



Freelance Process CHEAT SHEET

The 6 steps you **SHOULD** automate & the online tools to use to save time, be more productive, and impress your clients.

BY LEAH KALAMAKIS
Founder of THE FREELANCE TO FREEDOM PROJECT
Creator of STRESS LESS & IMPRESS

STRATEGIC CONTACT FORM

The initial contact you have with a potential client usually comes through your contact form or directly via email. The problem with this? Most potential clients won't give you all the information you need in that first contact. Especially if you only ask for their name, email and "message".

The result of this? Right off the bat you have to send them an email asking them more details about what they need. That's one extra email you shouldn't need to spend time reading and writing. And often, you'll forget to ask all the questions and this leads to several back and forth emails.

How to fix this? Use a more thorough contact form as a mini-questionnaire in order to get all the details you need from a client up front and not waste your time with clients who you don't want to or can't work with.

Tools to make this easy: *Gravity Forms, Typeform, Wufoo Forms*

CONSULT CALL SCHEDULING

Ever had one of these email conversations?

"I'd love to chat with you to understand your needs better, let me know when you are available for a consult call." (Email #1)

"How about Thursday?" (Email #2)

"Thursday works, does 10am work for you?" (Email #3)

"10am EST? I'm not sure where you are located." (Email #4)

"I'm in Seattle, so 10am EST is too early" (Email #5)

And on and on and one.

This is a waste of time. **The solution?** Use scheduling software that connects to your calendar where you can set up your availability and people can book the time that works best for them.

Tools to make this easy: *Calendly, ScheduleOnce, Time Trade, Acuity*

3

INVOICING/TIME-TRACKING

Invoicing and time-tracking is one of the best parts of freelancing. It means you're making money and going to get paid after all! But surprisingly, people actually put this off. And even if you are on top of it, it still takes a ridiculous amount of admin time.

No one likes admin stuff.

By using online invoicing software, you can have preset invoice templates for each of your services, track your time and turn it into an invoice in one click and also have reports and statistics to track your income & expenses.

Tools that make this easy: *Freshbooks, Harvest, 17Hats*

CONTRACTS

Like scheduling consult calls, contracts are another uber-simple thing to automate that a surprising amount of freelancers don't do.

The old-fashion (and super annoying) way to send contracts: *create a pdf or word doc, email to client to print, sign, SCAN and send back to you.*

If you do this, you might as well fax it to them instead of email while you're at it!

Don't make your clients do so much work to start working with you. Not only can online software automate this, but you can create one contract template and just edit certain parts if necessary within the program to adjust based on the service and product.

4

Tools to make this easy: *Docusign, Contractually, Echosign*

5

PROJECT MANAGEMENT

If there is one thing that will change your life as a freelancer, it's project management software. Both for organizing your own business, and also organizing your communication with clients.

Not using a PMS means spending a lot of time digging through email threads, looking for attachments, and getting lost as soon as you or your client starts a new thread on a different topic.

Even if you have different email folders for each client, the amount of time you'll spend looking through those threads seriously adds up over time. There is nothing less productive than dealing with clients through email.

So do yourself a favor, right now, and start using project management software where all discussions, files, to-do lists and deadlines can clearly be kept in one convenient place for both you and your client to see.

Tools to make this easy: Basecamp, Asana, Redbooth

6

CLIENT RELATIONSHIP MANAGEMENT

Not every client that contacts you will decide to hire you on the spot. That doesn't always mean they don't want to work with you, it may just be that now is not the right time.

On another note, ending a project with a client doesn't mean they are done working with you forever. They will likely need your services in the future. But those extra projects might be sitting on the back-burner, or they just forgot you could help them with that too.

Save yourself some time and loss of potential income by using Client Relationship Management software. With this you can organize people by potential client, past client, etc and be reminded when you should be following up with them.

Tools to make this easy: Streak, Contactually

SO, WHAT ARE YOU GOING TO AUTOMATE?

Admin work is busy-work. If you are ready to go pro in your freelance business and stop wasting hours and hours of time on admin stuff, it's time to start using online tools to automate your process.



HI. I'M LEAH.

Founder of The Freelance To Freedom Project

I've gone from aspiring night & weekend freelancer, dreaming of new clients...to full-time, booked out in advance just from referrals from previous customers who loved my process.

I've gone from scrambling through projects with my head in the clouds, to a well-oiled I-could-easily-hand-over-all-of-this-to-a-VA freelancing machine.

Through The Freelance To Freedom Project, I show people how to go from struggling freelancer to freedom-filled business OWNER. And the first step in making that possible is streamlining your client process & systems.

If you'd like some further help on doing just that, Stress Less & Impress will help. I walk you A-Z through an effective client process & how to maximize your time, automate where possible, and impress the crap out of your clients.

LIKE THIS CHEAT SHEET? SHARE IT!



SHARE ON
TWITTER



SHARE ON
FACEBOOK