



How to Manage Freelancers: Lessons Learned from LSPs

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Though not yet a trend, CSA Research observes more companies considering the option of directly managing the freelance linguistic talent responsible for generating their multilingual customer experience. This brief outlines [why organizations choose to adopt this model](#), followed by guidance for: 1) [resource manager profiles and responsibilities](#); 2) [required technology](#); 3) [talent acquisition tips](#); 4) [training](#); and 5) [performance monitoring](#).



This research is based on interviews with 31 language service providers (LSPs), demos of resource management features in translation management systems (TMSes), and an analysis of more than 30 translator registration portals.

Determine Whether You Want to Take on Direct Supervision of Freelancers

Managing internal and external translators and reviewers was quite common in the 1980s and '90s. However, organizations in early phases of the localization learning curve wrestled at that time with processing large volumes of multilingual content for episodic product releases or localizing software from scratch. Translation providers recognized the opportunities in taking on management of the language services function for their clients, and the rest is history.

Arguments For and Against the Do-It-Yourself (DIY) Model

Many medical facilities and international institutions have managed their own interpreter pools for a long time. However, the pendulum has recently begun to swing back for organizations in other verticals. Disintermediation fuels their quest for efficiencies as they seek to take back control to:

- **Reduce extremely tight turnaround times.** Unrelenting deliverable requirements push organizations to require direct, frequent access to linguists, rather than filtering requests through project managers at LSPs.
- **Improve quality through closer relationships with the same linguistic team.** If language suppliers aren't able to assign the same resources across multiple engagements over time, quality and delivery times can suffer. Enterprises may

decide to mitigate this risk by hiring and managing freelancers themselves or recruiting from their own user pools.

- **Eliminate talent brokers.** Just as Monster.com changed the role of professional recruiters, online linguist marketplaces make it easier for organizations to develop their own networks. By cutting out the intermediaries, they can often pay linguists higher rates and increase retention.
- **Meet stringent security requirements.** Financial institutions, gaming and entertainment teams, life sciences companies, and manufacturers are just a few examples of the industries that may require linguistic talent to work on-site. The contractors may need to test hardware or machinery. They may also have to be closely supervised to ensure that no intellectual property walks out the door.

As with any process change, it's important to understand the pros and cons. Counterbalancing the plus for taking back control of resources are three possible downsides:

1. **Managing linguists requires an investment in infrastructure.** You will need to implement streamlined processes with the support of other departments such as finance and procurement. Expect to generate more purchase orders and process more invoices than when dealing with agencies. Set aside time and resources to establish a strong QA backbone to resolve quality and service issues. You may also require more IT support with various program and font installations to process files efficiently and to resolve technical issues.
2. **Scalability roadblocks may appear.** We have seen several companies at earlier stages of localization maturity adopt this model, only to find that global success leads to more content volumes and languages than they can handle.
3. **Some translation teams lose focus when managing their own linguists.** Why? Because they decide to function as an LSP for both internal and external buyers of their services. Based on our observations, they usually fail to meet expectations on both sides of the corporate wall.

Your company may have its own requirements that lead it to adopt a production model that includes direct management of freelancers for regular predictable work volumes – if not for all languages, at least for the ones that are critical to your success. As long as you implement backup resources from reliable LSPs, the risk should be fairly limited. The rest of this brief outlines how to set up a do-it-yourself model for managing linguistic talent.

Engage a Resource Manager

There's a reason that LSPs charge administrative and project management fees. Capacity planning, talent acquisition, training, and performance monitoring don't come for free or happen magically. Depending on your volumes, at least one team member will need to devote part or all of his or her time to overseeing these areas. Companies often pair resource management with project management or quality assurance duties.

Focus on Five Types for Your Hiring Profile

Our interviews uncovered five sought-after backgrounds for resource managers (see [Table 1](#)). However, we found that credentials are less important than certain soft skills. Candidates should be persuasive talkers who can negotiate good rates and moderate difficult situations (see [Figure 1](#)). They need to be savvy networkers who can find hidden talent using resources such as social media and professional associations in local markets.

Five Sought-After Backgrounds for Resource Managers	
Background	Characteristics
Vendor managers with supply-side experience	Past vendor management experience with an LSP makes for ideal candidates. Because they've already been exposed to best practices, such professionals already understand the particularities of the language supply chain and have established contacts among linguists.
Former project manager (PM)	PMs understand how the industry works, what makes a good supplier, and how to interact with them. However, they typically need additional training in areas such as negotiation.
Procurement staff	People with a background in purchasing services make great candidates. However, not all procurement backgrounds are equal. Look for people who have experience dealing with small vendors.
Recruiters	Candidates with a background in staffing offer experience in locating and qualifying vendors, along with negotiating rates for a wide range of specialized skills.
Translators	Don't rule out translators with good people and negotiation skills who may be looking for a change in focus for their work.

Table 1: Five Sought-After Backgrounds for Resource Managers

Source: Common Sense Advisory, Inc.

The Best Resource Managers Have Excellent Soft Skills

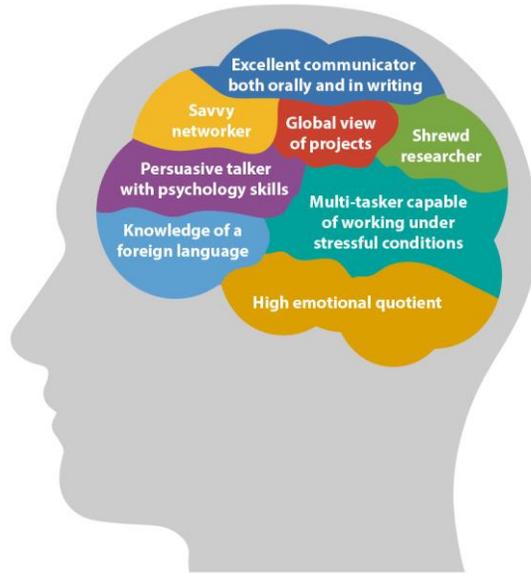


Figure 1: The Skills of Great Resource Managers
Source: Common Sense Advisory, Inc.

Resource Managers Oversee Six Areas

Whether full- or part-time, resource managers are responsible for database maintenance, talent acquisition, rate negotiations, performance monitoring, training, and capacity planning (see [Table 2](#)).

Areas of Responsibility for the Resource Management Function	
Category	What Resource Managers Do
Database maintenance	<ul style="list-style-type: none"> • Manage record updates such as address changes, vacation notices, qualification updates, and price modifications. • Track supplier status updates – whether upgrades or downgrades.
Talent acquisition	<ul style="list-style-type: none"> • Recruit candidates, vet qualifications, and onboard new resources. • Coordinate tests, paperwork, and evidence collection for special requirements such as certifications, security clearances, and vaccination records.
Rate negotiation	<ul style="list-style-type: none"> • Negotiate standard rates as well as special discounts and terms.
Performance monitoring	<ul style="list-style-type: none"> • Oversee resource quality data collection. • May conduct problem investigation. • Act as the arbiter or moderator for linguistic disagreements.
Training	<ul style="list-style-type: none"> • Provide for freelancer education, e.g., company-specific quality requirements or technology.
Capacity planning	<ul style="list-style-type: none"> • Proactively add resources, as required, for additional volumes, languages, and domain expertise.

Table 2: Areas of Responsibility for the Resource Management Function
Source: Common Sense Advisory, Inc.

Deploy a Robust and Flexible Database

The core function of resource management is to enable project managers to assign resources with the correct expertise, tools, and availability. A strong database – not Excel spreadsheets – makes this possible by tracking approved resources, those under evaluation, and prospective resources (see [Table 3](#)). Many translation and interpreting management systems offer resource management as a component.¹

Main Elements to Capture for Freelancer Profiles		
Category	Typical Fields	Special Notes
Contact information	Name, address, phone and fax numbers, instant message ID, photo	Advanced systems enable you to contact resources straight from the system with auto-telephone dialing or Skype messaging.
Availability	Work hours, days off, workload indicator, schedule	Based on the location, some systems can provide “awake hours,” obviating the need to manually calculate time zones to gauge if it’s appropriate to contact a supplier.
Services	List of services offered	Systems usually present this information combined with fields that show editing rates for English to Vietnamese for pharmaceutical translations, for example.
Language pair capability	Native language and working language pairs	These may vary by domain expertise.
Subject matter expertise	Verticals and document types	More advanced systems enable resource managers to document the level of expertise within a specific field.
Background	Education, certifications, and memberships	You can customize pull-down lists, checkboxes, and text fields to help track details relevant to your organization, such as security clearances or published research.
Experience	Elements that describe the resource’s experience inside and outside the language services industry	More advanced systems can show the history of projects completed by resource to guide PMs when assigning new projects.
Volume capacity by job type	Supplier’s volume capacity for different job types (such as 250 words per hour for translation)	TMSes can use this information to calculate timelines, provided that the system tracks work hours and maximum volume desired.
Technology	Hardware and software capabilities	Resource managers need to specify the requirements for suppliers to meet to qualify as approved resources. For example, should they own a specific version of software? Is a certain expertise required?

Main Elements to Capture for Freelancer Profiles		
Category	Typical Fields	Special Notes
Rates	Rate information for language pairs, services, expertise levels, turnaround times, and technology applied	More granular data entry enables you to automatically generate purchase orders.
Recruitment documentation	Résumé, cover letter, references, submitted paperwork, signed confidentiality statements, and translation test results	You should be able to attach a résumé and then search for the information while executing resource searches.
Performance rating	Indicators of past performance	Systems vary greatly in: 1) scope (tracking quality only or quality plus on-time delivery and service ratings); and 2) depth (manually assigned scores versus rolling up per-task scoring for automatic rate calculations). More advanced systems allow you to customize quality metrics and report card tracking.
Performance notes	Feedback notes and results of investigations	In-progress reviews may be hidden for PMs, who see only the high-level view of resource performance records.
Payment and tax information	Bank routing information, VAT number, W-9 tax forms	These fields may be linked to your accounting system.
Update information	Time stamp of the last record update and tracking of who modified what in the profile	More advanced systems trigger a yearly update request to be sent to vendors.

Table 3: Main Elements to Be Captured for Freelancer Profiles

Source: Common Sense Advisory, Inc.

Focus on Talent Acquisition

Our research shows that the talent shortage tends to be more perception than reality. Challenges generally occur only in certain languages, specialties, and services (see [Table 4](#)).² The main shortage is that of fully trained talent at cheap-o rates. Most languages show a strong base of raw talent ready to be trained as needed to produce professional-level work. Armed with this knowledge, resource managers can focus on identifying and qualifying the right candidates.

Hard-to-Find Linguists	
Category	Example
Translation into English from less common language pairs	Zulu to English
Languages with a limited number of speakers, few who are translators, and even fewer who have domain expertise	Banking subject matter to translate from English into Swiss Italian
Immature markets where specialists aren't trained in translation (or vice versa) and too few linguists pass the tests	Doctor or engineer in Croatia who requires training to become a translator
Mature industries where the translation profession is looked down upon	Petrochemical engineer unwilling to work as a translator
High-wage countries where few educated professionals want to be translators	Japan
Agency-dominated markets where freelancers are hard to find	Latvia
Fields where top vendors are busy already	Conference interpreters

Table 4: Areas in Which Linguists May Be Difficult to Find
 Source: Common Sense Advisory, Inc.

Keep an Open Mind When Conducting Linguist Searches

There are many places in which to find the talent you're looking for: professional associations and networks, linguist marketplaces, conferences, and your own user communities and fans (see [Table 5](#)). Job postings are also popular. Reach out through social media with posts on LinkedIn, Twitter, and online ads that appear in relevant searches (and the local market equivalents of these routes). Newspaper ads work well when recruiting for African or Indic languages, or when hiring machine translation post-editors.

Qualification: Competency Evaluation, Rate Negotiation, and Paperwork

When vetting linguists, resource managers generally review résumés, test skills, and talk to references. They may or may not take the time to interview each candidate and verify all credentials. Beyond the screening and CV review, the order in which you choose to conduct the remaining steps may vary. Some resource managers handle paperwork up front to avoid wasting time on candidates who won't sign confidentiality agreements. Others start with the rate discussion so as not to evaluate freelancers they can't afford.

Where to Connect with Linguists	
Source	Examples
Your own user communities and fans	<ul style="list-style-type: none"> • User groups • Facebook groups • LinkedIn • Twitter • WeChat
Current linguists	Recommendations for peers with similar expertise in other languages
Professional networks	<ul style="list-style-type: none"> • LinkedIn plus local equivalents (good for finding vertical specialists through profile searches on discussion groups) • Professional associations in other countries in your field • Expatriate communities
Industry-specific portals	When looking for subject matter experts: <ul style="list-style-type: none"> • Directories and websites of associations focused on specific verticals
Translator and interpreter association directories	<ul style="list-style-type: none"> • American Translators Association directory • In-country association (for example, SFT in France) • Service-specific association (for example, AIIC for conference interpreters)
Academia	<ul style="list-style-type: none"> • Translation and interpretation programs • International students from IT, MBA, engineering, health sciences, or whatever domain you require from universities or technical schools
Linguist marketplaces	<ul style="list-style-type: none"> • ProZ.com • TranslationDirectory • TranslatorsCafé
Governmental agencies	When dealing with less common languages: <ul style="list-style-type: none"> • Embassy and consulate networks • Court interpreter rosters

Table 5: Where to Search for Linguistic Talent

Source: Common Sense Advisory, Inc.

- **Weeding out the scammers.** Interviewees reported that the vast majority of unsolicited résumés come from applicants who impersonate legitimate translators and deliver, for example, raw machine translation presented as human output. Check e-mail addresses against directories such as [Translation Scammers](#), and report suspects.
- **Testing skills.** A great résumé is no guarantee that a translator or reviewer will perform as desired. Provide test sample(s) from your own content, including ones that represent the most important categories or ones for which you've experienced quality issues.³
- **Negotiating rates.** Some resource managers make it easy on themselves by compensating freelancers by the hour, depending on the task to be done. However,

many continue to operate with per-word rates (see [Table 6](#)). How do you develop realistic and competitive rates? LSPs rely on three main external data sources: [ProZ](#), [Translators Café](#), and CSA Research.⁴

- **Processing the right paperwork.** This step involves documenting your expectations and putting appropriate contracts, confidentiality agreements, and service level agreements (SLAs) into place (see [Table 7](#)). Work closely with your human resource and accounting colleagues to ensure that freelancer status and tax issues are handled appropriately.

Sample Data Tracked in a Rate Sheet																	
Source	Target	Translation (0-74% match)				Translation (75-99% match)				Proofreading (100% match)				Minimum fee			
		Target	Average	Low	High	Target	Average	Low	High	Target	Average	Low	High	Target	Average	Low	High
EN	ES	.07	.08	.06	.12	.03	.04	.02	.05	.02	.03	.02	.04	20	25	15	30

Table 6: Sample Data Tracked in a Rate Sheet

Source: Common Sense Advisory, Inc. (sample data is for illustration purposes only)

Take Ownership of Training

LSPs find that it is cheaper in the long run to build talent than to hire it ready-made 100% of the time. And it's the same for companies that engage groups of freelancers directly. Focus on developing new talent pools by bringing interested freelancers up to required skill levels.

- **Cast the net wider to include non-linguists.** Pair subject matter experts with highly proficient editors so that they can collaborate – in real time, if possible – to produce the quality of translation required. Don't rule out the role that native speakers of the source language can play to ensure that your messages are conveyed accurately. After all, if the intended meaning is misconstrued, no amount of target language fluency can make up for the errors caused by misunderstandings.⁵

Paperwork for Freelancers	
Component	What to Include
Non-disclosure and confidentiality agreement	<ul style="list-style-type: none"> Establish the ground rules regarding what freelancers can share about their interactions with you. They are often privy to privileged information that may cause harm or financial damage if it leaked to the general public.
Payment terms	<ul style="list-style-type: none"> Provide a choice of payment vehicles: check, wire transfer, and online payment via Payoneer, PayPal, Skrill, Transpay, or Xoom. Take into account any fees to be deducted from the final amount received by the freelancer. Balance company cash flow requirements against negotiating better deals to come up with shorter payment cycles.
Service level agreement	<ul style="list-style-type: none"> Document specific expectations for turnaround times, productivity rates, and quality.⁶
Incentives and penalties	<ul style="list-style-type: none"> Describe how freelancers will be rewarded for exemplary performance, as well as the consequences for failing to meet the terms of the engagement. Outline the investigation and appeals process, and remediation or penalty schemes for subpar work.
Freelancer status	<ul style="list-style-type: none"> Provide a form for linguists to fill out to verify their freelance status.
Banking and tax paperwork	<ul style="list-style-type: none"> Supply whatever forms are required by your organization (such as a W-9 for U.S. companies) to provide a taxpayer identification number or banking details.

Table 7: Paperwork Requirements for Managing Freelancers

Source: Common Sense Advisory, Inc.

- Train freelancers on your products, services, and corporate culture.** They're worth the investment if you hope to retain them as members of stable teams for the long term. Cover the basics such as workflow, quality standards, terminology, and style guides.⁷ Pay them for their time when requesting their input on your current processes or a new MT initiative.
- Attract interns.** If you have an in-house linguistic team that can support the initiative, join forces with academic institutions to develop structured programs to take on and train new graduates. Again, don't limit this opportunity to translation and interpreting schools. Once the interns are on board, assign mentors to provide feedback and correction analysis on their tasks.
- Deliver training through multiple channels.** To increase the level of freelancer expertise, offer workshops, webinars, on-demand training videos, manuals, and reading lists. Most linguists will jump at the chance for live chat opportunities with product designers, engineers, or digital marketing managers who are willing to answer questions while providing a deeper dive into their projects.

Aim to Do Less Performance Tracking Over Time

The main goal of performance monitoring and measurement should be to do less of it as your freelance team becomes more knowledgeable and proficient in your organization's processes and requirements.⁸ To ensure this outcome, develop an efficient process that provides timely and useful feedback for contract linguists.

- **Share your quality assessment method with freelancers.** There are three primary methods, each with its own pros and cons, which you can apply in this area (see [Table 8](#).⁹ A *holistic quality approach* focuses on the overall impact of the translated content. The *analytic quality model* finds defects, and the *automatic quality model* identifies potential problem areas.
- **Performance issues may not require immediate termination.** Holding freelancers accountable for their output and service is a process, not a single event. Probation status allows freelancers to benefit from constructive feedback and coaching.

Three Approaches for Assessing Translation Quality		
Method	Pros	Cons
Holistic	<ul style="list-style-type: none"> • Quick and relatively cheap • Easy to implement 	<ul style="list-style-type: none"> • Imprecise and comparatively subjective • No audit trail or path to resolve specific errors • Contestable – without specific errors, the judgments can be questioned
Analytic	<ul style="list-style-type: none"> • Provides specific feedback • Comparatively objective • Widely used by LSPs 	<ul style="list-style-type: none"> • Expensive and time-consuming • Requires more extensive training • May not reflect overall perception of quality
Automatic	<ul style="list-style-type: none"> • Provides quick indicators of problems • Cheaper than manually finding errors 	<ul style="list-style-type: none"> • Many types of translation errors are not automatically detectable • High false positive rate (that is, systems falsely detect errors)

Table 8: Pros and Cons of Three Quality Assessment Methods

Source: Common Sense Advisory, Inc.

If You Choose to Manage Freelancers Directly, Invest in Their Success

Before committing to build and maintain a team of your own linguistic resources, recognize the responsibilities that come with it: capacity planning, talent acquisition, training, and performance monitoring – all managed by a capable member of your

team, supported by a robust and flexible database and cooperation from departments such as finance and procurement.

Invest in your freelancers' success by delivering the right training and offering relevant feedback on tasks well done as well as areas that call out for improvement. At the same time, keep LSPs on call to deal with sudden spikes in volume, hard-to-source languages, and infrequently requested expertise.



¹ CSA Research, "[Translation Management Systems for Enterprises and LSPs](#)" (Aug14)

² CSA Research, "[Translation Future Shock](#)" (Apr12)

³ CSA Research, "[Insights on How LSPs Test Their Supply Chain](#)" (Dec15)

⁴ CSA Research, "[Translation Pricing by Language Pair](#)" (Sep12)

⁵ CSA Research, "[Translation and the Native Language Myth](#)" (Nov11)

⁶ CSA Research, "[The Well-Tempered Language Service Level Agreement](#)" (Sep10)

⁷ CSA Research, "[The Style Guide Challenge](#)" (Dec15)

⁸ CSA Research, "[Is Traditional Linguistic Validation Still the Way to Go?](#)" (Dec13)

⁹ CSA Research, "[How to Assess Translation Quality](#)" (Dec15)