Building large, high-performing teams through Elance-oDesk

A power-user's playbook

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Introduction

Over the last two years, I have worked with hundreds of oDesk contractors to deliver exceptional customer service to users worldwide.

I have “scaled-up,” growing from a handful of people in the Philippines to a roster of 100 people across 7 countries. And I have “skilled-up,” starting with basic customer service contractors but growing to management, analytics and social media contractors.

The following a brief and not entirely complete “Playbook.”

The Playbook

- Define goals
- Foster a culture
- Recruit & hire
- Train & supervise
- Structure the team
- Manage performance
- Pay fairly and transparently
- Work across cultures and economies

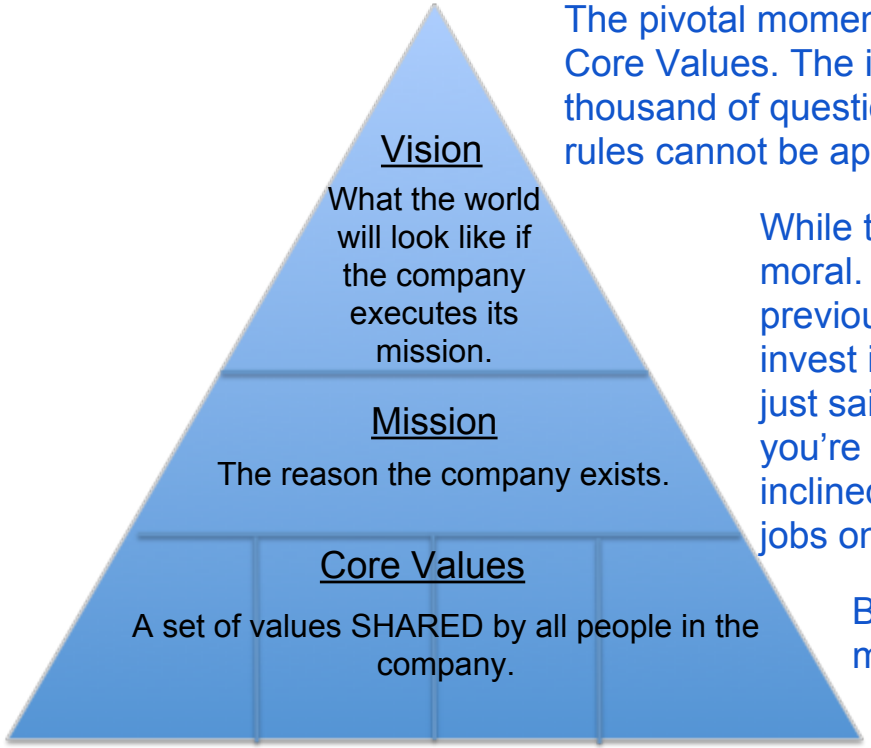
Define goals

Primary reason for seeking contractors

Expected duration of contracts	Low Cost	Scale	New Capability
Short-term			
Long-term	Secondary		**Primary**

We looked to oDesk for long-term employees with call center expertise. Much of the talent is in the Philippines, which also enabled cost savings.

Foster a culture



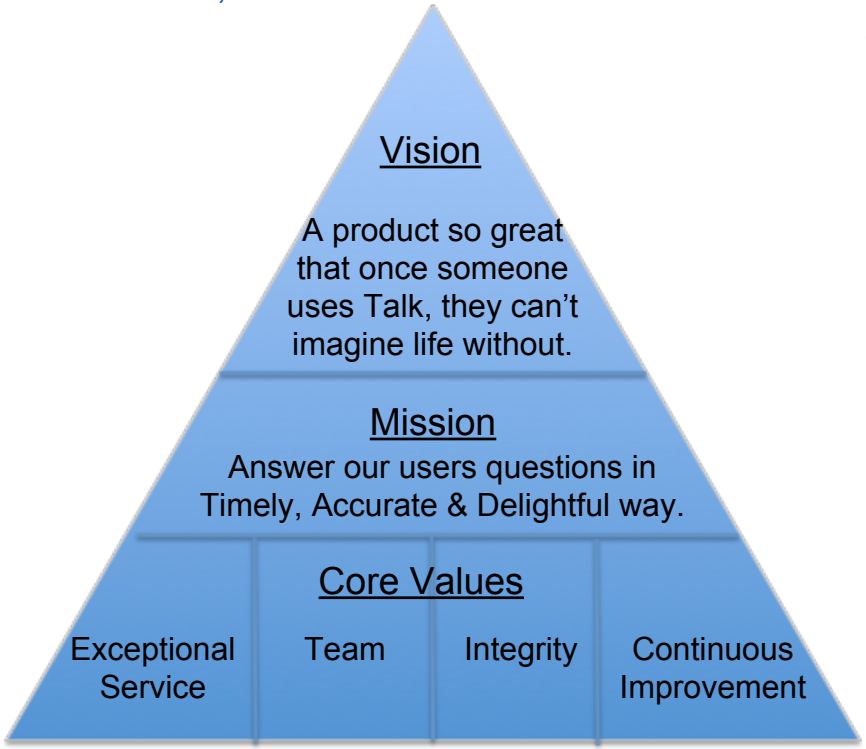
The pivotal moment for our team was adopting a Vision, Mission and set of Core Values. The impetus was to improve the product. Since we handle thousand of question types, it was impossible to write rules. Therefore, when rules cannot be applied people must rely on values to solve problems.

While the product improved, the greatest impact was on the team's moral. It became apparent that many of my contractors had previously worked with "extractive" clients. These clients did not invest in training. They did not establish a sense of purpose. They just said, "here is the work - figure it out. Oh, you can't figure it out - you're dumb." Since the client was extractive, the contractor was inclined to be extractive. They cut corners and worked on other jobs on the clock. It was a vicious cycle.

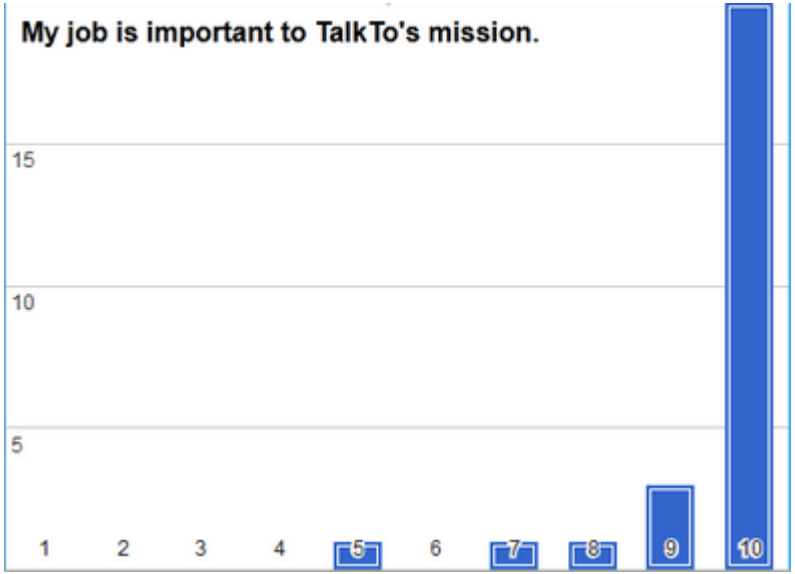
By tying our work to a greater vision and having a set of values, morale and performance increased and turnover fell.

Culture @ Path Talk

1. Our Vision, Mission & Core Values

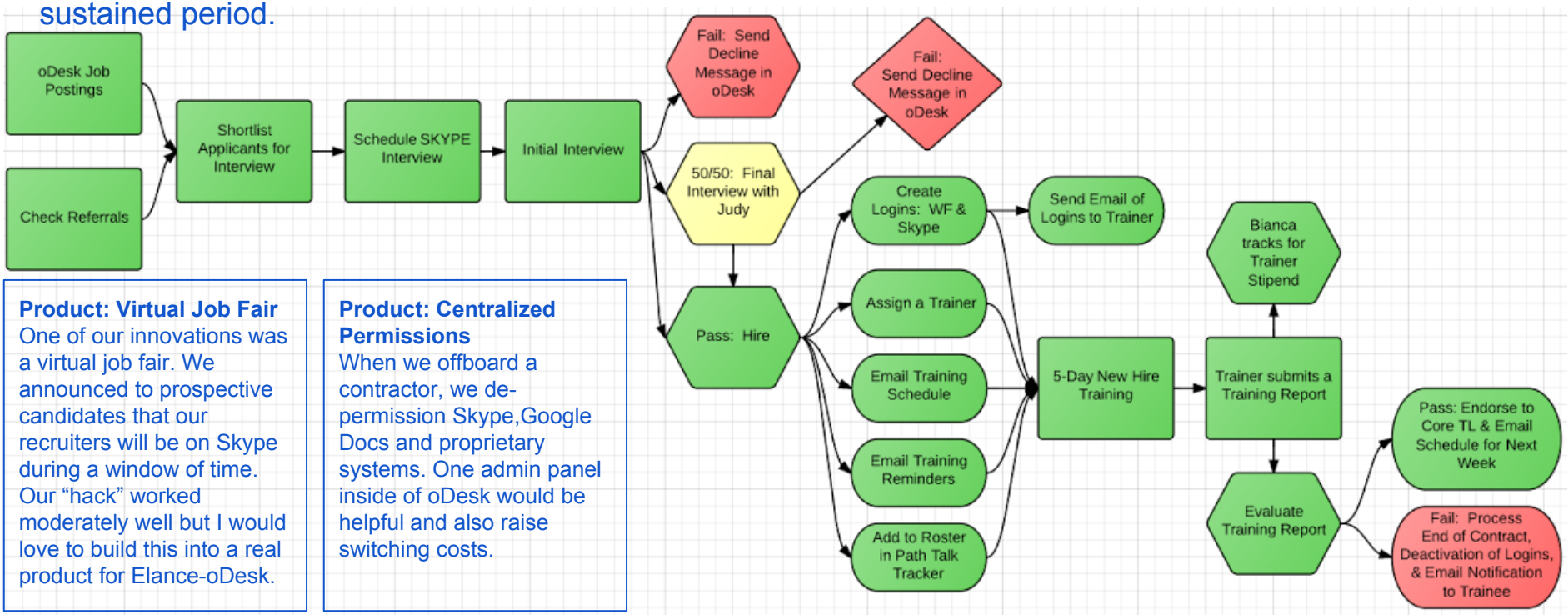


2. Survey results. The vast majority of team members answered 10 (on a scale of 1 -10) that their job is important to the company's mission.



Recruit & hire

After many burst of hiring, we honed a process that enables Talk to onboard 10+ people per day over a sustained period.



Product: Virtual Job Fair
One of our innovations was a virtual job fair. We announced to prospective candidates that our recruiters will be on Skype during a window of time. Our "hack" worked moderately well but I would love to build this into a real product for Elance-oDesk.

Product: Centralized Permissions
When we offboard a contractor, we de-permission Skype,Google Docs and proprietary systems. One admin panel inside of oDesk would be helpful and also raise switching costs.

Train & supervise

In order to quickly scale up and to ensure exceptional and consistent quality, we invest heavily in training. Below is the Five-Day New Hire Training Module in detail. Additionally, we do refresher trainings for veteran team members.

Day 1

- Meet & Greet
- Intro
- Shadow
- Wrap-up

Day 2

- Day 1 recap
- Best Practices
- Shadow
- Sample calls
- Mock ticket handling
- Wrap-up

Day 3

- Day 2 recap
- Best Practices
- GO LIVE!
- Listen to calls
- Wrap-up

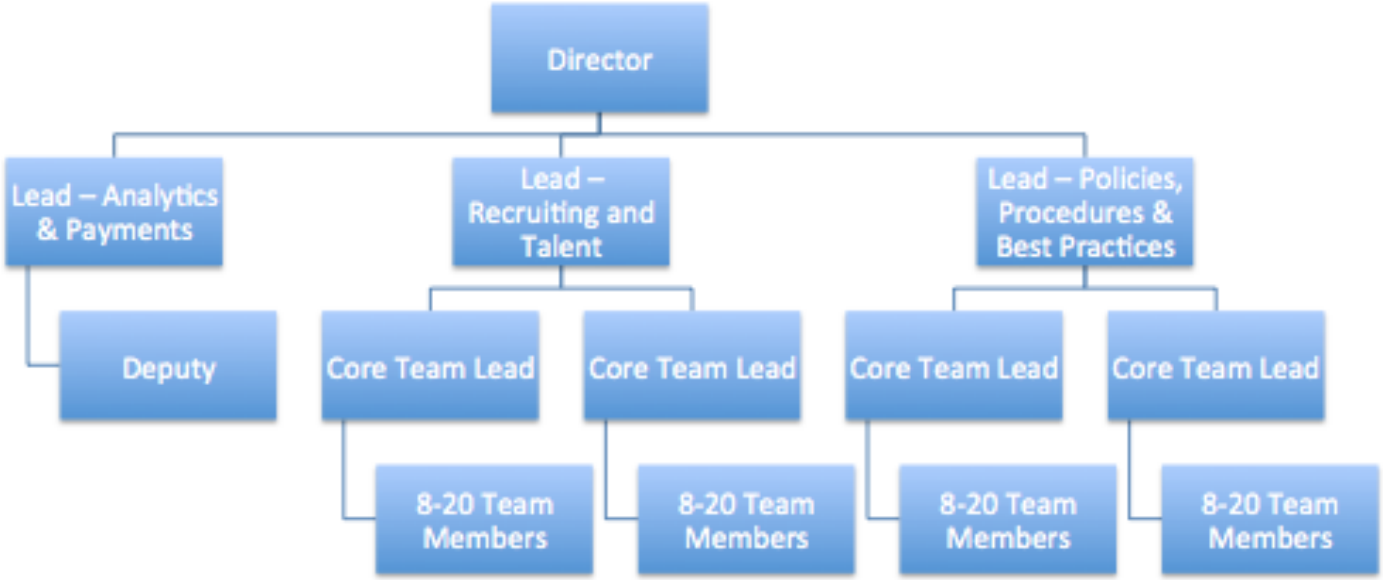
Day 4

- Day 3 recap
- Handbook - Policies
- GO LIVE!
- Wrap-up

Day 5

- Day 4 recap
- GO LIVE!
- Graduate - Intro to wider team

Structure the team



After several iterations, we found a structure that fits. Each Team Member is assigned to a Core Team Lead, who is responsible for their success. Core Team Leads report to Leads. Additionally, Leads are responsible for key aspects like hiring, training, policies and data.

In the future, there will be a 4th lead specifically focused on Training and below him/her will be dedicated trainers.

Manage performance
Quantitative

Performance Management is both qualitative and quantitative. Below is a quantitative report, published every week, that looks at ticket actions and attendance. We have honed this report so that done/delay ratios factor in shift time (ratios change throughout the day due to businesses being open / closed).

As a result of Core Team Leads reviewing this report with Team Members, both done ratios and attendance improved.

	PERFORMANCE			ATTENDANCE					
WF ID	Done	Delay	Total	Scheduled	Manual Time	PTG	Tracked	Actual	Compliance
k8.algara@gmail.com	74.38%	25.62%	100.00%	40:00:00	0:00:00	3:40:00	33:50:00	37:30:00	93.75%
xian_weber@yahoo.com	60.00%	40.00%	100.00%	15:00:00	0:00:00	0:00:00	15:10:00	15:10:00	101.11%
cristina.peral07@gmail.com	72.73%	27.27%	100.00%	40:00:00	0:00:00	17:30:00	19:30:00	37:00:00	92.50%
romlinelingat@yahoo.com	74.74%	25.26%	100.00%	40:00:00	0:00:00	4:40:00	33:30:00	38:10:00	95.42%
bernadettepajares@gmail.com	73.96%	26.04%	100.00%	40:00:00	0:00:00	8:40:00	22:30:00	31:10:00	77.92%
nikko.bonifacio@gmail.com	78.26%	21.74%	100.00%	40:00:00	0:00:00	5:30:00	32:40:00	38:10:00	95.42%
rspa.88@gmail.com	83.20%	16.80%	100.00%	40:00:00	0:00:00	6:50:00	31:10:00	38:00:00	95.00%
lui_asprer@yahoo.com	75.00%	25.00%	100.00%	40:00:00	0:00:00	5:00:00	33:50:00	38:50:00	97.08%
monicaisidro.online@gmail.com	78.10%	21.90%	100.00%	40:00:00	0:00:00	9:30:00	29:00:00	38:30:00	96.25%
mac.obsines@gmail.com	71.15%	28.85%	100.00%	32:00:00	0:00:00	10:00:00	20:30:00	30:30:00	95.31%
haponisangigat@gmail.com	69.42%	30.58%	100.00%	40:00:00	0:00:00	6:50:00	31:10:00	38:00:00	95.00%
glenjumilla@gmail.com	81.82%	18.18%	100.00%	15:00:00	0:00:00	0:00:00	14:40:00	14:40:00	97.78%
	74.40%	25.60%	100.00%	422:00:00	0:00:00	78:10:00	317:30:00	395:40:00	93.76%

Manage performance
Qualitative

Performance

Culture & Values	**Weak**	**Strong**
Aligned	❖ Fabricio Barboza ❖ Leighton Dawkins ❖ Ridoy Sirait ❖ Charmain Mata ❖ Jenny Garcia	❖ Ram Tayag ❖ Yeff Gomez ❖ Cynthia Villaflor ❖ Perly Joy Fuentebella ❖ Richelle Villanueva ❖ Delio Deslate ❖ Jonel Ectuban
Not Aligned	❖ Mark Duro ❖ Mackevin Dalisay ❖ Rafuncel Libre ❖ Rodney Ormejes	❖ Sherrie James ❖ Maila Perez

We also care greatly about “qualitative” fit.

Every quarter, leadership looks at Performance in relation to Alignment with Values.

- Aligned & Strong are fostered for future leadership roles;
- Aligned & Weak are coached;
- Not Aligned & Weak are let go;
- Not Aligned & Strong are carefully assessed and often times let go.

This framework is based on Jack Welch’s work. We have found it very helpful because we need strong values as much as we need strong performance. In the at-home world, if team members aren’t aligned with your values of integrity, continuous improvement, exceptional service and team, you’re dead-in-the-water.

Pay fairly and transparently

Hourly rates did not enable alignment between contractors and the business. So we developed variable payment schemes to address different problems.

Pay-to-go: When traffic spikes we need people immediately. “Surge pricing”, i.e. paying a bonus to first responders, failed because many of our extra people were sleeping or caring for kids when surges hit.

So we reversed it! We schedule extra people and if traffic is normal we pay those people a fraction of their scheduled hours to NOT work. It’s a bit more costly but we are able to manage traffic much better.

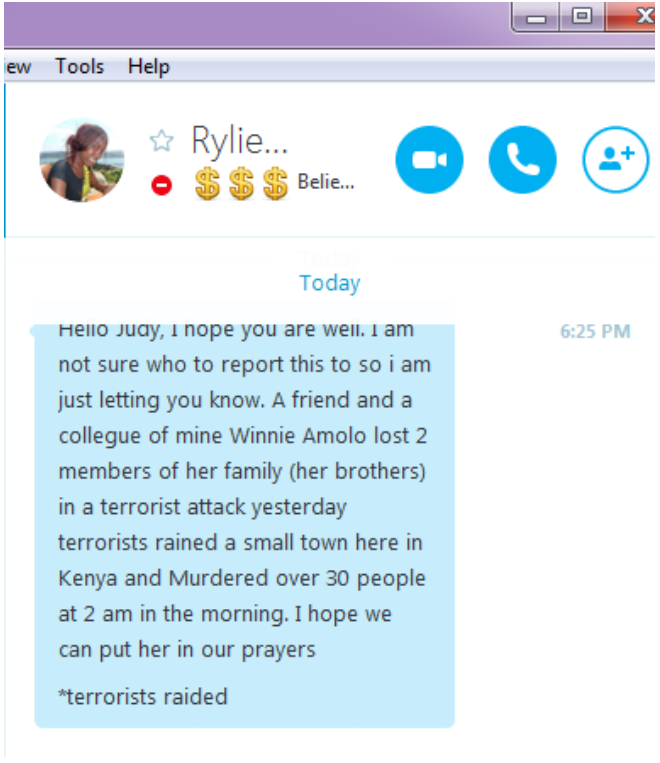
iCare: How do you control for quality when tickets are coming in every second? You empower your agents to become Quality Controllers.

If an agent spots a ticket of questionable quality, they can submit the ticket to be reviewed by the Lead team.

If the ticket is found to be in-error, the agent that reports the ticket earns 5 tickets worth of pay (we pay $ per ticket worked) and the agent in-error is “clawed back” 5 tickets for that 1 erroneous ticket.

Variable payments are processed every week and we publish a report showing all calculations.
#TransparencyIsKey

Work across cultures and economies



The last play in the playbook is understanding what is happening outside of your contractors' windows. It's easy to forget this when you do not meet contractors face-to-face.

As you plan your team structure and your disaster recovery / service levels, do not forget to look out your contractors windows. Political instability. Severe weather made worse by weak building/road/sewer infrastructure. Street level violence. Violence against women. Religious violence. Disease. These are part of everyday life.

Here is just one example of what our contractors go through. This was from December 2, 2014.

I find it helpful to read the local (City, National) newspaper of source countries, as well as understand the overarching risks.