

Independent contractor onboarding checklist for hiring managers

NAME: _____

DATE: _____

The way you onboard your external workers can make or break their performance for you and really impact the final deliverables you receive from that worker. Use this independent contractor onboarding checklist to ensure that they're set up for success and can deliver you the results that you need.

- ☐ Sign and save the contract (and any other legal documents you will need) in one place
Your legal and finance teams will thank you later
- ☐ Share company objectives and how this ties into their work
Help them see how their work impacts company goals
- ☐ Introduce them to the people they will be working with
Set them up for successful working relationships before they begin, so they don't need to chase anyone down once they've started working
- ☐ Give them access to the tools they will need to use
This might seem small but if they need to be added to each tool as they go it can really slow down their work
- ☐ Define communication guidelines
How often will you have check-ins? What's the best way for them to reach you when they need you?
- ☐ Establish availability
This is for both you and the freelancer. How and when do you both prefer to be contacted?
- ☐ Establish feedback processes
When will you check in to ensure they're on the right track? How do they prefer feedback? Feedback is a really key part of working successfully with freelancers. Be thoughtful about how this can best work for both of you to ensure that you're both happy with the working relationship and the final deliverable.
- ☐ Share past successes from previous similar projects to help them get an idea of what success will look like for them if applicable
What has past success looked like? How did you measure it? If you have concrete examples, share these with the freelancer
- ☐ Send all relevant project information
This includes briefs, guidelines, and a description of the end deliverables. The more you include the more likely they are to give you work that you're happy with
- ☐ Setup timeline and schedule for expectations and deliverables
The more specific you are here the less room for confusion there is for your freelancer
- ☐ Let them know when and how they will be paid
What payment method will be used at the time of payment? Will they be paid in installments, or once the work is completed? If payment is at the end, how long will it take between project completion and the payment?
- ☐ Share payment info (bank, etc) with finance and make sure they're aware of the expected payment schedule
Freelancers often get paid late. Looping finance in now ensures that you can minimize the chances of this happening and avoid burning bridges with a freelancer.