



Getting Organized

a checklist for freelancers

- ✓ **Define your client profile** and cultivate only those who match that profile.
- ✓ **Identify your capacity** and say “no” to work that will push you beyond that limit.
- ✓ **Create a written scope of work for each client** to avoid confusion and dissatisfaction.
- ✓ **Use a color-coded master calendar** to distinguish - at a glance - between clients and personal appointments.
- ✓ **Create an organized workspace** that aids productivity.
- ✓ **Consider using productivity tools** like apps or even just good old-fashioned pen and paper to keep organized.
- ✓ **Outsource repetitive tasks** to free yourself to do the work for which clients are paying and secure new business.
- ✓ **Communicate effectively with clients** about project status and to secure information you need to best serve them.
- ✓ **Begin and end each day with a review** to stay on top of projects, meetings, and client needs.
- ✓ **Practice self-care** to promote your mental and physical wellbeing and avoid burnout.