Checklist for working with an Outsourced Planner

1) An email address in your domain (plannername@yourdomain.com), with whatever additional access that entails (calendar, etc.)
2) Access (using that email address) to whatever cloud storage solution you have in place
3) Extra licenses (again, using that email address) for your planning software, CRM, and other tools you want the planner to use
   Note - All tools should be cloud or web-based. No Windows-only client-side software.
4) An onboarding session to go test access to the above tools and work out any kinks in permissions, etc.
5) An onboarding session to go through your preferred planning process, deliverables, etc., and discuss how best to handle communication between you and the planner (email, text messages, Slack or other chat function, etc.) and how much communication is necessary. It will be more extensive at first but should level out over time as a rhythm is established.
6) A review of data security procedures and any adjustments the planner needs to make to meet your requirements
7) A review of respective work “styles” and how to integrate them. As a contractor billing by the hour, the relationship is very task and calendar centric - if there is no assigned task to work on, either in the CRM, email, text message, or something documentable, you shouldn’t be billed for anything. As the client, you would either need to assign tasks to the planner directly in whatever system you wish, or the planner can create and record them in the CRM based on your verbal or written direction.

It is important that you as the end-client advisor own and control all the systems, the client data, etc., since you are ultimately responsible for all of it from a compliance and regulatory perspective. I merely utilize your systems to get the work done on your behalf and you can cut off my access neatly and cleanly when our work together comes to an end.