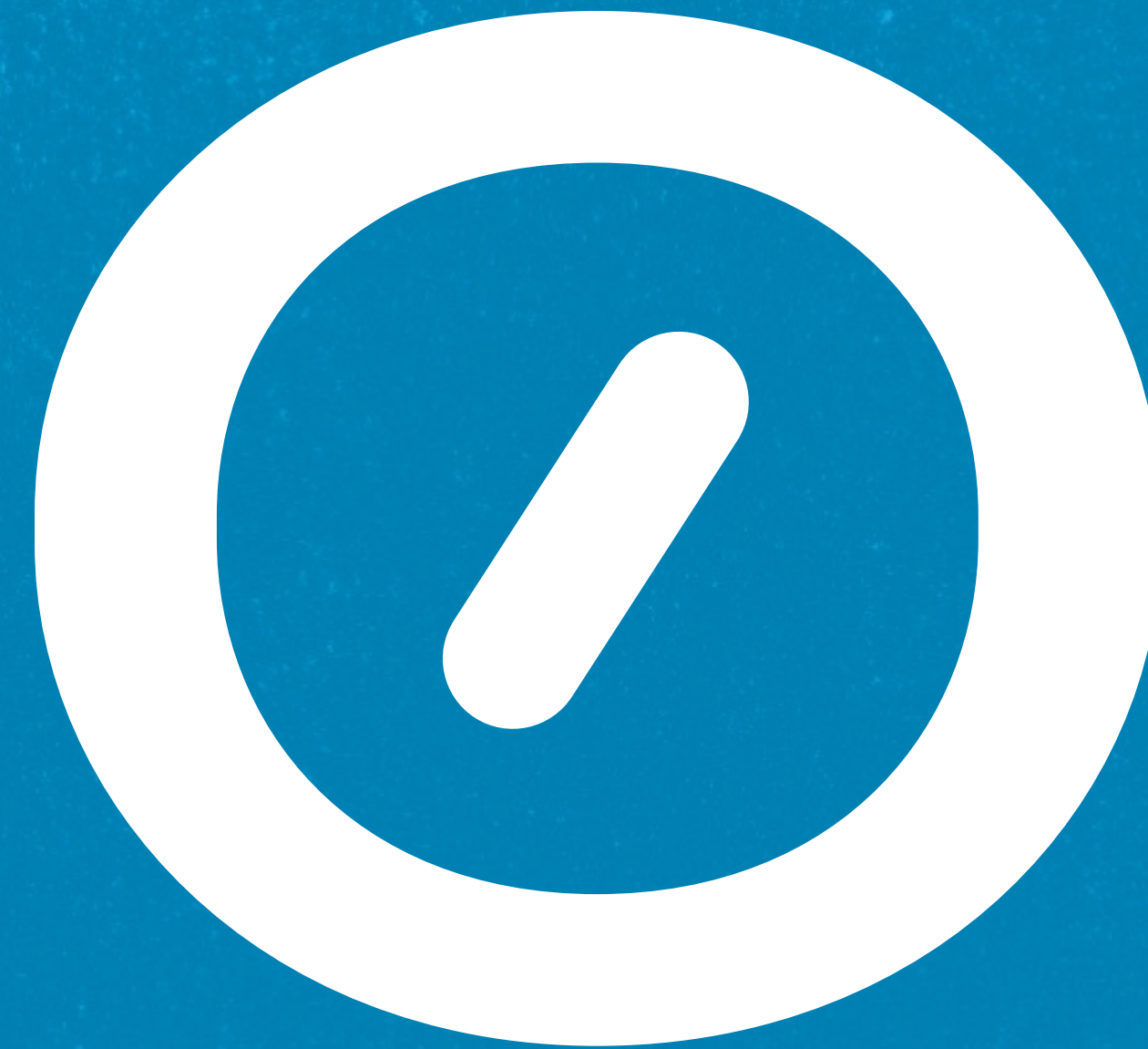


Freelancers: The Secret Sauce to Scalable Support Operations

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Why freelancers?

Freelancers **help you scale**

Flexibility

Identify buckets of work freelancers can help with. Outsource those in different combinations to supplement in-house team.

Relationships

Direct hiring and coaching encourage investment in your customers and organization, and can lead to permanent hires.

Extra service

Part-time freelancers can provide services you may not be able to staff with a small in-house team, like multilingual support.

Cost and benefit

Cost

More people to manage.

Benefit

You get to:

- Pick who you work with
- Coach them to ensure the quality you want for your customers
- Make decisions on who to cultivate (and who's not a good fit)
- Build goodwill
- Potentially gain full employees whose work you've already seen

Me talking \rightleftharpoons Workshop \rightleftharpoons Discussion

Steps to incorporate freelancers into your support organization

- What is your desired outcome of outsourcing to freelancers?
- What is the scope of work?
- When do you need freelancers?
- Who do you want to work with?
- How will you support freelancers?
- What will need to happen to set this up?
- What does success look like?

Workshop!

Steps to incorporate freelancers into your support organization

- ◉ **What is your desired outcome of outsourcing to freelancers?**

1. What is your goal?

Using the worksheet, spend a couple of minutes to jot down why you came to this workshop: why are you thinking about working with freelancers?

What is the outcome you hope to see?

Steps to incorporate freelancers into your support organization

- ◉ What is your desired outcome of outsourcing to freelancers?
- ◉ **What is the scope of work?**

2. What is the scope of work?

Using the worksheet, spend a couple of minutes to write down high-level ideas of what you want freelancers to work on: is it a small portion of the work? Are there a few different things? Is it everything?

- What categories of requests? (Eg, Tier 1? Billing?)
- What support channel(s)? (Eg, email, live chat, phone)
- What would you want escalated to your in-house team?

Steps to incorporate freelancers into your support organization

- ◉ What is your desired outcome of outsourcing to freelancers?
- ◉ What is the scope of work?
- ◉ **When do you need freelancers?**

3. When do you need help?

- Temporary, or long term?
- Seasonally?
- Certain times of day?
- Part-time, or as many hours as possible?
- When do you want freelancers trained and in the queue?

Steps to incorporate freelancers into your support organization

- ◉ What is your desired outcome of outsourcing to freelancers?
- ◉ What is the scope of work?
- ◉ When do you need freelancers?
- ◉ **Who do you want to work with?**

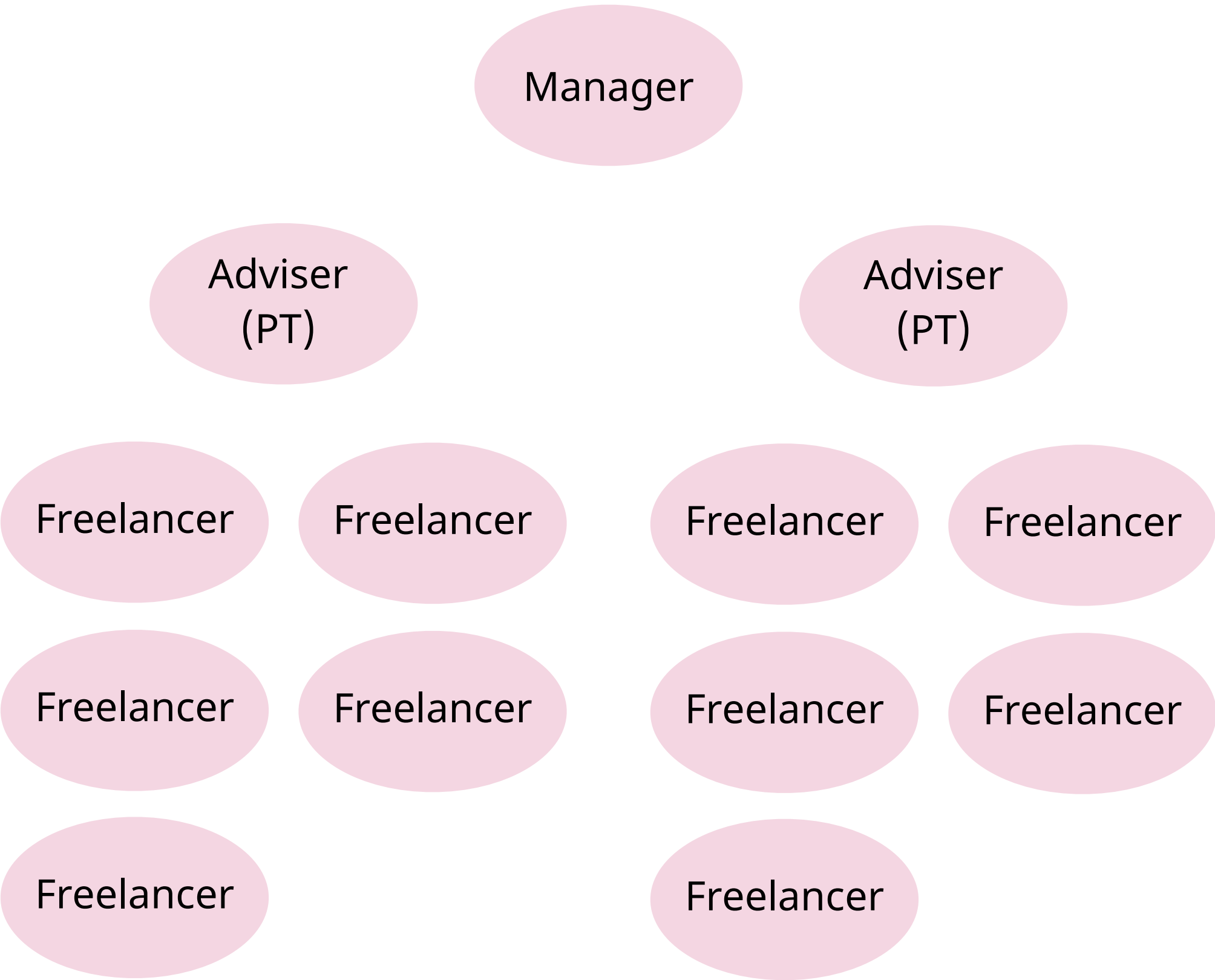
4. Who do you want to work with?

- Who is your desired candidate? Think mindset, skills, pay range, time zone/location, when you want them to work, how many hours per week.
- How will you screen candidates? Eg resume, interview questions, writing sample/example support questions.
- What will your contract look like? Will you need an NDA? Will you write performance expectations into it (recommended)?
- Where will you find freelancers? (Eg Upwork, Fiverr, Toptal, Hubstaff, Guru)

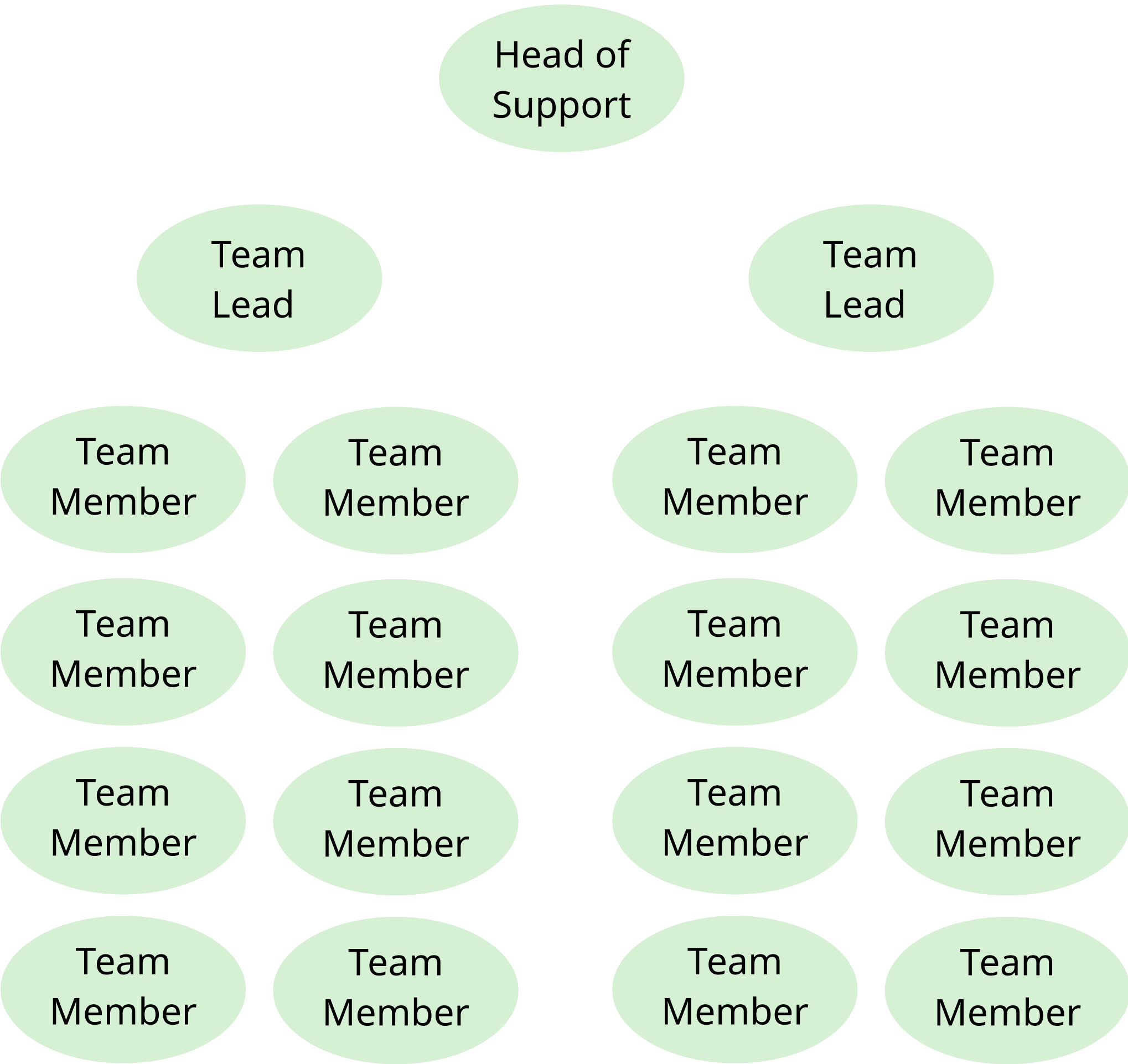
Steps to incorporate freelancers into your support organization

- ◉ What is your desired outcome of outsourcing to freelancers?
- ◉ What is the scope of work?
- ◉ When do you need freelancers?
- ◉ Who do you want to work with?
- ◉ **How will you support freelancers?**

Freelancer Support



In-house Support



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 and ticket trends.
- How will you recognize and reward high performers?
- How will you help freelancers feel like part of the team? (Eg swag, watercooler channels, buddies)
- How and when will you handle performance evaluations, rate adjustments, and terminations?

Steps to incorporate freelancers into your support organization

- What is your desired outcome of outsourcing to freelancers?
- What is the scope of work?
- When do you need freelancers?
- Who do you want to work with?
- How will you support freelancers?
- **What will need to happen to set this up?**

6. What needs to happen?

- 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?
- How will you schedule freelancers?

Steps to incorporate freelancers into your support organization

- What is your desired outcome of outsourcing to freelancers?
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- When do you need freelancers?
- Who do you want to work with?
- How will you support freelancers?
- What will need to happen to set this up?
- **What does success look like?**

7. What does success look like?

Using the worksheet as a guide, take a couple of minutes to write unedited, first thought responses to these two questions:

1. How will you know if your work with freelancers is working?
2. What will you measure?

Thank you.

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