

SETTING UP YOUR FREELANCE FOUNDATION

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I have identified skills I can monetize that have market demand

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I have researched my industry rates and set competitive pricing

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I have created a compelling freelance profile on at least one platform (Upwork, Fiverr, LinkedIn, personal website, etc.)

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I have set up an invoicing system (PayPal, Wise, Stripe, FreshBooks, or Wave).

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I have a basic bookkeeping system for tracking income and expenses.

FINDING & SECURING CLIENTS

- ☐ I have identified 3+ ways to find clients (freelance platforms, networking, outreach, social media, etc.)
- ☐ I have a list of 10–20 potential clients to contact.
- ☐ I have set up a simple client inquiry and onboarding process.
- ☐ I know how to write a strong, tailored proposal that speaks to a client's needs.
- ☐ I have drafted a professional email template for client outreach.
- ☐ I have a clear pricing structure and service offerings.
- ☐ I have a contract template.
- ☐ I have an invoice template for smooth payment processing.

PROFESSIONAL COMMUNICATION & MEETINGS

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I know how to write professional emails that are clear, concise, and well-structured.

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I understand meeting etiquette and how to conduct myself professionally in client interactions.

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I have set up a system for managing client communication (email folders, project management tools).

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I know when and how to follow up with clients to keep projects moving forward.

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I understand when to use AI responsibly and when to rely on my own communication skills.

MANAGING CLIENT CHALLENGES & COLLABORATION

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I know how to set boundaries and prevent scope creep.

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I have a strategy for handling clients who are vague, unresponsive, or provide conflicting feedback.

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I understand how to handle negative client feedback professionally.

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I know how to work collaboratively with other freelancers and manage dependencies.

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I have a process for managing my workload and meeting deadlines.

CLOSING A FREELANCE ENGAGEMENT & BUILDING FOR THE FUTURE

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I know how to send a professional project handover email.

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I have created an invoice template and understand how to request payments.

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I know how to ask for client testimonials and referrals.

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I have a plan for maintaining client relationships and securing repeat business.