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How Lone Star simplified their freelancer onboarding, invoicing, and task assignment to save hours of time with Worksuite
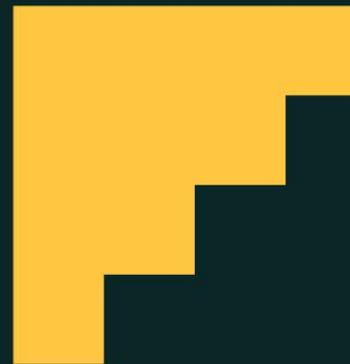
LONE STAR ®

Finding a robust all-in-one platform to manage a growing contractor network of local and global SMEs

n 2018, Lone Star had a network of several hundred independent contractors. At that time, they were managing onboarding, task assignment, and invoicing with predominantly manual processes and paper documents.

The invoicing process was time-consuming, with invoices being generated by each individual freelancer, which were then sent on to the project lead, who passed them on to the finance team.

As their company and talent pool were growing rapidly, Lone Star was spending an increasing amount of time on the day to day management of their contractors. They realized they needed a more robust solution that would simplify every aspect of engaging, managing, and paying their independent talent pool.

Lone Star tested multiple ways to streamline their workflow across their network of contractors - including spreadsheets and other software solutions, but it was apparent that what was really needed was an online platform that could handle everything from onboarding to payment and reporting.

> **"We were wanting some kind of online portal that did it all. I'm very grateful that we found Worksuite"**

When the Lone Star team discovered Worksuite, they knew it was exactly what they had been looking for. With the help of their interns, they began the lengthy process of converting their SMEs' paperwork to digital profiles on Worksuite's freelancer management system.

> **"We found Worksuite and realized it's an excellent tool. It really does it all. And if it doesn't do it all - the developers and the team are constantly adding new features to accommodate everyone's needs"**

A customizable online software portal for freelancer management that "does it all"

From the outset, Lone Star knew that Worksuite was the technology partner they needed to solve their freelancer management challenges. It was a platform that met them where they were currently at, and it had the flexibility to grow and adapt alongside them for the future.

The Lone Star team worked with Worksuite's developers to customize the onboarding workflow for their specific needs – setting up separate flows for local and global contractors and ensuring every new freelancer gets the correct instructions to build out their profile.

> "I thought it was really neat how you can capture everyone's information on their profiles, and keep everything separate - so the only people who can see these profiles are the employees of Lone Star. I was really intrigued when I first saw it"

For compliance purposes, Lone Star's onboarding workflows require documents such as 1099 agreements, non-disclosures, conflict of interest, consulting agreements, and ethics agreements from their freelancers.

With Worksuite's onboarding, they can now send out the relevant instructions to each individual freelancer with a few clicks – no matter where in the world they are. They can then track the information that has been provided, and see which information is missing - in real time.

This ensures that Lone Star is always compliant and has all the legal information they need before any tasks are assigned to a contractor.

> "From everyone that has ever commented on Worksuite and the onboarding process, it's always been positive things like "this is the easiest onboarding I've ever had"

"One of the biggest differences for our organization is that Worksuite helps keep everything in one place. You don't have to run and chase things down. You're organized, and able to look ahead to figure out what contractors are needing or wanting - you have everything right there at your fingertips."

KayCee Reed
SME Relationship Manager, Lone Star Analysis

— **Result**

Significant time saving with a centralized platform that simplifies everything from onboarding to payments

"It met all of our needs, and as we have continued to grow – so has Worksuite"

Once Worksuite was implemented, the Lone Star team immediately noticed positive changes and time savings in their daily workflow - particularly when it came to onboarding new contractors, and locating the perfect contractors in their talent pool for any assignment.

When a new freelancer is hired, it's now as simple as sending them a quick welcome email with an outline of the onboarding process. Then it's over to each freelancer to build out their individual profile and provide the required documents such as banking and tax details.

"Once a new contractor gets an invitation, I go into Worksuite, enter their name and email, and click whatever workflow I want them on. If they're an international SME I send them the international paperwork, and if they're at home in the States I send them the regular paperwork.

Worksuite automatically sends them an email with a link - and all they have to do is literally click the link and it takes them right into Worksuite to put in their profile and e-sign the agreements. It's so simple."

The Lone Star team customized their workflows to receive notifications when a document is completed, set up templates for task assignments, and simplified the freelancer profile pages to remove elements that weren't necessary.

The Worksuite team also created Boolean search functions that enabled Lone Star to get laser-targeted in their search for the perfect contractors to assign specific tasks to.

> "When Worksuite started implementing our search feature changes, there was an immediate positive response. They set up Boolean search which allowed us to find the correct people instead of having hundreds of contractors come up for any search who may not be relevant. So they've made it where you can just put your search in quotation marks - and now it's not casting a wide net anymore."

Invoicing also became quick and painless after implementing Worksuite's invoice portal. This means invoices get approved and actioned faster, and freelancers get paid faster.

> "The amount of time it saves is tremendous. In the beginning people would send an invoice to Person A who wasn't on that project anymore. So then they would send it to person B, who sent it to the operations manager, who then gets it to the finance team. That could have taken days or even a week to figure out. Now it's done with a simple click."

Lone Star also had workflows set up to reduce the time spent on sending out agreements and checking on completion. Now when agreements are e-signed by freelancers, the Lone Star team gets a notification so that they can progress with onboarding and begin task assignment.

And when there's a need to check that existing agreements are current - they no longer need to search through their filing cabinet.

> "Previously, we needed to go to the filing case (and find the key!), then go through all the paperwork. Now we just click a button and we're able to see if agreements are current. It's definitely saved a lot of time."

Worksuite highlights for Lone Star

Lone Star now uses WorkSuite for their talent pool hub to help manage multiple types of independent contractors across the USA and around the world.

The tasks and projects module in Worksuite helps Lone Star manage projects by effectively assigning tasks to its SMEs, and the workflow module ensures they accurately onboard talent before work begins.

Lone Star also uses Worksuite's workforce analytics module to get deeper insights into their talent, and view trends when assigning new tasks to their contractors.

Another highlight is the relationship-driven nature of the Worksuite support team, who are always at hand to offer guidance, customize features, and work alongside the Lone Star team as they grow.

> "If you're looking to add ease to your life or to your organization, Worksuite is the way to go. The features, the ease for your organization, and the time that you're going to save using it - it's absolutely worth it"

Lone Star

Lone Star Analysis is a US-based solutions provider offering predictive and prescriptive analytics and guided artificial intelligence to help companies make smarter, faster decisions.

They work with a global network of SMEs, including freelance writers, editors, researchers, and consultants.

See how easy it is to onboard, manage, and pay your freelance network with Worksuite's centralized, user-friendly platform.

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