

WELCOME KIT - WORKING OUTLINE

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WELCOME

If you're reading this, you're officially part of the Visually freelancer community. Congratulations!

We're excited to have you and wanted to share a few details that will help you understand how we work, and how you can get the most out of our platform.

COMPLETING YOUR PROFILE

The first thing you'll want to do is make sure you complete your profile. Upload a photo (we prefer pictures of people, and ask that the picture actually be you!) and fill out a brief bio introducing yourself.

Designer, Illustrator, Animator or Videographer

It's best to upload at least 3 portfolio projects to your profile (though, the more projects you upload, the better your chances of getting project invites). The work in your profile will help us match you to projects, so make sure it's the type of work you want and that it's representative of your style. Also, be sure to tag it with as much information as possible. As you go on to complete projects with clients, you can add those that are public to your profile (projects that are marked "private" should never be uploaded to the platform).

Writer/Researcher, Copywriter, Scriptwriter, or Proofreader

If you have worked on any visual content you feel is representative of your writing (mov, m4v, png, jpg, etc.), feel free to upload it to your profile. The best way to share written work in other formats (doc, pdf, blog posts, etc.) is to link to it. We suggest gathering your work on a personal website or portfolio so it's easily accessible all in one place. This makes it easier for us to review your writing,

and to reference your work when we're trying to match you to projects.

GETTING READY FOR ASSIGNMENTS!

Since we match our freelancers to projects based on things like overall skill, experience, and topic, sometimes it might take a while before we find a good match (completing your profile and uploading representative work helps us do this more efficiently).

As you get familiar with the platform and establish a track record of good work and happy clients, your ranking (determined by your client and fellow freelancer ratings*) will begin to earn you preferred status in our pool of certified freelancers.

** A note about ratings: Ratings are compiled from client and fellow freelancer feedback, and they are a measure of your capabilities and reputation on the Visually platform. They quantify work quality, punctuality, and communication. Higher ratings make freelancers eligible for more project assignments and oftentimes higher-paying projects.*

ACCEPTING YOUR FIRST PROJECT!

Now that your profile is complete, you're ready to start receiving invites. Project invites are sent via email. They include important details about the project, like the project title, fee, a brief description, estimated timeline, and other information about the project scope. At the end of the email, you'll have the option to accept or reject the project.

Some important things to keep in mind:

- Invites are often sent to several people at once and projects are assigned to the first that accepts. If you accept a project that has already been assigned to someone else, you will receive an email notification. Please don't be discouraged if you don't get assigned a project that you've accepted; we welcome you to try again! Our goal is to assign projects within 12 hours, so we move quickly. Kicking off projects right away helps keep projects on time and budget for our clients.
- If you are unable to accept a project, please let us know by clicking the "Reject" link in the invite email and provide a short explanation. We're aware that our creatives don't always have the time to work on a project, or don't aren't interested in the subject matter or client.
- Each time you accept a project, you're agreeing to our [vendor terms and conditions](#).
- We have standard timeline of three weeks. Rush projects, or projects with custom timelines or deliverables will be shorter or longer, but you probably won't encounter these until you've got

several standard projects under your belt. [Vertical-specific average ranges (explain that the extremes are edge cases)]

→ **Vertical-specific:** Once journalists have gained experience in the Marketplace, we may assign them to more complex projects that require more research, brainstorming, and/or ideation. Those projects typically have a Creative Director in addition to a Designer.

SO HOW DOES A VISUALLY PROJECT ACTUALLY WORK?

1. To start, the client fills out a Creative Brief. This includes key information about the project, like general approach, audience, style examples, and project goals. The Creative Brief will be your road map for the project: a critical guide and reference as you begin to conceptualize content.
2. Once we get the completed Creative Brief, we invite freelancers (usually several) that match the project's needs. Again, invites are based on a variety of factors like design or writing style; experience in an industry or project type; availability; and previous ratings on communication, responsiveness, and overall quality (don't worry, we give new freelancers a chance to build their ratings!)
3. If you're the first freelancer to accept a project invitation, you'll receive a follow-up email that makes your assignment official and takes you to the project feed.
4. Once you're in the project feed, you'll see the pictures and names of your team members, including the client, in the upper right. We encourage you to say hello and introduce yourself. You should always review the Creative Brief, Brand Assets, and Files right away so you're familiar with the project details and can ask any obvious initial questions, especially those that are critical for getting started.
5. After that, it's time to do what you do best: collaborate with your team, hit your milestones and create amazing work!

THE PROJECT CENTER

This is the heart of the Visually platform. The project feed contains everything for your project all in one place. You'll notice tabs across the top to access various resources like the Creative Brief, Brand Assets, and Files uploaded by the client. The main feed is where the majority of your communication and uploads will take place.

- **Activity Feed:** The Activity Feed is your project hub: it's the place where you will communicate with your client and other team members, and where you will upload your work. At the top right of the page you'll see your team members, along with links to their profiles and to start a private chat. Beneath the team, you'll see your project timeline. [screenshot]
- **Timeline:** The project timeline lists your assigned milestones. At Visually, we automatically set up milestones for every team member, including clients. You can follow along with the progress in the feed, or add the milestones to your own calendar. This helps everyone see who is responsible for what and keeps the whole team on track. [screenshot]
- **Creative Brief:** The Creative Brief is your project roadmap. It includes a summary of the project and the client's goals, along with information about audience, project scope, design requirements, style references, and more. These details will help you deliver drafts that are in line with the client's brand and vision. It's important to review this information right when your project begins, and to refer to it often as you work. The scope information (on the right-hand side) tells you what materials you are expected to provide. If you feel your project is exceeding the scope that's outlined in the Creative Brief, reach out to your Project Manager, Project Coordinator, or Help@visual.ly and let them know. [Screenshot]
- **Files:** The files tab is where you'll find the client's materials: the copy, design examples, and other documents you'll need to do your work. And it's where all of your uploads (and the uploads from your team) will be stored, so you can refer to them as needed throughout the project. [screenshot]

Important: If for any reason you are going to miss a milestone deadline, please contact your Project Manager, Project Coordinator, and/or help@visual.ly as soon as possible. If a client wants to move a deadline, let us know that too!

4 tips for success on the Platform [this can be a separate, highlighted call-out box]

[For all of the TIPS we should link to relevant ed docs.]

TIP #1 - Introductions are key (people + content)

→ Introduce yourself immediately to the client as soon as you get access to your project. You only have a few days to prepare your first draft, so you want to get all the information you need to begin work quickly.

→ This may be your first Visually project, but you've been selected to work on our platform because you're qualified. Telling clients "I'm new at this" only creates a lack of trust in your skills.

We have tested, trained and certified you as a Journalist **[vertical specific]** on the Visually Platform, which means you've got the skills and experience you need to do a great job!

→ Again, remember to look over the Creative Brief and any other uploaded content right when the project starts and, if anything's unclear, ask for more detailed information. Don't wait for the client to kick off the conversation, this is your job. Own the timeline. **New info on kick-off stuff here: phone call vs. no phone call.**

TIP #2 - Communication

Every member of the team (especially the client) wants your project to go smoothly. And at the core of every one of our most successful projects is clear, effective communication. Here are a few pointers for being a great communicator on a Visually project...

Be clear, concise, and polite. It's very easy to misinterpret messages in the project center, especially across cultures and languages. Re-read your messages before posting.

Be time aware. We're a global community: be aware of the time zone that your client and team members are working in. Ideally, it's best work the same hours that your client/team members are available. Remember, you're being hired on a deadline. When working in the same time zone isn't possible, do everything you can to keep conversations as consolidated and efficient as possible and be communicative about your schedule. And, of course, always be sure to meet your milestones.

Document everything. Sometimes phone calls and emails are necessary, just make sure to take notes and include that as a follow up message in the Project Center. If it's not in the project center, it didn't happen. When our Help team is asked to provide support, it's important that we be able to follow the entire conversation; recapping in the Project Center allows us to do that.

Pick the right method. The Visually Platform offers two communication options: real-time instant messaging (chat), and the project feed. Use messages to discuss more complex issues one-on-one, and posts for updates to the entire team. Chat is a great tool for collaborating with fellow freelancers in the background.

Ask questions. We can't stress this enough. Don't hesitate to ask if there's something you don't understand. It's always better to ask first, work second.

Share your opinion: It matters! While clients do have the last say, we encourage you to share your perspective and expertise with clients. You're the creative expert, and most clients will appreciate hearing your thoughts.

Connect with your Project Manager / Project Coordinator: They are here to help and are assigned to most projects. You can always message them 1:1 using the private chat feature to sort out questions or issues behind-the-scenes before you reach out to the client. Always let your Project Manager/Coordinator know about any potential issues with meeting deadlines, or if you are noticing work that is out of scope.

TIP #3 - Meeting deadlines

Meeting deadlines is critical for success with Visually. Many of our clients need the materials you are creating for important events and launches. But even when they don't, Visually prides itself on delivering on-time. Meeting deadlines (and letting us know immediately if you can't) goes a long way toward establishing a strong reputation for yourself on the Platform.

TIP #4 - Delivering your best work, every time

Visually clients represent some of the world's biggest, most influential brands. And they expect world-class work. Every draft should be excellent. This means clean, clear, free of typos...

[elaborate - vertical specific]

CLOSING PROJECTS, RATINGS & PAYMENTS

At the end of every Visually project, we ask everyone to rate their experience. Ratings are a critical part of the Visually Platform: they help us find our best freelancers, and identify problematic areas that may need our attention. You'll rate your team on the following criteria:

- Responsiveness: Was the team member quick to respond or did delayed responses cause problems?
- Communication: Did the team member communicate clearly? Was their tone positive?
- Quality: Was the team member's work well done? Did they address the project Brief and incorporate feedback?
- **More here? Want to make sure we include the current questions.**

PAYMENT

Setting up Your Payment Profile

Before you can get paid, you'll need to set up your Payment Profile. Please visit our [Help Center](#) for detailed instructions.

Getting Paid

Once you have set up your Payment Profile and the client has approved and closed your project, Visually will automatically begin processing your payment. You will receive a notification at project close confirming the fee and providing a Payout ID.

Payments initiated by the 15th of the month will be paid by the last day of the month. Payments initiated between the 16th and last day of the month will be paid by the 15th of the following month.

For example, a payment initiated on May 20th would be paid by June 15th.

If you have any questions regarding your payment, please contact payments@visual.ly and reference your Payout ID.

If you have any tax related questions, you should seek advice from your financial advisor, tax advisor, or the IRS about your individual situation.

WE'VE GOT YOUR BACK

One of the things our freelancers love about working on our platform is that we're always available to step in or help out. There are many situations when you may want to reach out to your Project Manager, Project Coordinator, or help@visual.ly. Here are a few examples:

- **Project concerns.** If project concerns can't be addressed by your Project Coordinator, Project Manager, or Creative Director, feel free to reach out to Help!
- **Scope creep.** If a client is asking for work you think may be outside of the original project description, please contact us. This may be an extra draft, illustration, stock photography **[vertical specific]**... We know client needs can evolve as projects progress, and we'll work with the client to re-scope as-needed so you get paid for any additional work. **[For more on project scope, please visit...]**
- **Payment questions.** Again, if you have any questions or concerns about payment, Help is here to help.

OTHER RESOURCES

List of ed docs.