



Bonus Report #2:
Five Checklists
to Make Outsourcing a Breeze

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Table of Contents

Introduction	4
Checklist #1: Advertising Jobs	4
Checklist #2: Evaluating Freelancers	5
Checklist #3: Hiring Freelancers	7
Checklist #4: Creating Project Briefs	8
Checklist #5: Project Management	9
Conclusion	12

Introduction

If you've already read the main **H.A.N.D.S. Free Formula™** course, then you're well aware of the fact that outsourcing a task requires you to step through many processes, including finding freelancers, evaluating them, hiring the best people for the job, managing your team and more.

At first glance, it may look overwhelming. However, if you simply work your way through the process one step at a time, you'll soon find it's easier than you think.

And to make it even easier, I've developed this outsourcing checklist, which is actually a set of five separate checklists that you can use for the five main parts of the process.

Don't even think of hiring a freelancer unless you use these checklists!

Note: Your first step, of course, is to evaluate your own short-term and long-term needs for different freelancers. (Review the H.A.N.D.S. Free Formula for more information on this topic.) Once you've done that, then you're ready to step through the rest of the process using the following five checklists...

Checklist #1: Advertising Jobs

- Have you evaluated your needs?
- Do you have a clear picture in mind of the type of freelancer you need to hire for this particular job?
- Have you created a clear and detailed project description?
- Did you post the project on one of the top freelancing sites, such as:
 - Elance.com?
 - Odesk.com?
 - RentACoder.com?
 - Guru.com?
 - Freelancer.com?

- Did you browse the service provider ads on the above sites?
- Did you search Craigslist.org for a suitable freelancer?
- Did you post your own ad on Craigslist.org?
- Did you ask your offline colleagues for recommendations?
- Did you ask your online colleagues for recommendations?
- Did you ask your contacts (such as on Facebook.com and via your newsletter) for recommendations?
- Did you search your local classified ads?
- Did you post your own classified ad in the local newspaper?
- Did you post an ad in the college newspaper?
- Did you post fliers on campus?
- Did you talk to college professors to ask for recommendations?
- Did you search business and marketing forums (such as WarriorForum.com)?
- Did you search Google for a freelancer?

Checklist #2: Evaluating **Freelancers**

- Did you check the freelancer's feedback rating on the freelancing site (where applicable)?
- Did the freelancer send a personal reply with his or her elance.com (or other freelancing site) bid, which shows he really understands the project?
- If you posted a special instruction in your ad, did the freelancer carefully follow the special instruction?

- Is the freelancer's bid or rates within your budget range?
- Did you check the freelancer's portfolio?
- Did you check the freelancer's references?
- Has the freelancer done projects similar to the one you're proposing?
- Do you know anyone who can personally vouch for or recommend this freelancer?
- Has this freelancer been in business for six months? If so, how long?
- Does this freelancer have a good reputation?
- Did you search Google for the following information:
 - Freelancer's name?
 - Freelancer's business name?
 - Freelancer's email address?
 - Freelancer's phone number?
 - Freelancer's website?
 - Freelancer's username(s)?
 - Other identifying information?
- Did you uncover any serious complaints during your search? If so, what were they?
- Did you uncover any minor complaints during your search? If so, what were they?
- Did you uncover a pattern of complaints (either minor or serious) during your search?
- If you uncovered any complaints, how recently were these complaints posted?

Note: Sometimes freelancers who're just getting into the business may have complaints from clients, such as missed deadlines, poor communication, etc.

However, if you're doing your due diligence on a well-established freelancer – and if these complaints are in the long-distant past – then it's possible that the freelancer was just going through "growing pains" when he first started his business.

Point is, use common sense.

If a freelancer started three years ago, did NOT have any major complaints (such as fraud), but did have a few complaints three years ago and none since, then it's quite possible the person will do good work for you now that he's more experienced.

On the flip side, take note that a freelancer who's just starting out - even if he has a perfect feedback rating now - may experience growing pains down the road.

Example: If someone has been in business for only a month or two, he's probably not yet experienced enough to know how to handle a full project load. Thus he could easily take on too much work, which will create delays.

Checklist #3: Hiring Freelancers

- Did you start with a small project with your new freelancer?

Note: In essence, don't give a new freelancer one of your bigger or more important projects until you're sure the two of you will work together well.

- Did you create an agreement that defines:

- The scope of the project?
- Project milestones and goals?
- Payment terms?
- Deadlines?

- Did both of you sign the agreement?

- Did you tell your freelancer about your expectations?

- Did you ask your freelancer to tell you about his or her expectations?

- Did you ask your freelancer to contact you with project updates on specific dates?

- Did you ask your freelancer to complete and turn in parts of the project on specific dates?

- Did you offer your freelancer any incentives for finishing the task early?
- Did you educate your freelancer about your overall company mission, vision and your business philosophy?
- If local, did you ask the freelancer to come in for an interview?
- If remote, did you ask the freelancer to conduct a phone interview?
- Here's what to look for during the interview process:
 - Did the freelancer show up on time for the scheduled start of the interview?
 - Did the freelancer make some effort to look professional?
Note: Part of the appeal of working from home is not having to get dressed up – so don't read too much into what someone wears, especially if they are otherwise qualified.
 - Did the freelancer come prepared?
Example: Did he or she bring a portfolio and references?
 - Did the freelancer share his or her relevant experience?
 - Did the freelancer seem excited about his job?
 - Did the freelancer seem excited about your project?

Checklist #4: Creating Project Briefs

- Did you create a clear and detailed project brief for your freelancer?
- Does the project brief list specifics, such as colors and imagery for a graphic, word count and topic for an article, etc?
- Did you provide samples, links and other examples to give your freelancer a clear idea of what you want?

- Did you tell your freelancer how the project will be used? (For example, if you hired a ghostwriter to write a report, it's important for him to know the intended audience, the topic and that it's a lead-generating report that's intended to pre-sell a product.)
- Did you encourage the freelancer to ask questions?
- If needed, did you provide training tools? This includes things such as:
 - Instructions on what type of writing you prefer.
Example: US English versus UK English... or first-person writing versus third-person writing.
 - Written instructions which detail how to complete a particular process.
 - Flow charts and/or decision maps to help a freelancer make relevant decisions.
 - Answers to frequently asked questions that are relevant to the freelancer's task.
 - Tools that make the freelancer's job easier.
Example: Such as "copy and paste" answers that a customer service representative can use for common email inquiries.
 - Video instructions.
 - Instructions with screenshots.
 - Audio instructions.
 - Mindmaps to give the freelancer an overview of a process.
 - Access to another experienced freelancer on your team who's in charge of training new freelancers.
Example: A project manager.

Checklist #5: Project Management

- Did you provide an email address for your freelancers?

- Did you provide a phone number where they can reach you?
- Did you tell your freelancers your Skype username?
- Did you tell your freelancers your preferred means of contact?
- Did you exchange information about your time zones?
- Did you establish the best times to contact each other?
- Are you using project management tools to make the freelancer's job easier?
- Have you given your freelancer access to the other relevant members of your freelancing team?

Example: The copywriter and designer often work together to create a professional, persuasive website.

- Have you created a mindmap that shows how the work flows through your organization, and specifically how it flows between freelancers who all work on different pieces of a project?
- Have you set up weekly meetings with your team?
- Have you established what days and times your freelancer usually works (e.g., Monday through Friday, regular business hours)?
- Did you determine what days your freelancer may not be available? This includes during religious holidays, during national holidays, etc.

Note: Obviously, if you're hiring a freelancer who resides in a different country than you, it's a good idea to learn more about national holidays.

- Does the freelancer have any potential issues with connectivity, such as an ISP that goes down often, a satellite connection that goes out during inclement weather, or perhaps an electrical system that has frequent brownouts or other outages?

Note: Some of these issues are more common than you think in certain regions of the world, especially if your freelancer lives in a developing country or rural region. While this may not be all that big of an issue if your freelancer is completing a project such as an ebook for you, this can become a big issue if the freelancer is doing something like customer service for you (which requires her to connect to your site daily).

- Have you asked your freelancer to check in with you on specific days?
- Do you offer constructive criticism to help the freelancer do a better job? If so, do you ensure your criticism is polite and professional, never personal?
- Do you brief your freelancers thoroughly, let them know they can always ask questions, but then leave them alone to do the job you hired them to do? (In other words, do you avoid micromanaging your team?)
- Do you offer generous praise for jobs well done?
- Do you offer cash rewards for good work?
- Do you offer other incentives for good work?
- Do you offer cash bonuses for early delivery of a project?
- Do you offer other incentives for early delivery of a project?

Note: Other incentives may include things like paid days off, gift cards for popular stores and restaurants or other relevant gifts. If you have local staff, then you can do things like buy lunch for the entire team or even take them out to dinner. If your team is particularly invaluable to your operation, you may even enjoy weekend “junkets” or parties once a year.
- Do you have any performance-based incentives?

Example: You pay a writer his or her usual rate for an article. But if the article makes you money, you send a cut of the profits to the writer.
- Do you offer cash or incentives when the entire team reaches a milestone or meets a goal/benchmark?

Note: This can be powerfully effective. That’s because an individual freelancer isn’t just working for himself. Point is, if one person “messes up” his end of the project, NO ONE gets a reward. Thus this sort of incentive promotes teamwork and good work, because no one wants to be blamed for the team failing to reach a goal.
- Have you asked your freelancer what you can do to make their projects with you run more smoothly?

- Have you asked your freelancer what you can do to make working with you and working in your environment more pleasant?
- Do you “retain” your freelancers by keeping them busy every week?
- If you don’t have enough work for a freelancer – or if you have a limited need, such as a web graphic – have you referred them to your colleagues?

Note: The freelancer will appreciate this and will definitely remember you for it. Thus the next time you need this freelancer’s services, he or she is likely to accommodate you if at all possible.

Conclusion

You can see why I said you shouldn’t even think of hiring a freelancer unless you have all five of these checklists in hand.

Go ahead – print them off and hang them by your computer. You’ll find them absolutely invaluable the next time you need to hire freelancers, send them project briefs and manage them!