



LEARNING FREELANCE

The eBook

Written and produced by **Duets Learning**
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Chapter 1: Getting started as a freelancer

Hundreds of books, blogs, and websites list the magical steps for branching out on your own. Some play it straight—save money, write a business plan, network. Others go a bit sideways—save money, learn yoga, eat, pray, love. While I value both types of lists, I don't find them useful. How can I tell you how to get somewhere when I don't know where you are or where you want to go? Only you can define that journey. However, while we may take different paths, freelancers do have a few core destinations in common. We all want to survive this transition unscathed.

I have my own list. Below is a list of goals I believe you should strive to build strategies for either before you begin freelancing or at least within your first six months of freelancing.

1. You need to be able to survive with little to no income from the business.

The world is not awaiting your arrival on the learning and development (L&D) scene. Do not expect your new business venture to make front-page news. It should go without saying that if you cut off a prominent (or only) income source, you will need a way to pay the bills. I don't know what this means for you because only you know whether you have supplemental income or other ways to finance your lifestyle. If you do not, you must save money. I can't say how much, but the more, the better. I saved *some* money, but I focused on paying off my credit card debt.

2. You need to know what you are selling.

I quickly learned that I was not selling the same instructional design “package” I provided as an employee. I am selling “Hadiya’s Instructional Design.” I am selling my skills, my processes and templates, and my personality. My clients are buying the entire experience of working with me. Do you know what the “[Your name here] Experience” is? Don't worry about making it unique—it already is because you're unique. But you must define it for yourself, own it, and regard it as an asset to your clients. It has value.

3. You need to know the value of what you're selling.

Speaking of value, what is the value of what you're selling, financially or otherwise? I won't say you need to recoup that value just yet, but you must gain an understanding of what it is and how you can increase that value continuously . . . and what factors may contribute to diminishing it. Freelancers always want to know how much they should charge. I ask, “How much are your services worth?”

4. You need people who will buy what you're selling.

Part of understanding the value of a product or service is knowing what people will pay for it. Where are these people? Yes, they are hard to find, but I bet your biggest problem is that you don't know who they are. Rather than just looking for clients, I suggest you devise a strategy that considers both the needs of your potential clients and what you have to offer. If you're not creating a business plan (that's another topic), at least create a table that lists the types of people/positions who would be interested in buying what you're selling (e.g., training managers, startups, etc.), their needs, your offerings, and how to meet those needs with what you have to offer.

5. You need to manage your business.

There's an entire profession called “business manager.” People do this for a living—and it's their only job. You must now do it in addition to your job. People often ask questions such as “How do I do [this hard thing] and [this even harder thing] at the same time?” There are no satisfactory answers

to these questions. You must do them, or, rather, you are responsible for doing them (other people may actually carry out the work) whether or not you know “how.” The key is to find a way to do them while minimizing the impact on your productivity. The best way to do this is to find tools on both the business side and the products/services side to streamline your processes.

6. You need to understand your revenue cycle.

The life cycle of a project begins once you win the work and ends (theoretically) when you get paid. This seems simple enough, but what if you have multiple projects? Can you use the money from project A for purchase X because the money from project B will come in before your bills are due? It would be best if you found a way to track when money comes in among all your projects, or you’ll never know whether you have enough money for expenses as they arrive.

There you have it! At the bare minimum, you must consider how to manage all six of these issues before you freelance or at least within the first six months of freelancing. You may not have the perfect strategy for each one (and they will change over time), but you must consider them. Some may even include the most important decisions that you’ll ever make.

Chapter 2: Saying goodbye to Total Rewards

In the early days of my career, I was focused on salary. I, like most employees, initially saw salary as the only *real* benefit the company offered in exchange for my services. As one ages, of course, health benefits gain a certain sheen, but during my performance review, I don't want more cough syrup—I want more salary.

In the 1990s, human resources (HR) started talking about the concept of “Total Rewards” to widen the scope of what employees perceive as compensation. Total Rewards includes health and life insurance, vacation/personal time, transit cards, and a lot of other good stuff we take for granted. One company I worked at even gave employees “receipts” for all of the wonderful things it gave us every quarter. The company eventually abandoned the ritual. Why? Nobody cared.

I didn't care either. But now that my Total Rewards are totally gone, I get it. Total Rewards is a thing. And before you leap, you'd better figure out how you're going to mitigate the risk of losing all that free water.

I've created a worksheet to help you figure out what you'll be losing and how you'll get it back. Before panicking as you read the list, consider these three perspectives:

- The list is meant to prepare you, not scare you.
- The list is relative. Some of you may not miss any of these items at all.
- Attitude is everything. I wrote this list, and I'm more committed to freelancing than ever.

Of course, eventually, you'll make your own Total Rewards package that will include all of the professional and personal benefits you get from freelancing. Somehow, I think they will be even harder to walk away from.

Chapter 3: Benefits of subcontracting

Subcontracting is a business arrangement tailor-made for the Solo Freelancer. To subcontract is to contract with another company so that it can fulfill one of its contracts. As a subcontractor, you have two clients: the company that hired you and the primary client. The degree to which the hiring company is involved in the actual project varies. This arrangement can be beneficial, but it has its drawbacks as well.

In this chapter, I'll cover the benefits from my perspective.

Why subcontract?

There are essentially two ways for a Solo Freelancer to be hired (as opposed to creating classes or products independently and selling them):

- Contract directly with a primary client
- Contract with another company or agency that has a contract with the primary client, which is subcontracting

While many L&D Solo Freelancers either only subcontract or wouldn't dream of subcontracting because they want their own clients, most build a client cache that includes a combination of primary clients, agencies, and other training companies.

Benefits of subcontracting

I was initially reluctant to subcontract with other companies. My only trepidation was about sharing the hourly rate for which I worked. But with several direct contracts now under my belt, I definitely see the benefits.

- It can be a win-win situation. The contracting company finds clients for me (for a price), and the company gets to use my talent (for a price).
- I can add more large name-brand companies to my list of projects.
- By being a part of the sales process early on, I am essentially learning how to sell and price from professional salespeople who work for the contracting company.
- I receive a regular paycheck (usually) and may not have to wait the typical net 30-60 days as I do with my primary clients.
- I don't own the relationship, which reduces the drama factor by a random percent.

The contracting company's sole purpose is getting people like us contracts (and consequently making money), so they provide the focus that you don't always have because of all the hats you have to wear.

Chapter 4: Four ways to be an L&D freelancer

New or not-yet L&D freelancers may not know that “going on your own” constitutes a variety of different working arrangements.

Much of the distinction is determined by how you see yourself and your goals (the government also has a say). The one you initially select (or the one that selects you!) may evolve over time, and, at some points, you may experience all four working arrangements at once.

Generally, there are four types of L&D freelancers:

Type 1: The Solo

The Solo is the traditional freelancer who identifies as working only for him- or herself. The Solo works on a project basis and often works on several projects simultaneously. Solo freelancers get clients through their own marketing and networking efforts and via word of mouth, but they also work with consulting agencies and their clients. Solos are more likely to seek out remote opportunities, and the project-focused nature of their roles usually allows for it. The tradeoff for freedom is shouldering the most significant administrative load of the four types because, although you only have to manage yourself, you will probably attempt to do it ALL yourself and be less inclined to outsource your administrative tasks.

Type 2: The Attached Solo

The Attached Solo is a freelancer, but one who typically works exclusively for one consulting agency or one client/company for an extended time. Attached Solos like the freedom of not being an official employee but still want the stability of a consistent work environment (and paycheck). This role is also referred to as “augmented staff” because its scope goes far beyond one project. You fulfill an employee's role—often working onsite and taking on projects as a manager assigns them. If you work for a consulting firm as a W-2 employee (versus a 1099 employee), your administrative burden may be reduced somewhat because the firm manages your tax payments. Some consulting firms even offer health insurance. Attached Solos who work directly for clients or companies (as a 1099 employee) rarely get any benefits beyond payment and are still responsible for managing all of their own administrative tasks.

Type 3: The Solo Provider

The Solo Provider is a well-connected freelancer who may view him- or herself as an overall provider of services—not only as a trainer or instructional designer. So, while Solo Providers work hands-on with projects that best suit their skillset (and interests), they also take on additional projects and outsource (subcontract) them to other freelancers. They do not want to be their only resource but would prefer not to incur additional overhead yet. Obviously, this role requires more paperwork, but since Solo Providers are already comfortable with outsourcing work, they are more likely to outsource tasks, such as managing the invoices they send and receive. This arrangement may also generate “passive” income.

Type 4: The CEO

The CEO has created a corporate (or LLC) entity and identity and has hired employees and Attached Solos (CEOs also contract with Solos and frequently do the work themselves) to work as a team. While all freelancers are technically CEOs, everything changes when you have to think beyond just keeping yourself employed. Also, freelancers tend to adapt their style and offerings to an opportunity while CEOs are more prone to dictate a specific style and offerings to a company to carve a niche for their services.

CEOs are no longer technically a “freelancers” because they are far from “free,” but they still get to chart a course, not just for themselves but for an entire organization.

For many freelancers, the strategic CEO role is the ultimate goal, but, for others, the tactical design/development role is what they live for. However, there are ways to have the best of both worlds.

Regardless of which way you choose to go, you must always think strategically about your own business entity's future.

Chapter 5: Should you have a website?

I find myself frequently debating with other Solo Freelancers about the value of having a website. In fact, MOST of the Solo Freelancers I know DO NOT have their own website with a customized URL.

I find that the website-less fall into three different groups.

Group 1: The Defiant Ones - Many freelancers started their journeys many years ago—before a website was something people could create over the weekend—and they didn’t need one then, so why bother with one now?

Group 2: The Busy Ones - This group believes for some reason that once you have a website, you need to “do stuff” to it every day. Consequently, having a website is just too much work.

Group 3: The Confused Ones - This group doesn’t have the faintest idea of how to get a website—and, besides, it sounds expensive.

You got this information from my website, so clearly I am pro-website. I believe that my website offers many benefits, including the following:

- It adds legitimacy. It proves that I’m not just freelancing on the side or using freelancing to hopefully get hired full-time by one of my clients (clients have told me this).
- It’s a place to store my portfolio. I believe that portfolios are essential. Seriously. I can’t expect potential clients to put their faith in me sight unseen.
- It helps me control my message. I can break free of the structure of social networking sites and tell my story the way I want to tell it.

Allow me to convince you to leave one of the aforementioned groups and join us in the 21st century.

Group 1: You’re right. People have sold services for generations without websites, and there is no reason to change. You are probably getting all of your clients via referrals, and no one has asked to see your portfolio in years. BUT, I offer that this is a risk in today’s competitive business world. A client of mine told me that he had to quit freelancing because he ran out of friends and didn’t know how to sell. I’ve talked to freelancers who eventually DO run across new and interesting opportunities that they do not get because they have nothing to show. Why not cover all of your bases? Perhaps no one will ever look at it, but it’s there, just in case.

Group 2: You’re too busy, huh? Um—it’s a one- to five-page website—not *The Huffington Post*. You may take literally a week (more time than you need) to get the website up, and you may have to update it only when you feel like it. I concede, however, that a little thought (okay, a lot of thought) has to go into it. You must consider how you want potential clients to use your website. If you want people to use it only to learn about you and your services, then build the site and walk away. If you want clients to use it to see your work, then you will have to update it a few times a year. If you want it to be the “go-to place” for all of the world’s instructional design news, then you will have to update it 10 times a day. It’s up to you.

Group 3: Let’s end the confusion here. It’s so easy to build a simple website now that there are people who’ve built one without realizing it (Me: “I saw your website.” Them: “What website?”). Many, many services are free for building (with lots of templates) and hosting a simple website. You may not even

have to buy a URL. Keep in mind that you get what you pay for, but, in this case, nothing + your time can get you an awful lot

Chapter 6: New client orientation

I learned early on that I am not just selling instructional design and development services. I am selling “Hadiya’s Instructional Design and Development Services.” I’m selling the entire experience of working with me. That experience includes more than just the quality of my work. And it goes beyond the typical “roles and responsibilities” discussion.

The experience includes how I get the work done—which processes and tools I use, how I present drafts for review, and how I gather and incorporate feedback. It includes aspects of my work style and personality—how I collaborate with teams, how I build rapport, and whether I set the overall tone as formal or casual.

Before I started freelancing, I thought I would have to adopt my clients’ processes and follow their lead. That has rarely been the case—for me anyway. I see now that I was confusing the process with employee onboarding where you are just trying to learn “how things are done around here.” My clients expect me to be a complete package and to contribute my own methodologies and strategies, which reflect best practices that I’ve gathered from other organizations.

Bringing my own processes to a project certainly works to my benefit. It’s challenging enough to have to switch gears constantly and move in and out of projects. But if I had to use a different template and project plan for each one, I’d go nuts!

This is where New Client Orientation comes in. It’s a new practice I’ve been experimenting with, and, since many of my clients are repeats, I don’t do it very often. However, when I have a new client and it becomes clear that we are using my processes, I give the client a short deck that includes the following items:

- **Descriptions of my design/development cycle and all of the processes and deliverables involved:** Descriptions of each component are important because, as we know, the learning and development community has not quite agreed on a common language. If clients have worked with other consultants in the past, a design document could mean one thing to them and something entirely different to me. I explain what a storyboard is, how it looks, and how to navigate it. I also describe what distinguishes Alpha, Beta, and Gold versions from one another. I repeat these descriptions once I send the actual documents/links.
- **Timeline guidelines:** I like to give a sense of how long different aspects of a project may take. I want to make it clear that just because you need a module completed in two months doesn’t change the fact that a storyboard typically takes a minimum two weeks to draft and review. Time isn’t squishy like that. Now, this can be tricky because you do not want your estimates to become promises. Factors vary from project to project and may impact the timeline (or you have other projects that need to be factored in).
- **Project guidelines (or your “quirks”):** Of course, you don’t want to include a section titled “Your Quirks” in your orientation, but you do want to weave them into an explanation of your other processes. For example, clients are often under the impression that because they return feedback to me earlier than expected, they are reducing the timeline. That is not the case. The timelines I create are intended to accommodate other work. And while they don’t need to be concerned about my other clients, they do need to know that, unless I’ve agreed to a reduced timeline in an earlier discussion, the timelines I set are staying the same. Another thing I make clear is that, since the feedback is probably coming only to me, it shouldn’t consist of a series of questions that the reviewer has for the

group (“Should we really be saying this?” or “Isn’t this changing by the end of the year?”—Um, I don’t know). I ask reviewers from whom they seek answers to those questions and incorporate their responses into the actual feedback.

Chapter 7: Think services, not titles

Instructional Design Manager. Senior Instructional Designer. Training Consultant. I've held many titles. Some I loved (Vice President was nice). Others, not so much (Training Consultant? Can we be less specific?). But my titles never seemed to clearly communicate what I could do. I mean, really do.

Titles aligned me with a department and set expectations about how I should spend my time. But none of them genuinely articulated my value to the organization—at least not in a way that resonated with people outside of training and development.

Although I no longer needed to fit into a hierarchy and be knighted with a title that the organization saw fit to give me, one of my first tasks as a freelancer was to select a title. CEO? President? Learning Consultant? Learning Strategist? Goddess? I've played around with a few. But after a few years on my own, I realized something.

No one cares.

No title I've had or considered giving myself truly described the value I add. Now when people ask what I do, I don't respond with a title. I say what I do. Or better yet, what I *can do* for them. Although the message is the same, depending on where the encounter takes place, with whom I'm speaking, and what my mood is—what I say and how I say it varies.

- Executive or manager who appears to be able to make purchasing decisions: “I help organizations create and implement learning strategies to improve performance.”
- Person at any level who may be able to tell someone about me: “I help organizations create training to improve employee performance.”
- Random person with only a tenuous connection to someone I barely know: “I create training for a variety of organizations.”
- Slightly blurry person I meet at a social gathering after a few drinks who probably didn't even ask me what I do or is even talking to me: “I create training.”

You get the point. While I do officially have a title (the LinkedIn machine must be fed), when it comes to my professional life, I am no longer a title. I am the services I offer. I am what I can do for your organization. Or maybe I'm the Senior Executive Vice President of What I Can Do for your Organization. Nice.

Chapter 8: A project process of one's own

Okay, you finally got the call. They said they'd call on Tuesday and now it's Friday, but whatever, right? You've won the work! The switch is flipped. You're in project mode. Now, what do you do first? Do you have a process for kicking off projects?

When I worked internally, managers always wanted to create a consistent process for initiating and tracking projects. The process did not necessarily dictate the design process itself; rather it governed how documentation, communication, and administrative tasks would be managed.

I was never part of a department that nailed it because, while it looked good on paper, either an "exception" occurred (every time) or people just flat out didn't want to do it. And, most importantly, the managers didn't hold us accountable for it (a few tried: "I'm not going to let you start this huge project with impossible deadlines until you get me that kick-off document." "Um, okay. Sounds good.").

Now that I *am* the training department—wouldn't you know it—I've found that developing and following a process is essential. I could never juggle multiple projects without it.

Here's my kick-off process.

1. **Sign the paperwork.** Any paperwork that must be signed by the client or by me needs to be signed first, including contracts, statements of work, vendor forms, and non-disclosure agreements (NDA). This is common sense, right? But I find that I am most susceptible to starting work too early when the client is a personal friend who works for a large company or the deadline is really tight. I haven't been burned yet—but it has gotten pretty warm!
2. **Have a kick-off meeting.** Insist on a kick-off meeting. Even if all of the documents are signed, I don't start until I see the white of their eyes or hear the pitch of their voice. This is rarely a problem because they want the same thing. However, there have been times when I overlooked this, and it was not pretty. Also, consider regular status meetings. I used to resist this, but I've since learned of their benefits.
3. **Fill out a kick-off document.** Create a template for yourself if you are not supplied with one. You may find a few tools online. Not everyone does this, but it's a good way to get all of your questions answered and documented. I typically include key information about the project, such as the location of the content, the identity of the subject matter experts (SME) and reviewers, and key dates.
4. **Find out who's managing the project plan.** Make no assumptions. If it's you, develop one and seek approval as soon as possible. Even if you don't do a formal project plan, at least lay out the milestones on paper. Several online tools are available for you to use (some free, some not). I use SmartSheet because it includes a Gantt chart, allows for dependencies, and has export capability. Tracking keeps everyone (mostly) focused and on task. Microsoft Excel works fine, but I don't use it because I **MUST** have built-in dependencies. Also, I find that a "tight turn around" suddenly loosens up once the client sees what "tight" really means in black and white (1-day review cycles anyone?).
5. **Set up new clients and projects in my time tracking and invoicing system.** Again, tracking and invoice systems can run from free to way too much. Some products combine project management, customer relationship management (CRM), time tracking, and invoicing all in one. Of course, there's always Microsoft Excel and Word.

6. **Create a new or add to the file structure on my laptop.** I have a directory structure on my computer for all of my projects. The structure is client → project → phase. I set it up immediately. If I don't—MAYHEM!

Chapter 9: Don't forget customer service

Have you ever worked in the fast food or retail industries? Did you ever have to deliver customer service or technical support over the telephone? I have—all of the above. And while my favorite job remains a six-month stint I did at Borders Books and Music back in the early 1990s (RIP), my other forays into customer service were not fun. And it's best that I don't even mention my early career in computer technical support for fear that the flashbacks might return.

For a long time, I considered my customer service jobs of yore to be “throw-away jobs.” They were just ways I made a living until I got a “real” job. Later, as an internal employee who always worked in the “cost center” of the organization, I was encouraged to see our constituents as customers or clients. But, depending on the culture of the organization, it was often difficult to see everyone up and down the hierarchy as a customer. We were too close. We knew too much.

Now, as a freelancer, I often reflect on my customer service roots. From the outside looking in, it's easier for me to see my clients—regardless of where they sit in the organization—as my customers. I've adopted (albeit unconsciously) a few customer service principles that I use for my business.

Principle 1: They don't come looking for me. I look for them.

If my client has to contact me about a deliverable that I didn't deliver as promised, I get a demerit. On the other hand, I fully expect occasionally to have to report my clients to the police as missing persons.

Principle 2: Everyone is my customer.

I must respect my client's organizational hierarchy while simultaneously not letting it affect how I provide service. When I was an internal employee, I would get intimidated if I needed to talk to the CEO. Not anymore. Consultants can't afford to. Remember that you are also a CEO and own it. I don't mean be arrogant. I mean look him or her in the eye and speak your mind. Do not be concerned about whether the individual sees you as an “expert.” If you see yourself as one, trust me, they'll get it. As for people further down the hierarchy, I also see them as my clients (“Hey, they may see you as just the training coordinator, but all I see is the woman who always has the Lindt chocolates on her desk. You're all right by me.”).

Principle 3: The customer doesn't always want to be right.

See what I did there? Your clients don't hire you to be a “yes person,” even if they often act like they do. Your client is your partner. You both share the same goal—a successful project. That goal is compromised if you do not share your expertise. I agree that there is a fine line you must walk. For me, I remind myself that the goal is not to be right but to do what's best for the project. And, yes, often when resources and time are dwindling, it's best to move the project forward with the solution you have even though it's not the one you want.

Principle 4: My customers will feel like they are only one but will know they're not.

Be present, focused, and turn in work that is not just good but professionally done. Reinforce through your behaviors and the quality of your work that the clients' project is as important to you as it is to them. And I never ever say, “I can't do this until next Wednesday because I'm working at another client's site on Monday.” Instead, I say, “I will deliver this on Wednesday.” Be firm and confident, and Wednesday it will be. Of course, this assumes that Wednesday is a reasonable date. You also do not want to deceive the client into believing that this is your only project when it is not because you want to set realistic

expectations (e.g., some will outright ask you whether you have other projects—be honest but be clear that you would have not taken on the project if you didn't have the bandwidth). Again, I believe that firmly stating when you can realistically turn around projects is the best course of action, period.

Finally, my philosophy is that “I am in it, but not of it.” It's not really a customer service principle, but it does impact my client relationships. I tread lightly. I do not want to gossip or get pulled into politics. I do not want to pick sides. I cannot forget why I am here, and I won't let the client forget either.

Chapter 10: Client dynamics: Be intentional in your relationships

When I was an internal employee, the status of the relationships I had with different departments and people was the subject of a lot of talk. My managers often acted as if a SME returning my call was based more on whether I hugged him or her in the hallway than on the importance of the project.

However, those relationships were influenced heavily by a million other factors outside of my control. Sometimes, the leadership in a group has a “history” with the training department (or that manager specifically). Perhaps there’s the perception that the training department “takes too long” or “always says no,” and they’d rather not have us involved at all.

Now that I’m on my own, it’s clear that I have far more control over my client relationships than I had (or thought I had) in the past. At first, the types of relationships I had would evolve simply on a mixture of personality types and other factors. This sometimes resulted in great relationships and other times, not so much. I was leaving too much to chance. I soon realized that it would be in my best interest to be **intentional** about the relationships I formed with my clients and SMEs and not simply rely on my winning personality. I started by adopting a philosophy of driving and continually reinforcing the dynamic of all my client/consultant relationships.

I considered the three patterns into which my client/consultant relationships fall, selected the one that works best for me, and developed strategies to avoid the other two.

Dynamic 1: Followers/Faux Leader

This happens when you somehow become the sole person responsible for driving a project to completion. You seem to care more than the client does, and you are constantly trying to motivate the team to move the project forward.

There can be many reasons for this, but I know it’s more likely to happen when I take on too much of a leadership role and become the primary decision maker. It’s easy to get “seduced” when your client agrees with everything you say, but it’s actually a huge red flag. There’s that saying, “You can delegate authority, but not responsibility.” If clients try, don’t let them.

Dynamic 2: Boss/Employee

When you’re a freelancer, there are two schools of thought on clients as bosses: You either see yourself as being your own boss, or you see yourself as having a thousand bosses—one for each project. The truth is that you are your own boss, both philosophically and legally, for better or worse. Once I truly accepted that, I become a far better consultant.

Clients don’t hire me so that they can supervise another employee. I have knowledge and skills that they want to use. It is my responsibility to let that happen. If I fall into a boss/employee dynamic, I may lose sight of why I’m there—not to make one person happy but to use my expertise.

My primary strategy for avoiding this dynamic is to be confident and prepared in my interactions with clients. I know I’m slipping into the boss trap if I leave every meeting no more the wiser and with a bunch of “to-do” tasks. When I’m prepared, I know exactly why we’re meeting and what I want to gain

from the discussion. I go into the meeting with a few decision points to confirm. The results of these decisions fuel the next steps, of which I am obviously well aware (I should have planned them myself).

Dynamic 3: Partner/Partner

Here's the sweet spot. Your client is not your boss, and you are not theirs. Your client is your partner. Trust me on this. Adopting this philosophy changed everything for me. Yes, he or she hired me (and can fire me), and I respect the reality of that. But I believe that to get the most out of the relationship, we must have a common goal—to efficiently move a project forward successfully. There's no need for grandstanding or trying to prove who knows more. In fact, I no longer think in terms of who's an expert and who's not (myself included). I just think of resources (i.e., knowledge, content, materials, skills), who has them, how can I get them, and to whom I can give them.

Be intentional about the philosophy you choose to adopt. Make sure you understand the implications of your path. Some clients want to be my boss, period, and I must make the choice to walk away or not. But you'd be surprised how easy it is to reinforce an idea if you model it yourself.

Chapter 11: Closing down projects when they end

One of the many new processes I adopted when I went out on my own was a project close-down process. It shouldn't have been new, really. I believe all instructional designers and developers should have one. Where are the source files, exactly? What are the learning management system (LMS) settings for each module? As an internal practitioner, I found it easy to forego the formalities and pat myself on the back for remembering to save the source files to that impeccably organized network drive or SharePoint. But, as a freelancer, I need a more formalized process so that my clients know what to do in my absence.

Here's my process:

- **Wait until the project is over:** The first step is the most difficult one: Identify when the project is really over. I'm not a fan of going through steps 2-4 only to get a call about an SME who just got back from vacation and wants to take a quick look. Yes, repeating the close-down process is a pain, but the larger issue is version control. A year later, when your clients are looking for source files, they may overlook the updated set because they forgot that you re-sent them.
- **Send the published files:** There are two rules to remember here. First, every freelance instructional designer should have some sort of large file-sharing system/process. Second, every freelance instructional designer should have TWO large file-sharing systems/processes in case the first one doesn't work. Companies have come up with all sorts of creative ways to protect their technology. But I can be creative, too :) Oh, and here's a bonus: Use your file-sharing system regardless of the file size. Clients will appreciate not having to contact you when they can't find the .zip files in their email anymore.
- **Send the source files:** . . . after the LMS version is greenlit. I do not recommend sending the published files and the source files at once. Again, re-sending different versions of the same files becomes a matter of version control and is an overall waste of time.
- **Create and complete a close-down worksheet and give it to the client:** I created a Project Close-down document a while back. It provides information about the course's settings and other facts, such as the course approval dates, SME names, and even the voice-over actor's name.
- **Store the source files:** Yes, you sent the client the source files, but you should keep your version as well. On a few projects, my initial contact left the company and his or her replacement reached out to me looking for files. Make sure you have them safely stored and backed up (which is another topic entirely).

TAKING THE LEAP

QUESTIONS TO CONSIDER

THE BUSINESS	THE WORK	THE LIFE
<ol style="list-style-type: none"> 1. What is my business? Why does it exist? 2. How would I describe my business to a potential client? 3. How do my services match my potential client's needs? 4. What distinguishes my services (i.e., type, quality, quantity, etc.)? 5. What services do I want clients to associate my business with? 6. How can I manage my business efficiently with the most negligible impact on my productivity? 7. What resources do I have to operate my business? What resources do I need? 8. What is the value of my services? How can I continually increase that value? 9. How will I find potential clients, and how will they find me? 10. What are the short-term and long-term goals for my business? 	<ol style="list-style-type: none"> 1. Which of my services do I prefer? Which are the most lucrative? Which new ones would I like to offer, and which ones would I like to cut? 2. What title(s) do I believe most accurately reflects my business role (i.e., Owner, Senior Instructional Designer, etc.)? 3. What are the experiences that shaped my professional life that could impact my perspective on operating my business? 4. How do I work differently than I did as an employee? 5. What perception do I have of my company's relationship with our clients? How can I ensure that my perception is always positive? 6. What role do I prefer to play on a project? How can I communicate my preferences to my client? 7. Am I an expert in one of my services? How can I demonstrate my expertise? 8. What are three learning and development philosophical perspectives vital to me (i.e., "People learn by doing," etc.)? How can I incorporate my positions into the work that I do? 9. How can I demonstrate my value before my clients even meet me? 10. How can I create and continuously reinforce a brand that reflects me and my values? 	<ol style="list-style-type: none"> 1. How will my perception of myself as a learning and development professional impact my business? 2. Why am I doing this? 3. How will I continually and objectively evaluate my performance? 4. What is this business worth to me personally, professionally, and financially? What would I be willing to give up to keep going? 5. What is the impact of my business on my family and me? 6. What is the impact of my business on my personal and financial goals? 7. How can I shape my business to match who I am? How will my business shape who I am? 8. What motivates me to stay focused and engaged? 9. In which (work) space (s) am I most productive? 10. What is my perspective on the lifecycle of my business? Do I hope to stay self-employed forever? What are my keep/change/stop signs?

TAKING THE LEAP

TOTAL REWARDS WORKSHEET

Instructions: **Start** by reading through this document. **Next**, cross off the items that are of no concern to you. **Finally**, in the *Mitigation* column, list ways to prevent/reduce each item’s financial impact.

Note that with a lot of creativity (and charm!) and personal knowledge (i.e. ability to build an Access or use Excel database for your accounting needs, etc.) there are ways to avoid paying for many of these items. But remember, time is money. You’ll have to balance the cost of buying a solution with the time it will take to build it – and support it – yourself.

ITEM	IMPLICATIONS	MITIGATION
Consistent salary payments and amounts	<p>For 1099 contractors (U.S.), consistency is relative. If you ensure that the <i>Statement of Work</i> allows for interim billing (i.e., every 30 days throughout the project), you will be paid regularly – that is, if the client pays on time. If you are on a W-2 employee assignment, you will be paid regularly, but the amounts may differ depending on the number of hours you worked during the pay period.</p> <p>In some cases, the perceived instability of self-employed status may make it more difficult to secure personal loans or credit cards.</p>	
Bonuses and yearly increases	<p>In theory, you can give yourself a raise—perhaps even a bonus—but it’s just not the same. And it certainly won’t come in a lump sum every year at the same time. The good news is that your bonus won’t be taxed at 40%.</p>	
Employer-paid tax	<p>The Self-Employment Tax (U.S.) is how an independent contractor pays Social Security and Medicare payroll taxes. In the case of employees, the employer and employee split the cost of these payroll taxes. An independent contractor, by contrast, is both the employer and the employee, so a self-employed person pays both halves.</p>	
Employer tax administration	<p>With no employer to manage tax deductions, you need to pay Estimated Taxes every quarter, or you will be penalized with interest (U.S. tax law). Also, note that you are unlikely to receive tax refunds because your approach to taxes will make substantial “over payment” less likely. However, there is the possibility of overpaying your Estimated Taxes and receiving money back during tax season.</p>	

ITEM	IMPLICATIONS	MITIGATION
Health Insurance	<p>You will need to furnish your own health insurance.</p> <p>Note that some consulting firms with full-time, long-term subcontractors are required to hire them as W-2 employees. Some of those firms will offer health insurance based on their own eligibility criteria (e.g. hours worked, project length).</p>	
Life Insurance	<p>You will need to furnish your own life insurance.</p> <p>Note that some consulting firms with full-time, long-term subcontractors are required to hire them as W-2 employees. Some of those firms will offer life insurance based on their own eligibility criteria. It may not be free, however.</p>	
Business Insurance	<p>Many of your direct clients (especially large organizations) will require that you carry liability insurance policies worth well over one million dollars. While you may not need it when you are just starting out, you may eventually be required to buy it.</p>	
Paid time off	<p>No <i>paid</i> vacation, sick, or personal time</p>	
Retirement	<p>No 401K match or pension</p>	
Discounted and Free Items	<p>Some organizations have arrangements with other companies and secure discounts for their employees. The discounts you will no longer receive may include:</p> <ul style="list-style-type: none"> • Copy and printing services • Parking garage discounts • Movie coupons • Gym memberships • Cellular service and other technology • Software deals • Public transportation • Childcare <p>Don't forget the free stuff (at some companies):</p> <ul style="list-style-type: none"> • Free water and other beverages • Free food (or occasional lunches) • Free holiday parties and summer events (open bar, anyone?) 	

ITEM	IMPLICATIONS	MITIGATION
	<ul style="list-style-type: none"> All the equipment you need to conduct business – computers, supplies, mobile devices (for some). Yes, your employer is obligated to give you these, but you're the employer now! 	
Events and Professional Development	You may have to pay for all of your non-free professional development opportunities. This may include travel, lodging, and all expenses.	
Business tools and supplies	<p>You will need to invest in your business and buy the tools and equipment you need to get the job done.</p> <p>This may include:</p> <ul style="list-style-type: none"> A laptop computer Computer peripherals, like a printer (optional: scanner, fax) Microsoft Office (or iWork) suite An email and calendar solution Accounting software (usually an online subscription) Productivity subscriptions (most are optional, some are free): Customer Relationship Management system, large file transfer system, webinar system, conference call line, file backup system, FTP capabilities All office supplies eLearning development software and other graphic/audio editing tools Access to an image database A website/URL (optional, but HIGHLY recommended, can be FREE) and/or premium LinkedIn (maybe?) 	
Technical support	Printer not printing? Computer not...computing? You cannot take your computer to technical support and get a "loaner" while your computer is being re-imaged. Even if you have a "guy," he's not on the third floor waiting for you with four other people just like him (Mitigation tip: Have a work around for EVERYTHING.)	
Additional services	<p>Some of you may have to acquire new professional services that you didn't need in the past:</p> <ul style="list-style-type: none"> Legal representation 	

ITEM	IMPLICATIONS	MITIGATION
	<ul style="list-style-type: none"><li data-bbox="430 268 634 296">• An accountant<li data-bbox="430 317 672 344">• Technical support<li data-bbox="430 365 886 392">• Graphic design/marketing help/editors	