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## HOW TO OUTSOURCE RESEARCH TASKS USING UPWORK

EPISODE 51

Speaker 1:

On today's episode I'm going to talk about some lessons learned that I've had on how to outsource research tasks to freelancers. I'm going to be discussing this with reference primarily to one particular platform namely Upwork which is a website to find and interact with freelancers around the world. Upwork is the name given to the merger of Elance and oDesk, if you're familiar with either of those previous companies.

While I'm talking about Upwork primarily, the same principles apply to other platforms that you might use. Upwork is not necessarily the best platform for every purpose. For example, Fiverr is very well adapted to interacting with freelancers doing illustrations and other sorts of creative work. Again, the principles for Upwork apply to these other platforms. I'm going to structure this discussion in two parts, first I'm going to talk about the types of tasks that you might want to outsource, and then two, practically how do you actually go about and outsource those tasks.

Types of tasks. It's really limited by your creativity, and let me talk about some of tasks that I have personally outsourced and used Upwork for, and then you can use your own imagination to think of other ones. Web research. I've used Upwork for example to collect articles for me. I had one topic where I wanted to get a scan of all the articles, all the newspaper articles on a particular topic, and a lot of the work is sometimes just using Google.

You'll find repeat articles, the same one posted multiple places, so I had someone find articles that were of a reasonable length, not super short and save them as a PDF, create an Excel index to all of those. Each PDF was numbered, and in the Excel file it had the number, it had the title, it had the source and the URL link. I got about 100 articles and then put those all in a Dropbox folder and send them to me. That saved hours from the task, and then I was able to just read the good stuff and then have to find it myself.

Another example of web research I had from one other client about 1,000 companies that we wanted to do a quick screening on, and all we really had

was the names of these companies. We wanted to get those down to a much smaller number that we could spend more time on. I had a researcher via Upwork find the website of those companies where we just had the company name, and then go to that website, take a screenshot of the homepage, and put those screenshots in a PowerPoint.

Since there were so many companies we had, I don't know, about 10 or 15 separate PowerPoint with all those screenshots. That allows us to look at the homepage of these companies, and usually from that you can get a pretty good sense of ... is it sort of a mom and pop operation, or is it professional, large corporate enterprise, and allowed us to quickly screen it down to the ones that were interesting to us for further research.

Next would be for example data entry. Sometimes you might be able to scrape websites, but in other cases there's not enough ... you're doing multiple websites and you're just trying to get some data off of multiple websites. For example, pricing information, I had certain set of products I was interested in and about 20 websites that I had identified, and each website there's maybe hundred products. I had somebody kind of by hand go in to each one of those websites and get the product as well as other product information such as the weight, and the product description and so forth, and put those on to a spreadsheet for me.

Next would be for example LinkedIn. Let's say you're doing due diligence on a company, you might want to get the names of all the key executives, I use a contractor for that. Next would be for example, also with LinkedIn, in some cases I want to get a list of every current or past employee of that company, in cases like that, you [inaudible 00:04:35] do it for IBM, but for smaller companies it can give you a sense of what kind of people they hire and what the roles are. I would create a spreadsheet with the titles, so forth, and I'll talk a little bit about that in the second part of this episode.

Next would be data scrapping. Let's say I found for example a website that has a store locator but it only lists the stores within 50 miles of the ZIP code you select, and I want to know every store in the United States that carries that product for that company. I have identified a subcontractor on Upwork who could write a script for that, and just gave him the website, in a day he's provides back to me in Excel sheet with every store that's on that store locator.

Next might document manipulation. Let's say you have a 100 page PDF and has one of those tables in it, but when I tried to cut and paste it into Excel, it just get that kind of garbage in Excel. That one I sent off to a freelancers in Upwork, and for \$10 and about two hours, he had sent it back to me and all the data was beautifully formatted in Excel and he's able to manipulate it.

Phone calls. Maybe you need to make phone calls perhaps in a foreign country to find some information out, I needed a German speaking freelancer based in Germany so it would be a local phone number and found one on Upwork. Mapping. I needed help creating a dynamic mapping tool. We had multiple layers of proprietary data, so we had a layer of locations of competitors, locations of customers, locations of potential customers, the company's own locations, the company's sales rep territories, and we wanted all these in a map and PowerPoint was really not the answer.

I found someone on Upwork that created a dynamic tool where you could just click on and off the different layers, zoom in and out, you can draw circles and export all that data within that circle into an Excel. The client loved that, the tools adapted by their sales team and they've continued to invest and build that out.

Next would be in-person research. There are some things you can't do on the internet and you need to actually have someone in-person, so mystery shopping or just some local investigation. For example carpets, I wanted to find out for one client what carpets were actually being sold in the store. You can't just go to the website because website may have hundreds of skews but the actual store has a much smaller selection. Found people via Upwork in different cities across the US and had them visit the store in each of their cities, they gave me a spreadsheet back with a list of all the skews that were carried in the store, and the colors, and the prices, and photographs of all those carpets.

In another case, for a product with a coffee machine equipment cleaner, we wanted to find out what was being used by coffee shops around the world. So I hired freelancers in about 20 countries to go visit coffee shops in their neighborhood and identify what products were being used locally. Another case, DNA paternity test. I wanted to find out what it takes to buy a DNA paternity test, this is not for my own use this was for a client, in different countries around the world, had folks go visit local pharmacies and find out what brands are for sale, what the price was, and what the process was to buy one. Do you need a prescription, was it behind the counter, was it just out in the open? How do you buy it?

Another case, products at grocery stores, I wanted to find out what products were being carried. A lot of times, in-person research can be very powerful, the clients aren't necessarily expecting it, and it can really supercharge what you can get off of the internet. You can find people on Upwork because it's a global platform and you can filter by country.

This only scratches the surface. The other categories on Upwork for example that I haven't really used are web, mobile, and software development, IT and networking, data science if you're doing some big data analytics, engineering

and architecture. You can apparently find electrical engineer or a contract manufacturer on Upwork, design and creative, graphic design, video editing, voice talent. Although again, for some of those there are some other very compelling platforms out there like Fiverr. Writing and editing, so you can find a blog writer, or a copy editor, or grant writer. Translation and transcription, personally for transcription I like Rev.com as I mentioned in previous episodes.

You can get sales and marketing, lead generation is big, SEO and SCM, lots of people on Upwork around that. Accounting, bookkeeper. It's really quite extensive the things that you can find on Upwork find people to do.

Next part of the episode is how to actually outsource tasks. This may be kind of straightforward but hopefully there'll be some tips and tricks that are useful. First step, post your project. So on Upwork, after you set up your account you go to my jobs, post a new job. Keep in mind that anything you post is going to be in the public domain, it's going to be visible to thousands and thousands of freelancers out there. I wouldn't include the name of my client, I keep it sanitized, so you give the job. A title, pick a category, describe the work to be done.

Again, I keep it sanitized, and then when people actually apply to the job I [inaudible 00:10:50] specific people more details on it. I ask people questions that you want the researcher to answer in the proposal, that's part of setting up the project. I often will ask what particular tools or websites the freelancer has access to or plan to use on the job, and that's a good way I found to narrow down the pool of respondents because a really good candidate will take some time to give you a customer response and not just cut and paste the response that they had given to every single person.

I often learn something from those, someone who puts in a really thoughtful set of tools that other subcontractors don't, or maybe they'll mention that they have special access to some database or some tool that they've invested in that can help differentiate someone. You can filter to get candidates from a particular geography, I'll do that definitely if I'm looking for researchers for on the ground research of course, so you can filter. I need someone in Brazil for example. There might be some cases where you're having someone make calls in a country, you might want to have someone based in that country. So you post your job.

The next step will be selecting the freelancer. After you post the job, on Upwork you can invite people to it, so that's a useful thing you can filter the complete set of freelancers on Upwork and then go and invite people to it. Now let's see, a bunch of people have applied to your project and you can see all the people that have applied, they'll list their price, and they'll give some kind of short, written proposal.

Rather than spending a ton of effort picking the ideal best, most qualified person which is difficult, I'll split it up. Let's say I have a job that will take about 40 hours, so I'll divide it up so that I have a two hour chunk of work to do, and then I'll select five or so freelancers to do that same chunk of work. I'll tell them that I'm going to have a trial period of two hours, and the best candidate will get the rest of the job. I ask them to send me their output ASAP. So if it's two hours of work, I'm ought to get it two or three hours.

Out of those five, often one will just completely bail, so they'll accept the project and then not deliver and never hear from them. One or two might do an okay job, and one or two will be really diligent and do a great job.

Obviously, I'll hire one of them. I talked about getting people to apply to your job. The one or two people that do a great job on your trial, hire them.

Obviously, as you get more experience of the platform you've done this over time, it really makes sense to invest a little bit extra time in each project and keeping track of those freelancers who've done great work in the past, and then you want to go back to them in the future. Because if you keep giving someone work, they're going to obviously give you a little bit more attention as well because there's more customer lifetime value from serving you well.

To get the output, what I found really is a smart move is to invest a little bit of extra time and create an Excel or a PowerPoint template that I want the researcher to fill in, and I create all the columns that I want and I fill in a few rows myself with sample data so that the freelancer can see exactly what I'm looking for. Rather than just describing say, "Create an Excel sheet with this information." I'll create every single column, fill it out, and then they know they just have to follow my example.

So you get the results back from the two hours. The other good point about doing that two hour check in is that you have a chance in giving people feedback. I'll ask people to give me their results everyday even if it's 40 hour of work, rather than just saying, "Waiting until Friday." Each day, send me whatever your work in progress is and that gives me a chance to make sure it's progressing properly and also check in and giving you feedback if they're not filling in one of the columns the way I had in mind.

Let's see, the couple other points about selecting a freelancer is I look at how much work they've done through the platform already, so that's perhaps a little bit unfair to people that are just starting out, but I'll let other clients test them out. I want people who have built several thousand hours through Upwork that shows that they're committed to it personally, they're going to care a lot about doing a great job because that's where a big chunk of their income is from, and their livelihood depends on it, so they're going to want a good review and they've proven a commitment to it.

I also look for the thoughtfulness of their proposal. If it's just cut and paste or if they've really customized. I don't go too cheap so you can find people who with college degrees who are working for \$4 an hour, but generally I find that it's just more cost-effective to pay more. Often you can get someone overseas with a college degree, very professional for \$10 an hour, and I find you get fewer errors, better english skills and it's going to take less [inaudible 00:16:30] and less supervision.

In terms of paying the freelancer you just pay them through the platform with your credit card, you can control the budget because you can set the maximum number of hours per week that the person can charge you. If someone does bill you for more hours than you think that they actually did, you should quickly initiate a dispute via the site so they can put a hold on that. Your time is valuable and you shouldn't spend your time doing a task that you can outsource to someone else.

I hope these tips are useful and that you can get some work off your plate.