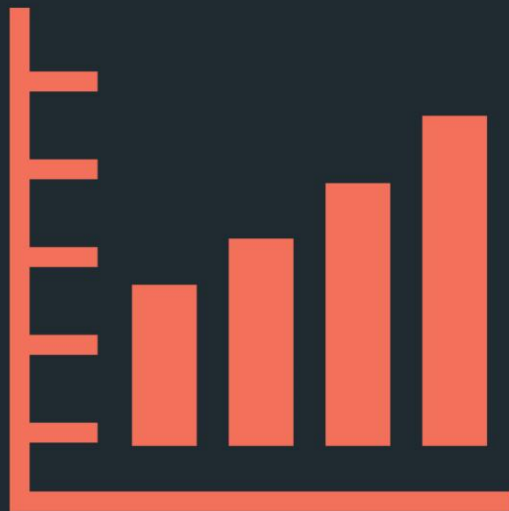# MASTERING UPWORK TO GET CLIENTS

This guide is written by Gaege Root from Gaege.xyz.

He's very successful at UpWork, so he's the one who wrote this guide for us.

This isn't a step by step guide on getting started and all the small details of UpWork. This is a guide on how to get more clients, earn more and stand out from the crowd.

*Disclaimer:*

*I can't guarantee you will achieve success like Gaege has, but if you do implement these strategies and tactics he mentions below, you will be in a much better position to achieve success compared with those who don't implement it.*

It's impossible to enter the world of freelancing, especially in the tech industry, without running across mentions of the juggernaut that is Upwork.com. At the time of this writing there are just under 40,000 jobs available **in the "web, mobile, & software development" category alone.** That's a whole lot of opportunity. I'm going to show you how to capture some of that opportunity-pie for yourself.
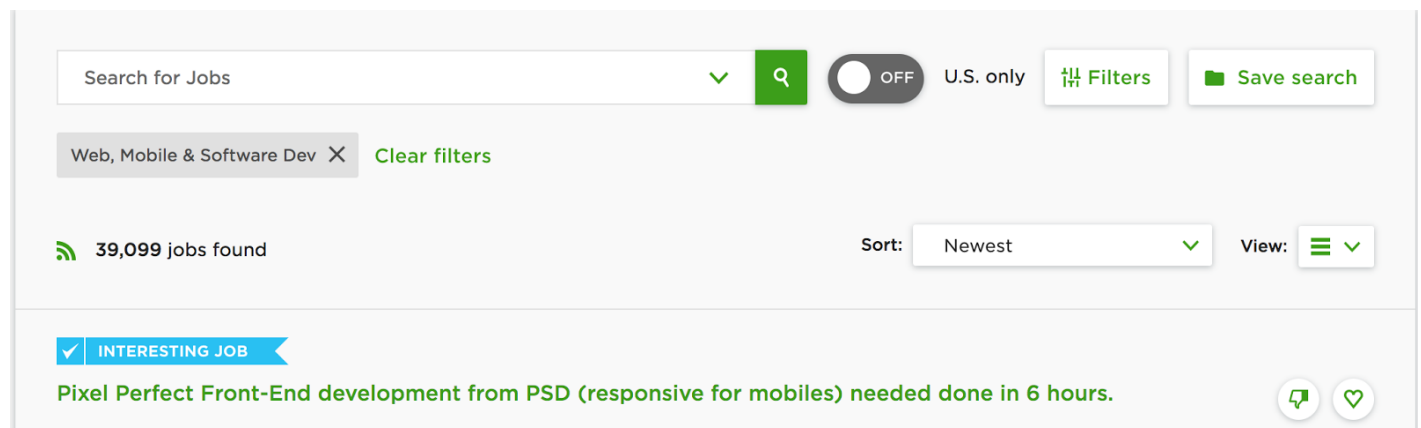


In typical fashion, with growth comes growing pains. As Upwork has soared in popularity among both freelancers and clients, there have been countless "horror stories" from both sides.

*"I paid this freelancer $1,000 then I never heard from them again!"*

*"I built an entire site for this client and they only paid me $100!"*

And on and on and on....

Guess what? These aren't just stories. This actually happens.

Which is why this guide isn't just going to cover the basics of getting jobs on Upwork but also how to avoid the nastiness that such a platform can introduce into your business if you're not careful.

Hopefully it's no surprise to you that freelancing isn't all rainbows and butterflies. To be quite frank, Upwork (and sites like it) is one of the more volatile avenues for client acquisition as a freelancer. It's certainly not the "get-rich-quick" tool that so many freelancers seem to imagine it is when they first discover how easy it is to sign up and start submitting proposals.

There are hidden forces at work beneath the shiny surface and seemingly simple value proposition of Upwork that you absolutely must be aware of if you expect to have any amount of success on the platform.

Of course, no guide would be complete without the requisite disclaimer: there's literally no possible way I can guarantee you'll obtain the same level of success that I (and many others) have with the advice and guidance that follows.

This isn't a silver bullet that breaks down every little nuance of the platform and tells you exactly what to say. If anyone says they have that, you're being lied to. This guide contains guidance on the main facets of your activity on the platform and how to set yourself apart from other freelancers and minimize the amount of work you do while maximizing your revenue.

Now that I've (hopefully) set appropriate expectations, let's get into the meat of this section so you can start using Upwork to its full potential as a valuable addition to your arsenal of prospecting tools.

## What is Upwork?

Outsourcing work has been standard business practice for centuries. Upwork is a modern, structured tool meant to simplify the outsourcing process for all parties involved.

"Projects" can be posted by anyone for "freelancers" to submit proposals for.

Here's what a typical project post looks like in their project feed:



**AR/VR mobile App**

Fixed-Price - Intermediate ($$) - Est. Budget: $4,000 - Posted 10 minutes ago

This app is for chain of markets, goal is to entertain customers with AR and VR zone events. I am still thinking it will be cross-platform or native (iOS+android). I already have animator and designer, so basically you need only front end develop par ... **more**

Proposals: **Less than 5**

Client: ⊘ Payment unverified  ★★★★★  $0 spent  📍 Japan

Here's a quick overview of a typical project lifecycle:

1. Potential client posts a project with description, budget, and any other preferences
2. Freelancers submit proposals to be considered for the project
3. Client picks a freelancer

4. Freelancer does the work
5. Client pays the freelancer

The obvious simplicity attracts hundreds of new freelancers and thousands of new jobs every day.

With so many people on the platform, it's critical that you understand how to stand out. As a freelancer on Upwork you have two opportunities to wow any potential clients: your **profile** and your **proposals.**

### Your Profile

When applying for a traditional job, it's normal to supply a resume. In the context of Upwork, your profile serves the same purpose as your resume.

There are entire companies dedicated to helping people craft incredible resumes. They're obviously extremely important. Your profile on Upwork is no different.

Luckily for you, the vast majority of freelancers on the platform don't optimize their profile. Would you submit a resume to a potential employer written in pen? That's essentially what you're doing if you don't take the time to polish every section of your profile.

The following sections will walk you through the various pieces of your profile and explain how to massage them for maximum effectiveness.
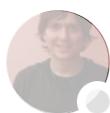
## You've got to specialize

Search for "web developer" on Upwork and take a look at the main title area on all the results you get back. Here are some of the top results I got:

I can tell you what you'll see. 98% of the profiles will say one of two things:

"Web developer" (literally just that…..)

Or something like "Front end developer with responsive design and WordPress experience".

Here are some of the top results I got:

You know when you see a bunch of birds all take off from a tree at once?

Using a bland, generic title for your headline is tantamount to being one of those birds. You won't stand out.

Your headline is one of the very few things that is initially displayed to potential clients during searches for freelancers and when they're filtering through proposals.

Stand out by specializing within a vertical (finance, sports, restaurants, service businesses, dentists, etc) or a narrow horizontal skill (mobile app, calculators, React, Angular, email automation, ad handling, form building). You can even do both, once you've discovered a common combination.

A couple of examples:

- I specialize in building beautiful, responsive forms ("for small businesses", maybe)
- I specialize in building React components ("for admin dashboards", maybe)
- I specialize in automating email capture funnels ("for restaurants", maybe)

- I specialize in Facebook pixel integration and custom event capturing ("for influencers", maybe")

You may feel like you're narrowing your pool of potential clients by doing this, which you are. But that's ok because I guarantee that there is plenty of work within most highly specific verticals to keep you busy. Besides, specializing in a single vertical allows you to charge even more for your services.

Would you rather do five different projects per month for $1,000 each or one project per month for $5,000? Most people would choose the latter, which is made possible by niching down.

Worth mentioning briefly in this section are the "tags" that Upwork allows you to select, which are meant to be a way for you to show up in results for certain specific activities or technologies.

I recommend following the guideline of specialization here and only select 2-4 tags that are highly related to your very specific horizontal skill.

*Section summary:*
*Narrow your focus to appear like an expert and stand out from the masses on first look*

## Establish credibility as soon as possible

The people looking for freelancers on Upwork want to hire someone they believe can take them from where they're at to where they want to be.

The key word here is "believe".

If you want to be the one they hire, they must believe you can solve their problem.

What's the best way to demonstrate your ability to solve a problem?

Show that you've solved a similar problem before.

What's the second best way to demonstrate your ability to solve a problem?

Show proof of your extensive knowledge of solutions to similar problems.

Here's an example of a bad opening paragraph:

"I can provide any work you need related to responsive web design. I have worked with PHP, JavaScript, HTML, CSS, and XML to create interactive websites. I guarantee you'll be happy with my work. I began as a web developer 10 years ago and am now a full-time freelancer."

Now, here's an example of a great opening paragraph:

"I'm currently contracting with a Fortune 1000 company to rebuild a page that gets 50+ million visitors a year. Previously, I helped build embeddable lead generation financial calculators for a number of large financial organizations."

Notice the differences.

The first is focused on the freelancer. It describes what they can do, what tools they use, their history, and their current status. The client doesn't care about this stuff.

The second is focused on the results of the freelancer's work. It allows the potential client to envision a similar successful end to their own project.

Here's an actual profile I found that is highly client-centric (though a bit shorter and vague than I recommend). Pay attention to the his focus on benefits to the client:

**Ne**

📍 **Woodstock, GA -** 9:09pm local time - 3 hrs ahead

**100%**

Job Success

👑 **TOP RATED**

## Web Developer

Providing useful and meaningful service to customers with their projects; you have a small or big project, I have the knowledge to complete the assigned task or the skills to find the answer somewhere else, but the job will be done.
Self managed and resourceful, able to manage a web development from design all the way to delivery and after sale customer support.

For those of you that don't have a lot (or any) formal experience in the niche you're trying to get into, you've got a few options to establish at least a little bit of credibility to earn those few initial jobs:

Take (and ace) any Upwork tests related to your niche, then call out your stellar results at the top of your profile: "I scored in the top 10% of JavaScript, CSS, and HTML freelancers on Upwork."

Open profiles on sites that allow you to test and share your technical abilities. Some popular examples are <u>codewars</u>, <u>hackerrank</u>, and <u>coderbyte</u>. Call out your rank/score/etc of those at the top of your profile

Build projects for yourself that are similar to what you'd be doing for clients, then provide links to a few of those projects at the top of your profile.

All you need to do is establish enough credibility to get an entry-level project in the niche you're targeting. Then you can use the results of that as credibility for a slightly larger project. Continue this pattern and soon enough you'll have plenty of impressive projects along with the solutions you provided to reference.

*Section summary:*
*Use the first part of your profile to establish credibility. Don't talk about yourself. Focus on solutions, if you can.*

## Have some standards

Perhaps by now you're seeing a trend.

The primary goal of revamping your profile is to bring your potential client to the point where they think *"This is the perfect person for my project"*

Just as you crafted a very specific title for yourself, you should use the second paragraph of your bio to provide more detail on that speciality. Be sure to remain focused on benefits and results, not tools and features.

As an example,

"I specialize in building custom WordPress templates, primarily for companies in the transportation industry. My focus during any custom template development is functionality first, as I have found usability to be the most important factor in a visitor's positive assessment of a website. Creating custom templates allows me to implement elements to drive visitor-to-customer conversion that heavily target my clients' unique audiences."

Immediately following your specialization paragraph, you'll want to clearly define the types of projects you will work on as well as the type you won't work on.

This doesn't have to be long, but it will resonate with your ideal client. Further, it will deter clients that think you're a good fit but don't jive with your standards.

Example:

"I prefer to work on short-term (1-2 month) projects that are being freshly built. I will not accept jobs that require me to inherit code from a previous developer. I also prefer to work with clients that are generally able to respond to questions or requests during the evening hours (PST) on weekdays and try to respond within 48 hours of communication."

*Section summary:*
*Define your ideal project and your ideal client. Call out those projects and clients you won't touch.*

Explain the process, then request action

We're almost to the end of your profile section, I promise!

Clients, especially ones you haven't worked with before, are always a bit apprehensive about "the process".

*What happens after we initiate the contract?*

*When do I get the final product?*

*How do I get updates?*

Take a paragraph (or two) to clearly outline the general process that you go through with your clients. Knowing what to expect during the project will go a long way towards earning their trust during the process of selecting a candidate for the project.

Once you've done that, there's one last bit to the profile:

You've got to ask them to take action.

Something simple will suffice, for example:

"Click the 'Contact' button to invite me to view your project or open a chat with me if I've already submitted a proposal for your project."

*Section summary:*
*Provide a quick overview of what the client should expect after the contract is started, then directly ask them to contact you.*

At this point, you'll be firmly placed in the top 1% of Upwork freelancers that actually look like they know what they're doing, which will unlock access to the top 1% of extremely lucrative projects on the platform.

Your portfolio and other odds and ends

There are only a few bits of your overall presence on Upwork to handle now!

Your portfolio is where potential clients will look to see that you've actually done what you say you can do. However, digging through portfolios takes a ton of time, therefore the vast majority of potential clients will only glance at the thumbnails and titles in your portfolio section or even skip looking at it altogether.

As a result, you don't need to spend a bunch of time putting your portfolio section together.

Just follow a few basic guidelines:

- Have 3-5 entries
- Make sure they're all relevant to your chosen niche (your title, remember?)
- Use the title of each project to focus on the solution/benefit provided, not the tools or languages used

Here's an example of a portfolio section for someone that specializes in web development for real estate companies:



The "other experiences" section is stuffed all the way at the bottom of your profile, so it doesn't get much visual traffic. However, you can use it to share a story or two about past projects with a little more focus on the technical side of things. This will allow you
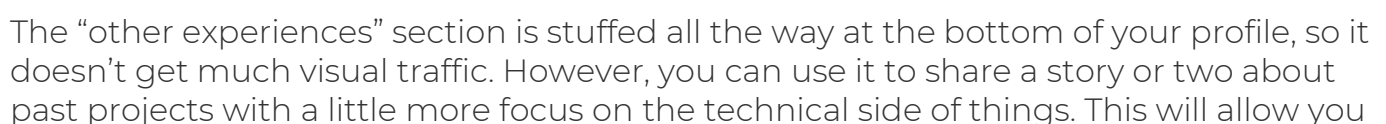
to cash in on searches for certain languages or frameworks without boring the non-tech people that are reading your main profile.

As for your profile picture, it should go without saying that it should convey professionalism. Smile, make sure it's high resolution, minimize background distractions, and get your whole head in frame. It's that easy. Be like Jimmy:



Ji
📍Rockport, ME - 9:31pm local time - 3 hrs ahead

Lastly (though it's a controversial topic), set your prices at what you're worth. Do not try to compete on price on the Upwork platform. It's a game you don't want to win.

*Section summary:*
*Focus on your niche with your portfolio. Get a professional photo. Charge what you're worth. Don't compete on price.*

Now that you've polished up your profile to ensure your ideal client will get in touch with you as soon as they see it, you can move on to the single most important piece of content you'll write on Upwork: your proposal.

## Your Proposal

It is said that first impressions are extremely important. Your proposal will be most clients' first impression of you.

If you mess it up, you don't get a second chance; you're off their radar.

Thankfully an **effective** proposal doesn't mean a **long** proposal.

Getting the attention of a potential client with a proposal is as simple as expressing genuine interest in their project, communicating like an actual human being, and providing value.

Open your proposal with a sentence or two that acknowledges the client's project to let them know you actually read the project description.

For example:

# Cover Letter

**Mixing social media elements with affiliate marketing is an incredibly interesting idea. I'd love to lend my 10+ years as a developer to bring this idea to life.**

This can be difficult for those projects that have extremely vague descriptions ("I need a developer for a new website"). Guess what? Those are clients you don't want. Trust me.

For the ones that do provide some context, do what you can to relate to the project. Similar to how you might open a conversation with someone by complimenting their shoes.

Once you've done that, you've got two options to provide immediate value to them (which hardly anyone else ever does):

- Give a quick summary of a similar project you did in the past along with the positive results of that project
- Give them some recommendations on how to move forward with the project along with supporting points to your suggestion

The first option is a no-brainer for most clients. All they want is a solution to their problem. If you've previously solved that problem for a similar client, you're a shoe-in. This is why it's extremely important to niche down. If you're not niching your services down, you're not maximizing your opportunities to leverage past work for future clients.

The second option is a bit more abstract and can be difficult without sufficient project information or context. The point here is to simultaneously demonstrate your expertise in tech while educating the client.

Perhaps they mention a particular technology they'd like to use but you realize that may not be the best approach for their use case. Maybe they are hoping to implement a certain feature that you know is typically ineffective in their industry. Those things are worth mentioning.

What you're doing is providing a valuable perspective on their problem without them asking for it or paying for it. This goes a long way in establishing rapport with them and you're certain to be on their shortlist as they whittle down candidates.

Once you've demonstrated interest in their project and provided them a mini case study or bit of valuable insight on their project, all you have to do is mention that you'd love to discuss the project more with them and ask them to get in contact with you.

While Upwork does provide in-app messaging, I have found it beneficial to have a Calendly link ([www.calendly.com](www.calendly.com), it's free), where they can set up a 15-minute call. Making yourself quickly and easily available for a voice chat is a quick way to gain another edge over other freelancers vying for the project.

That's it! Too many freelancers over-think this process and somehow still end up with horrible, robotic-sounding proposals full of meaningless buzzwords. Be genuine, relate to their specific pain points, and give value.

## Follow Up

Once you've completed the project (excellently, of course), there are a couple things you'll want to do.

Client feedback is extremely important on the platform so you'll want to mention how great it was (hopefully) to work with them and would love for them to provide a few sentences when they submit their rating of the work that you performed.

This is the kind of feedback you're shooting for:

### Client info capture web form to PDF + website updates

$300.00 earned
Fixed Price

Jun 2015 - Sep 2015

★★★★★ 5.00

*A          is, without pause, my "go-to" web and online marketing guy. I've had the pleasure of working with him on multiple projects and always to full satisfaction. He's thorough, solution-oriented, and always a pleasure to work with (his positive, can-do attitude makes every exchange easy and comfortable). Aaron's skill set is seemingly unending. Most recently, he expertly edited countless underwater video clips to create a fluid, sound-tracked, treasured vacation video! Hire Aaron. You won't want to work with anyone else.*

Upwork allows both parties involved in a contract to share a "star rating" as well as text-based feedback on the experience. Getting at or near a 5-star rating for each project is desirable, but equally as important is the text-based feedback that give future potential clients an accurate depiction of what it's like to work with you.

You'll also want to determine whether to add that completed work to your portfolio section on your profile. Ideally, your portfolio section will be filled with 3-4 examples of your best work **within the specific niche that you're targeting.** If the latest project fits that bill, throw it in the portfolio section. If it's not "top 4" for you but you'd still like to show it off, you can have a section in your "description" area on your profile with a few links to projects as well.

# Some Notes and What's Next

Savvy readers will notice I made no mention of pricing. That's because it's an extremely complicated topic (I could, and probably will, write an entire book on the subject).

For the sake of getting you up and running quickly on Upwork, I recommend sticking to the middle-of-the-road hourly rates between $30-$40 USD for those projects which are hourly-based.

For flat-rate-based projects, simply stick to submitting proposals for projects that you feel the client-supplied budget value is appropriate for the work you'll be doing. Granted, it can be difficult to gauge the intensity or scope of the work based on the project description alone, but that's why you're going to speak with them on the phone before committing to anything.

If, after speaking with a client for a flat-rate-based project, you don't feel that their budget is in line with the scope of work **tell them and let them know that your original proposed project cost was made with incomplete understanding of the project.** You aren't doing yourself any favors by discounting your work, especially when the client doesn't even realize you're discounting your work. If you take the inflated job at the original proposed rate, any similar work in the future from them will be expected at that price point. **Maintain your pricing conviction.**

It may seem counterintuitive, but it's been my experience (and echoed by many other experienced freelancers) that the less someone is willing to pay for web work, the more picky they will be during the project.

The mindset of people looking to pay the least is *"I know exactly what should be done, I just need someone to do it. Therefore, I will be in charge of everything and guide everything."* You will be constantly micro-managed.

On the flip side, those who are willing to pay a premium understand that they are paying you not only for your ability to implement, but to understand how the project fits into their overall business model. Therefore, they understand that you will make the appropriate choices within the context of the project to serve their business best and they tend to keep their hands out of it.

Thusly, it's in your best interest to continually seek to work with higher-tier clients. Work your way up the ladder. You may have to start small, but push the budget boundaries regularly and you'll eventually find yourself earning much more for the same amount of work.

This should all be plenty to help you get those first critical clients on Upwork that will allow you to climb to the top of the charts when any serious client is looking for freelancers. The beauty of Upwork is that once you've established yourself and done incredible work within a niche, you will be quickly surfaced to the top when anybody is

looking for the kind of work you do. If you specialize in a particular industry niche (like SaaS startups, dentist's offices, finance institutions, schools, etc.) you'll reach the top that much quicker.

If you consistently deliver great results for your clients in a particular niche, you will eventually find that your inbox is regularly full of requests to submit proposals for projects you weren't even aware were posted. That's when you'll know you've mastered Upwork and turned it into a truly passive stream of client leads.

I wish you the best of luck on your journey toward freelancing success. If this guide proves to be helpful in any way to you or you have any further questions, feel free to reach out to me.