expectations and clear parameters
- Main reference document for project - update and adjust as needed
- Critical document for dispute resolution
- Review with freelancer and agree prior to finalizing hire



# Scope of Work

## What to include?

- Basic info (company/employer name, position title, role description)
- Tasks and responsibilities
  - Link to appropriate SOP's
- Freelancer Schedule (hours of availability, daily/weekly hours estimate)
- Freelancer rate or Project Budget
- Project Deliverables (Reports, documents, products/services created)
  - Signify progression of project

# Scope of Work

## What to include?

- Project Milestones/Timeline (break into 'phases')
- Project Goals (what results are you aiming for?)
- Communication specifics (frequency, channels, points of contact)
- Optional - candidate qualifications (skills/experience discussed)
- Appropriate resources (account logins, relevant info)

# Contracts and NDA's

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## Do you need one?

- Not required or provided by FreeUp - personal preference
- Added level of security, peace of mind
- Common uses:
  - High value projects/positions (Ad campaigns, web dev)
  - Work involving business-critical systems (coding, integrations, billing)
  - Sensitive data (client info, business finances)

# Contracts and NDA's

## Enforceability

- Freelancer and Employer located in the same country = greater chance of enforcing agreement
- Employer and freelancer located in different countries = enforcement jurisdiction is the freelancers country. More difficult to enforce.
- Signing a contract/NDA is still a beneficial action, providing an extra layer of protection and powerful statement of intent to your freelancer

# Freelancer Access Limitations

# Freelancer Access Limitations

## Creating Sub Accounts

- Some platforms allow for the creation of subsidiary accounts
- Limit the access to certain data and features depending on user roles
  - CRM, Accounting/Bookkeeping, Project Management, G Docs, WordPress

## Temporary Logins

- Create unique logins for your freelancers and delete them upon completion of your project

# Freelancer Access Limitations

## Login Credential Protection Services

- [LastPass](#) - Encrypted passwords, add and remove users as needed
- [1Password](#)
- [Okta](#)
- For Wordpress projects: [Temporary login without password](#) plugin

## Update Passwords

- The ultimate safeguard: update all relevant passwords upon completion of your project!
- Best Practice: update ALL passwords once a month/quarter



# Project Budget Controls

# Project Budget Controls

## Determining Appropriate Rate

- Establish your project budget and freelancer rate range
  - Depends on your circumstances, freelancer location, skill level, training available, etc...
  - Simplify rate range
  - Importance: varied candidate pool, multiple quotes to consider
- [FreeUp Pricing Guide](#)
- Determining Freelancer Pay Rates Webinar (attached)


# Project Budget Controls

## Rate Negotiation

- Within your project ticket, click the Review Candidates tab then click on the Negotiate Rate button within the relevant candidate profile
- Our team will do the negotiation for you and update you on the status
- Reminder: Don't forget to record the agreed upon rate in your Scope of Work!

REVIEW CANDIDATES    DID NOT HIRE    HIRED    EDIT JOB REQUEST

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**Danzyl John Quiogue**  
US  
\$1 per hour

[View profile](#)   [Contact](#)   [Negotiate rate](#)   [Pass on this option](#)   [Hire at hourly rate](#)


Need more candidates? Let us know and we'll add them here.

# Project Budget Controls

## Setting Limits

- Mitigates the risk of overbilling by a freelancer
- Limits establish a cap on how much a freelancer is able to bill a client over a weekly billing period
- 20 hour limit = freelancer cannot bill for more than 20 hours in a week
- Great feature to use at the beginning of a project
- Document all rate agreements in SOW

### Your Hires ?




Manage your hires -  
pause, set limits, and give  
bonuses

[View weekly billing chart](#)

ACTIVE    PAUSED

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**Workington Testington**  
United States of America  
Paused | -

[View profile](#)   [Contact](#)   [Send bonus](#)   [Unpause](#)   [Set hours limit](#)

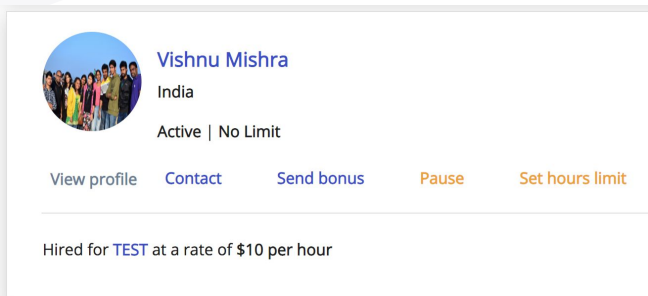
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Hired for [gvfhf](#) at a rate of \$1 per hour

# Project Budget Controls

## Pausing

- Using the Pause feature ceases all billing from a particular freelancer on a particular project
  - Project has reached its conclusion
  - Client and freelancer part ways
  - Intermittent or inconsistent projects - eliminates potential billing during periods of inactivity



The screenshot shows a user profile for Vishnu Mishra. It includes a circular profile picture of a group of people, the name 'Vishnu Mishra', the location 'India', and the status 'Active | No Limit'. Below the profile information are five action buttons: 'View profile', 'Contact', 'Send bonus', 'Pause', and 'Set hours limit'. At the bottom of the profile card, it states 'Hired for TEST at a rate of \$10 per hour'.

# Project Budget Controls

## Fixed Price Projects

- Fixed Price Projects are great for advanced level freelancers who may need to work on a more “salary” type of pay structure.
- Ideal for one-off or short term projects
- Structure helps to stay within budget
- Example:
  - Web Development work, blog article composition, Logo design

Tip: Start a project at hourly as a test and then shift into fixed price

# Project Budget Controls

## Fixed Price Projects

- Flexible billing schedule
  - All fixed price projects are charged in full up front
  - We can accommodate most payment schedules
    - Weekly/monthly charges
    - Paid out to freelancer ½ up front ½ upon project completion
    - Paid out to freelancer according to project milestones
    - Reach out to our team and we can discuss your specific case

# Project Budget Controls

## Bonus payments

- You can award bonus payments to a particular freelancer by finding their profile within the project ticket they are working on
- Click the Bonus button and input the amount - it will be paid out on the following billing date (Thursdays)
  - Award based on agreed upon milestones (include in your SOW)
  - Commission payment
  - Performance bonus
- Bonuses are subject to FreeUp's standard 15% fee
- All bonus payments must be manually submitted



# Determining Freelancer Fit

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## FreeUp's Vetting Process

- Stringent vetting process
  - Heavy focus on identity verification
  - Skills assessments
  - Attitude and Communication
    - Well rounded freelance professionals
  - Best Practices test
    - How to work with our clients and platform
  - Hiring team video interview
  - Past work samples and documentation

# Determining Freelancer Fit

## FreeUp's Pairing Process

- Dedicated project pairing team
  - No automated algorithm that's determining who you're paired with based on freelancer profile features
- Volume control - you won't be inundated with candidates
- Our team reviews and proactively reaches out to freelancers with relevant skills, connecting you with the top 2-4 candidates (more upon request)
- You can Pass/Reject candidates, leave us feedback and we'll find you a better fit based on your feedback

# Determining Freelancer Fit

## Test Tasks

- Take your candidate assessment one step further and request a paid Test Task
  - Payment based on each freelancers quoted hourly rate
- You can do this with as many candidates as you like for a project
- Confirm with the candidate that they are willing to do a test task, click the Hire button, Set A limit for the task
  - Example: Copywriting project - "write 300 words on this topic in 1 hour"
- Get a feel for their skills, communication, working style, etc..
- Pause or adjust limit and move forward together

# Determining Freelancer Fit

## Probationary Period

- Communicate with your freelancer the length and limits of your initial trial period
- Set A Limit, capping their billable hours
- Flesh out the freelancer while they're on the job in an abbreviated capacity
- Scale up their responsibilities and hours accordingly

# Freelancer Tax Status

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## **\*Consult with a Tax Professional\***

- FreeUp is a Marketplace
- Payments go through FreeUp, not directly exchanged between client and freelancer
- General rule of thumb is that when working with a marketplace, expenditure can be recorded as a business expense
- You are not required to send FreeUp or the freelancers you work with through the platform a 1099
- If you exercise our freelancer buyout clause, move the freelancer off platform and start paying them directly, whether or not you want to classify them as an independent contractor at that point is entirely up to you

# Questions?

**Book a Free Strategy Consultation:**

**[FreeUp.net/meet](https://FreeUp.net/meet)**