

MAKING FRACTIONAL WORK FOR YOU

A Step-By-Step Guide to Getting the Most Out of Your Fractional Project



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INTRODUCTION:

If you're reading this guide, we're assuming you already understand the many different ways hiring fractional talent can benefit your organization (if not, we have a great primer [linked here](#)).

There are, however, right and wrong ways to manage a fractional engagement. Done well, you will see the outcomes you want (and maybe even exceed your goals), and you'll begin to immediately look at the other areas of your organization that could use the help of a fractional expert. Done poorly, the relationships can struggle to get off the ground, cause internal strife in your organization, and result in less-than-stellar results.

You obviously want (and likely need) to be in the first camp, and with good planning and preparation, the right resources and the right mindset, you can have a major influence on the success of your fractional project. How do you do that? Keep reading, of course!

We've put together a step-by-step guide on how to get the absolute most out of your fractional project, and the information was gathered from those who have seen countless relationships in both the good and bad categories: our community of Canopy fractional experts. With their insights in hand, you'll have everything you need to make your first fractional project, and every project after that, a resounding achievement.

Survey Methodology: Canopy Advisory Group delivered a survey on various elements related to fractional work to its community of expert advisors in May 2024, receiving 62 total responses.

STEP 1: KNOWING WHEN TO HIRE A FRACTIONAL EXPERT

Like any other type of hiring or method of building a team, fractional hires fill an important and often critical role for organizations in a variety of situations. Fractional experts are not, however, a one-size-fits-all hiring solution. If your project is to be successful, you need to ensure you're in a scenario where bringing on a fractional expert makes sense.

Here are scenarios in which you should consider fractional help, according to our community of expert advisors (percentages reflect that respondents could choose all that applied):

#1: YOUR ORGANIZATION IS LAUNCHING A PROJECT AND DOES NOT HAVE KEY/NECESSARY EXPERTISE INTERNALLY

Sixty-seven percent of expert advisors, the highest percentage in the results, noted that fractional work would be “extremely valuable” in this scenario. These data points line up with many expert advisor responses when asked why they chose fractional work: the ability to use their expert-level skills with a variety of different clients.

While all of the other items chosen are more tactical, it's telling that expert advisors chose closing the skill gap as their top choice. If you're looking for them, these internal skill gaps should jump out to you in the projects you're reviewing as possibilities, and those can be sorted quickly into the “need fractional help” pile.

#2: YOUR ORGANIZATION NEEDS STRATEGIC AND/OR TACTICAL SUPPORT IN VARIOUS AREAS AND CANNOT ADD FULL-TIME HEADCOUNT DUE TO BUDGET OR OTHER LIMITATIONS

This scenario was chosen as one that would be “extremely valuable” in terms of seeking fractional support by 62% of Canopy advisors, the second-highest percentage. While fractional work has long been a solution in this scenario (see the startup-related information below), it's becoming a more frequent occurrence in larger and more established companies as well.

One of the more common triggers: An important employee leaves, the company chooses not to backfill for the full-time role, but still needs expert help in the form of a fractional resource. It's also a scenario that we expect will grow in popularity as the world of work continues to shift to a much larger gig economy.



#3: YOUR ORGANIZATION IS EARLY-STAGE AND NOT YET BRINGING IN FULL-TIME HEADCOUNT IN VARIOUS DEPARTMENTS AND AREAS

Similar to the item above, 59% of expert advisors chose this as a scenario in which fractional help would be extremely valuable, with the difference being the specifics around the company stage. When fractional work first began to gain popularity, it was through startup and early-stage companies choosing to hire fractional executives instead of bringing on more costly full-time hires.

While today, the rapid growth in the share of fractional workers is being driven by organizations of all sizes and types, startups and early-stage companies are still major players in fractional hiring.

#4: YOUR ORGANIZATION NEEDS AN OUTSIDE PERSPECTIVE ON BUSINESS PROCESSES AND SYSTEMS

Fifty-seven percent chose this scenario as one where a fractional resource would be extremely valuable, and it's another where the scenario lines up with answers on why fractional talent can be so important to the success of critical projects.

Anyone that has ever worked as a full-time employee for any length of time knows how alarmingly easy it can be for organizations to develop blind spots. Beyond lending their expert skills, an outside perspective from a fractional hire can be equally useful to a company in uncovering a problem they may not have even known was there.

Other scenarios that our expert advisors believe offer potential for fractional hiring include situations where leaders or the executive team require coaching, situations where the organization needs acute support with strategic planning or a large change management initiative, and situations where the organization is approaching or underway with merger and acquisition activity. While the list above is not exhaustive, it should give you a good starting point to understand whether you truly need fractional support.

Are there situations where fractional is absolutely not the right move? Definitely. Check out our blog post, [When Does a Full-Time Employee Make More Sense Than a Fractional Hire?](#), for more detail

STEP 2: SETTING PROJECT GOALS, EXPECTATIONS AND PRIORITIES

The importance of this step cannot be overstated (and you'll see it repeated in various areas throughout this guide). There may be scenarios where you adjust goals, expectations and priorities based on the fractional expert you choose to bring in.

That said, the most successful engagements are those in which you, the key contact in your

organization for the project at hand, have a crystal clear understanding of what you want and why you want it.

Why is this so important? We asked our expert advisors multiple questions around why they believe fractional engagements succeed or fail, and expectation setting and clarity showed up in nearly every capacity:



- When asked the factor that has the biggest negative impact on fractional relationships, 29% of respondents chose: “Unclear goals, objectives and outcomes for the project.”
- “Lack of clear expectations” and “lack of decision-making about the project” were two of the top red flags that expert advisors denoted as seeing before engagements that were unsuccessful.
- Conversely, both “Clear organizational understanding of the needs and specific

problems to be solved” and “Clear documentation of goals and resources” were green flags for successful relationships according to expert advisor respondents.

The implication being clear: there’s likely no bigger risk to fractional projects than a lack of clarity around goals and expectations.

It sounds like an obvious step in the process, but it was noted often enough by our expert advisors that it’s a surprisingly common miss for organizations.

HOW TO SET STRONG PROJECT GOALS

If you’re having trouble putting project goals, expectations and priorities together, one tip is to attempt to simplify. You don’t need to identify every single metric that you’ll be tracking or even nail down every key KPI for the engagement. Your fractional expert can help you with that. Instead, focus on what’s most important by asking yourself the following:



What key business goal is driving the need for the engagement?

For example, revenue target, new donor target, fundraising goal, etc.



What is the specific project you need the fractional expert to be working on, and at the end of the project, what’s the one metric (quantitative or qualitative) that would denote success?



What context does the fractional expert need about the business, project, your team, etc. to ensure they will be successful?

Be as thorough as possible!



How will this project affect the priority list, capacity and workload for key staff who will be involved? Which projects will be halted or slowed to introduce capacity?



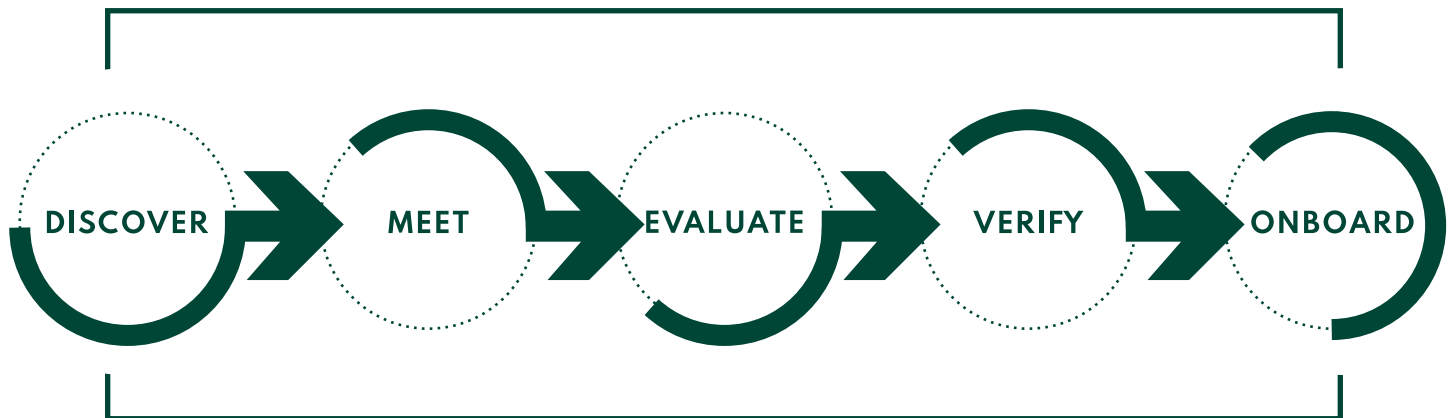
What do you need to do to rally the members of your organization to ensure they’re a help instead of a hindrance?

Answering these questions alone, and formally documenting the answers, can go a long way toward setting the engagement up for success from the very beginning.

STEP 3: FINDING THE RIGHT FRACTIONAL TALENT FOR YOUR NEEDS

This one can be tricky. More employees are choosing a fractional or consulting route every day, and while that means there's more talent to choose from, it also means it can be harder to separate the mediocre from the good, and the good from the great. And make no mistake, while you can make do with good, a great fractional expert is what you need to solve your stickiest business problems.

Here's the process we recommend to find the best fractional experts for your specific situation:



1st: DISCOVER

FIND CANDIDATES FOR FRACTIONAL ROLES THROUGH YOUR REFERRAL NETWORK — There are excellent job boards and career marketplaces out there to help you find fractional help, including Fractionals United and FractionalJobs.io. Like most marketplaces, however, they offer a more traditional approach to viewing and reviewing talent, which is not always the most effective approach for finding fractional experts. If you can manage it, the best way to find tried-and-true fractional experts for the specific projects you need them for is through referrals.

If you're looking to ramp up with fractional support for various projects, it makes sense to develop a structured referral process, outlining your specific requirements for candidates to pass an initial screen:

- Do they need to have a certain number of years of experience, and in certain types of organizations, industries or verticals?
- What do you want and need to see from an education standpoint?
- Which referral sources are the most credible?

2nd: MEET

EVALUATE TOP CANDIDATES IN A FACE-TO-FACE

INTERVIEW— We realize that, with remote and hybrid work taking up a larger share of roles, a face-to-face interview might not always be possible. When it is possible, however, we've found that it can make a world of difference in evaluating candidates for fractional roles after they have passed through your initial screen. Set these sessions for an hour, and come prepared with a list of both your standard questions and specifics based on the project in question and the expert you're interviewing.

In this session, you're focusing more on getting a sense for how the expert thinks, how they solve problems, and how they communicate, and slightly less on their specific skills (which should have become clear through your initial screen). It's also important for the interviewer to be someone who will be one of, if not the, key decision-maker on the project, as they will know best the type of person they need for their upcoming project.

3rd: EVALUATE

ADMINISTER A TWO-PART COGNITIVE AND CULTURAL

ASSESSMENT — At this point, you will have a good sense of the candidates you want to move on to the final evaluation steps for the fractional role. When you've reached this step, we recommend asking candidates to complete an assessment.

As you know, there are many different types of assessments, each with different use cases. For vetting expert talent like most fractional workers, we recommend an assessment that combines cognitive and cultural questions. The best example here is a [Harver assessment](#). With an assessment that focuses on both of these elements, you can ensure that you're selecting not only the best and brightest from a cognitive perspective, but also someone who is likely to connect well with the members of your organization. Given that everyone learns differently, you may not wish to put hard and fast rules around what it means to pass or fail the cognitive or cultural assessments; it generally makes sense to use these more directionally. The cognitive and cultural assessment should be completed in addition to standard vetting procedures, like background checks.

4th: VERIFY

TALK TO AT LEAST TWO PROFESSIONAL REFERENCES —

Like most interview processes, reaching out to references is surprisingly one of the more oft-overlooked steps in the vetting process. You've completed a thorough evaluation up to this point using varied tools and strategies, and those are all important elements, but it's also extremely valuable to get perspectives outside of your own as part of this process.

The reference checks serve a dual purpose: 1) The conversations validate or invalidate our initial takeaways from the evaluation process and 2) help us understand each candidate's greatest strengths and areas where they may not have as much experience or interest.

Finding the right fractional expert often comes down to discovering the person whose skills and passions best align with the project in question, and references can often shed light on these areas in a way that even candidates cannot.

5th: ONBOARD

HOLD A COMPREHENSIVE ONBOARDING SESSION —

While technically occurring after the fractional expert has been hired, we included an onboarding session in this section as it can be a final way to gauge fit as the project kicks off. Since you've already completed your evaluation and made a strong choice, the onboarding session is more of a chance for you to watch how your chosen fractional expert interacts with your staff.

You can then use any lessons learned from this session to adjust elements of the relationship accordingly. For example, if a member of your team is clearly at odds with the fractional expert in your onboarding session, you may be able to alter the structure of the project in a way where the two need to interact less.

You may want to adjust and refine your own version of a vetting process (using the above as a starting point), and it's always worth spending the time to make it your own. We are highlighting the process above because it's actually a higher-level version of the process we use to identify, evaluate and onboard every Canopy expert advisor. As you can see, the process is both stringent and time-consuming, because to ensure the highest quality, it has to be.

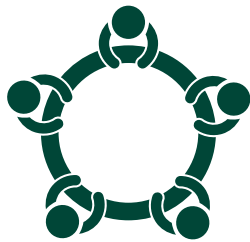
If you want to take the time to build out your own process, make sure you're not cutting any corners. Alternatively, partner with [Canopy Advisory Group](#) to take the vetting portion of your fractional project completely off of your plate.

STEP 4: MAKING DAY ONE COUNT

You used Canopy Advisory Group to help you find and vet the best candidates, chose the perfect expert advisor, and now they're starting a week later. Congratulations! You've taken the all-important first steps toward building out your team with fractional experts.

One mistake we've seen companies make at this juncture is to take their collective foot off the gas for their fractional project. We have the right person for the right project, time to sit back and let the magic happen. Right? Don't fall into this trap. You're now at a critical point in the engagement, as what you do to plan for and kick off the first day of the project can determine the tone for the entire relationship.

So what can you do to set your organization and your fractional expert up for success on Day 1? Here are some of the most popular tips provided by our community of Canopy expert advisors:



**BRING YOUR
ENTIRE TEAM INTO
THE FOLD**



**ALIGNED GOALS,
EXPECTATIONS
AND PRIORITIES**

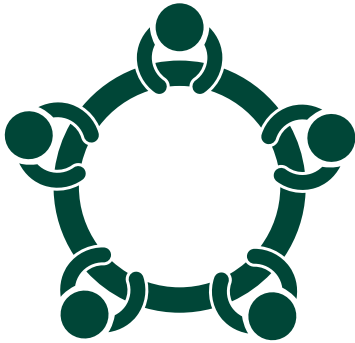


ALL SYSTEMS GO



**SET CALENDARS FOR
THE ENGAGEMENT BY
DAY 1**

BRING YOUR ENTIRE TEAM INTO THE FOLD



Consider holding an all staff/all team meeting on the first day of the engagement to introduce your fractional expert and the project. This can be extremely valuable for a few key reasons:

1. Getting your team excited about the project can ensure more than a smoother takeoff (removing any obstacles from team members who could delay the project by dragging their feet or pushing back against the expert). It can also generate new ideas and applications from enthusiastic team members that you and your expert may not have uncovered in preliminary discussions.
2. You avoid setting up the project in a silo where only certain people are in the know. This can save you from headaches later, including communications issues with internal staff, having to bring people up-to-speed mid-project, and a lack of internal understanding of how the project fits into the broader organizational strategy.
3. Sharing the “why” behind the project gives you an opportunity to further unify your team. Any chance to remind your team of the mission, vision and values of the organization is worth taking, and because a fractional project is often designed to fill a critical strategic need, it will tie easily into the longer-term strategic vision.

ALIGNED GOALS, EXPECTATIONS AND PRIORITIES



You’re well aware of the importance of going through this process in advance of the engagement starting, as we already spent a full section talking about it (see pages 4-5). It’s worth mentioning again here given how many Canopy expert advisors noted issues with relationships where there wasn’t alignment in these areas on Day 1.

Make sure you have your project outline, background, deliverables, timing and detailed goals, done ready, and agreed upon with your expert, by the project kickoff date. Perhaps even more importantly, to the point above on crystallizing the “why,” do the work to tie the project into your biggest picture organizational goals and how and where the engagement fits.

This might include pulling your past three years of profit-and-loss statements, 12-month forecast vs. budget, and other information that can give your fractional expert the context they need to be successful.

ALL SYSTEMS GO



While this one is a bit more tactical than the others, it can be just as important: make sure your fractional expert has access to everything they need to get moving by the kickoff date. Here's a quick checklist of what that might mean for your organization (since every business and fractional relationship is different, there may be items you would add or remove from this list in your specific situation):

1. Key Systems — What does your fractional expert need to integrate themselves into your workflows and organization at large? Ask yourself the following questions about your expert (and any more you can think of relative to how your internal staff works today):

- Will they be logging and submitting their time?
- How will they share and receive files?
- Will they be tracking changes and viewing shared documents?
- Will they need access to internal shared folders?
- Will they be using internal communications tools like Slack or Teams?
- Will they be using your organization's email (or need an email address of their own within your domain)?
- Will the expert need access to your content management system and/or your social media accounts?
- What other custom/unique systems do you operate that the expert might need access to (i.e., log in to the back-end of your website, custom versions of software platforms, etc.)?

2. File Sharing — File sharing challenges are an entirely avoidable issue that can cost precious time in your engagement. As mentioned above, make sure that the expert has all of the system access they need and, if/when issues arise, that they know who to contact to resolve any issues. For things like file sharing and reviewing work in particular, it's also important to have a concrete process in place for how communications and work should flow on Day 1.

One useful tip is to create a separate folder that includes copies and versions of all of the files you believe the expert will need access to in one place. This can help you avoid delays caused by your expert having to search through unfamiliar systems to find important documents.

3. Organizational Chart — Interestingly enough, org charts are one of the items that are most commonly left off of the list of important files provided to fractional experts. The org chart is a document that's valuable in every organization, as it can help the fractional expert both ensure they're going to the right person with questions and for decisions, and avoid stepping on toes unnecessarily.

To that end, any context you can provide around the org chart itself in terms of how your team and individuals work within your organizational structure will be of great value to your fractional expert.

SET CALENDARS FOR THE ENGAGEMENT BY DAY 1



Another tactical move that can pay dividends for the entire project is lining up the right resources for the fractional expert and setting recurring meetings by the kickoff date.

Lining up the right resources should be looked at from both sides of the relationship: ensuring your internal team members know their roles in interacting with and supporting the fractional expert, and ensuring that your fractional expert knows who to work with and why throughout the project.

Once you've made that clear, setting the recurring meetings takes something immediately off of the expert's plate (and your team's plate, for that matter), allowing them to focus on other elements on Day 1.

You will always end up adding, removing and adjusting meetings as the project moves forward, so this is less setting things in stone as it is greasing the wheels for the first few weeks or months of the relationship.

Continue reading for **STEP 5** >>>

STEP 5: AVOIDING OTHER FRACTIONAL PROJECT PITFALLS

Now, you've done all of the important prep work for your fractional engagement, Day 1 went even better than you expected, and you're off and running. You have a solid understanding of the green and red flags that can make or break a fractional relationship.

At this point, it's worth considering a few final things to keep in mind as the relationship goes forward:



PAY ATTENTION TO THE PEOPLE ASPECT — We all want to believe that every member of our teams will welcome outside support with open arms. Sometimes, that's the case, and it's a testament to your team dynamics when it does. More often, though, bringing in outside experts can stir up resentment or at least some level of distress in even your best people.

As the relationship goes on, this can rear its ugly head in a variety of ways, including members of your team excluding your fractional expert from key meetings, agreeing with the expert in front of you then bad-mouthing the expert and/or the guidance behind closed doors, and omitting important information or outright lying to the expert.

There's a lot of nuance here in terms of how you handle employee retention and the weight you place on this specific project, so the best guidance we can give is

to be vigilant and to make an effort to spot the warning signs. Often, the best way to do this is to make time to have separate, open, one-on-one conversations with both the fractional expert and the members of your team involved in the project.

LOOK OUT FOR SCOPE CREEP — This is a tough one, as it's often a trapping of success in a fractional relationship. The more value the fractional expert brings to your organization, the more tempting it will be to add more and more to their plates. If you're completing change orders as you go and being very clear on the new scope of work, what the expert will be paid, and how it adds to/replaces the original scope, most experts will be very open to this (bandwidth permitting).

The challenge comes when you want more and you either can't or won't pay for more of the fractional expert's time and expertise. This puts the expert in a difficult position and can sour what was a mutually beneficial relationship for both parties.

If you find yourself in a situation where you have more work for your fractional expert mid-project, start with crystal-clear communications, and set a one-on-one meeting as quickly as you can. The conversation is often much more effective than trying to communicate tone and important details over email or text, and it can allow you both to share how you're feeling about the potential change in the engagement.

Fractional experts are paid hourly or by project, and encroaching on their scope without offering more time and hours can make them feel like you're trying to take advantage.

COMMIT TO MEASURING SUCCESS REALISTICALLY— If a project doesn't end up going the way you wanted it to, there will be a temptation to place blame. Fractional experts and consultants are often easy targets; after all, they won't be around to defend themselves, and internal team members (and you) will be.

And to be clear, there are situations where the project just doesn't work out, and your fractional expert may be a part of why. Our caution here is to remember the project goals and expectations you set out in the beginning when measuring the success of the engagement.

Often, you will qualitatively "know" how an engagement went based on how happy you and your team are with the work. In that case, line those feelings up with the business outcomes to ensure that you've been successful across both types of metrics.

The same goes for when you feel like things went wrong throughout the journey. It's also important to remember that you are likely to see some short-term metrics that gauge success, and that others may show up after a longer period of time (again, do your best to identify both at the beginning of the relationship).



A MESSAGE FROM GRIFFEN O'SHAUGHNESSY

Founder and CEO, Canopy Advisory Group

I hope you enjoyed reading through our guide, and that you came away with a stronger understanding of fractional work and how to make it work for you.

We had fun putting it together, and one of the things I love most about the guide is that the information and advice goes far beyond theory and prioritizes helping you take action. We are able to provide this level of detail and guidance through the help of Canopy's advisors, our community of fractional experts, as they offered us exclusive insights into their experiences with fractional work.

At Canopy, our mission is to inspire humanity to connect for meaningful work. In practice, that means connecting organizations with the fractional talent they need to solve important business problems, complete projects on time and at a high level of quality, and build the teams they need to be successful. For our expert advisors, we offer the ability to do the work they love to do with clients they can choose, without the headaches of business development, billing and paperwork.

If you find yourself in one of the scenarios outlined in Step 1, our team would love to be able to help. We will find you the right Canopy expert and get them in and working on your project at the speed your organization needs to be successful.

Thank you again for reading, and for considering Canopy for your fractional needs. If you're interested in learning more or booking a free consultation, [fill out a form here](#) and we will be in touch.

Warm Regards,

Griffen O'Shaughnessy

The Future is Fractional





**READY TO BRING ON A FRACTIONAL EXPERT TO HELP
MOVE YOUR ORGANIZATION FORWARD?**

We'll connect you with the very best fractional talent available.

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