



freelance preparedness checklist

Are you thinking about going full-time freelance? Here's a step-by-step guide to make the transition go as smoothly as possible. And the best part is that you can do much of this while you're still employed. That way, when you do make the leap, you can hit the ground running. Ready, set, go!

12 MONTHS BEFORE

Lower your monthly expenses

Pay off debts, refinance loans and set up budget billing with your utilities. If it makes sense, find a roommate or move to a cheaper place. The idea is to make your monthly living expenses as consistent and as low as possible because your freelance income will fluctuate. This will allow you to figure out how much you need to work and how much you need to charge to stay in business.

Create an emergency fund

If you haven't already, make sure you have about six months of living expenses saved up when you take the plunge. That way you won't be tempted to give up if your business doesn't take off right away, and you won't stress out if you have a slow month.

6 TO 12 MONTHS BEFORE

Name your business

Maybe you're planning on using your actual name. Maybe you've had an idea for a business name for awhile. Now's the time to do some research and see if anyone else is using it (or something similar). Purchase the URL, create a Twitter account, start a Facebook page (you don't need to publish it yet), open an Etsy store, create a Pinterest account, build a Google plus page ... Basically, secure your name everywhere you can think of. Why? Well, you don't know in what ways your business will grow in the future, plus you don't want someone else using your business name in these arenas, which could create confusion and divert potential customers.

Write a business plan

This may seem like a pointless exercise, but the process will provide an excellent road map for starting and growing your business. Craft your mission statement, describe your products or services, determine your target audience, research your competitors, outline your marketing strategy and estimate your income and expenses. Luckily, there are lots of great online resources to help you get started.

3 TO 6 MONTHS BEFORE

Brand yourself

This is the fun part! Hire a designer that specializes in branding (like Bright Spot Studio) to bring your vision to life. You'll want to develop your brand identity prior to building a website or launching any marketing materials. Resist the urge to throw something together. A good designer will take a close look at your business plan and then develop a unique, visual identity that will make you stand out. Think of this as an investment and not an expense. Be forewarned: This process might take a couple months, but don't rush it. Relish in the time and attention your designer is pouring on you. It's all about you, you, you. How often does that happen?! And don't forget to get some business cards designed with your fabulous new brand while you're at it.



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1 TO 3 MONTHS BEFORE

Make sure you're covered

Start preparing all the contracts and legal agreements you'll need to operate your business. You can probably find some decent templates online, which are a great starting point, then run them by a lawyer to make sure your i's are dotted and your t's are crossed. Figure out if you'll need business insurance and, if so, shop around for an appropriate policy.

Create a website

This is a crucial step in your marketing plan. Potential clients need to be able to find you online, and you want to make a great first impression. This is where you'll be able to showcase your skills, sell your product/services, establish your expertise, etc. It will be a virtual hub that connects your entire web presence. Make sure it's easy to use and reflects your branding in terms of tone, message and visuals. Unless you're a designer yourself, I strongly recommend hiring someone. They'll be able to build something faster and with more professional results than if you try to do it yourself. You'll have plenty to do just writing content, compiling work samples, requesting recommendations, etc. Leave the web design to a pro.

1 MONTH BEFORE

Think social

Now that you've figured out your messaging, update your social media profiles to reflect your personal brand and what you want to do. Rewrite your LinkedIn bio, update your Twitter profile, create a nice-looking Facebook page ... Wherever people decide to connect with you, have a clear and consistent story ready. And make sure all your avatars are the same, too. This is such a simple concept, but I'm amazed at how few people do it. If you're using a picture of yourself, use the same picture everywhere — that picture serves as your logo and lets people know instantly that they've found the right person, especially if they're already connected to you on another network. You can use an actual logo, too, just make sure it's legible and recognizable at a small, square size.

2 WEEKS BEFORE

Build out your network

Most, if not all, of your business will come from people you already know, so now's a great time to update your contacts. Make a master list of everyone you'd like to stay in touch with (this could be the beginning of your future mailing list). Divide the list into sections like Family, Friends, Classmates, Coworkers (subdivided by different jobs) and Professional Contacts (subdivided by professional organization). Once you've compiled this list, connect with them one by one on all your social media platforms. Your best contacts could be your dormant connections so be sure to get back in touch with people you haven't talked to in awhile. (A personal note with an invitation request can go a long way.) And make a concerted effort to grow your network, too. Practice your elevator pitch, grab those business cards and take your show on the road — networking events, conferences, happy hours — anywhere your potential collaborators or clients will be hanging out.



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THE BIG DAY

Announce your decision

Tell everyone you know — friends, family, former colleagues — about your new business. (Aren't you glad you made that list?) You never know where your customers or clients will come from so the more people who know that you're available for work the better. Even your former employer can turn into a client, so don't burn any bridges when you make your exit.

ON YOUR OWN

Give yourself some time

Success won't happen overnight. It's going to take awhile for your marketing campaign to bring leads, for your Twitter audience to grow, etc. But stick with it. If you have a tendency to freak out, set a time frame (like 6 months, one year or two years) that you'll wholeheartedly devote yourself to your new endeavor, after which point you'll give yourself permission to find a new employer. Having an escape hatch might make you feel more comfortable and work even harder until you hit that milestone. Just be sure to give yourself as much time as you gave your former employer — in other words, at least 40 hours a week every week.

Believe in yourself

When business is slow, self-doubt will creep in. "Will I ever get another client?" "What if I'm not good enough?" "Did I make a huge mistake?" The bottom line: If you don't believe in yourself, no one else will. It's not going to be easy (I doubt anyone said it would be), but it will be immensely rewarding (I promise). When times are tough, turn to a personal project to remind yourself of why you started down this road in the first place. And before you know it, you'll have so much client work you'll wish you had more time to finish that personal project you started.