



Freelance Kickoff Checklist

As you prepare to engage freelancers via the gig economy, use this checklist to make sure you're following best practices for "projectizing" tasks, selecting a platform, and managing freelancers.

"Projectizing" Tasks

- ☐ Start with small, low-risk projects (*i.e. non mission-critical tasks, "I should" and "We shouldn't" projects*)
- ☐ Avoid projects that involve confidential data
- ☐ Clearly define the following:
 - ☐ Deliverable(s)
 - ☐ Desired skills or experience
 - ☐ Expected timeline
 - ☐ Important milestones
 - ☐ Estimated hours
 - ☐ Budget
- ☐ Provide examples of success

Selecting a Platform

- ☐ Determine your talent need and level (perpetual giggers, experts, specialty demographic -- *i.e. college students, moms returning to the workforce*)
- ☐ Understand the structure of your desired platform, including:
 - ☐ Liability (*Who takes liability? Who mediates in the event of a dispute?*)
 - ☐ Confidentiality (*Are there NDAs? Who owns the work product?*)
 - ☐ Background Checks (*Does the platform conduct background checks? Will your company conduct background checks? Are background checks likely required for the type of project your freelancer will be completing?*)
 - ☐ Worker Classification (*Who is the employer of record? Are the giggers 1099s of your company or the gig platform?*)
- ☐ If unsure of the implications for your company, speak with Legal or Procurement about the structure of the platform you choose
- ☐ Understand the fee structures of potential platforms and how they align to your budget:
 - ☐ Membership and Sign Up Fees (*Worth it for continuous use. Less worth it for a one-off project*)
 - ☐ Processing Fees
 - ☐ Transaction or Account Withdrawal Fees
 - ☐ Conversion Fees (*Important to consider if using giggers as a potential talent pipeline*)
 - ☐ Fees Paid by Giggers (*Platforms with high gigger fees could affect work quality given your budget*)



Managing Freelancers

- ☐ Establish a clear communication plan, including relevant tools for:
 - ☐ File sharing
 - ☐ Draft Review
 - ☐ Check-ins
 - ☐ Questions and other urgent communication
- ☐ Determine all accesses the freelancer will require and make sure all is granted by the start date, including:
 - ☐ Access to draft content
 - ☐ Resources where information can be accessed
 - ☐ Access to company specific tools
- ☐ Provide clear feedback on the deliverable at project completion and how it aligned to expectations
- ☐ Solicit feedback from the gigger on what was clear, what challenges they faced with the project, and what the company should be aware of for next time