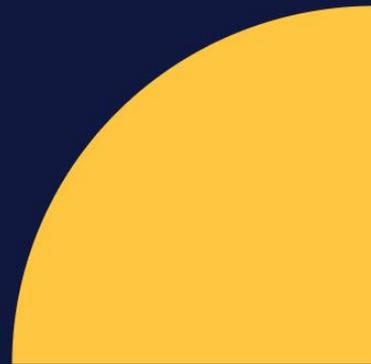


# How Vested Gets Deeper Insight Into Their Freelancer Spend And Ensures Reliable Global Payments With Worksuite



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## Challenge

# Finding a robust, all-in-one platform to replace their existing platform and ensure fast, seamless payments to their global freelancers.

Vested were initially using a competing freelance management platform, but over time it became clear that this solution wasn't going to be suitable for their long term needs – especially when it came to payment processing.

Their existing platform was also preventing Vested from providing a good employee experience for their wide network of freelancers – and they began to lose valuable talent.

*“Our payments were not consistently on time, and a few times we got 24 hours notice that payments were going to be seriously delayed. So we ended up losing one freelancer who was really good”*

In addition to the features side of their existing platform letting them down, Vested also found it to be inadequate in other ways. The support team was unresponsive when they needed help, and there was no clear visibility into the payment progress for their freelancers.

*“Their payment process was not as transparent as Worksuite. So we knew that we paid the invoice and that it was supposed to be paid out within a certain number of days – but we didn't actually get to see any of the behind the scenes processing like we do with Worksuite.”*

Vested values their working relationships with their freelancers, and aims to be a responsive employer that pays on time. So once the payment problems began with their existing platform, the Vested team knew it was time to hunt for another solution.

In their search, it became apparent that while there were many alternatives out there, most platforms treated freelancer management as a secondary thought, rather than being focused on helping companies manage and retain their best talent.

*“Worksuite was the first one that I discovered where I was like – oh wow, this looks really cool! And they had a free demo. So I went through the process and thought – this is actually really nice”*

The Vested team was confident that Worksuite would be a good fit in terms of quick payment processing, the ease of creating tasks for freelancers, customizable onboarding workflows, and compliance.

A presentation was put together for the leadership team, with an emphasis on Worksuite's advanced global payment solutions being a better choice for paying their freelancers on time.

*"We ran through the numbers and the pros and cons. The biggest con to keeping the existing platform was we potentially could lose more freelancers, which is very disruptive on the client side. In PR, things move very quickly and we can't afford to lose the extra support that we have"*

In addition to their main freelancer management platform, Vested was also paying their talent through other freelancer marketplaces where the platform takes a cut of each freelancer's earnings.

So the decision was made to partner with Worksuite and pull all of their freelancers into one place where management and payment was simpler and more cost effective for everyone involved.

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## Solution

**A platform that is as easy to implement as it is to use - making freelancer management and payment a breeze for both Vested and their talent network.**

*"We were looking for something that was an easy transition because a lot of freelancers don't have the flexibility to change up their income stream on a dime. It was important that we not miss any payments in the transition process"*

Vested partnered with Worksuite to perform a phased rollout across two environments over the December holiday period, ensuring a smooth implementation and minimizing the risk of disruptions to client workflow and payments.

Their existing freelancers were notified by email about the transition to Worksuite so they could begin the transitioning and onboarding process.

**"We've now got a custom dashboard so we can see how much we're spending on freelancers for each client team. The breakdown really helps us when we're looking at how much we're spending per client, so we get a more full picture. It's been a definite improvement."**

**Christine Nielsen**  
Resource Manager, Vested

The Vested team made a quick video walkthrough and held a live training to guide their freelancers through setting up their profile and providing all the documentation needed for compliance and payments.

**"Worksuite is so easy to use. I did some quick training sessions as Worksuite has a lot of resources. And I didn't have nearly the same amount of folks reaching out on the freelance side, or even internally, who were confused by the new system"**

Tasks were set up in Worksuite so that when each freelancer completed the onboarding stage, their existing assignments and ongoing projects were already in there - matching what was in the previous system, and enabling them to keep working with no confusion or downtime.

Due to the nature of Vested's industry, it is critical that they keep compliant. Vested worked closely with Worksuite to build specific onboarding workflows that ensure all freelancers provide the necessary paperwork before any tasks are assigned.

**"We have everyone sign an NDA - that's really important for a lot of our clients, especially being financial institutions. They want to know that every partner we work with has been assigned one of those"**

It's also important for Vested's clients that every freelancer has a portfolio online for viewing. With Worksuite, freelancers can build their own profiles, add resumes, and include their personal website links and social profiles if they choose to.

WorkSuite also set up conditional formatting for payments and taxes. This ensured that Vested's freelancers automatically get the correct tax paperwork, no matter where in the world they are.

The team at Vested always go the extra mile for their freelancers, so they also built some special additions into their onboarding flow.

*"We often send out swag packs. So I was able to ask for people's birthdays, their t-shirt sizes, and other extra information."*

On Vested's side, the customizable onboarding questions allowed them to get granular about their freelancers' pay and work preferences, so they can quickly match their clients with the ideal contractor for every project.

Freelancers all have different styles of working, and different payment options. Vested was able to add questions to the workflow that enabled them to quickly filter for specifics like whether a contractor offers flexible pay rates, sliding pay scales, quick turnarounds with rush fees, and weekday versus weekend rates.

*"When it comes time to find the right freelancer to pair with a client, not only do I have all the information about their skills, I also know how much it's roughly going to cost – and that's really useful."*

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## Result

### **Significant improvement in the onboarding, assignment, and payment of their freelance talent pool.**

Vested implemented WorkSuite across all of its different entities and departments – for both freelance management, internal work, and client facing work. This has helped make things more streamlined for their teams – and make life a little easier for their accounts department.

Payments are now transparent and on time, and their teams have found the platform to be user-friendly and straightforward.

*"With our old system, I had at least one phone call or a screen share meeting to show someone how to use it. And I have not had to do that with WorkSuite. It's saved a lot of time in a lot of different areas"*

The Worksuite team customized the analytics dashboard for Vested, enabling them to pull out the data they needed on any given client project – which has given them more transparency into their freelancer spend.

“If we internally go over on hours for a particular client, now we actually have the ability to see the freelancer spend in addition. It’s really nice that we were able to say “Hey, we need these data points” and Worksuite was able to pull them out”

## Worksuite highlights for Vested

Vested now uses the full range of Worksuite features, including recruiting, onboarding, compliance, task management, and payment processing.

With Worksuite Pay, they can send a high volume of payments to their freelancers at scale, with clear visibility into the payment process at every step. And with Job Openings they can use task templates to automate their creation of tasks.

Vested has significantly improved their freelancer management and payment processes with Worksuite – saving time and providing a seamless experience for both their freelance talent pool and their internal teams.

“I don’t think there’s another platform out there that does everything that Worksuite does. The ease of use is wonderful, and the communication between the Worksuite team and your own team is fantastic”



### **Vested**

Vested is an integrated communications agency that deals with clients in the financial space. They’re a group of several different entities with a core focus on PR and marketing. Their VCo System (what they call their network of freelancers and contractors) supports their full-time Vesties. The VCo System consists of a variety of freelancers from creatives, to writers, to PR professionals.



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



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