



COMPLIANCE SPECIALISTS

ON DEMAND

**SPECIALIST
BEST PRACTICES**

INTRODUCTION

Congratulations on taking your first steps to controlling your own compliance career.

Whether you're a freelancer or a consulting firm, we hope to connect you to more job opportunities and are excited to have you in our specialist network.

We hope these best practices will help us, as a community, maintain the high quality standards businesses expect. Ready to get started? Let's go!

- 1 Effective Profiles
- 2 Applying to Projects
- 3 Completing the Work
- 4 Follow on Work

EFFECTIVE PROFILES

You'll never get a second chance
to make a first impression.

Complete your profile

While it may be time consuming, it is important to ensure you have thoroughly filled in your specialist profile. Tempted to skip your educational experience because it's been 20 years since college? Don't! Your profile is your chance to impress the employer and you never know what little detail you include might help you find common ground.

Describe your experience

It's not enough to just list all of your credentials and former employers. Take the time to provide a description of your work experience. This is your opportunity to highlight the skills you've acquired and the accomplishments you've made in these previous roles that make you suitable for the projects on our platform. The more detailed you can be, the more you stand out from the crowd.

Hashtag key skills

What skills do you have professionally that you feel define you and your expertise? Hashtag it! Businesses can also hashtag key skills they want to require in a specialist so these hashtags become a part of how we curate strong matches. Don't know what businesses want? Try looking through some of the project listings to get an idea of what's popular.

Update your profile

Obviously if you're on our platform then you're the consummate professional and constantly trying to stay abreast of industry trends and knowledge, so let's brag about it! Developed a new skill? Update your profile. Gained a new certification? Update your profile. We allow specialists to view all project listings (even those they aren't qualified for) in order to provide you with a roadmap for professional growth and development. When you improve professionally, let's share it with our businesses.

APPLYING TO PROJECTS

You miss 100% of the shots
you don't take.

It's a numbers game

Not getting hired? Don't get discouraged. Get better prepared. We specifically allow specialists to see all opportunities on our platform regardless of whether they can apply for them in order to allow you to see what the most common needs and skill requests may be so you can develop and grow professionally to meet market demand. Continue upgrading your skills and continue applying!

Play to your strengths

While it may be tempting to toss your hat in the ring for all lucrative projects and full-time job opportunities on our platform, be mindful to go after work that you are actually well equipped to complete. Your past relevant experience will make you a stronger candidate for these roles and a satisfied client will likely provide you with recurring business.

Address their needs

We give all applicants a chance to include a short message to businesses when they apply for a role. Take the time to write something! Show the client that you're a good match not because of all the ways you are awesome, but how well you understand *their* needs and have the specific set of skills required to fulfill the role.

Manage your time

You lucky duck! You applied for a dozen different roles and you're starting to get chosen for a number of them. Don't forget to manage your work load by withdrawing yourself from any opportunities that may overlap with the existing engagements you've been chosen for. Only you know your schedule, so it's important to manage it wisely in order to ensure your work product doesn't suffer. High quality work and positive client interactions ensure you continue landing all those projects, you superstar!

COMPLETING THE WORK

Quality is never an accident. It is always the result of intelligent effort.

Understand client expectations

Whether the client initiates it or you do, be sure that your understanding of goals and deliverables from the engagement match those written in the project listing, your project dashboard conversations, or an external consulting agreement before you begin work. This helps prevent scope creep and facilitates the successful completion of a project.

Establish project milestones

You may understand what the client wants and agree on the key deliverables, but a great way to build trust and confidence throughout the engagement is to establish milestones to allow the business to see and provide real time feedback on your work. They say an ounce of prevention is worth a pound of cure and periodic check-ins and submissions of the work being done helps prevent unpleasant surprises.

Use your resources

Even the best of us need a little help from time to time. There's no shame in that. At Complect, we encourage collaboration and have built tools and resources to promote it. Have a unique client issue or question you'd like to share with other specialists for their feedback? Post it in our forum. Having a difficult time managing client expectations and looking for tips on how to push back? Solicit tips from other specialists from within our forum. Is the client simply being unreasonable? You always have the right to escalate the issue to us and we are happy to intervene. You are just as valuable to us as businesses and we are here to play an unbiased role as mediator for any disputes that may arise.

FOLLOW ON WORK

Don't find customers for your products,
find products for your customers.

Read between the lines

Whether you're a consulting firm or a freelancer, the best way to attract business is by upselling current business. Compliance is ever evolving and to remain compliant, many businesses have several recurring obligations. Take the opportunity in your present engagement to impress them with your rock star skills and with your close access to their business, self-identify opportunities for you to help the business in other ways. Completing an annual compliance program review now? Maybe you could help them implement your recommendations and address your findings as a follow on engagement.

Go above and beyond

Good work will result in good ratings and reviews, but awesome work results in repeat business. We've laid it up for you by making it easy for businesses to copy projects and re-hire specialists they've hired in the past. You can make it a slam dunk by going above and beyond in your current engagement so they just have to have you again.

Make the ask

It can be uncomfortable to self promote and give clients the hard sell job. We don't want you to do that. However, it never hurts to identify issues outside of your present engagement to bring up to them and offer your own services to rectify or investigate the matter further. You are doing the client a favor and going above and beyond. So, don't hesitate to make the ask for follow on work you identify.