

OSMOSIS 2019

Table Topic: Subcontracting Success – Top Tips for Making it Work

CHECKLIST FOR SUCCESSFUL SUBCONTRACTING

Before

- Work with people you trust
- Inform client
- Complete paperwork (NDA, subcontractor agreement)
- Discuss client pain points, goals
- Discuss contractor expectations, budget, time frame and milestones, special issues
- Discuss subcontractor fees, payment requirements, limitations (time, other)
- Communicate preferences/requirements (e.g., email, phone, or text; frequency; best times; *direct communications with ultimate client allowed?)

During

- Supply needed background info, documents, templates
- Train in process and deliverables
- Question all assumptions
- Conduct regular check-ins with new info, problems encountered
- Discuss problems immediately

After

- Answer any client questions
- Evaluate process and results/refine
- Send/pay invoices quickly

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