



# **SECURELY WORKING WITH REMOTE FREELANCERS**

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# PROTECTING YOUR DATA IN THE DIGITAL WORLD

## The cloud is the new normal

Companies are embracing **digital strategies** at an entirely new level, increasingly utilizing cloud-based technology to meet business demands.

The cloud's advantages of consolidation, simplicity, and improved efficiencies explain why companies are moving in this direction. In fact, **70%** of all organizations have at least one application in the cloud today, with the majority (85%) using **multi-cloud strategies**, a mix of proprietary or private clouds and public or managed solutions.

More recently, departments like Human Resources and Procurement are also adopting cloud technologies, creating **a fundamental shift** in how companies work—from how we acquire new talent to how we improve workforce productivity.

## Be proactive with your security

Accenture predicts that **by 2022**, digitally connected talent marketplaces in the cloud will be the norm, enabling companies to tap a global network of in-demand skills and innovate faster, regardless of location. This trend is expected to propel corporate adoption of freelancers, **according to Barry Asin**, president of Staffing Industry Analysts. As such, it's important for companies to establish data security processes for freelance engagements, which can resemble those already in place for similar workforce and vendor relationships.

20% of Fortune 500 companies rely on Upwork, the leading freelancing website, to find, engage, and pay freelance professionals safely. Upwork Enterprise builds on **Upwork's security policies and practices**, and provides our larger customers with robust technology features, tailored configuration options, and dedicated support services to help maintain IT compliance while engaging freelancers at scale.

# UNDERSTAND YOUR DATA SECURITY RISKS

## Build a solid foundation

For many companies, security uncertainties can be a showstopper, but it doesn't need to be. By applying the right techniques and security measures, you can improve the safety of your core data while engaging freelancers for virtually any kind of project-based work.

To adequately protect your organization against data security breaches, it's important to first categorize projects by risk level. This entails working with hiring managers to identify existing or potential use cases, the types of data freelancers may need to access for each, then assessing the level of risk posed in the unlikely event data is mishandled.

There's some upfront work required, but taking care of this step first will help reduce data security vulnerabilities and create a safe and scalable environment for future freelance engagements.

## Classify projects by data risk level

Data is generally classified in **five categories**: sensitive, confidential, private, proprietary, and public. The table below provides examples of projects that commonly fall under each category.

CATEGORY	RISK LEVEL	DEFINITION	PROJECT EXAMPLES
Sensitive	Very High	Data often involving PII (personally identifiable information) that can put a company in financial or legal risk if publicly disclosed.	<ul style="list-style-type: none"> <li>• Customer relationship management</li> <li>• HR payroll administration</li> </ul>
Confidential	High	Data (like trade secrets, vendor contracts, and production methods) that can affect operations if publicly disclosed.	<ul style="list-style-type: none"> <li>• Software code</li> <li>• Web analytics</li> </ul>
Private	Medium	Compartmental data not meant for public disclosure but will likely not affect the company if publicly disclosed.	<ul style="list-style-type: none"> <li>• Customer support</li> <li>• Market and competitive research</li> </ul>
Proprietary	Low	Data that is publicly disclosed on a limited basis or contains information that could impact a company's competitive advantage.	<ul style="list-style-type: none"> <li>• Public relations</li> <li>• Product development</li> </ul>
Public	N/A	Data that may be publicly disclosed.	<ul style="list-style-type: none"> <li>• Graphic design</li> <li>• Web research</li> </ul>

Once you've categorized projects by data risk level, you can easily configure access controls and data protection requirements specific to each classification category.

By doing so, you're avoiding the common mistake of applying a one-size-fits-all approach for your company's freelance engagements. Not only are you able to protect projects that touch sensitive data with distinct security measures, you can remove any unnecessary security requirements for lower risk projects and enable faster starts.

## HOW UPWORK ENTERPRISE PROTECTS CLIENT DATA

### Centralize contracts to maintain IT compliance

Upwork Enterprise is designed to meet the varying and often complex needs of large organizations. By centralizing freelance contracts onto a single solution, you can configure security requirements that resemble the security measures already in place at your company.

### Features that control access to platform data

The following features and services provide companies with more control over who can access data within their Upwork Enterprise solution.

FEATURE	DESCRIPTION	BENEFIT
Custom Portal Page	A custom homepage portal, where new users create accounts and log in to your company's Upwork Enterprise solution.	The custom portal page requires new users to register with your company's email domain, ensuring communications on Upwork are sent to inboxes that are already monitored by your IT systems.
Teams	A way to organize users based on internal team structures (e.g. marketing, engineering, and design), limiting access to platform data to members within the same team.	Teams help ensure information like activity history, active contracts, and spend on Upwork Enterprise are only accessible to authorized users.

<p>User Permissions</p>	<p>Distinct permissions assigned by role for each platform user. Permission types include:</p> <ul style="list-style-type: none"> <li>• Staff Member - Can use Upwork Messages</li> <li>• Talent Sourcer - Can post jobs and invite Freelancers to interview</li> <li>• Hiring Manager - Talent Sourcer permissions, plus can release payments and open contracts</li> <li>• Finance Administrator - Can manage payment methods, view financial reports, and make deposits and withdrawals</li> <li>• Administrator - Hiring Manager and Finance Administrator permissions, plus can manage user permissions, remove team members, and edit company information</li> </ul>	<p>User permissions provide guardrails around who can access certain modules (e.g. team financial data and contract history) and the actions each user can take on the platform.</p>
<p>Compliance Services</p>	<p>Dedicated resources assigned to your account, like program managers and compliance specialists.</p>	<p>This service layer helps ensure all IT and HR requirements (e.g. onboarding tasks) are completed by the freelancer and hiring manager before data is exchanged and work begins.</p>

## Features that help enforce your security requirements

In addition to platform access controls, Upwork Enterprise provides features that help ensure external freelancers and agencies meet your security requirements.

FEATURE	DESCRIPTION	BENEFIT
Custom Fields	Custom project tags (e.g. indication that systems access is needed for a project) that can be added to all job post forms.	Custom fields help capture information about a project and trigger the appropriate onboarding and offboarding tasks. This helps ensure all security and compliance measures for sensitive projects are complete before work begins.
Default Terms	Unique contracts or requirements, like confidentiality agreements and additional skills tests, that can be added as onboarding tasks for similar projects.	Default terms provide an opportunity to further customize engagement terms and standards for projects within the same category.
Onboarding and Offboarding	Tasks outlined by your compliance, IT, or business teams. Each freelancer's onboarding/offboarding progress is captured in real-time on the onboarding dashboard.	Onboarding tasks can include the same requirements used for freelancers engaged off-platform, like background checks, NDAs, and more.  The offboarding process enforces steps to disable access to internal data or systems once a contract is complete.
Talent Cloud	Your company's private view of freelancers who are pre-screened or have been previously engaged by someone at your company.	Talent Clouds can be organized by the type of work (e.g. projects involving data classified as high, medium, or low risk). Doing so makes it easier to audit freelancers' access to internal data or systems.



## How Upwork engages contractors safely

At Upwork, we use our own Upwork Enterprise Compliance solution to find key skills and complete projects. Our teams work with freelancers for a variety of use cases, including marketing, creative and design, data analytics, and web and mobile development.

The program is supported by our Contingent Workforce (CW) team, who works closely with IT to ensure proper security measures are implemented for every engagement.

### TEAM STRUCTURE

We've designed the teams in our Upwork Enterprise account to resemble our existing organizational structure, making all job posts, contracts, budgets, chat messages, and more only visible to members within the same team. This makes it easier for users to navigate the platform, as only the most relevant information is available to each team.

### USER PERMISSIONS

USER PERMISSION	TYPICAL USERS	ENABLED ACTIONS
Talent Sourcer	Members of our Talent Services team	Can search for talent and invite freelancers to interview for projects posted by our team
Hiring Manager	All employees	Can source, contract, and release funds through the platform
Finance Administrator	Directors and above	Can manage payment methods, view financial reports, and make deposits or withdrawals
Administrator	Only members of the Contingent Workforce team	Can perform all actions on the platform, including managing user permissions, removing team members, and editing company information

## **ORGANIZATION OF TALENT CLOUDS**

We have four different Talent Clouds, organized by the type of contractor, whether it be their skills, special engagement parameters, or data access requirements. Our four clouds are:

1. Engineering freelancers
2. Leased workers who are employed by our third-party staffing agency
3. Freelancers who may need access to internal systems or sensitive data
4. Freelancers who will not access internal systems or sensitive data

The benefit of designing our Talent Clouds this way is two fold.

1. Legal and IT can design onboarding and offboarding requirements for specific projects, then add freelancers who have met all requirements into the appropriate Talent Cloud. This helps us easily audit freelancer access to internal systems.
2. Hiring managers can quickly refine their search to a specific Talent Cloud comprised of freelancers who may already meet baseline skill, engagement, or onboarding requirements.

## ONBOARDING PROCESS:

Our onboarding workflow varies depending on whether the freelancer will need access to sensitive data within our internal systems or not.

	SYSTEMS ACCESS REQUIRED	SYSTEMS ACCESS IS NOT REQUIRED
1	Hiring manager drafts job post, specifying systems access need in our custom job post field  Job post submission triggers notification to CW team	Hiring manager drafts job post, specifying access is not needed in our custom job post field  Job post submission triggers notification to CW team
2	CW team begins general background check	Freelancer completes compliance onboarding tasks for worker classification
3	In parallel, freelancer completes compliance onboarding tasks for worker classification	Once step 2 is complete, work begins
4	Hiring manager completes systems access request form (one of our default terms), which indicates specific internal systems the freelancer will need access to	
5	Once steps 2-4 are complete, CW team submits IT request for systems access	
6	Once access is granted, freelancer accepts contracts and work begins	

### **OFFBOARDING PROCESS:**

The offboarding process helps ensure any freelancer access to internal systems is disabled as soon as a contract has ended.

1. Once a project is complete, hiring manager releases payments and closes contract
2. Hiring manager completes in-product offboarding form, a default term for all projects requiring access to internal systems
3. Once offboarding form is submitted, CW team is notified and creates IT request to disable systems access

As an additional checkpoint, the CW team reviews all recent billing activity. If a freelancer with systems access has not billed within the last 30 days, the team will reach out to the hiring manager to confirm the contract has ended and begin the process of disabling systems access.

# TIPS TO ENSURE SECURE FREELANCE ENGAGEMENTS

1. **Assess your current situation** to identify existing vulnerabilities and categorize projects by data risk level.
2. **If new, phase roll out** and start with projects that don't require freelancers to access internal systems or highly sensitive data.
3. **Establish a process** and SLA with key business partners, like IT, HR, and Legal.
4. **Break sensitive projects down into smaller projects** and assign each task to a different freelancer out of context.
5. **Encourage teams to use Upwork Messages** to communicate and share deliverables, as it will help resolve issues quickly in the rare instance of a dispute.
6. **Continuously evaluate existing policies** and remove friction, like unnecessary onboarding tasks, to create an efficient process.

# ABOUT UPWORK ENTERPRISE

Upwork Enterprise combines technology with talent sourcing and compliance services, giving companies a single solution that makes it easier to get work done with freelancers. Built on the world's largest freelancing website, companies get simple, quick, and cost-effective access to qualified contractors and agencies. The result is work delivered to you faster and more affordably.

Companies lean on our 10+ years of experience to implement and grow their freelance talent strategies.

Ready to explore how Upwork Enterprise can help protect your data while engaging freelance talent? Get in touch with your Account Manager or contact us today.

**+ 1 866.262.4478**

**[upwork.com/enterprise](https://upwork.com/enterprise)**

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