



Microsoft 365 Freelance Toolkit

Tools, templates, and best practices to launch and
scale an enterprise freelance program

October 2018



Overview

What is it?

Microsoft 365 Freelance toolkit is a solution of curated tools, templates, and best practices that help enterprises launch, execute, and manage freelance programs at scale.

Who is it for?

Enterprise customers who want to integrate freelance talent into their sourcing models.

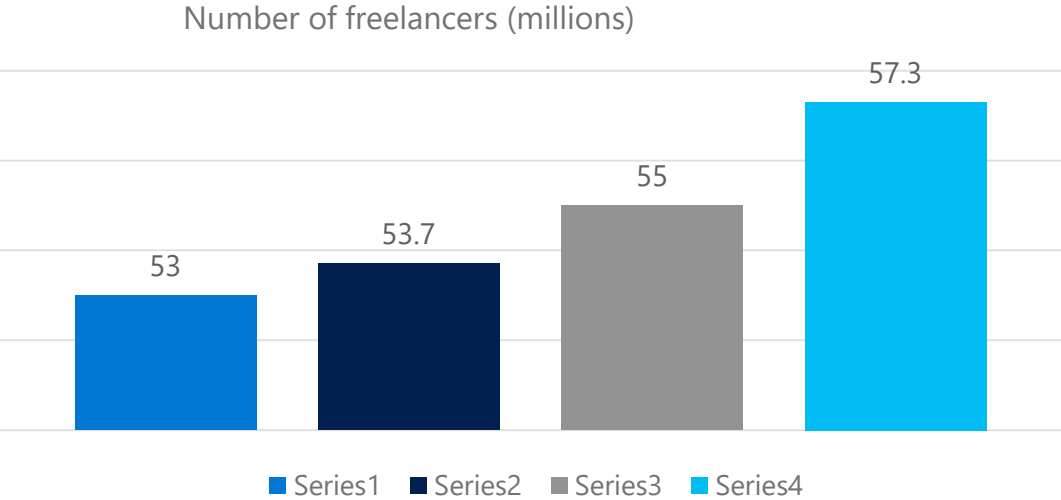
Why is it important?

Launching and executing an enterprise freelance program at scale can be complex and daunting. The Freelance Toolkit makes it streamlined and turnkey.

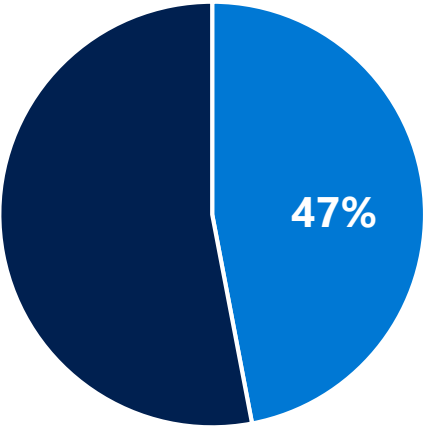


The future of work is now

To thrive in a highly competitive environment with rapidly changing technology and customer behavior, enterprises must be agile, adapting to new business models and new kinds of workers. Enter the gig economy, a labor market made up of independent workers—freelancers, consultants, contractors, solopreneurs—who contract for short-term engagements. According to Field Nation, 86% of freelancers intentionally choose freelancing.

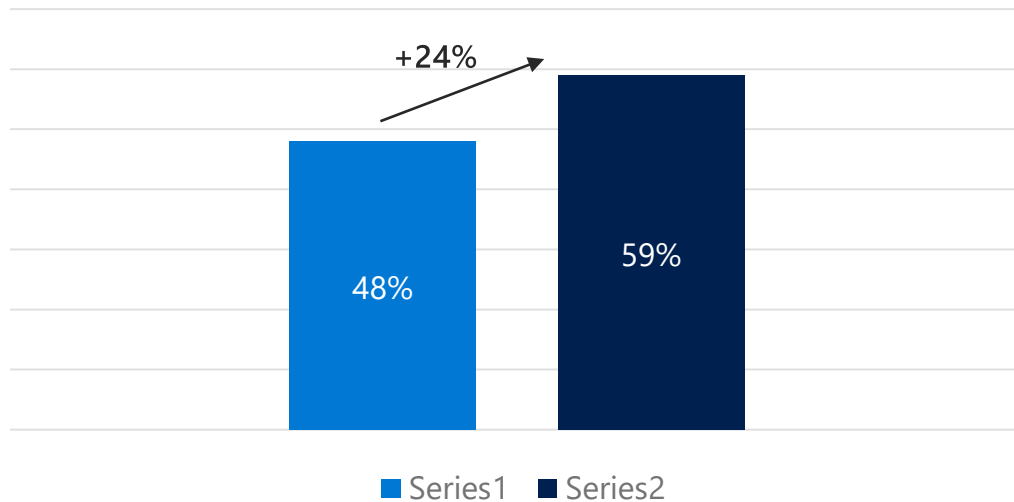


Freelancer growth has nearly doubled each year. At this current rate, most of the U.S. workforce will be freelancers by 2027.



Millennials are a driving force of the gig economy. Nearly half of them are already freelancing.

Enterprises are embracing flexible talent



Usage of flexible talent has increased 24% in the last year.



Enterprise companies have engaged freelancers for work within their organizations and integrated freelance capabilities into their own operations.

Challenges for enterprises

While adding on-demand freelance talent to the mix is proving substantial, measurable results in speed and efficiency, the path to transforming existing policies and processes is largely undefined.

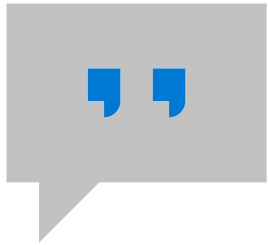
To be successful, enterprises must:

- Change the mindset for how they approach work
- Transform existing policies and processes
- Develop an infrastructure that supports the complexities of an enterprise freelance program



Microsoft 365 Freelance Toolkit

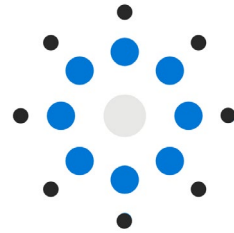
"How do I roll out my program, while adhering to our company policy and compliance?"



Internal communication

A one-stop shop for freelance program details and tools to help accelerate onboarding and adoption

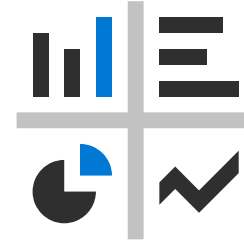
"How do I share files & collaborate effectively with freelances in an IT-supported way?"



Team-wide collaboration

A hub where teams can communicate, manage tasks, store shared files, and collaborate with external users

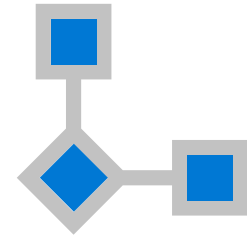
"How do I track the effectiveness of freelancers to convince others to sign-up?"



Data analytics

Analytics to drive data-driven decisions, compare freelance KPIs to other staffing options, and identify effective groups and categories

"How do I automatically create a ticket for my program operator to review large projects?"



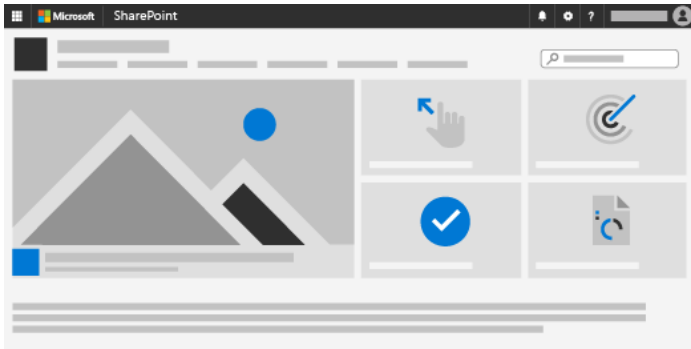
Workflow automation

Automated workflows to connect apps and services, send notifications, synchronize files, and collect data

Internal communication

Employees need a place where they can learn how the program works, fulfill their training requirements, and review best practices for working with freelancers.

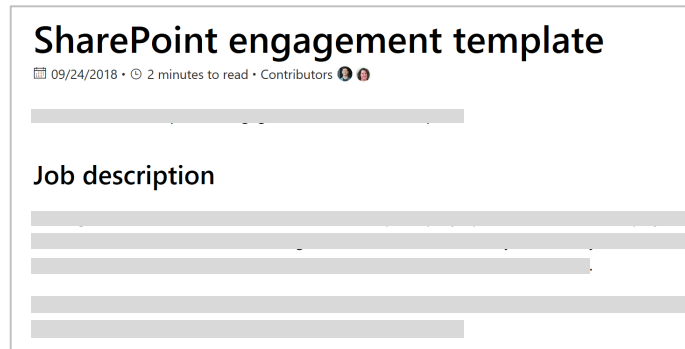
Tools



A SharePoint communication site that provides a repository for program documentation

A curated talent pool of SharePoint experts to help enterprises customize their communication sites

Templates



A SharePoint communication site template that includes an FAQ seeded with the top questions from enterprise employees

A prepopulated hiring template to help employees start engaging with freelancers

Best practices

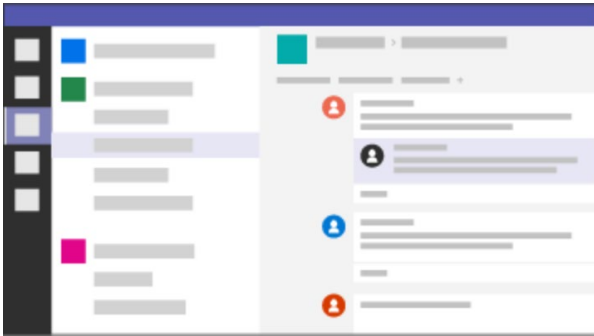


As employees begin thinking about working with freelancers, we've found that it's important to provide access to as much information as possible, and to make onboarding clear and simple. [Learn more](#)

Team-wide collaboration

Enterprise freelance projects require team members to work together on multiple files, manage varied tasks, and communicate across time zones.

Tools



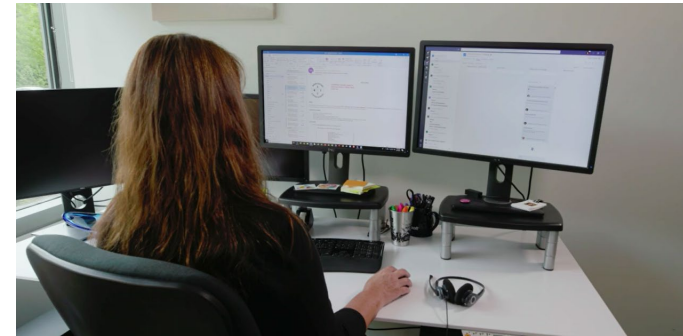
Public and private teams for members to engage in discussion

One place to track progress and align each team member's workflow through project management tools like Microsoft Project

One place to store shared files and retrieve them through intelligent search

The ability for external users worldwide to collaborate in all aspects of freelance projects through Microsoft teams free guest access

Best practices



As employees start working with freelancers, we've found that streamlined collaboration becomes critical to operating effectively. [Learn more](#)

Data analytics

Freelance program administrators need to capture, track, and communicate program metrics, compare freelance KPIs to other staffing options, and identify groups that leverage the program most effectively.

Tools

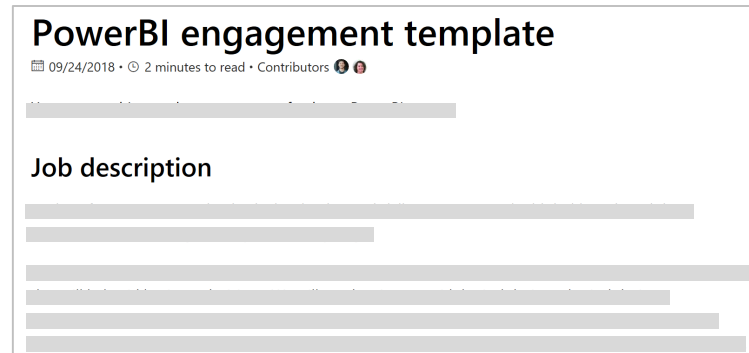


Power BI to share data visualizations, insights, and reports with others

A Power BI connector to pull data from disparate sources into dashboards

A curated talent pool of Power BI experts to help enterprises customize their dashboards

Templates



A Power BI template with sample visualizations

A prepopulated hiring template to help employees start engaging with freelancers

Best practices

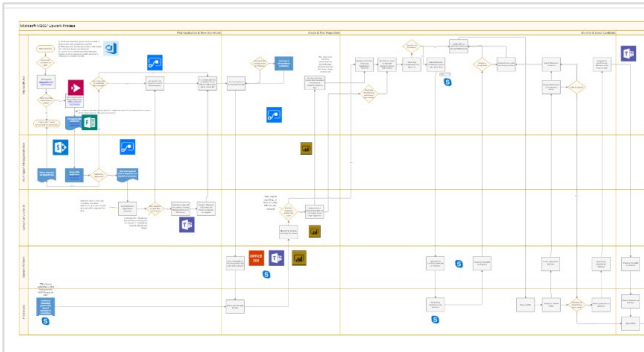


As a data-driven enterprise, we've found that measuring the effectiveness of our freelance program is critical to program growth and health. [Learn more](#)

Workflow automation

Freelance program managers need to reduce manual completion of repetitive tasks by creating automatic, repeatable processes.

Tools

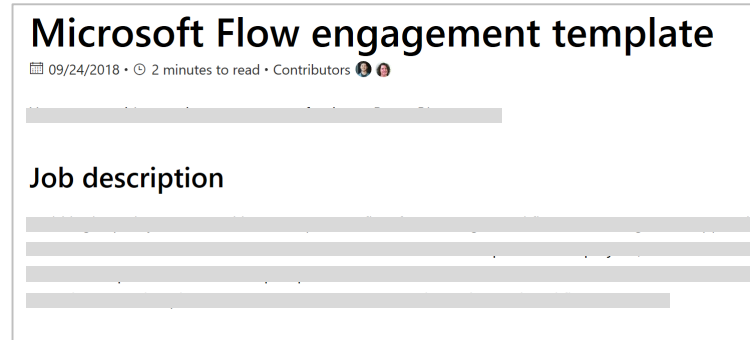


Microsoft Flow to create automated workflows, send notifications, synchronize files, and collect data

Infographics that show how to use Flow within an enterprise freelance program

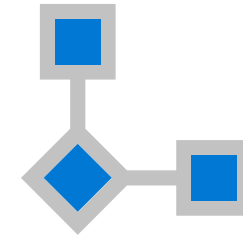
A curated talent pool of experts to help customize flow scenarios

Templates

A screenshot of a Microsoft Flow engagement template. The title is "Microsoft Flow engagement template". Below the title, it says "09/24/2018 • 2 minutes to read • Contributors". The main content area is titled "Job description" and contains several horizontal lines for text input.

A prepopulated hiring template to help employees start engaging with freelancers

Best practices



As our enterprise freelance program grows, we've learned that freelance program management is a high-demand, multi-faceted role. Automating some aspects of the work has been critical to sustaining operations. [Learn more](#)

Our journey

It's paid off. To date, we've:

- Completed over **1,800 freelance projects**
- Reduced time to engage **from 20 to 5.4 days**
- Achieved **4.9/5 freelancer star rating**

More importantly, we have seen firsthand how employees can evolve from having a genuine fear of a freelancer model to recognizing how much more productive and enjoyable their work is when they work with freelancers.



What we learned

Getting to this point was not easy—we had to internally transform ourselves, and we needed to build an infrastructure that could support the complexities of an enterprise freelance program.

This led us to develop the Microsoft 365 Freelance Toolkit, combining our own leading enterprise productivity apps with curated tools, templates, and best practices to address the specific needs of enterprise freelance programs.



Next steps

Ready to get started?

Microsoft 365 Freelance Toolkit is free with Microsoft 365 subscriptions—there are no additional costs if customers already have Teams, Flow, SharePoint and Power BI.

[Learn more](#)



Appendix

These infographics were designed to help you drive stakeholder discussion around how your existing investments in Microsoft 365 can help support an enterprise freelance program.

[Learn more](https://aka.ms/freelancetoolkit)

Microsoft

Launch, execute, and scale your enterprise freelance program

What you need to launch a freelance program:

Internal communication & awareness Learn, engage, and stay updated with the program SharePoint	Team-wide collaboration Communicate, project manage, and collaborate in real time Microsoft Teams	Data analytics Measure business success of your freelance program Power BI	Workflow automation Create a seamless experience from talent platforms to current work streams Microsoft Flow
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How to launch your freelance program with the Microsoft 365 freelance toolkit:

Leverage our curated tools, templates, and best practices within your existing Microsoft 365 stack.

Turn key deployment

Best practices, Work description templates, Case studies, Expert marketplace

For more information, visit <https://aka.ms/freelancetoolkit>

Microsoft

SharePoint

One place for your employees to learn, engage, and stay updated with the program



Get started with training
Get started using the pilot program today by watching the training video

Learn, engage and stay updated
Get desired information about the pilot program on the website and with email updates

Subscribe to email alerts, Check out FAQs, Learn from the business program knowledge base


Examples of real-world projects
See how your colleagues have leveraged freelancers on projects to deliver success.

For more information, visit <https://aka.ms/freelancetoolkit>

Microsoft

Microsoft Teams

One place to communicate, project manage, and collaborate in real time



Supports both cloud-only and hybrid scenarios

Provides a hub for teamwork

One place for freelancers and full time employees

Full time employees work together in Microsoft Teams


Engagement and collaboration to be more in good work

For more information, visit <https://aka.ms/freelancetoolkit>

Microsoft

Power BI

One place to measure business success of your freelance program



Enterprise focused metrics
Track quality, time, and cost for projects

Easy to customize with rich data visualization

Track spend by business group to review adoption and opportunities for your freelance program


Track spend by category to understand which freelance projects and skills your organization is using most

For more information, visit <https://aka.ms/freelancetoolkit>

Microsoft

Automate workflows

with Microsoft Flow to create a seamless experience from talent platforms to current work streams



Go from a manual process... to an automated process with Microsoft Flow

Microsoft Flow gives you:

- End-to-end workflow automation
Employees can quickly go from awareness to action on the freelance pilot program.
- Enterprise grade scalability & security
- Compliance

...and from training to posting their first project on the freelance platform

Create awareness, Employee onboarding, Interview and hire, Employee onboarding, Employee onboarding, Project is reviewed, Confirmation email sent

For more information, visit <https://aka.ms/freelancetoolkit>

These case studies are a sample of projects you can use with freelance. With the Toolkit, you will receive the full list.

[Learn more](#)

Case Study – Data Science & Analytics

Project

We needed help with keywording our library of icons for an internal database tool. This involved breaking out the visual (physical), conceptual (metaphor), and category (genre) tags for each icon. We have 4,000+ icons that need to be defined and categorized as part of our taxonomy development.

Feedback to Freelancer

"Michael was easy to communicate with and asked questions to clarify what we needed to get the job done right. I appreciated the follow-ups and would be happy to work with him again."

Deliverable

Icon	Visual	Metaphor	Genre
User	Person	Contract/Person	People
Task Recorder	Form	Memory/Document	Forms
Clipboard/Task Document	Form	Memory/Document	Forms
Exclamation Circle	Error	Error/Status	Notifications
Bar Chart	Graph	Graph	Charts
Link Open	Link	Link	Links
Calendar	Calendar	Calendar/Month	Calendars
Microphone	Microphone	Microphone/What's New	Microphones
Phone	Phone	Phone	Phones
Project Happy Day	Happy Day	Happy Day/Action	Actions
Send/Close	Close	Close	Closes
Default/Default/Rectangle	Rectangle	Rectangle	Rectangles

Case Study – Writing

Project

Two articles needed to be edited and proofed for clarity and concision, and needed to be balanced by the MSFT Style Guide and the author's voice.

Feedback to Freelancer

"Jenna was able to accommodate a very quick turnaround time for this last-minute project."

Deliverable



Case Study – Infographic Design

Project

Despite the fact that more and more people are working remotely, meeting habits still tend to focus on a conference room. This leads to a loss of efficiency and poor inclusion of people who aren't in the room.

After crowd-sourcing some best practices, we hired a freelance designer to create a beautiful infographic to distribute around conference rooms in Redmond.

Feedback to Freelancer

"Super quick turnaround time, willing to accept numerous iterations, high quality work, AND he provided the source .ai files."

Deliverable



Case Study – Web, Mobile, and Software

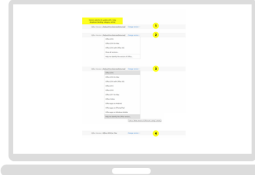
Project

Web-based help & how-to content: Design patterns for navigating help for multiple versions.

Feedback to Freelancer

Daniel was an experienced UX designer who asked great questions and provided some good options for us.

Deliverable



Case Study – Design & Creative / Illustration

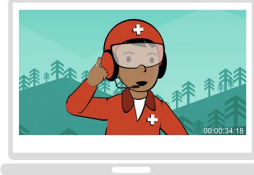
Project

Our animator had 4 other videos on his plate, so we decided to outsource this project. The characters came back on point – it saved us so much time! We are happy to work with Vicki again!

Feedback to Freelancer

"Wonderful working with Vicki, she understood our ask and had a quick turnaround."

Deliverable



Case Study – Video Production

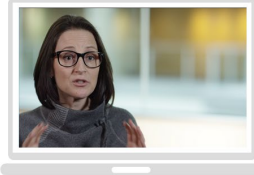
Project

We recorded a 45-minute interview. The deliverable was provided one day before the due date.

Feedback to Freelancer

"Got edit before deadline, Thank You!"

Deliverable



Thank you