



# 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.

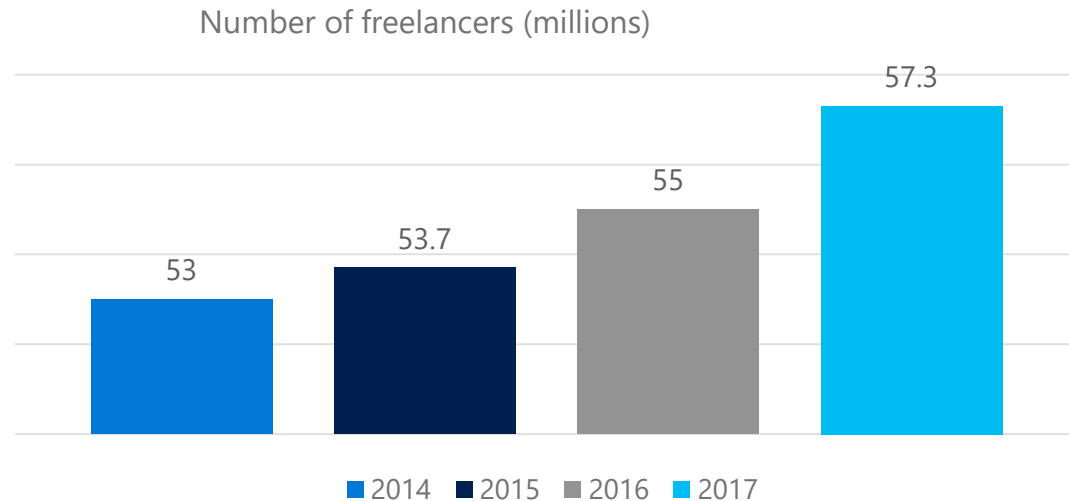
## Why is it important?

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

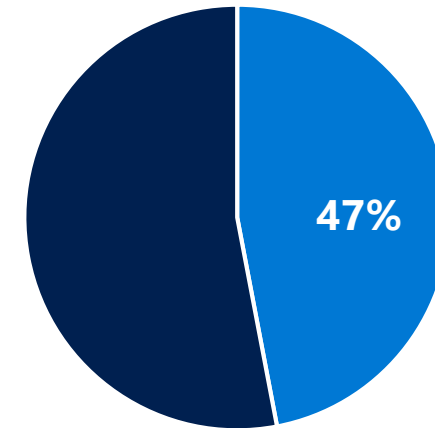


# The future of work is now

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.

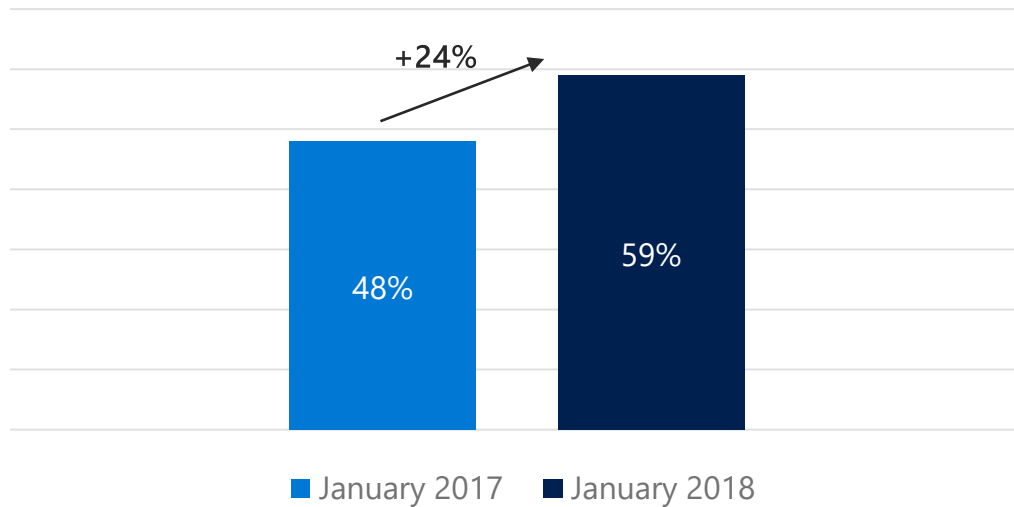


Freelancer growth has nearly doubled each year. At this current rate, a larger proportion of the U.S. workforce will participate in the gig economy by 2027.



**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 projects 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.

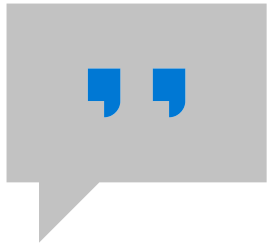
To be successful, enterprises must:

- 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 to help drive awareness among internal stakeholders?"*



## Internal communication

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

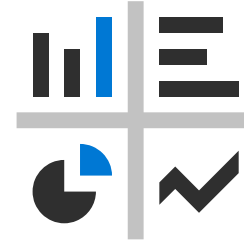
*"How do I share files and collaborate effectively with freelancers on specific projects?"*



## Team-wide collaboration

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

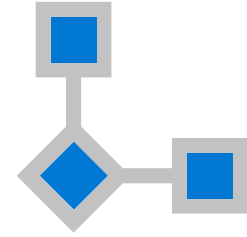
*"How do I track the effectiveness of freelancers to convince others to sign-up?"*



## 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?"*



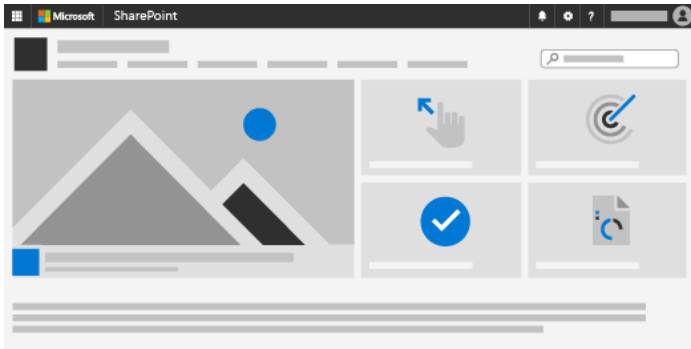
## Workflow automation

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

# Internal communication

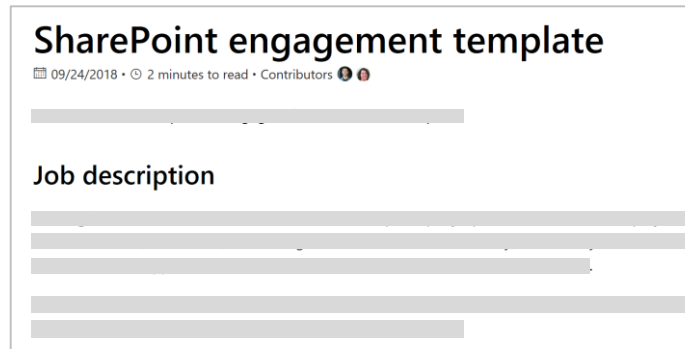
Employees need a place where they can learn how the program works, fulfill their training requirements, and review best practices for engaging with freelancers.

## Tools



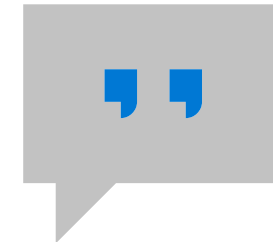
A SharePoint communication site that provides a repository for program documentation

## Templates



A SharePoint communication site template that includes an FAQ seeded with the top questions from enterprise employees  
A prepopulated engagement template to help employees start engaging with freelancers

## Best practices

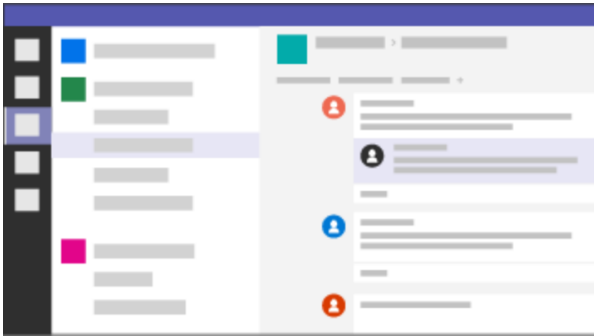


As employees begin thinking about engaging with freelancers, we've found that it's important to provide access to as much information as possible, and to make onboarding clear and simple. [Learn more](#)

# Team-wide collaboration

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

## Tools



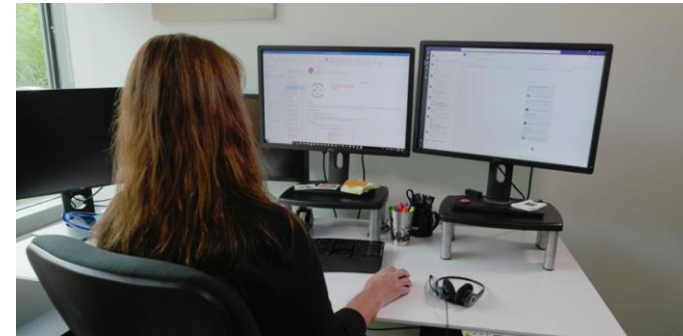
Public and private teams for members to engage in discussion

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 engaging 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.

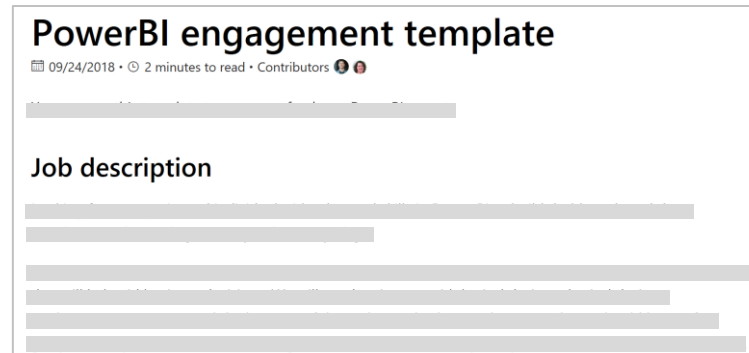
## Tools



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

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

## Templates



A Power BI template with sample visualizations

A prepopulated engagement template to help employees start engaging with freelancers

## Best practices

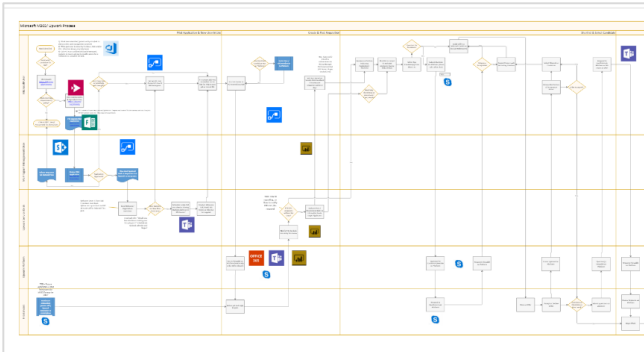


As a data-driven enterprise, we've found that measuring the effectiveness of our freelance program is critical to program growth and health. [Learn more](#)

# Workflow automation

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

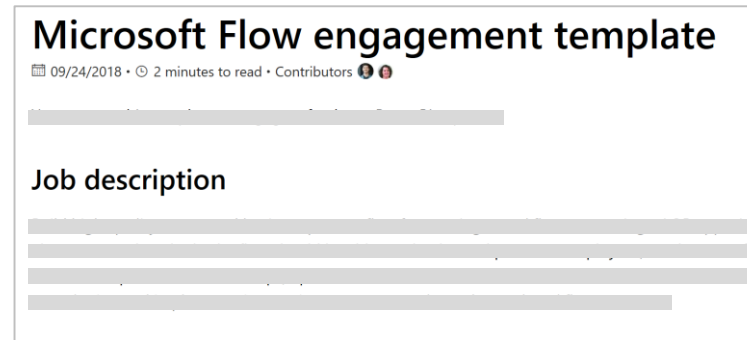
## Tools



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

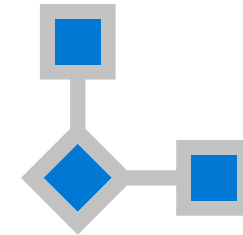
Infographics that show how to use Flow within an enterprise freelance program

## 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". There are two main sections: "Job description" and a section with four horizontal lines for text input. The form is designed to help employees start engaging with freelancers.

A prepopulated engagement 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 people and organizations are able to do more by being augmented with on-demand access to experts.

In areas where we have used this model, it has allowed us to increase innovation and reimagine ways to better serve our customers.



# 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:

<b>Internal communication &amp; awareness</b> Learn, engage, and stay updated with the program SharePoint	<b>Team-wide collaboration</b> Communicate, project manage, and collaborate in real time Microsoft Teams	<b>Data analytics</b> Measure business success of your freelance program Power BI	<b>Workflow automation</b> 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 freelance 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**

Chat, Share, Manage, Collaborate in real time

**One place for freelancers and full time employees**

Full time employees work together in Microsoft Teams


Engagement can add dimensions to the team as guest users

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.  
Create awareness, Employee onboarding, Interview and hire, Employee onboarding, Employee onboarding, Project is reviewed, Confirmation email sent
- Enterprise grade scalability & security**
- Compliance**

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

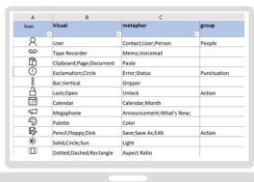
#### Project

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	Connect User/Person	People
Tap/Reorder	Hand	Memory/Remember	
Clipboard/Document	Page		
Exclamation/Alert	Error/Status		Notifications
Bar/Vertical	Diagram		
Link/Chain	Link/Link		Action
Calendar	Calendar/Month		
Microphone	Microphone/Record		Action
Phone	Phone/Call		Action
Search/Find	Search/Find		Action
Document/Document	Document/Document		Action

### 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

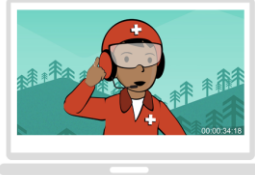
#### Project

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