What mom forgot to tell you about remote and freelance work

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To my Wonderful Wife and Kids who put up with many years of grumpy, stressed out me while I figured all these things out.

Contents

This isn’t a book of answers

That’s a funny way to start a book. Aren’t people after answers?

> “Tell me what three things I need to do to double my rate”.
>
> “What are the five best ways to get new clients?”
>
> “Should I bill hourly or by the project?”

All important questions! There have been countless pages written and podcasts recorded on just these issues - How do I find clients and make sure I’m getting the proper compensation for my work?

You need to decide those things, especially if you are still considering whether or not to make the switch from a salaried position, or still in the early days of your freelancing career. But have you ever asked a former freelancer who finally “gave up” and switched back to full-time why they did so? The most common reason I’ve found that people do so is the unpredictable workload and long hours that come from being consultant, marketer and business manager all at the same time. The “feast and famine” of client loads and the evening hours spent marketing yourself after you’ve put in a full work day, so that you have something lined up for when the current project ends. As the joke goes, “I decided to freelance so I could be free to work *all* the time.”

This little book focuses on those problem. Smoothing out the peaks and troughs, helping you double up the effect of your time, pointing out when *not* to do everything yourself. It isn’t very long, and I’ve done my best not to pad it. Your time is valuable - get the main point, and get out! I hope that each and every one of them is something that will be immediately useful in improving your life (and bottom line).

Freelancing *is* a great life! All of the freedoms you've heard about are true. Also, if you don't plan your life well and prepare for them, all of the stresses. I hope I can help you get rid of some of the stress so you can fully enjoy being your own person.

What’s your “remoteness” rating?

It is estimated that within five years of the time of this writing, nearly 40% of all U.S. workers will be at least part-time remote. If that seems extraordinarily high, think about all of the jobs today that really don’t require a trip to the office. Remote doesn’t necessarily mean “siting at home in your pajamas”. Your electricity meter reader? Someday that will report itself, but even now, what purpose does that person have for first visiting a central office before starting their route? (To be honest, they may not even do that now, for all I know. Just goes to show how quickly things are moving in this direction).

It’s a pretty good chance that you’ll be switching to some remote work sooner rather than later. For many people this means simply logging in from down the road a few days per week; for others, it may suddenly give them the freedom to live some place more conducive to their lifestyle or family situation. While this brings about a lot of great lifestyle changes that we already know and probably look forward to, there’s a problem that only gets cursory acknowledgment when you decide to pack your bags for Belize.

I want you to consider for a moment the difference between two parts of “remote” - the words “alone” and “lonely”. Alone is easy - it’s a quantifiable word about the number of people around you. It’s also what most people think of when they hear “working remotely” - you’re not in the office, so you are alone at home, without the need to be a constant part of group decisions. “Lonely” is much tougher. It is caused by so many factors that it is impossible to really come up with a good measure. Yet it is *imperative* that you do so if you are thinking about working remotely, whether you’re planning to become a digital nomad or just work from across town. We need to consider the level of our remoteness - call it our “remoteness rating” - on our feeling of isolation.

> **You need to think of the cost of lowering your remoteness rating as a business expense, and include that when you calculate your rates.**

“Imperative?” That sounds rather strong - why such a harsh word? In a nutshell, this is going to be one of the leading factors in your personal happiness. Which translates to your ability to work well. Which translates to how much money you bring in. So just like your laptop or software licenses, you need to think of the cost of lowering your remoteness rating as a business expense, and include that when you calculate your rates.

You may *think* that you’re an introvert who prefers the company of books, and looks forward to the opportunity to be cut off from distractions for a year to finish that project that’s been gathering dust. You will be surprised at how much contact with others you actually have most days, and what a huge gap it can become after a while. You WILL feel lonely.

What I’d like to do here is to help you consider a lot of the factors that can go into creating a feeling of being cut off, so that if you do jump on that plane (or just move to rural Kansas), you will be prepared. Yes, working from a beach in Thailand sounds wonderful! Tourist areas are expensive, so you’ll want to find an apartment somewhere. Do you speak Thai? How long do you think it will take you to learn to read and understand, “He’o min argent lu stringiu tantu?” These aren’t questions to be brushed off.

Consider these questions about your remote work plan:

- Is it easy to drop into the office or a local collaboration spot from time to time, or are you completely cut off from interacting in person with your company?

- Are you in your own country, or a place that is culturally similar to your own?
- How difficult is it to learn the language of where you've chosen to live?
- How difficult is it to have a beer and chat with people who speak your own language?
- Are you in or near a city with a good-sized community of people with your profession, and events to attend?
- Do you have children, and will you need to be home "on time" in the evenings to share family life?

How much will it take to allow you to live a relaxed, normal life in the place you've chosen to settle down?

The single theme running through all them is simple: How much will it take to allow you to live a relaxed, normal life in the place you've chosen to settle down? Can you pick up the language to be conversational with a simple effort, or do you need to allow for the expense of time off for classes? Is there a community of similar people you can chat with on the weekend, or do you need to travel - perhaps a long distance - to attend a Meetup?

Don't just answer these casually! These are business expenses - sit down and write out the answers to these questions, and then find out actual prices of language classes or a travel weekend to the provincial capitol. If you are like everyone else in the world, money gets tight sometimes, and these will seem like "extras" that are the first items to be cut from the monthly spending. That can sometimes start a bit of a spiral; best to anticipate it and charge accordingly.

This is your "remoteness tax", and you had better be prepared to pay it!

What's your “independence” rating?

I used to read job descriptions that said “looking for someone who can work independently” and think, “Ah! A project manager who can't be bothered to write specs!”. We've all had those clients who seem to think that their project is exactly like everyone else's, and we can look into our magic ball of experience and pull out their business logic. I would very often pass on those completely, or at least down-grade my efforts to get them. No one wants to work on a disorganized project with no clear goals or structure.

> **A key in working for anyone is to determine not, “What can I make” but rather, “What can I do to solve this person's problems?”**

Over time, I started to look at these as a potential opportunity. What you should *really* be saying to yourself is, “This person lacks either the time, knowledge or desire to write the specifications - and so this is something I can do for them.” A key in working in consulting - or anywhere, for that matter - is to determine not, “What can I make” but rather, “What can I do to solve this person's problems?” Their problems may start long before (and continue after) what they hired you to work on.

There are a couple of important things to determine before you go down this road. Is this manager *genuinely* happy to have someone to take on these tasks on their behalf, or are they just trying to get something out on the cheap by leaving these out of the development process? You need to explain to them the importance of documentation and how it will save time and money building the project, and then offer to assist with this as part of your paid work. If they agree and seem thankful that you are willing to handle this time-consuming, boring task for them then pat yourself on the back that you've found a good client. If, on the other hand, they start making assurances that "they'll have that for you on Monday"; if they offer you one-page MS Word docs that beg more questions than they answer; if, worst of all, they start complaining that they "expected you to figure these things out" about the very business logic of their company - all of these are signs that you should be looking for your exit. Those projects are not going to end well, and you probably don't want to be around when they do.

Having decided that question, you now need to take a hard look at yourself. Just how independent a worker are you, really? We're not talking about your ability to work unsupervised - you're a highly-paid adult doing professional work for a client who's depending on you. You'd darn well better be able to do that, and if you can't, fix it fast.

What I mean here is, what is your ability to size up what needs to be done and then set the ball in motion? You have to be honest with yourself - we all know this is a desirable trait, but do you really have it right now? Can you figure out what answers are missing and write out a brief for the project manager so they can simply evaluate your choices and pick one, or do you find yourself often sitting around waiting to be told how to handle the next task? Where are you on the "independence" scale?

There's no right answer to that. The further up the scale you can move, the more benefit you will get from it. Any assignment always requires certain fixed tasks, so the more of those you are willing and able to step forward and take on, the more you will be viewed as an asset to your client - and, of course, the more work you have. How can we improve our rating? Start by figuring out where you are now.

IMPORTANT! Make sure that you have gauged

> **your manager and understand the limits of your contract. The last thing you want to do is be proactive on tasks and then have an argument over 20 hours of unsolicited work. If it's questionable - ask first.**

Many developers prefer to write code from clearly defined issue tracking software and then go home at 5 o'clock. They like this approach to work because it allows them to separate their private life from the company, and it tends to reduce job stress. If you are a salaried worker you can get away with this; if you are a contract or freelancer, you are actually making things worse for yourself. The problem with this approach is that once the tickets dry up, they no longer need you - and that can happen as quickly as a Friday afternoon, "Thanks, see you around!" note on Slack leaving you without a job Monday morning.

If you are this style of worker, your biggest business concern is keeping a constant flow of tickets. Your assignment is simple: find existing tickets that are not yet clearly defined, and get those definitions; find tasks that you know need to be done, and go about creating the tickets yourself (although perhaps not directly in the issue tracking software, unless you've been told it is fine to add things yourself - you don't want to look like you are taking over the company!)

What both of these mean is that you need to use your own knowledge of the business and talk to anyone else who understands it (*except* your busy project manager) to learn as much as you can about what needs done, so that you can sit down and clearly write out a simple specification. Once done, you are now in a position to say to your PM, "Hey, I've gone over this with John and Susan and written up the spec for Task X. I can have that done by Wednesday."

Side note about sales, which if you are a contract worker is now one of the hats you wear: Notice I didn't say, "Is it okay if I do Task X".

I *know* Task X needs done or it wouldn't be in our issue tracking software. Move his answer from whether or not you're allowed to do this job, to whether or not he wants it by Wednesday. Similarly, if you are able to set up more than one ticket this way, ask *which* ticket he'd like to see done first. Always give a list of positive outcomes to chose from.

"Ah, HA! I see what you're doing there! You're turning me into one of those sneaky sales weasels!"

No, I'm not. Here's why I'm not. Your manager or client has a single, big pile of work - stuff she has to do. Two of those items are: "define this task" and "manage my developer". By doing the above, you are removing *two* of those items with one fell swoop, in one of those nice "everybody wins" solutions that helps you, your manager and the business all at once.

Trust me - managers like those!

More than this, you are *proving* that you are reliable and able to work *independently*. Once you've come though on a few of these, you might start to see your manager actually coming to you first asking you to lay out the plan for a new feature, or even wanting you to sit in on meetings in her place. Their being able to count on you means that they can offer an environment where you can count on them for a steady, long-term relationship.

After all this, however, you may find with some managers that it just doesn't work. Primarily it is because they are of one of two breeds: they are micro-managers by nature, and don't want you "touching their stuff", or they are simply bad, disorganized managers who become flustered by the idea of having to do too many things at once. In either of these cases, your response is the same - prepare yourself to move on. I don't mean give notice - if things are working well, by all means stay and enjoy a pleasant work environment! Understand, however, that this is temporary position, and be ready to go to the next client. These people are a bottleneck preventing you from staying fully employed, and if you can’t remove the bottleneck, you’ll need to find a new flow of work.

What’s your “expert” rating?

How good are you really, and what can you do to improve it?

Oh, my - that’s a loaded question! Impostor syndrome, here I am! Really, though, this is a question you should ask yourself. What do I know, and how well do I know it?

My reason for saying this might be a little unexpected. If you are a consultant, you need to assess the level of all your skills in order to decide where to focus your business.

There is a core lesson about being a consultant that most people don’t understand when they begin, and for many it is never completely accepted. As a consultant, you are a business first and foremost. As a business, you will be more successful if you can specialize what your company offers.

This is really the debate between deciding on a generalization vs. specialization of skills. The answer - if you are a consultant - is “specialization”. That may seem counter-intuitive (and against what you’ll hear on many podcasts, but that’s usually because they are giving advice to *new* people in their industry, not experienced consultants), but it is proven time and time again. Businesses hire consultants to come in and do a specific job, and they want the best they can find. They are not interested in having you come in and wear a half dozen hats, or be adaptable to learning new skills. They need you to either do a task very well, and then leave, or fill a specific role for a set number of hours per month, working with several other similar people. Peripheral knowledge helps you, of course, but you can’t charge for that. If you are hired to optimize their databases, for example, you can’t sell your time more dearly because you happen to know javascript.

Focus your attention on as narrow a subject as you can and then go deep, deep, deep.

Therefore, the area that you know best is where you want to focus most of your attention for improving yourself, so you can build your business around it. Do try to broaden your knowledge when you can by interacting with people on the team outside of this skill set and even working on those other skills when you have the opportunity, but don't expect the client to want to foot the bill for your learning time.

How can you become an expert in a specialized field?

As a consultant, I'm going to advise you to do something a little different than what I think most people do. What I think "most people do" is, they sit down and read every single line of the official rules and documentation of their field as they can. If they are studying law, they memorize their law books (of course, they have a bar exam to pass, so perhaps they are an outlier in that regard); if they are a programmer, they read the entire source code of the framework or libraries they use.

Don't do this. As a lawyer, or as a programmer, this is useful. As a business person, you are spending a lot of time spreading yourself thin over areas that may never bear any fruit. You need to measure the ROI on your time, because you have a lot of other roles to play, and you need to match your knowledge to what is in demand so you can find people willing to pay you for your knowledge. If that sounds very mercenary, I suppose that it is. Consulting is not like working for a company. We *will* eventually read that entire source code, we just won't sit down and do it all up front. We need to think about our business.

Back to the subject of increasing our expertise. Here's one path that "worked for me" (words you always want to be careful of, but I think this is pretty reasonable advice). I like this advice because it not only helps you learn your subject matter, but will also help you see where the demand is and guide you toward marketing yourself.

Find two or three help forums related directly to your subject, such as Stackoverflow, a Reddit sub-reddit, or a software library's community pages. Assign a half hour or so to your daily schedule to reading and answering new questions. Try to answer *all* of them (but don't post garbage answers! this isn't about plastering your name everywhere).

Chances are, you won't *know* the answer to most things. That's where your learning comes in! Assume this person is your client, and get that answer. You may have to go read other blog posts; you may have to dive into thick documentation or dense source code. Treat this like it is part of your workload, and learn how to do it. Rinse and repeat tomorrow. Keep going!

Keep notes on two things as you go: What subjects are being asked about, and interesting things you've learned while researching. You'll use both of these for the same thing, but for slightly different reasons. The subject list is telling you where the demand is - if these people were to hire a consultant, what are the things they might want the person to do for them? Condense your answers into a blog post. Now when people are looking into how to do X, they'll find your clearly written explanation; they'll also find a sidebar of other things you know about and how they can hire you to come help them.

A few cautions! You're not dashing off quick answers on the forum any longer. Make sure that your code examples are clear *and actually work* (you'd be surprised). Make sure, as well, that your English is correct and coherent (hire a local ESL teacher for a few dollars to proof-read it if you aren't a native speaker). Speak with authority about the subject, and feel free to be opinionated. 99% of the people who read you just want a quick answer, but always assume that every one of them is a potential client and put your best "expert foot" forward.

I mentioned a second task to track - interesting things you learn as by-products of studying the main problem. These are great subjects for the community members who like to go deeper in their subject knowledge, and will help you take your place as a very knowledgeable person in the field.

As you gain more experience and clients, you're going to have less time (and probably desire) to spend this way. Your goal now is to move from someone who knows the answers to basic questions, to an experienced person who has personally solved the type of business problems the potential client is experiencing. Look to do the same process, but focus more on case studies than small problems. Explain how you created a flexible documentation workflow that saves your clients time, or how you implemented an authentication system. Your goal here is for people to read this and think, "Yes! This is what we need. Let's ask him if he can do this for us."

Eventually you'll reach a level of success in your business where you can simply take "Friday study" days and expand your knowledge more freely. Early days, however, you need to keep your eye on gaining and presenting your knowledge to clients who want to pay you for it. You are going to be very busy establishing your business. If you can combine improving yourself and improving your client prospects with the same effort, you'll be that much more ahead.

August and New Year's, Oh, shit! (aka, Down times)

It is 57 million times easier to sell to an existing client than to a new one

Survey results may vary on the precise multiple above, but the assertion is real. As a consultant, we should always be looking for ways to establish recurring or repeating client work. Monthly retainers, maintenance contracts - these are our friends, and often our bread and butter.

Even knowing that, sometimes we find ourselves with good clients with whom we have an established relationship but we don't have any long-term guarantees. All of the sudden the flow of tickets has become a trickle. The project manager is sympathetic, but nothing seems to come of it. His replies to continued queries become slower, and you are afraid of becoming a nuisance if you push to hard. But you gotta eat!

You may simply have fallen victim to "holiday syndrome". Every year, without fail, key players at your client's company go on vacation in late August. They do it again at the end of the year. Every year, without fail, consultants are taken by surprise by this. It isn't just these periods you have to watch out for, but also the weeks directly before and after that can be very dry, indeed, if you aren't prepared.

It boils down to this; the weeks before a vacation period are often spent getting internal projects and paperwork "finished up" before they go. The weeks after are spent in 3-4 days of the "Monday Blues" and a desperate fight to get a handle on all the emails and tasks that piled up while they were gone. What *doesn't* happen is, New contracts are not signed, and the least important people in the group (aka, outside consultants) are not given much attention. If you are in July or November, and you don't have work lined up for the next two months, you could be in trouble.

Fortunately, there are many ways to deal with this. Like any other problem, anticipation and preparation are key. The fact that Christmas is happening *again* this year should not catch you by surprise. Here are a few tips:

*Retainer contracts.

These are desirable not just for avoiding the downturns. If you thought writing software estimates was hard, try managing your company on rough income estimates. Locking down fixed minimum hours per week or month can alleviate this pain and give you a sense of stability.

Be a little careful with these agreements, however. Your goal is not just to get long-term employment, but to establish *steady* employment. Roll-over agreements, where the client is allowed to push unused hours into the next time block, can leave you with big holes in your paycheck *and* 80 hours owed in the final week of the month, with no time for your other clients.

*Calendar notifications.

That's right - go right now to your Google mail, and set a notification on November 1st that says, "Got work for January lined up yet?" Twitter is full of people tweeting out "looking for next gig" messages, and many of them mean "right now". If you have a contract that covers you for the periods we're talking about, wonderful! If not - even if you expect the assignment you're on will last until then - start looking for something new just in case. It is easier to find a peer to take over a new client for you if you can't make good than it is to find a new client when no one is hiring.

*Create your own tasks.

This takes some independent-thinking - you may want to have another look at “What’s your ‘independence’ rating?”, as it ties in very closely with that. A few months before the expected lull, start putting together a list of “it would be nice when we have time” tasks. Every company or team has them, and no one ever wants to do them. Organize them, talk to people on the side to spec them out and then approach the project manager with the “pitch”. “I know with holidays coming up everyone is really busy. Here are a handful of tasks I can work on without needing supervision and have ready for review by the time you get back”.

There’s no guarantee they’ll agree, but you’ve just offered to remove yourself from their list of responsibilities and at the same time clean up a bunch of necessary work that no one wants to do. You’re unlikely to make enemies doing this even if they decide to pass.

*Write project specifications

A little bit similar to above, but the case I have in mind here is when you *already* have that new client lined up, but they are taking forever to get the specs and other business logic set up for you. The holidays might be a tremendously busy time for their business or family, and so you are left unable to start working.

This is something I think consultants should strive to include as part of their package, but if your client is lacking time or knowledge to create these and it is holding things up, offer to write a high level version for them and let them revisit it and clean it up.

Most of our clients don’t write specifications very often, and probably less so for the specific type of work we are doing for them. Even once they get past the initial three weeks of staring at a blank page, what they come up with is often as not next to useless. Relieve that pain point! You’ve done this many, many times - you have a very good idea of what this is going to look like. If you are clever, you’ll even start to put together a set of templates to help yourself doing this quickly and smoothly. Once you’ve written something they can look at, it is much easier for them to cross off or correct the bits they feel need changed.

The key in all of these is simple: Look for ways you can help *them.* Don't think about getting yourself more work, but instead, what you can take off of their plate to make things move more smoothly. Leave them with the feeling that not only was the project eventually successful, but working with you with so easy! That's the key to repeat business and recommendations.

"I'll gladly pay you Tuesday for a Hamburger today!" and other promises

This is a page from the School of Hard Knocks. Not about clients skipping out on payments, as the title might imply - there is plenty of good advice out there about contracts and payment plans and how best to protect yourself. This one is about the well-intentioned or "harmless" little white lies clients will tell you that can hurt you very badly if you take them at face value.

"We're negotiating with a new client - can we count on you for next month?"

Hooray! you think to yourself. A solid gig in the works. I can slow down this exhausting search for new clients, maybe loosen the purse strings just a tad…Not so fast!

"Can we count on you?" and "How many hours can you give us?" are two of the most over-used, empty expressions you will ever hear from an client. These typically come from agencies, because they are constantly in negotiations with prospective clients and, as such, need to be sure they have the resources to fulfill the contract they *want*. This doesn't mean they actually *have* any work for you - in fact, most of the time, they do not.

> **They have a slot on a client sheet somewhere that says, "Job X:" and they need to put a name there.**

When you think about it, How would the person asking you even know how many hours they need from you? Usually they are not a lead developer or technical lead, and the tickets haven't even been written yet - maybe the *specifications* haven't even been written yet! This is part of why so many times when a client is hiring you for hourly work on an existing project, the amount of work falls well short of what was implied. They want to get their "ducks in a row", but everyone knows how hard estimates are, and anyway, no estimates have even been started yet. They just know they have a slot on a client sheet somewhere that says, "Job X:" and they need to put a name there.

So how should we answer those? Start by understanding things from their perspective at this point. Really, all they are asking for is, "Can we work together?". Did we get along well enough on our last project that you're willing to repeat the experience? As long as you're still accepting their emails, we can assume you are happy to take on the new work if they get it. In truth, most of the time when the project is still at this point, nothing ever comes of it. If they *do* land it, it might be many weeks before they are ready for your part to start, meaning you still have time to make yourself available. In a worst case scenario, you can always introduce them to a peer to take the role, saving them from the uncertainty of vetting a new person while helping out a friend. For all these reasons, you are usually safe accepting a query like this when things are still at that point in the time frame.

Does it satisfy *our* needs, though? Each time we say that, we have signed up for another potential project to monitor in our leads list (No, they won't follow up with you from time to time. You'll need to email them if you want to know how things are moving, or if it dropped completely.) It's always possible we *will* get the contract, so we need to prepare for that eventuality. All this leads to *more* uncertainty, when we already know that running a successful business is about creating *less* of that.

Are they serious enough about hiring you to lock you into a contract right now?

Retainers to the rescue! As I mentioned above, one of the most important reasons why clients do this is because, just like any other company, it is *hard* to find reliable people that they can work with. This is an important asset you have in your corner, and you should be prepared to leverage it. When they start asking about how much you can give them, it is time to find out how much they *really* want. How much are they willing to contract for right now?

Once again, I know that for many of you, this feels like sales and haggling and it is something you’re not entirely comfortable with. You’d rather say, “Oh, sure - that would be great!” and then sit by the phone, waiting for it to ring. You need to shake that for your own sake. There is nothing dishonest going on here; you are merely sending out feelers to see how serious they are at this point. When they ask these questions, an answer similar to, “I’d love to work with you again! Are things certain enough that you’d like to lock down some time with me yet?” forces them to give you a truthful answer about the likelihood of things moving forward, nothing more. If they do, congratulations on the new client work! More likely they will not. That’s fine, too. You know now that you need to continue your search, and they get the hint that you expect this to be a proper business deal.

If you are newer to the the world of consulting, you may still be tempted by offers to work more cheaply or even “for exposure”, with the promise that if this project goes well there could be follow ups. This same rule applies - if you don’t have a contract in place for these future jobs, they don’t exist. If they did, why would you even want them? The only thing worse than taking a job at less than your normal rate is being locked into your next three projects at that lower rate as well. If you are happy with that rate - lower your rates and make less money. If it is too little, why lock yourself into half a year at a smaller salary?

The take away of all of this is - you are a business person, working with other business people. Do not allow them to take advantage of the fact that sales and contracts are not your specialty in order to push you, either through hopeful thinking or guilty feelings, into giving them a deal that is not even and mutually beneficial.

Keeping your client happy & in the loop

A few years ago I made a wonderful little Saas application that absolutely nobody signed up for, called “Trellup”, which very simply created automated reports from your Trello board and emailed it to the client so that they didn’t need to access or even know about your planning boards. My marketing skills may have been lacking, but I still stand by the idea behind it all. You must keep excellent communication with your client!

However, knowing what level of communication to have can be an art form in itself. I’ve had clients who ping me on Slack every time I commit code, others who have the attitude, “Call me when it’s done”, and everything in between. The opposite is true, as well - I have more than a few stories about projects that stagnated and missed deadlines because the customer would simply “disappear” for days or even weeks without answering important emails. So this is no small matter to brush aside.

The tricky part about this, of course, is there is no “one size fits all” way of doing things. You may decide to create a process and rules for how often and what level of detail you update your client, for example, but if it’s not enough to make them feel like they understand the progress being made, you will, at best, have an unhappy customer who won’t want to recommend you or use you again, and at worst find you’ve been replaced behind your back because they didn’t feel things were moving at a satisfactory pace. You need to get a good idea of expectations up front so you can tailor to their wants.

It is surprising how few consultants take

proper steps to ensure good communication with their clients.

How often you update them is the easy part. It only requires that you be organized, and that you ask them! This is so simple and obvious, and yet you'd be surprised - or maybe you wouldn't - how few consultants actually take this step. This is particularly true among technical people reporting to non-technical clients. We are notorious for both hating to write documentation and our dislike for explaining what we do to people who we think are going to second-guess us on matters they don't fully understand.

This is a very dangerous attitude, however, because these people are paying for our services, and yet are often left feeling like they are just dumping money into a black box from which they have difficulty understanding what they are getting in return. In fact, if your client suddenly starts to ask a lot more tiresome questions than they used to, it could be a warning sign that you aren't communicating with them and they are getting worried about their investment!

There are two times when you should *always* update the client. First, *anytime you submit an invoice!* Always find a few positive things to say in a note - even if the project isn't going very smoothly - and let them know what you accomplished since the last time you asked for money. The second time is, as the end of every week.

"Wait! You cheated - that's like, all the time!" Yes, it is. They are paying your bills and they have a right to be kept in the loop. However, this doesn't have to be a tedious, time-consuming task if you stay organized. Unless the client is actually requiring time and task breakdowns, a simple list highlighting what you did, perhaps emphasizing the more exciting tasks, is sufficient. I like to add a short list of what I'm expecting to do in the following week, as well, to keep the feeling that things are moving along. A nice detail is to use a consistent subject line - this way you can tell them, "I send out weekly updates, but if these don't interest you, you can just set up a mail filter to route them to our project directory to have whenever you might want to refer to them later." This is nice for the customer who wants to be left alone as much as possible and also sets a precedent for the more "busy body" client that they'll be getting their update each Friday, so just be patient. You can even just scrape these to use when writing that invoice note.

(This has another benefit that hopefully you'll never need, but probably will some day. There will be projects that don't go well for one reason or another, and clients who will get frustrated and try to shift the blame to you. Weekly status reports showing exactly what you've been accomplishing can be a helpful paper trail for cases where, "You aren't getting thing done!" accusations start flying.)

> **Learn to detach the conversations you're having about specifications from the task that you have in front of you.**

That should help with your communication, but what about theirs? How do you deal with that customer who is always slow to respond to questions? If you are sending out weekly summaries that mention your upcoming tasks, you're already a leg up! Like everything else, the key here is organization and anticipation. Planning out what you'll be working on in the coming week means that you can look ahead to the questions you have, and can include those in the weekly email. Rather than always discussing the immediate work at hand each day, learn to detach the conversations you're having about specifications from the task that you have in front of you. This should give you sufficient lead time to prevent ever being hung up waiting for answers.

Sometimes, as well, what really needs to happen is an actual conversation. Remember that (in most cases, at least) the client really *does* want to get that project finished. Remember also that while the project you are working on is the center of your world for a few months, it might not *theirs.* Scheduling a short meeting and being open about the fact that their slow response time is holding you up - and perhaps forcing you to split your time with other clients to make sure you are able to bill a full work-week - is often all it takes to clear the logjams. Find out if there are better ways to ask the questions - perhaps all at once for the week, perhaps in shorter, more frequent bursts; sometimes an email for them to read when they are available works, other times you may just need to schedule a weekly half hour meeting.

An existing client is worth infinitely more to you than a potential one, so it is only logical that you work as hard as you can to reduce the communication barriers and maintain a healthy and fruitful relationship with them so that it continues.

Building a reputation through Social Media

Reputation is a funny thing. You would think that the more well-known you are, the more customers would be lining up at your virtual door to hire you. In fact, your reputation is what gives you visibility - but that doesn't always translate to sales.

Nevertheless, you *do* need visibility if you are going to run any sort of business, even if much of it is simply to convince customers who never even read your technical blogs that you are, in fact, a well-respected expert in the field and they can rest assured that if they hire you they will be successful with their project.

> **Reputation is about lowering the feeling of risk of hiring you.**

Remember, in a lot of cases you are being recruited by someone who doesn't really know your field. That's *why* you're being hired. Hiring someone in a field they don't understand, however, is risky. The success of their project depends on you being able to deliver what you say you can. That's why "no one ever got fired for hiring IBM" - IBM is a known quantity.

Your goal, then, is to make yourself a known quantity. Show them through your involvement in the business you are in that you are, in-fact, a low-risk option.

There is a wide array of avenues you have open to you to demonstrate this expertise and build both an audience and a reputation. Podcasts, newsletters, blogs and speaking engagements are the most obvious ones that anyone - and that means *anyone*, regardless of your current level of expertise - can use to get their name out. All that is required is the willingness and dedication to spend the time and effort to create a quality product.

Most people fail at these, however. They start out with a bang and quickly fade away without so much as a whimper. How many times have you come across a blog post that goes something like, “Well, here I am blogging again after a year. Should really try to do this more often…” Maybe that’s you? Let’s look at these mediums and how, through selecting correctly and making a sustained effort, we can use them to increase our reputation, and at the same time improve our own knowledge.

First of all, let’s challenge that assertion I just made that you don’t actually have to be an expert in the subject you are demonstrating in order to be successful. What is the reason people come to your blog or podcast - to listen to what *you* have to say about something, or to learn about that subject? As long as you are providing correct, digestible information, they will consider your offering to be a resource worth coming back to time and again. It doesn’t actually have to be from your “mouth”, if you are the channel to the answers they are after.

Some of the most enjoyable podcasts I listen to are based on interviews with experts; the host has researched the subject enough to ask intelligent questions, but it is the guest that we really came to hear. This interviewing format, whether written or audio, is a great way to start for people for several reasons. One, in order to do a good job you must research the subject to the point where you can converse intelligently in front of your audience. What a great way to really learn a subject and at the same time increase your visibility!

More than that, it gives you an air of authority. It’s a mutually beneficial opportunity for you and your guest; they get a platform to express their views and expertise, you have the chance to work with top people and build your network. And, of course, your audience has a resource to learn from.

Now that I've hopefully convinced you that doing one or more of these is worthwhile, how can we make sure that our efforts are successful? *Effort* is the keyword here. All of the blog posts and podcasts you listen to take a lot more time and effort than most people realize; a sloppy product will do nothing but gain you a reputation for shoddiness. You need to look at this as the marketing part of your job, and set aside actual work hours to produce these. By that, I don't mean it can't be your Saturday morning quiet time task, just that you shouldn't look at it as a side project. This is something that needs to be worked on *every week* as part of your business' marketing plan.

Before we look at which mediums we should use, let's consider a few things that I think can make or break your efforts:

Regularity - releasing new material on a fixed schedule, and not missing that schedule because of holidays, personal workload or other issues in your life.

There is nothing worse than sitting up Sunday night with the "I need a newsletter topic for tomorrow" Blues. Except, perhaps, listening to a podcast where the conversation starts, "So…what should we talk about this week?" The easiest way for a medium to die is when the producer starts to slip with releasing new material in a timely fashion. The easiest way to lose your following is when you are so irregular they forget about you. You should have material ready to release on an automated process at least 3-4 weeks in advance. Don't make rushed, unedited posts - people can tell, and you'll make foolish mistakes. Interviews, especially, require a lot of editing. Even if you are trying to make a blog about current topics - which is probably not the best kind to start with if you've never done this, as it can be very demanding - have a few back up articles for when life gets crazy.

Accuracy - check your facts, check your statements.

I used to see this a lot in programming blogs, especially long tutorials. Code was not actually followed by the author afterwards to make sure it was clear and *worked* - it was always necessary to read the comments to find the fixes that previous readers had made, in order to be able to complete the tutorial. Proofread - yes, check your spelling and grammar! - and check your links; work through the process you are describing once you've finished to make sure you haven't skipped steps or made mistakes in the procedure. I told you these take more time than they seem!

Plagerism - insufficient attribution, or just plain stealing.

I think we all know what this is, even if we disagree on exactly where we draw the line. The worst cases of this usually come from sites that are doing something we aren't actually interested in - "page view magnets". They simply try to get as much traffic as they can, either to increase their site's ranking, display Google ads, or whatever. We're not after that. We want to build a rapport with each and every person who finds us. We are after quality, not quantity.

This doesn't mean we can't quote or incorporate material from other sources, but we need to get permission if it is more than a couple of sentences, and we should *always* try to link to either the original source or something for the reader to find that person. Remember, that author probably wrote the quoted material for the exact same reason you are using it - to increase their own visibility. If they've helped you out by giving you something to work with, return the favor. Often times it leads to new relationships!

Which medium should we use? Whatever you feel most comfortable with, and fits your image of what you are trying to create. There is a ton of material readily available on the pros and cons of each; this book isn't about rehashing things that have already been said. Whichever you chose, though, here's one last recommendation:

Try it out a couple of times before going public.

A podcast program where you interview a new guest each week sounds like a lot of fun, but after you've done one or two and seen the time and work involved in lining up guests, preparing questions and editing out all the "uhm's", you may realize that it's far more than you want to try to do each week. Or perhaps writing 1000 words is pure torment, and you learn that blogging your own original material is never going to work out. Find out what each is like before announcing that this will be part of a long-running series. (You can always release what you made - no need to throw away good material. Just avoid calling it your "weekly" and be sure to keep looking for something you actually enjoy doing.)

Whichever path you take, I'm sure you will find one or two that are a comfortable fit. After that, remember you'll get back what you put into it!

Onboarding new clients - “Specs” and Estimates

Let’s get a simple truth out of the way - estimates are hard, and writing specifications combines that difficulty with a high level of boredom.

Let’s look at another simple truth - dirty jobs are where the opportunities lie.

No one wants to do them. Few people are particularly good at them. As a result, a lot of potential business is passed up because it is simply too bothersome to deal with.

I have a confession - I do this a lot! The reason is simple. Often times, these people seem to be merely shopping around for the “best price”, and meeting with them, collecting a clear definition of the work they want done and then providing a reliable estimate is time consuming work that may never result in anything profitable.

I think this is a huge mistake! This is your opportunity to take the next step in increasing your “independence rating” by actually running the whole show - for the right people. How do we separate the potential wheat from the chaff?

Constants.

The reason estimates are so hard is, of course, that they are so variable. But what if they weren’t? What if you could break down the customer inquiry into parts that you have done before, and already understood with a great deal of certainty how long it would take to repeat? This frees up *your own* risk of giving them a number and reduces the amount of time it takes to come up with that number, which allows you to actually make a bid for their business.

You do this by starting your own “menu of tasks” and tracking how long it takes you to perform each of them each time you do so during the normal course of your work week. At first, break the tasks down to as granular a level as you are able; over time you can start to group them together into blocks to make things quicker and easier. Discover which parts may not fit well in your own skill set, as well as which ones are so simple and repeatable that your skills and time are wasted.

Let me give you a slightly contrived example, retreating to my own familiar software background. Let’s say a client would like an estimate for a “TODO List” web application, with both a simple (email and password) and Facebook login in an “old-fashioned” web page design (meaning no javascript frameworks). We might break the tasks down to this list:

*Transform Photoshop designs to css styling

*Create html pages

*Setup web framework

*Setup database

*Users storage in database

*Register account functionality

*Login functionality

*Logout functionality

*Forgot password functionality

*Reset password functionality

*Login with Facebook functionality

*TODO pages with functionality

I’ve left a few things out but that’s the bulk of a simple TODO list application. So let’s create an estimate.

First of all, is there anything in here that is not my specialty? For me, the photoshopping and html creation is just that. I *know how* to do those things, but I am slow and not able to create the same quality as someone who focuses on those skills for their own bread and butter. Fortunately, I have a designer I work with on a regular basis, so I pack up those files and ask for an estimate of time and cost. This means I can get a fixed cost in the one area I am most uncertain about, by allowing it to be handled by someone who understands it better than I do! My estimate is well on its way.

Avoid the urge to do everything yourself! Remember that you are in business. You will make money by focusing on what you do efficiently. Yes, I can do those design to code changes, but at about half the speed of the other work. This is another way of saying, "My ROI on those items is 50% of that of my specialty". Why do you want to work at half your normal rate?

Looking down the rest of the list, we see that everything there except the "TODO pages" is something that I have done on virtually every website I've ever built. Not only that, but I can even bucket things together. For example, login and registration always go together, so I can simply refer to this as an "authentication module" with a "Facebook add-on". Two menu items with known costs. At the end of the day, the TODO business logic is the only area where I have to sit down and compare it to things I've done before to make an estimate from scratch.

If you think we are in much better shape now, you are right - but we can do better still! Let me repeat something from above - *Avoid the urge to do everything yourself!* Setting up a database, framework repository and authentication module are pretty repeatable processes. So much so, I could probably train a junior developer to do these things for me and then just request a "Basic auth package" for a pre-agreed upon price whenever I start a new client. Now we eliminate work where my time and skills are being wasted, and lock in a little tighter on a fixed cost for my estimate.

If that idea seems strange to you, it shouldn’t. Chefs, hair stylists and lawyers are just some of the people who do exactly this so that they can focus their time on work that only they can do, and process more customers each week. They have all learned to separate as many lower-skill tasks as possible and assign them to someone more junior who is paid at a lower rate. I invite you to spend the next week looking around you and noting all of the instances of this that you find in your own community.

Sometimes, however, you’ll have a project that is *so* complex and *so* unique that there is simply no way you could possibly break it down into familiar parts. It is a genuine “never been done before” request. What then?

First of all - really? You are considering a project for which you have absolutely no previous experience, and can’t identify subtasks that are familiar enough to estimate? What was it that made you even consider bidding for this project in the first place? Be careful that this isn’t a warning sign. If this is something outside your normal scope of work but you still want to do it you may want to find a resource to help you break it down so you fully grasp what is involved.

If you *still* want to go ahead, I think this is a case where you should explain the difficulties to the client and quote them an hourly rate. Don’t trap yourself in the nightmare of a fixed price project for something you don’t understand inside and out. “I should take this on because it is a great opportunity to expand my skill set” is a terrible decision to make when you are running a business.

Remember - you are running a specialist service. Keep your own focus on *your* specialty and work with others who are doing the same, and you have a much better chance of creating a quality project on time and for the expected price - and leaving everyone happy!

Review your failures

We all have failures. It may be a traditional “death march”, or more subtle such as not achieving the smooth work flow process we had hoped to manage this time, or just taking longer to deliver than expected. If it is important to review projects that went well to ensure we can repeat and improve, then it is doubly so to look at ones that were less than ideal.

However, a lot of consultants who do this type of review don’t get much of anything out of it. Instead of stepping back and make an honest, nuetral assessment, they mark the problems up to a bad client who didn’t deliver specifications on time, constantly changed their mind, didn’t respond promptly, and a host of other problems. With clients like that, how can you hope to be successful?

Remember the old adage, “Practice doesn’t make perfect - *perfect* practice makes perfect”?

It’s the same thing with reviewing your failures. If you review them with the idea, “It failed because my client was stupid”, you may as well not even bother at all. Chances are, your client was only partly to blame, and you’ll never discover those things that were your own fault or be able to take action to prevent them from failing again. Your consulting career will be a series of spinning your wheels, hoping to get lucky with good clients and being miserable when you don’t.

Instead of this point of view, assume *everything was your fault.* Go ahead - this is only between you and yourself. No silly blame games here. Identify as many of the failures as you can, and look at each one of them as though you were the one who didn’t communicate, was unreasonable, or didn’t come up with “the goods”. This is going to lead you down an interesting path.

First of all, you're probably going to end up admitting to yourself that a certain number of the failures really were your fault. Sometimes it isn't "despite our best efforts". Sometimes our effort just wasn't very good. If this is the case, after the dust has settled, write a note to your (now former) client. Tell them, "I wasn't very good at X, Y and Z, and I think that led to a lot of our difficulties." Not very many people apologize or take ownership of failures these days; you might be amazed at what comes of it.

When you've cleared those out, you're going to find that many issues that could have been repaired had you identified and acted on them in time. Remember, depending on the type of client you are working with, you probably have much more experience doing this than they do. The burden is not always split fifty-fifty to recognize and deal with conflicts. You may have to take this on yourself, even if it doesn't feel fair. If you are having communication problems, speak up. If you feel things are drifting away from the original plan, write a clarifying email. The one commonality in all of your projects is *you* - you've seen all these issues before, and should know how to spot and diffuse them before they become problems.

With the remaining issues, you'll find things where the client did not fully understand where the line was on what they were paying for, or was simply making unreasonable demands. In these cases, did you try to determine what was reasonable and negotiate to provide that, or simply turn your back on them? Perhaps they were demanding an extra service you don't normally provide, but you could have introduced them to someone. Or the "scope creep" could have been turned into a paid extension on the work. Did you miss an opportunity?

There will be clients, however, who were simply toxic or unwilling to work with you to find solutions. Walk away. Walk away from them, and then don't look back or think about them any more. Accept the fact that this will happen sometimes and don't let it affect your ability to move forward.

Whatever the case, learn from it. See where you need more clarity in your contract terms, how to spot a bad customer before signing, or what you can do to improve your own communications. Don't let a failure become a waste of your time!

Some final thoughts

Let me close with a few thoughts about things I think are important, but are often overlooked or dismissed. What I would like you to do as you read each of them is ask yourself, “How much time and effort would I actually waste if I did these but they didn’t really matter, and what are the possible benefits of doing them?”

Learn to test to avoid careless mistakes

Put processes into place to avoid these. Use a word processor to check your spelling, unit testing to check your code, software to confirm your numbers.

Complicated mistakes are understood and more easily accepted by your client; careless ones do nothing but leave a bad impression.

Buy software or services that will improve your workflow

Yes, they cost money. No, you may not have much at the beginning. Cut some things out of your life this month and buy the correct tools (and learn to use them). Make your workflow smooth, fast and efficient.

Don’t lock yourself into long-term projects at below your normal rate

There will be times when you will need to cut a deal. I’m not going to tell you to never do this; you are your own business manager, with your own situation. You don’t want to get involved in something that prevents you from taking on new projects at your normal rates. The length you are tied to a client should be inversely proportional to the amount you have discounted. (I am not talking about weekly or retainer rates here. Those can be considered your normal rates - every business discounts for contracted large volume.)

Write correct English

You may not think this is important, especially if you work in an area like software. Your client may not share that opinion. When you are first meeting them to discuss a project, your correspondence is all they have to make an impression of you. Personally, nothing turns me off more than a native English speaker with a university degree who writes, “I have went…” Learn to read and write your own language properly before asking to work for me. Get someone to proofread your work if you worry you’re not up to scratch.

If you are not a native English speaker, you have the added weight of having to show me that communication isn’t going to be a problem. $10 spent hiring an ESL teacher to correct your cover letter and emails will be well worth the money spent.

You may think, “That’s not fair! I should be judged by my work.” So what? I have the money, I make the rules. If you don’t make a good impression in your cover letter, I’ll never see how good your work is. You’re not the only one who is good at what you do.

Sign your full name on the early emails

“Oh, you’re from Chicago! Do you know Joe?” I don’t mean all your emails once you are working for them, but rather when you are applying *and the thank you after you’ve been rejected* (you send that, right?). Six months from now they won’t remember “Joe”, but if you made a good impression and then they bump into your complete name on an article they were just impressed by, they will remember you. If you are lucky, they just happen to need someone right about then…

Set yourself up as a legal business

In most countries, this means the equivalent of an LLC. Every government in the world has some sort of “small business bureau” that can help you learn about incorporating and the advantages of doing do. Get *good* advice, not what your friends say, and follow up on it if it makes sense.

Run your business as a business - hire someone to do your company taxes (they can find amazing savings for you sometimes), check for tax credits for living abroad, keep good books. In most places, the tax laws and economic system is set up to work for businesses, so let it work for you.

Above all, remember what I've said elsewhere in this book - Always be on the lookout for what you can do for your clients to help them with their problems. If you keep that rule in mind, you will always land on your feet.

Good luck!