



# OpenStudio

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**Start Your Freelance Business Now**

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**By William Frazier**

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# Introduction

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A clear trend is emerging across the U.S. - over [34% of the workforce in America is freelance](#) and that number is growing. Companies are starting to understand the value of working with freelancers and individuals are taking control of their professional lives. If you're considering going freelance for the first time or you want to take your freelance business to the next level, this guide is for you.

I've designed this guide to provide a comprehensive overview of freelancing and how to get started, or how to evolve your current freelance business. I'll walk you through an overview of key topics, from branding and positioning, to onboarding clients and I'll suggest the best way for you to get started on your own.

This guide covers:

- ✓ Identifying why you want to freelance in the first place
- ✓ Branding and positioning yourself to get the clients you want
- ✓ Developing an online presence in order to successfully promote your business
- ✓ Onboarding and managing multiple clients
- ✓ Resources that can help make this process even easier



## Chapter 1 - Identify The Why

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When choosing a freelance path, the first step is to make the conscious decision and identify why you want to freelance in the first place. This path is definitely not for the faint of heart and will require equal parts hard work and introspection. Here are some common questions people should consider when going freelance:

Are you looking for the ability to work from home or anywhere else you choose? One option is to find this working for someone else. It may take a little while to build trust, but more and more companies are allowing their employees to work remotely.

Is work-life balance something you are constantly trying to reach? If you tend to lack discipline, a full-time job can actually give you more of this, since you clock in and out at a certain time.

Or do you want to steer your own professional life? Have you come to the realization that each day, you are further and further from reaching your full potential and living a life that is fulfilling?

If your inner voice screams option number 3, then you're in the right place. For me, this realization came a little earlier than others during college. While learning from a liberal arts curriculum that stressed "connecting the dots," I was being told what skills I would need and what projects would hone those skills.

I slowly realized this sort of thinking would lead me to the traditional nine-to-five job that seemed to lack autonomy, or the ability to make my own decisions. This has always been important to me. If I make a

bad decision, I want the ability to make it and learn from it. If I make a good one, I want the chance to identify why it was good and move forward.

For me, freedom has always outweighed immediate financial stability. Once you identify your why, it's time to weigh it against sacrifices that will have to be made.

That work-life balance I mentioned before will be non-existent while getting started. As you may have already guessed, working for yourself means not only are you doing the actual work (designing, developing, writing), you are also responsible for making your business sustainable. That is, at least while you're starting out.

A good way to get started after identifying WHY you want to freelance is to position yourself as an actual freelancer, which you will learn in the next chapter.

**Bonus:** When considering diving into freelance, it's important to remember that Rome wasn't built in a day. In order to become completely self-sustainable, it will take time and hard work. Just like most business endeavors, it's important to balance your long-term goals with your day-to-day actions.



**Key Takeaway :** Take time to dive deep in order to figure out what you actually want for your professional life and decide if freelancing is the best way to obtain it. It's not going to be easy starting out.



## Chapter 2 - Position Yourself

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Now that you've thought through why you want to freelance, the next step is to position yourself as an actual freelancer.

I'm not talking about someone who sits at home in their pajamas while checking emails on the couch or kicking back on a beach somewhere with WiFi. I'm talking about positioning yourself as someone who solves a need for someone else and gets paid for it.

This may be the most underappreciated step in getting started. It's easy to start looking for work (which isn't always a bad idea). After all, the quickest way to be a freelancer is to do freelance work.

However, in order to position yourself for long-term success sooner, it will be helpful to communicate who you are, what you do, how you do it, and the value you offer to others. This will set you apart from the sea of amateur freelance talent out there.

So how exactly do you positioning yourself? Start with these questions:

- **Who am I?** Are you a designer? What type of design are you both good at and enjoy doing? Brand identity design? Motion design? If you're a writer, what types of writing projects do you want to focus on?

- **What do I do?** Now is the time to start getting a little more specific. Exactly what type of services do you want to offer clients? If you're a designer, do you offer brand identities? Web sites? Promotional material? If you're a writer, do you offer copywriting for websites? Microcontent

for social media? Content strategy? At this point, the more focused you can get, the better.

- **Who do I help?** Who is your ideal client? Is it a restaurant owner that needs branding and promotional material? Is it an entrepreneur or startup that needs web design? Once again, the more specific your focus, the clearer your message will be.

- **What value do I provide?** This is where it might get a little tricky. You may not be used to talking about your discipline this way, but it will help you in the long-run. As a designer, you don't just create logos, business cards, and websites. You make someone's idea, product, or company more tangible, more real by helping them acquire customers, users, and other clients.

The final positioning statement should look something like this:

My name is William Frazier and I am a freelance designer that partners with entrepreneurs to help them start their own products, services, and businesses by offering ideation, branding, web design, user experience, user interaction, and pitching materials.

This positioning statement is relatively short and contains who I am (William Frazier, a freelance designer), what I do (services in ideation, branding, web design, user experience, user interaction, and pitching materials), who I help (entrepreneurs), and the value I offer (helping them start products, services, and businesses as a design partner).

This is a clear and concise way to explain what you do to someone who might need your help. After all, how can someone hire you if they don't know what you do and how you can help them?



**Key Takeaway :** Focus in on who you are, what you do, who do you help, and how do you help them.



## Chapter 3 - Branding

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You've made the conscious decision to go freelance and you can clearly communicate what you do with words. Time to take it a step further and communicate what you do visually.

This is where branding comes in. Some people consider branding and a logo to be synonymous, but there is much more to it than that. A logo is just one piece of the overall puzzle that is a brand identity. A successful brand is made up of at least the following:

- A logo system that includes different variations for different uses (web, print, 1-color, full-color)
- A color system that specifies what colors make up your brand and in what order to use them
- A type system that explains what fonts to use and what cases (wordmark, headline, body copy)
- An iconography system that includes simple icons, spot illustrations, and other visuals to communicate your offerings, value propositions, or other relevant information
- A promotional system that applies the branding to different promotional material, such as business cards and client leave-behinds.

As you can see, there is way more to consider than a simple logo for your brand. A lot of people tend to speed through this point in the process, when it can be one of the things that set you apart from everyone else.

If you don't personally have a design background, this is one of the few



cases that it is worth finding someone else who can create a professional brand for your business. After all, it is way more expensive to hire multiple amateurs than one professional.

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**Key Takeaway :** Find someone who can help you create a professional brand (i.e. not just a logo) and consider each piece as a part of the whole.



## Chapter 4 - Networking

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Judging by the title of this chapter, you may be expecting me to urge you to go to countless Meetups and industry events in your city. That's exactly what you should do...if you want to waste time while getting your freelance business up and running. Personally, I always approach networking with a quality over quantity mindset.

When you're beginning your new freelance path, it's important to remember that initially, you are on your own. This can be a little terrifying because no one will be there to bring you new clients or tell you what to work on day-to-day. It's all on you.

Once you come to terms with this, the next step is making sure that you're not alone for long. Since you have already positioned yourself and you can now communicate your value to potential clients (see Chapter 2), you are ready to spread to the word.

Who should you talk to first? There's a good chance your family and friends already know that you've chosen the path of enlightenment (i.e. freelance) thanks to Facebook and possibly texting, if you're parents are hip enough. So, it's time to look outward. It's extremely important to start meeting people who can help you, whether you already know them or not.

Start with your personal network and work your way out. This is where it helps to have a clear and concise positioning statement. If you choose to position yourself as a writer who helps launch Kickstarter campaigns, it's a good idea to start meeting with companies who are considering

crowdfunding. And where exactly would you find these companies?

In my opinion, local coworking centers can help take the initial stress out of building your network and are always a great place to start. However you've positioned yourself, these alternative working hubs can connect you with diverse members from all types of industries. If you dig deep enough, you should have no trouble finding clients within these communities, whether it is a coworking member directly, or someone from their own network. After all, word-of-mouth is the strongest type of referral.

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**Key Takeaway :** Networking is about quality over quantity. Look into alternative settings, like local coworking centers, incubators, and academic centers in order to tap into their existing networks.



## Chapter 5 - Online Presence

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After focusing in on why you want to freelance, positioning yourself effectively, and getting the word out, it's time to establish a call-to-action by creating your online presence.

A good place to start is a website. This may be obvious in this day-and-age, but a well-made website can help make the business side of freelancing even easier. Just like anything else you create, it's important to consider how it's going to be used.

Typically, your website is meant to bring in and onboard new business. This can be as simple as explaining who you are, showing the work you've done, and providing a way for the prospective client to contact you, usually a simple form.

If you want to kick things up a notch and make your life even easier, start introducing downloadable material like a "getting started guide" or an "onboarding questionnaire" that help remove some of the guessing game for the client. I also use these documents to see if a client is willing to respect my process by reviewing and filling them out. I'll dig deeper into onboarding clients in Chapter 7.

Don't have web design experience? With online tools such as [Squarespace](#), creating a website is extremely easy and intuitive. As long as you have high quality images (both of yourself and your work) and branding, you should be able to setup a site within a day or two.

This may also be pretty apparent, but you'll need a domain name and

email to complete your online presence. These days, any email ending with @gmail.com is fairly standard, but you can create a custom email to match your domain. To search and setup a domain and custom email, you can use [Google Domains](#).

When I first started, www.williamfrazier.com was \$15,000 to purchase and williamfrazier@gmail.com wasn't available. So, I got a little creative and decided to purchase [www.williamfrazier.is](#) instead as well as use william.frazier.is.available@gmail.com as my professional email. Both of these have become a memorable part of my online presence.

Now that your online presence is up to speed, it's time to attract the right people using social media and blogging. I'll talk more about this in the next chapter.



**Key Takeaway :** Creating a website is easier than you think, as long as you have invested in high quality imagery and professional branding.



## Chapter 6 - Social Media & Blogging

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Remember that website you created? As magical as the internet is, no one is going to see it unless you start getting it in front of the right people.

This is where social media and blogging come into play. With all of the social networks out there, it can be tempting to cast a wide net and set up accounts on all of them. Not only is this a waste of time, but it can also show a lack of focus. Below is a personal breakdown of different social networks and how to use them:

[Facebook](#) is perfect for sharing most long form content, like articles or images of your work. Typically, you'll want to build a community around what you do (like forming a page or group around your specific business), share your work, and link back to your website.

[Twitter](#), in my opinion, should be used by everyone to share insight, experience, resources, references, and work in short form. It allows you to build a following, position yourself as an expert in your subject matter, and connect with others who are relevant in your field.

[LinkedIn](#) is sometimes criticized for not being as useful to freelancers. I disagree. If you set up your profile correctly, you can make the most of the platform. I typically use it to share past client projects, natively publish new articles I write (which also link back to the original), and share as a digital resume.

Platforms like [Instagram](#), [Dribbble](#), and [Pinterest](#) highlight visual content

and allows others to see your work in short snippets. These are great for sharing previews of your work and linking back to your website.

Are you a writer? Trick question. Whether you're a freelance designer, developer, marketer, or project manager, writing should be a fundamental way to communicate what you do to your audience. [Medium](#) and [Tumblr](#) are quick and easy options to start self-publishing your own work and spreading the word.

At the end of the day, the most important thing to remember is to have a clear idea of who you are, what value you offer, and what channels will lend themselves to communicating this value. Once again, go for quality, not quantity.

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**Key Takeaway :** Determine what social media platforms are catered to your specific industry and focus on creating high quality content to share.



## Chapter 7 - Onboarding a Client

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So, you're all setup and now everyone knows you're available for freelance work. But what happens once someone wants to actually hire you? Traditionally, you fumble through the process of onboarding a client until you eventually create a process that works for you. Let me help you out by offering a framework to build from:

**Getting Started Guide:** This guide serves as an overview for your freelance business. It will have a lot of the same information as your website while also going into a little more detail about your offerings and your process.

**Questionnaire:** No matter the type of project, this document should work the hardest for you. This is your chance to find out as much information about the client and their project as possible. It also gives you a chance to vet them and see if they are willing to invest time into your process. If someone isn't willing to at least fill out one of my questionnaires, I usually see it as a red flag.

**Proposal:** The proposal is where you will spend most of your time while onboarding a client. This is where you take everything you've learned from the questionnaire and unpack it. In order for your proposal to do its job, it should include (at the very least) client and project information, a list of deliverables for the project, the proposed cost, and a timeline for project completion.

**Contract:** Over the years, I have been continually surprised to see a lack of contract use among freelancers and small business owners.



Even though it may seem an unnecessary inconvenience in the beginning, it will protect you in worse case scenarios and communicate to your clients that you take your freelance business seriously. In order to make it even easier, there are some projects where I combine the proposal and contract into one hybrid document. It essentially becomes a proposal with terms and a place for signatures at the end.

Once the client signs the contract, I typically have two other requirements they need to deliver (along with a signed copy). These are a non-refundable project deposit and any existing files that will help inform the new project. Both of these allow me to do my job more efficiently and are usually non-negotiable.

This process didn't come to me on day one. It took years of trial-and-error as well as learning from others. I hope you'll take this with a grain of salt and make any personal tweaks to better fit your own freelance business.



**Key Takeaway :** Establish yourself as a professional by creating a customized onboarding process that takes out a lot of the initial guesswork.



## Chapter 8 - Managing Clients

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Congrats! You've landed your first client and you've successfully started the project using your onboarding process. Now comes the hard part.

Over the years, I've heard a lot of people complain about working with clients. And in my opinion, it always boils down to one of two problems:

1. Lack of communication
2. Mismanaging client expectations

This is where freelancing becomes an artform. Not only do you have to provide high-quality work, you have to navigate the icy waters of client relationships. Let's break it down a little more.

The first problem is relatively straightforward. No one likes to feel as if they're being micromanaged. However, since you are providing a service to another human being, communicating with your client is a must.

In this specific case, I tend to gravitate towards over communicating. When in doubt, send that email, share progress, or let them know you are still actively working on their project even if there isn't any progress to show.

The second problem is by far the hardest. In order to manage a client's expectations, you have to first know what they are. These expectations should first be established during your onboarding process and then continually addressed throughout the project.

Are they expecting you to show a lot of progress throughout? Did you set this expectation?

If you are specifically designing a website for them, have you established that you aren't responsible for the copy or imagery?

There isn't a catchall way to manage ALL expectations, but if you take care of the first problem (communicating with the client), then they should always know what to expect.



**Key Takeaway :** Over communicate and set clear expectations for any client you work with. This will be even more important once you are managing multiple clients.



## Chapter 9 - Project Management

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You've successfully worked through your first client project, and it went so well, you landed another client! This is a great problem to have, if you are able to juggle multiple projects at once.

Now is the time to consider project management. This can be one of the trickier aspects of freelancing that sets successful individuals apart.

The reason this can be so difficult is because there is no one ultimate solution. There are countless methods to choose from when it comes to organizing all of your projects. With so many options, it can be a littler overwhelming to choose which one to use. Here are a few programs to get started:

- [Basecamp](#): Great for project management with teams
- [Trello](#): A visual approach that uses boards, lists, and cards
- [Asana](#): A beautiful platform that makes it easy to break things down into actionable steps
- [Evernote](#): Not conventionally used for project management, but it has worked for me over the past few years. Turn projects into notebooks where you keep everything organized and actionable.

These are just a few of the countless options. The main thing is to decide a system based on how you personally work. It took me a few years to create my own customized system which combines project folders and daily action steps on Evernote.



**Key Takeaway :** There is no one perfect method for project management. Use the process or program that works best for you. After all, you're the one that will be using it day-to-day.



## Chapter 10 - Finance

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We all know dealing with money isn't the easiest, especially when it comes to managing it on your own. This is another one of the few cases that I usually recommend outsourcing to a professional, especially when it comes to tax season.

Throughout the rest of the year, tracking your own expenses can be fairly easy and straightforward. Just like project management, there are a number of different programs to use.

- [Quickbooks Self-Employed](#): Top-rated small business software for finances
- [Mint](#): Gathers and displays all of your financial information in one place
- [Expensify](#): Offers one-click expense reports in real time

In this particular case, I am fairly old fashioned and use Google Sheets to track my business expenses. For each expense (and income), I track the amount, vendor, description, and date. If possible, attaching an invoice or receipt helps even more.

Once tax season rolls around, you should be able to take your records of income and expenses to a professional accountant. The more diligent you are during the year, the more time and money you'll save during this hectic season.



**Key Takeaway :** Take a few minutes to stay organized with your finances day-to-day, and it will save you a lot of time and money in the future.



## Chapter 11 - Legal

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I thought I would save this chapter for last. Legal help may seem intimidating, however, it is extremely necessary if you want to stay in business down the road.

This can be a little daunting starting out, so I will only include the most basic steps to get started:

1. Get the right licenses and permits
2. Register your business name (if it is different than your given name)
3. Pay estimated taxes
4. Create necessary documents (proposals, contracts, invoices) and have them reviewed by a lawyer
5. Complete a W-9 form when you get a new client
6. Receive, review, and keep a 1099 form from each new client

You may notice that “incorporating your business” isn’t included in this list of steps. As a freelancer, you aren’t legally obligated to incorporate your business. You have the option of acting as a Sole Proprietor, which means you are the only one running the business and there is no distinction between you and the business itself.

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**Key Takeaway :** Don’t let the legal part of freelancing scare you. There are plenty of resources online. Also, make sure to have a lawyer review any legal documents you are planning on using with clients.





## Conclusion & Next Steps

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Congratulations on taking the first step in controlling your own professional life! I know how exciting and terrifying this can be, especially when there isn't any one proven method for success. Hopefully this guide has given you insight and actionable resources that will help you “take the leap” or level up your own freelance business.

In the meantime, you can find even more resources and helpful advice by joining our community. If you haven't already, take a look at our packages that offer community access at [openyour.studio/packages](https://openyour.studio/packages).

As always, you can reach out for questions, comments, other resources, or recommendations. You can find me on Twitter at [@openyourstudio](https://twitter.com/openyourstudio) or online at [info@openyour.studio](mailto:info@openyour.studio).

