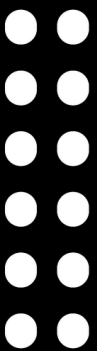


# FREELANCER HIRING GUIDE FOR THE HOLIDAY SEASON





# PLANNING FOR SUCCESS: SCOPE, GOALS, AND CHECKLIST

## **Project Scope**

Define the scope of your holiday season projects to clarify what each freelancer should deliver. Write down details such as timelines, deliverables, and key tasks.

### **Scope of Work:**

**Example:** "Website updates, product image enhancements, holiday campaign management."

**Scope:**

## **Project Goals**

Establishing clear goals helps ensure that everyone is aligned and focused on successful outcomes. Identify specific objectives for each area of freelance support.

### **Goals for Seasonal Freelancers:**

**Example:** "Increase website conversions by 20%, enhance customer service response times, manage holiday inventory updates."

**Goals:**



# PLATFORM-SPECIFIC FREELANCER HIRING CHECKLISTS

Use these checklists as a guide when sourcing and managing freelancers on different platforms. Check each box to stay organized and ensure that each freelancer meets your standards.


FIVERR HIRING CHECKLIST	✓
<b>Read Reviews Thoroughly:</b> Check recent feedback for reliability, communication and examples of work.	
<b>Check Recent Activity:</b> Confirm the freelancer has current, relevant experience, aligned to scope and goals.	
<b>Set Clear Expectations and Communication:</b> Outline timelines, deliverables, and regular updates.	
<b>Milestone Deliveries for Larger Projects:</b> Structure larger projects with milestones to track progress.	
<b>Provide Visual References or Examples:</b> Reduce miscommunication with specific references.	
<b>Ask for Referrals:</b> Request referrals from your network or colleagues to find pre-vetted Fiverr talent, especially for urgent or high-stakes projects.	
<b>Backup Plan:</b> Prepare an alternative freelancer for unexpected delays.	
<b>Additional Notes:</b>          	



UPWORK HIRING CHECKLIST	
<b>Detailed Review of Portfolio and Ratings:</b> Examine the freelancer’s portfolio, ratings, and experience.	
<b>Video Interview for High-Stakes Projects:</b> For complex tasks, consider a short video interview.	
<b>Milestone Payments for Structured Progress:</b> Use milestones to manage larger projects.	
<b>Document Project Scope and Requirements:</b> Clearly outline the project to avoid misunderstandings.	
<b>Ask for Referrals:</b> Reach out to your network for trusted referrals on Upwork, especially if you need a specific skill set or role filled quickly.	
<b>Maintain a List of Backup Freelancers:</b> Keep an alternate freelancer on standby.	

**Additional Notes:**



<b>AIRTASKER HIRING CHECKLIST</b>	
<b>Review Completion Rates and Feedback:</b> Check reliability and punctuality in previous tasks.	
<b>Verify Relevant Badges and Recent Work History:</b> Look for taskers with appropriate badges and recent activity.	
<b>Define Requirements and Deadlines:</b> Communicate specifics to ensure alignment.	
<b>Request Progress Updates for Extended Tasks:</b> For longer projects, request regular updates.	
<b>Ask for Referrals:</b> Inquire about Airtasker referrals from your network to ensure reliability, especially for critical roles during the busy season.	
<b>Alternative Taskers Ready:</b> Keep a backup tasker for critical roles.	

<b>Additional Notes:</b>
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# DATA SECURITY & ACCESS CONTROL GUIDELINES

SECURITY CHECKLIST	✓
<b>Do Not Give Access to Customer Data:</b> Ensure customer data remains private and is not shared with freelancers unless absolutely necessary.	
<b>Restrict Access to Platforms:</b> Where possible, limit freelancer access to tools such as Shopify and Klaviyo. Configure specific permissions that match only the tasks they need to complete.	
<b>Use Organizational Emails:</b> Set up dedicated organizational email accounts for freelancers, rather than using personal or business-critical email addresses. Always update the password once their work is completed.	
<b>Avoid Sharing Access to Core Accounts</b> Do not give freelancers access to core business accounts, such as your Google account or other major services linked to your organization.	
<b>Non-Disclosure Agreement (NDA)</b> Have each freelancer sign a Non-Disclosure Agreement (NDA) before starting work. This ensures they understand the importance of data confidentiality.	
<b>Intellectual Property (IP) Agreement</b> If relevant, include an Intellectual Property (IP) Agreement to protect the ownership of created content, ensuring all produced work belongs to your organization.	
<b>Use Secure Methods for Credentials Sharing</b> Share credentials through secure platforms, such as password managers, instead of directly sharing passwords via email or messages.	
<b>Regular Account Review and Access Termination</b> Regularly audit access privileges, and immediately revoke access when a freelancer completes their work to maintain security.	

# 5 MIN BRIEF

## WEB DEVELOPER

### INSTRUCTIONS

Choose the appropriate template below (Website Developer or Retail Assistant). Fill out the prompts to create a brief that is clear and informative. Each section has been streamlined to ensure you can complete the brief in under 5 minutes.

### Brand Overview

Provide a high-level overview of the brand.

- **Prompt:** *"Give a brand overview for a new starter, including core values. Do it in one paragraph"*

**Answer:**

### Project Scope

Describe the website developer's task.

- **Example:** *"Develop a new landing page for an upcoming holiday campaign. Do it in one paragraph"*

**Answer:**

# 5 MIN BRIEF

## WEB DEVELOPER

### Goals

Define the main goals for this project.

- **Example:** "Boost conversions for holiday products by x%. Do it in one paragraph"

**Answer:**

### Target Audience

Provide a brief description of the target customer persona.

- **Example:** "Female shoppers, ages 25-34, interested in sustainable fashion, prefer mobile shopping."
- **Prompt:** "Summarize my customer persona in one paragraph to brief a freelancer."

**Answer:**

### Specific Deliverables

List what the developer needs to deliver.

- **Example:** "Complete and test a new landing page, integrate it with Shopify."
- **Prompt:** "Specify deliverables for [project, e.g., Shopify landing page], including testing and integration needs. "

**Answer:**



# 5 MIN BRIEF

## WEB DEVELOPER

### Access & Credentials

**Specify access requirements.**

- **Example:** "Provide limited access to Shopify for testing, with secure credential sharing."
- **Prompt:** "Identify access requirements for [task, e.g., Shopify testing]. Make a succinct list"

**Answer:**

### Deadline

**State the deadline and any review checkpoints.**

- **Example:** "Complete within 2 weeks, with a review checkpoint at 1 week."
- **Prompt:** "Suggest a timeline for review checkpoints to ensure success, with a final deadline of [date/timeframe]. Do it in one paragraph"

**Answer:**

# 5 MIN BRIEF

## WEB DEVELOPER

### Cost

Specify the budget for the task.

- **Example:** "\$200 for project completion."
- **Prompt:** "Estimate the average cost for this project on [platform] using similar freelancer/contractor rates. Do it in one paragraph" (Use Perplexity for accurate cost estimation)

**Answer:**

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### NOTE:

#### Access & Credentials

What access will they need?

- **Example:** "Limited access to Shopify for testing purposes. Credentials will be shared securely."
- **Prompt:** "Identify the types of access a developer would need to complete [specific task, e.g., Shopify testing]. Highlight any potential risks and how to mitigate them. Do it in one paragraph"

**Answer:**

# 5 MIN BRIEF

## RETAIL ASSISTANT

### Brand Overview

Provide a high-level overview of the brand.

- **Example:** "Our brand delivers an exceptional in-store experience focusing on personalized customer service and quality products. We cater to families looking for convenience and value during their shopping trips."
- **Prompt:** "Summarize the brand's core values and customer service approach. How should the retail assistant embody these values in their work? Do it in one paragraph"

**Answer:**

### Project Scope

What tasks should the retail assistant focus on?

- **Example:** "Assist in restocking shelves, manage holiday gift wrapping station, provide customer support during peak hours."
- **Prompt:** "You are a retail assistant during the holiday season. Focus on [specific tasks, e.g., restocking shelves and managing gift wrapping]. What should be prioritized to ensure customer satisfaction? Do it in one paragraph"

**Answer:**

# 5 MIN BRIEF

## RETAIL ASSISTANT

### Goals

What are the main goals?

- **Example:** "Ensure all shelves are fully stocked before peak hours, maintain a friendly and efficient gift wrapping experience."
- **Prompt:** "The main goal is to [specific goal, e.g., maintain efficient gift wrapping]. What key actions should be taken to achieve this? Do it in one paragraph"

**Answer:**

### Customer Persona

Describe the customers they will interact with. (Utilize GPT persona insights)

- **Example:** "Families with young children, looking for holiday gifts, prefer a quick and seamless shopping experience."
- **Prompt:** "Describe the persona for families with young children shopping for holiday gifts. What are their key needs and how can a retail assistant best assist them? Do it in one paragraph"

**Answer:**

# 5 MIN BRIEF

## RETAIL ASSISTANT

### Key Tasks & Expectations

What specific tasks should they be aware of?

- **Example:** "Prioritize high-demand items for restocking, answer customer questions about holiday sales."
- **Prompt:** "Identify key tasks for a retail assistant such as [specific task, e.g., restocking high-demand items]. What are the best ways to manage these tasks efficiently? Do it in one paragraph"

**Answer:**

### Communication & Reporting

How should they communicate updates?

- **Example:** "Provide end-of-day updates on any low-stock items or customer concerns."
- **Prompt:** "Provide a communication plan for reporting [specific issues, e.g., low-stock items]. How often should updates be given and through which channels? Do it in one paragraph"

**Answer:**

# 5 MIN BRIEF

## RETAIL ASSISTANT

### Shifts & Availability

Detail working hours and expectations.

- **Example:** "Weekends are the busiest, extra assistance needed from 1-5 PM on Saturdays."
- **Prompt:** "The busiest times are [specific times, e.g., weekends from 1-5 PM]. How should shifts be organized to maximize efficiency during peak hours?"

**Answer:**



# CONTACT US



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