

Who Ya Gonna Call?

How to Contact, Contract, and Collaborate with an Independent Info Pro

A checklist for working with a freelance information professional

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Outline

- What kind of work can you outsource or contract
- Finding and contacting prospective contractors
- Negotiating and contracting the scope of work
- Collaborating and working together

What to outsource - a few examples

- Research, either primary or secondary
- Knowledge management studies – information audit or content management
- Technical writing, editing
- Data visualization services
- Biomedical literature searching

Finding Suitable Prospects

□ Referrals

- Ask colleagues within your organization
- Inquire with professional associations
 - [Assoc. of Independent Information Professionals](#)
 - [Society for Technical Communication](#)
 - [Patent Information Users Group](#)

Contacting – The initial conversation

- ❑ Define your challenge, situation, problem
- ❑ Clarify the points important to you
- ❑ Qualify the candidate by asking for relevant experience, background, or training
- ❑ Discuss business practices and policies

The prospective contractor should communicate confidently the expertise, resources, and experience they can apply to your situation. He/she should also be able to articulate policies and practices that provide for a smooth working relationship such as payment schedules, pricing policies, and contact preferences. An experienced info pro will be able to lead you through the steps required to get to the finished product.



Negotiating – There will be paperwork

- ❑ Contract, letter of agreement, or project proposal
- ❑ Confidentiality or non-disclosure agreement
- ❑ W-9 or taxpayer ID number
- ❑ Purchase order

The nature of the contract depends upon the nature of the project and the requirements of your organization and that of the contractor. It could vary from a single page letter of agreement to a multipage contract or proposal. Options for payment vary by company, but check, bank transfer, and credit cards through PayPal are fairly common.

Negotiating – Define expectations

- ❑ Costs – hourly or project estimate
- ❑ Billing and payment – when and how
- ❑ Timeline and deadlines
- ❑ Format of deliverables
- ❑ Contingencies – over budget, over time
- ❑ Legal review

Collaborating – Managing the project

- Establish a preferred means of communication and build a relationship
 - Reply promptly to emails and voicemails
 - Clarify expectations
 - Provide feedback on results
 - Check in at agreed upon milestones

Collaborating – Managing the project

- Communicate throughout
 - Ask questions when they arise
 - Provide feedback as needed
 - Follow through on specified action items

Collaborating – Wrapping up

- Conclude the project
 - Confirm receipt of final results
 - Discuss next steps
 - Arrange for final payment



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