

BlackFreelance

Strategy Workbook



Successful freelancing is all about having a structured plan that evolves as you grow. This means it's time to sit down and put together your personal freelance strategy!

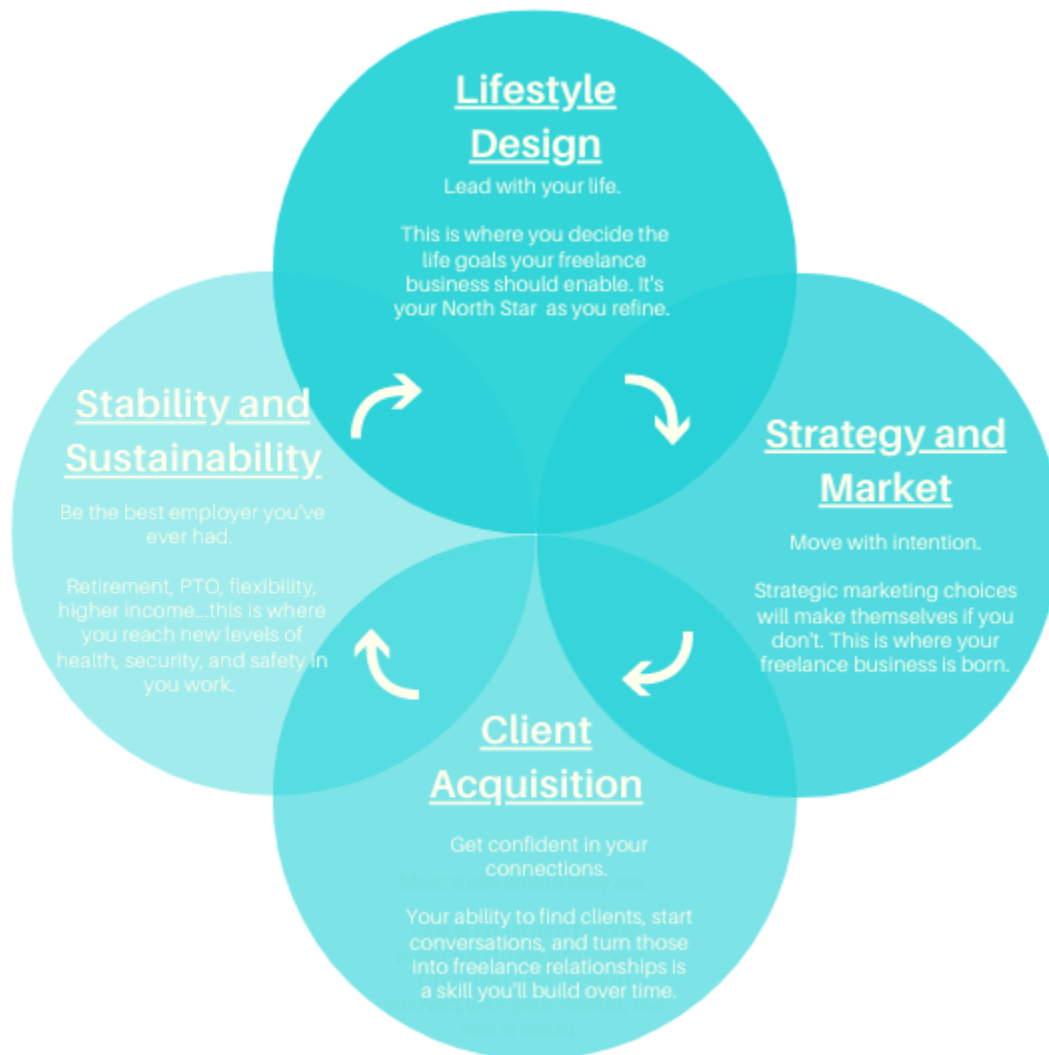
You're going to be returning to this document regularly to make changes and updates over your freelance career — so don't feel pressured to fill it all out at one time.

It's divided into 3 "phases" that mirror your progress through BlackFreelance.com. These phases also align with your overall growth as a freelancer in the coming weeks, months, and years.

If you need help or have any questions, you can always email me (connect@blackfreelance.com) but you'll also find links to helpful materials in each section.

Ready? Let's do this!

Megan



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Phase 1: Setting up The Basics-Lifestyle Design

Most established freelancers have a set of fundamental elements that don't change much across their careers. Three of the biggest are their motivation, skill set, and who they support as freelancers.

What Do I Want Freelancing to Do for Me?

It's tempting to just jump into freelancing and see what happens, but that's a great way to end up frustrated, underpaid, and running back to the [employment trap](#). If you write down a few basic reasons you're interested in freelance work, you'll have something to return to as a reminder when things get bumpy.

This is the start to your [freelance mission statement](#). You might think only "official" businesses need one, but we do too...maybe more! A mission statement is what keeps us oriented in a sea of options that is always expanding.

Spend some time on this one. You'll be tweaking this over months and years and the questions below will help you kick off the creation and refining process.



Why am I interested in freelancing? (improve control of my life, increase my income, grow my career, understand employment prospects, etc.)

What level of freelancing am I interested in right now? (full-time, part-time, occasional, six-figure income, etc.)

What level of income am I looking to generate? (full-time, supplemental, retirement/savings, fun, debt reduction, etc.)

My Freelance Mission Statement



You'll be using a basic structure of:

- Lifestyle goals
- Business description
- Business outcomes

You'll notice this is a little different than most businesses. It's more personal. That's because, as freelancers, there's a heavier overlap between our selves and our work outcomes. Here's an example of mine.

To create a location-independent, low-time investment, and high-earning one-person freelance business that consistently improves my quality of life – one that contributes to the enterprise healthcare content marketing landscape through tangible results and more sustainable relationships for tech vendors

My Freelance Mission Statement

Resources

[9 Questions To Ask Before You Start Freelancing](#)

[4 Ways You Can Use Freelancing to Build a Professional Career](#)

[Nation1099 Rate Calculator](#)

What's my Skill Set?

Most freelancers focus on one skill set, even if they do lots of things well. Even if you continue to practice in others, choose one skill set to focus on while you're at BlackFreelance.

Remember, your skill set is part of your lifestyle design. Choose something you enjoy or at least find interesting.

What's my primary freelance skill set?

Resources

[A Note on Freelance Skill Sets](#)

[Skill Set Resources](#)

Who Hires Me?



Knowing the *types* of organizations and individuals who pay freelancers like you will make your freelance life *much* easier. List as many as you can (this will probably change over time), but you can guess just 1 to start.

Resources

[People Want to Pay You...You Just Have to Know Where to Look](#)

***Next Steps:** Now is a great time for you to sign up for [the BlackFreelance newsletter](#) (it's free!), where we cover topics directly related to developing Phase 2.*

Phase 2: Building Momentum-Strategy & Market



Congrats on building your basics!

It's time to look at what your freelance business is really going to grow into. This means identifying a niche, translating your skills into basic services, and starting a foundation of continuous skill development.

What's my Focus?

Happy freelancers usually have a niche. This is *especially* true for high-earning freelancers.

Niches help you simplify your marketing, earn more, get more from your efforts, and meet your client needs better— the secret sauce to keeping them satisfied and wanting to keep you on as a long-term trusted partner.

Choosing a niche (or a sub-niche) can take time though, so if you can't think of something super detailed now, that's ok.

My Niche



Materials to Help

[*5 Simple Specialization Questions That Will Make You More Money*](#)

[*What Choosing a Niche Really Looks Like*](#)

[*Want to Work in Multiple Niches? These Tips are for You.*](#)

[*2017 Freelance Niche Report \(via Smarter Freelancing\)*](#)

What Do I Offer?

A lot of freelancers get overwhelmed figuring out how to turn their skills into services. That's totally understandable — and also possible to work past.

I will tell you though, that this varies WILDLY by skill set, and even niche, so your best bet? Search for freelancers who have the same skill set as you (either on [Upwork](#) or a

general search engine) and look at their services lists. Pick just a few things you think you could produce and list them here.

My Basic Services

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Resources

What Freelance Services Should I Offer?

How Do I Improve?

As a freelancer, you should be developing your skills as you grow, so keeping a list of your favorite educational methods and materials can be *extremely* helpful. As you run across books, podcasts, courses, and programs, drop them here.

My Favorite Skill Development Resources





Resources

[*Learn a Freelance Skill*](#)

[*Skill set Resources*](#)

Where Do I Find Community?

If there's one thing that can make or break a freelance career, it's community.

No freelancer is an island. We ALL need connection to fill in the gaps that employers used to fill and, sometimes, just keep us motivated.



Ideally, you should have a general community of freelancers to talk to (like this one!), but also one for your skill set and possibly even your niche.

My general community is:

My skill community is:

My niche community is:

Resources

[\(Drop down under "The Basics", "Choose Your Skill"\)](#)

How Do I Keep My Business Healthy?

You might not be a huge business, but as a freelancer, you're still a business. There's a lot to think about, but there are more services popping up every day to make life easier for us. Keep notes here of how you keep all the inner workings of your business straight.



How do I get paid and track work? (e.g. Harvest, PayPal, Wave, etc.)

Harvest, PayPal, Wave, etc.

How am I tracking expenses to write off on my taxes?

Do I have a contract or legal protection?

How am I handling my taxes?

Myself, hiring an accountant, etc.

What about health insurance, disability, life insurance, etc.?

How am I addressing retirement?

Roth/SEP IRAs, Solo 401k, etc



Do I need structural protection? (i.e. an LLC/S-corp) Business insurance? What am I using?

Resources

[Your Business, Your Money](#)

[Insurance for Freelancers](#) (Freelancers Union, U.S.)

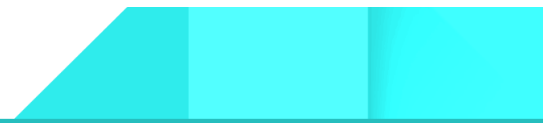
[The Ultimate Guide to Taxes for Freelancers](#) (Freelancers Union, U.S.)

Next Steps: You can stop here and continue to refine and develop your freelance career on your own – BUT – let me tell you from personal experience, it's a lot easier when you're connected to a freelance community. I'm going to invite you to [try a free month in the BlackFreelance Mastermind community](#). Come and stay for one month or a few years, whatever works for

you and your career. It's less than you pay for Netflix, and you can cancel at any time, no questions asked.

Phase 3: Client Acquisition and Sustainability

This phase is the simplest, but also the most rewarding.



Most of the work you do from here on out will be about applying what you've already established, setting up strong habits, and reflecting on your results.

The [BF Mastermind Community](#) is designed to stay with you every week in building good habits, evaluating yourself, and staying connected with your freelance community. You can record and update your results below.

How do I Get Clients?

If there's a second thing that can make or break your business, it's marketing.

We all dream of doing work so good that it sells itself, but the truth is, that's highly uncommon. If it does happen, it's either years into a career and not at a level that will get you to the freelance life you want.

That's why we market regularly, strategically, and actively.

I will dedicate this much time each week to marketing.

Short Term: (Place an X next to at least 1 in each category)

☐	Platforms
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☐	Bidding Sites
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	General/Company Job Boards
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Mid Term:

	Follow-up with previous clients
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	Networking (in-person and digital)
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	Warm-email prospecting
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	LinkedIn Marketing
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Long Term:

	Content Marketing
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	Word of Mouth
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	Inbound Social Media
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Resources

[Marketing Hub](#)

[Get Your Marketing Minimums In](#)

[Short, Mid, Long – Which Marketing Level Are You Missing?](#)

What Does my Online Presence Look Like?



Today's freelancers need an online presence. A simple path that many freelancers take involves graduating from a profile on a site like Upwork, to a strong freelancer LinkedIn profile, to a simple website, to a more involved web presence.

What is my online presence? (Website, bidding site profiles, Twitter, LinkedIn, etc.)

Is it working for me? (Is it bringing in work or helping convert people from prospects to signed clients?)



Which aspect seems to work best in bringing me work? (LinkedIn, Twitter, Craigslist, Upwork, etc.)

What would I like to change about my presence online?

Resources

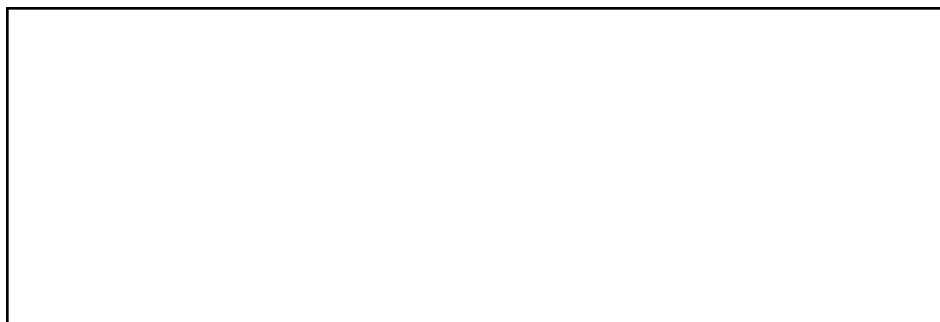
[*Your Freelance Profile is More Important Than Your Resume \(Sample Included\)*](#)

Who or What Position Makes the Decision to Work With Me?



Efficient marketing can change your freelance game and knowing how to zero in on who (or what title/role) within an organization finds you or makes the decision to hire you, is crucial.

This is easier to figure out if you've got some work experience. As you get a few clients or jobs, you'll start to see the same titles pop up over and over. List those here. (e.g. marketing director, content director, CFO, CMO, etc.)

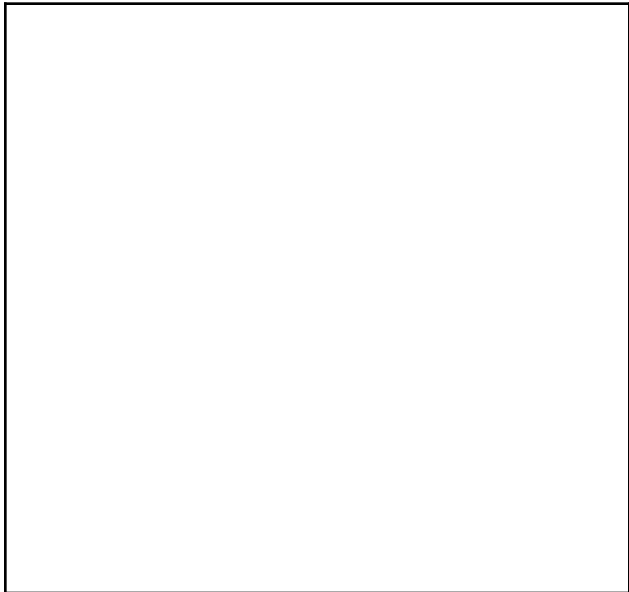


Resources

[\(Drop down under "The Basics", "Choose Your Skill"\)](#)

Examples of My Ideal Clients

We've all got 'tastes' when it comes to clients...work we love, work that pays well, work that's fun and challenging, etc. As you grow, you'll develop preferences when it comes to who you work with. This can range from the industry, to the organization size, even organizational maturity level or a manager's personality. Note these tastes here.

A large, empty rectangular box with a thin black border, intended for the user to write down their preferences or 'tastes' regarding clients and work.

What Value Do I Provide?



Clients don't buy services, they buy value. Learning how to build your value statement makes getting better clients and raising your rates *much* easier.

Review the results your clients see from your work and use it to fill out this value statement. (The first two blanks are your ideal client and your skillset. The last is the value you provide.)

"I help _____ (do) _____ so they can
_____."

I help

(do)

so they can

Resources

[Intro to Value](#)



[Don't Know the Value You Provide as a Freelancer? Read This.](#)

Who Are My Strategic Partners?

Your freelance partners can completely change your career, and you can even help build somebody else's! They don't come out of thin air though, so keep track of who helps you grow and who you can help too.



Resources

[Want to See Your Business Blow Up? Get Some Strategic Partnerships in Your Life](#)

[Network Exploration Workbook \(File, Make a Copy\)](#)

My Strategic Partners Are

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That's it! Once this is complete, don't just toss it to the side.

This document will get you through all kinds of marketing, income, and growth hurdles (plus, we circle back around to it twice a year [in The Mastermind Community](#)).

If you need help, again, catch me at connect@blackfreelance.com. Happy (strategic) freelancing!

Megan

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