Go For Growth: How to Scale Up Faster

An indispensable guide to identify the right tech, tools & talent to get more done
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Introduction

Why it may be time to evaluate your tech tools now

During our many years of working with growing businesses, we observed they all face one constant challenge: figuring out how to maintain growth while working with tight timelines, small budgets, and lean teams. Part of the answer lies in creating a solid foundation that can scale with your business, helping your team remain productive and efficient as workloads change.

If you’re using technology tools for marketing automation, customer support, or other functions, you’re already taking steps in the right direction. But you probably don’t have to look too far to find areas where you could be doing more. Or pressure points where manual processes, like email and spreadsheets, need to make way for scalable alternatives. Even if you’re off to a good start, it’s always a good idea to evaluate the tools and processes you’re using today, with an eye on what you’ll need tomorrow.

When surveyed, many business leaders say the key differentiators for their company’s success lies in access to the right tools and talent. This ebook aims to help you identify which tools may be best for your needs and how to access the right talent to get your work done as efficiently and effectively as possible.

We hope these tips help your company achieve its goals for higher levels of growth and profitability.

Rich Pearson
Senior VP of Marketing and Categories, Upwork

Michele Don Durbin
VP of Global Go-to-Market, Evernote
PART 1

Tech trends
A new opportunity for growing companies

A Bredin survey of small and midsize businesses (SMBs) shows most companies are using technology to work more efficiently, and often on the go. However, most are using tech only for basic tasks, such as email and file sharing. On top of this, there’s an explosive growth of data in recent years. This creates a new challenge: cutting through the noise to quickly find the information you need.

The thing is, there’s a huge selection of tech tools and apps available now that can help growing companies do better work, build stronger customer relationships, and make smarter decisions. And you don’t need an IT team to implement these tools. Powerful tech such as artificial intelligence and data science is accessible to nearly any size company. There’s a solution to fit the need, no matter what stage or budget.

This means that smaller companies that know how to take advantage of the many tools available may gain an advantage over their larger competitors.

What do you see as the key differentiator for successful businesses?

The Upwork SMB Survey was conducted online by Bredin, a research firm specializing in SMBs, from January 16-19, 2018, and polled 503 principals of U.S. businesses with 500 or fewer employees.
PART 2

Choosing the right tools
6 steps to choosing the right tools

With so many tools available, choosing the right solutions can be overwhelming. These tips can make it easier to identify which tools will best fit your specific needs, so you can scale and keep pace as technology evolves.

1. Ask the right questions

Ask core team members what problems they need solved.

- Where are our biggest pain points?
- What inefficiencies lie in the current processes and systems?
- As our company grows, where is the work going to increase?
- What can be automated?

**PRO TIP:** Chances are, no single solution can solve all your business needs. After making a list of all the needs, prioritize them by necessity, fit, and business impact in the short and long term.

2. Research with the right team

Generally, the people who are doing the work are best positioned to judge how a new tool or system will impact their daily routines and whether or not it’ll make them more effective. Their knowledge can help guide requirements and customizations.

**PRO TIP:** Look for third-party apps that integrate with the technology you’re already using. It may be a faster and more cost-effective way to build out a solution that can enhance your team without causing too much disruption.
3. Determine if it’s scalable enough

After narrowing down your list to the top solutions, make sure the one you choose can grow with you. Is the solution...

- Showing sustained innovation that reflects the needs of your business?
- Cloud-based for increased flexibility and scalability?
- Able to integrate or plug into any of your existing or planned technologies?
- User-friendly enough for the people who will use it?

**PRO TIP:** Make sure the solution can get up and running in the time frame you need.

4. Build a business case

Look at the total cost of ownership in the short and long term. Think about up-front costs but also the tool’s scalability. Be sure to include these costs: hardware, software, implementation, and training.

**PRO TIP:** When determining costs, be sure to factor in maintenance costs over time.
5. Evaluate the tech support

Ensure the tech solution you choose offers top-notch support including implementation, training, security, upgrades, and troubleshooting services. Since you’re looking for a long-term solution that scales, make sure it offers continuous tech training.

**PRO TIP**: Consider the available talent pool (local or remote) before adopting any new technology. It’s good to know additional help is readily available for troubleshooting or maintenance.

6. Review after implementation

Be sure to review your tool set on a regular basis to ensure the solution meets your company’s internal rate of return. For example, if your business case projected $500K in savings within the first year, compare it to actual performance.

**PRO TIP**: If the solution didn’t hit the mark, conduct a thorough review to uncover lessons learned.
PART 3

Top tools to collaborate and automate
Hey, there’s an app for that!

Businesses are using more third-party apps to get quality work done with the speed and agility needed in our competitive world. Here’s a sample of scalable tools for various industries and applications.

**Bitbucket**
Git solution for development teams to code, collaborate, and manage projects

**Zeplin**
Collaboration tool built for UI designers and front-end developers

**GoVisually**
Design collaboration tool for creative teams to share and get approval on projects

**InVision**
Prototyping tool for designers to collaborate and create interactive mockups

**Evernote**
A single place to capture, organize, and share work, from meeting notes to files

**Deekit**
Collaborative whiteboard for remote teams

**Wrike**
Robust, end-to-end project management solution

**Jira**
Service desk software for IT teams to fix issues, includes self-service knowledge base

“I think the real magic starts to happen when people can mix and match their own tools and create their own productivity suite.”

**Chris O’Neill**
CEO at Evernote
PART 4

Keeping it secure
Be sure to keep it secure

Nearly **two-thirds** of cyberattacks are directed at SMBs. Because they typically have less security infrastructure than large companies, SMBs tend to be easier to penetrate.

**Your data is like currency**

![Image of building]

60% of businesses fold within six months of a cyberattack

![Image of target]

75% of cyberattacks target SMBs

![Image of money]

A single data breach potentially costs **$82,200–$256,000**

Have measures in place to prevent, detect, and respond to attacks. Your security processes should cover:

- The company’s network
- Tech tools your company uses
- Devices used to access tools and systems
- The people who access your data and systems (e.g., employees, vendors, and freelancers)

For more tips, download the whitepaper **Securely Working with Remote Freelancers**.
Collaboration tools such as Microsoft Office 365, Skype, and Dropbox help growing companies work more efficiently, but they can also open your company up to greater security risks. Here’s how to benefit from these tools and keep your company protected.

**Malware**: Make sure content coming back from collaborators doesn’t open a path for hackers to access your network. Be sure your network conducts automatic antivirus scans on all file downloads and uploads.

**Passwords**: Even if you regularly change user names and passwords, an attacker can eventually guess them and get through. Be sure your tech tools add layers of protection by using two-factor authentication (2FA) or multifactor authentication.

**Mobile devices**: Smartphones and tablets may help increase productivity, but they’re vulnerable to compromised WiFi networks and man-in-the-middle (MITM) attacks. Look for tools with built-in features that protect data stored on mobile devices, such as 2FA, app whitelisting, and offline PINs.

**File sharing**: It’s wise to have a data loss prevention (DLP) system that prevents end users from sharing internal data outside of your company’s network. Make sure your collaboration tool integrates with your DLP system and that the tool scans every file with the same criteria on every device used to share content.
PART 5

Standardizing processes
Standardize processes

Creating a standard process is as important as choosing the right tools. Standardization provides a way to measure results and maintain efficiency, work quality, and accountability as you scale.

**Standardize anywhere you’d like more efficiency or consistency**

When Upwork’s analytics team wanted to shorten ramp-up times, they created a playbook to give to new team members at the start of a project. The playbook:

- Enables talent to resolve common questions on their own
- Helps talent optimize their time and avoid work delays
- Saves staff time by answering systems questions and minimizing admin tasks

**Yep, there’s a tool for that**

When teams grow or processes get more complex, workflow management software enforces the processes you map out, to make sure everyone’s doing it right every time.

**Check in and tweak**

It’s good practice to reevaluate your business processes regularly. As your business grows, some things may change, or you may gain new insights that can improve efficiencies.
PART 6

Expanding opportunities with remote talent
Tapping into the human cloud

When you’re growing, you need expertise in a lot of areas, so it may not be possible to do all the work in-house. Freelancers can help you fill skills gaps, innovate faster, ramp teams up and down as needed, and shrink turnaround times—all while helping you stretch your budget.

One tool that’s becoming a must-have for more companies are freelancing websites like Upwork. These platforms make it easy and cost-effective to find and work with the experts you need.

- **53%** companies use more flexible talent
- **>50%** corporate execs plan to increase use of freelance talent
- **6x** more managers say agile teams will be the norm
The fastest-growing freelance skills include:

- Bitcoin
- AngularJS development
- Asana work tracking
- Machine learning
- Natural-language processing
- Penetration testing
- Robotics
- Swift development
- Virtual reality

“Our success is very much tied to how we use freelancers every day. The cost savings are great, but the real value is getting distributed expertise. I get so many more brains working on a problem than I could ever get hiring employees.”

Shannon Williams
Co-Founder and VP of Sales, Rancher Labs
About Upwork

Upwork is the largest global freelancing website that helps companies get more done by connecting with freelancers across thousands of skills, from mobile app development to customer support. Upwork makes it fast, simple, and cost-effective to find, engage, and collaborate with top talent worldwide.

For more details, visit Upwork today.

About Evernote

Evernote is a platform that helps individuals and teams create, assemble, nurture, and share information, serving more than 225 million people. We build innovative products that give people access to information anytime, anywhere and provide resources that inspire organization so people can focus on what matters most.

For more details, visit Evernote.