

THE GRAPHIC DESIGNER'S

# BUSINESS ACTION PLANNER

GUIDEBOOK

**INSIGHTS AND INSTRUCTIONS FOR  
FREELANCE GRAPHIC DESIGNERS**

CORWIN HIEBERT

“

**BE A FREELANCER  
NOT A LONE RANGER.**

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# BUSINESS ACTION PLANNER

A DIVISION OF  
**TAENDEM AGENCY INC.**

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## TAENDEM AGENCY INC.

A boutique management and marketing firm providing professional services to creative entrepreneurs. The Taendem team helps creative people elicit curiosity and generate demand for their ideas, services, and work by guiding them through the process of making good business decisions.

Learn more at [Taendem Agency](#).

## CORWIN HIEBERT

As business manager to freelancers, digital artists, and entrepre-

neurs, Corwin cares about the "why" and the "how" of making a life, and a living, from one's creativity. He manages talent such as world-renowned photographer, publisher, and best-selling author David duChemin. Corwin is the author of *Living the Dream: Putting Your Creativity to Work [and Getting Paid]* (Peachpit Press, 2013) and has had eBooks published by *Craft & Vision* and *Flatbooks*. Corwin presents business and marketing lectures and workshops at photography and design conferences throughout Canada and the

United States; he is also a guest lecturer at [Vancouver Media Arts Institute](#), [Langara College](#), and [Capilano University \(IDEA Program\)](#).

Connect with him through his website where he doesn't blog, he delivers at [corwinhiebert.com](http://corwinhiebert.com).

## EILEEN ROTHE

Eileen is a business manager who loves helping creative freelancers get organized so they can focus on what they do best (which is usually NOT the “adminy” stuff). From brainstorming sessions, to email blasts, to events, and even that dreaded paperwork, finding an inspired-yet-practical process

for everything is, well, her thing. A singer/songwriter herself with an [EP on iTunes](#), Eileen has insight into what it means to put your creative self out there: the exhilaration and the hard work. For three years she co-produced the CREATIVEMIX ideation conference, bringing together artists, freelancers, professionals, and students into a one-of-a-kind exhibition showcasing creativity and collaboration. She loves cheerleading creatives and their endeavours. Her mantra is simply this: stop getting good at something you don't want to do, do what you love and see where it takes you!



# THE BIG IDEA

## LIVING THE DREAM

Freedom from a traditional day job, to work for yourself, is a kind of freedom that comes with a lot of risk—I get that. In order to embrace this entrepreneurial journey you must challenge the status quo, you must take all kinds of risks, all in hopes of one day making a living doing what you love.

Vocation independence is a sweet sound in your ear but it can too easily turn into the song of the siren. Instead of being lured into creative obscurity or financial ruin,

my hope is that you'll roll up your sleeves and shed the blood, sweat, and tears it takes to make this business idea of yours truly come to life. I'm here because you're here; we are in this together.

The journey must be a daily effort. Michael E. Gerber, in his book *The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It*, says over and over again that we need to work on our business, not just in our business, and that's proba-

bly one of the top issues I see amongst excited, maybe even in-demand but stressed-out freelancers. It's easy to get into the work, to get in so deep that you don't have time to invest in your own future. I come across it all the time—talented creative people with ugly websites, no pricing strategy, a hodge-podge sales process, or financial systems run amuck. This happens because they feel like they just don't have time, and I get it, I understand. I just want to encourage you right now to say, "Hey, this is a big deal. I'm a big deal. I am going to block out some time to work on my business, otherwise I'm not going to get where I want to go."

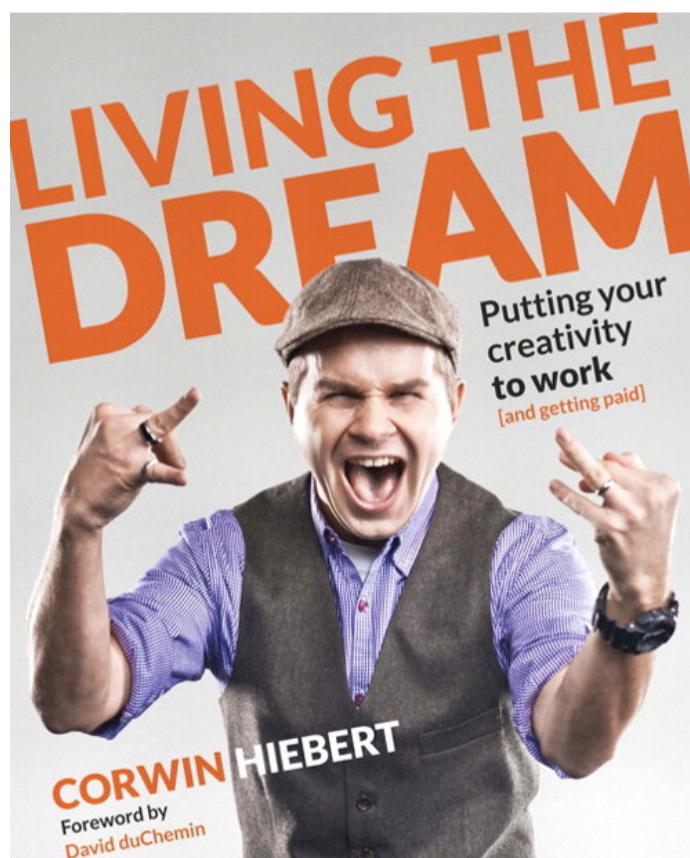
Hopefully, this process of being creative and in the marketplace is both challenging and invigorating in a way that you feel excited to climb your own corporate ladder.

*"Turning pro" is a catchphrase that perpetuates the feeling of "not quite having arrived." It implies that you're not a pro unless something big and magical happens that transforms you from dilettante hack to creative professional. From what I've seen, savvy entrepreneurs do not let this idea distract them. Ever. Instead they strive to do good work and get paid.*

- *Corwin Hiebert, Living the Dream*

*Buy it on [Amazon](#).*

*Read Corwin's articles at [Peachpit](#).*



# RELAX A BUSINESS PLAN DOESN'T HAVE TO SUCK

You want to move beyond the chaos of working on the side, you want to freelance in such a way as to build towards something bigger, you want to build an empire for one (or more), you want to establish a creative business instead of casually whoring your talent to earn some extra cash. What you want is to remove the mystery and stress associated with trying to generate revenue from your creative hobby. You've worked in the margins long enough, and you want

a business plan. I read you loud and clear my friend, loud and clear.

A business plan, you believe, will help you successfully start and grow your business instead of simply floundering in the periphery of your industry. I am here to tell you that you're right. I am also here to tell you this can be an exciting and manageable experience instead of what you probably think will be a horribly painful experience.

Business planning usually sucks because you've come into the process with a lot of preconceived notions. You've heard about business planning, you've seen elaborate business documents, graphs, pie charts, fancy tables of fiscal wizardry. You have so little time to work on your business that doing any sort of planning beyond the usual chicken scratches in your notebook, can be overwhelming. You may have even started a business plan at some point but it's been abandoned (don't worry, you're not alone).

Instead of making a planning effort that ends up just sucking the life right out of you, why not make a business plan that gives you confidence to move forward, creates momentum, and allows you to focus.

Business planning doesn't have to suck.

As a creative in the marketplace you are an entrepreneur regardless of your business acumen. You want to break free from the constraints of traditional work, increase your financial autonomy, and grow a creative enterprise that makes you happy. Accomplishing this, or even simply gaining momentum towards it, is easier than you think; you simply need to make one good business decision at a time. Good business decisions are a result of good business planning. A business plan is a snapshot of what you want your future to look like. In most cases, a formalized business plan will serve a few purposes:

1. To outline your vision for the future, and to document the strategic focus you're planning to pursue as well as how you aim to implement your plans.

2. To reassure those close to you who would be affected by the failure of your graphic design business.

3. To justify the economic value and long-term viability of your graphic design business to financial stakeholders.

This toolkit is geared to help you create a short-term, manageable method by which to plan and act on your ideas, or to address the barriers or concerns you face as a freelance or independent business owner. So, in effect, this tool can help you with the first two objectives listed above. The third one requires a more sophisticated effort that will take, at minimum, legal and financial advice, and is out of the scope for this tool. It's important that you know this.

# THE TOOLKIT

## HOW IT WORKS

Your **Business Action Planning Toolkit** is a *hands-on* resource that you can use on a regular basis to bring structure and focus to your business building efforts. A **Business Action Plan** assists you in identifying key questions and issues and then gives you the kickstart you need to brainstorm with more intentionality, evaluate and strategize, remove barriers, implement your ideas, and maintain momentum.

It sounds good, doesn't it?

A Business Action Plan is for you, something for you have at the ready to help you achieve your dreams. It's a tool that creates a manageable and serviceable structure for your hopes and dreams.

I have used this tool as both a consulting deliverable and as a workshop curriculum, and now Eileen and I are sharing it with you as a self-help resource because we believe it will help you in your effort to "live the dream."

I believe that simple action is better than sophisticated chatter or inaction. I believe this tool can be a catalyst for you to discover the questions you need to ask, help you get organized, understand the business building tasks ahead, and give you a cohesive place to record your answers and actions.

In comparison to a traditional business plan, a Business Action Plan is very different:

- The business elements are organized in a slightly different order than what you may be accustomed to. They have a flow to them based on my experience in helping creative freelancers build a plan for their vocational future. They are however not exactly sequential. They are organized in such a way as to decrease the chance of inertia; as you work through things you'll likely leave blanks and then come back to items later to complete them. This is not a prescription for starting a business; it's more like a shotgun approach to help you gain momentum.

- It lives in a cloud-based environment through the wonders of Evernote®. The end result is not intended to be a snappy looking document that you'll publish. Rather, it's a work in progress (WIP); it's for your business-building pleasure and it's a digital workspace to help you move forward.
- Very little credence is given to your competition because there are bigger issues to tackle and I don't want you to get distracted worrying about what other people are doing.
- There is only a subtle reference to governing documentation (like contracts, copyright, etc.) because these elements are not momentum builders; they are management tasks and are best discussed further in your entrepreneurial journey or on a case-by-case basis.

My encouragement to you is to never feel the pressure to produce a finished business plan. Set goals and deadlines and work towards them but this is not an exam—don't cram this stuff in. A creative business requires a certain amount of scheming and percolating and I

## **The Tale of Two Cautions**

*(1) The desire to simply do more of something you love is not the right motivation for starting a business. You must meet a need within the marketplace in order to justify a business operation otherwise you're setting yourself up to be a martyr for your craft.*

*(2) A creative business venture is not likely to be your savior from debt. If you're in a financially compromised position then know this: I have yet to witness the building of a creative freelance business as the means by which someone recovers from the weight of high-interest consumer debt.*

hope you feel you can work through this all at a pace that brings you joy.

Your creativity and passion are a gift to the world; when consistently expressed and delivered on demand they also likely have economic value and that is a very special thing. I wish you great success as you carve out a vision and a plan for accomplishing your entrepreneurial dreams.

## **THE TOOLKIT UNZIPPED**

The Business Action Planner Toolkit is a trilogy of awesomeness designed to help you rock your freelance business-building efforts. It includes the Guidebook, the Business Action Planner, and the Worksheets.

## **GUIDEBOOK**

Right now you're reading the **Guidebook**. This handbook includes my insights and instructions on the eight key elements of building a Business Action Plan. Once we get through the first few set-up chapters, each numbered section of the book is organized in the following format to help take you through the process:

- **Objective.** A clarifying statement about what you could aim to achieve.
- **Insights.** Remarks and notes to help bring context to the subject.
- **Kick Start.** Questions and commentary to help spark preparation.
- **Business Action Planning.** Specific tasks for you to work on.

I should mention here that my insights take a few different forms—some of my remarks are informative, others are rants, but most of my commentary is meant as simple encouragement... a nudge to help you in the right direction. I've written this guidebook in the hopes that you feel you can read it straight through (like a small business crash course) or treat it like a workbook and flip flop between it and your planner.

## **Guidebook Available in Two Formats**

*This guidebook is available in PDF format and as an Evernote® Notebook for your viewing pleasure. The work is protected by copyright law so please don't cut and paste for evil, only for good.*

## BUSINESS ACTION PLANNER

The Business Action Planner is a tool that lives in the form of an Evernote® .enex file; once successfully uploaded to your Evernote® account (see the next section) you can start working on your very own plan. The eight key elements correlate with the guidebook so you can stay in sync with what you're reading about and what you're working on.

Each numbered section starts off just like it did in the Guidebook:

- **Objective**
- **Kick Start** (questions only)

And then the planning elements are broken down into five bite-sized components:

- **Action Item(s).** A specific task, or a set of tasks, that if accomplished will help you achieve your objective.
- **Deliverable(s).** A placeholder area to write, edit, and add images or links.

*Take Control of Your  
Action Planner*

*We have provided you with tangible action items, deliverables, next steps, and success indicators but these are simply suggestions—we wanted to help you get the ball rolling. Based on your business needs you may feel it's best to edit or even delete our notes. No problem... it's your plan.*



- **Next Step(s).** A specific follow-up action, or actions, for you to consider.
- **Success Indicator(s).** A note about how you can evaluate your completed action item(s).

## WORKSHEETS

There are also a few Worksheets included. These spreadsheets will help you drill down and create strategies beyond having a good answer; they're a resource for you to use in an ongoing manner. The worksheets are available in both Microsoft Excel and Mac Pages file formats. Additional bonus worksheets will be delivered to your email inbox as they become available.

### *Don't Reinvent the Wheel*

*Both Microsoft Excel and in Mac Numbers have template galleries. The worksheets you see here are simply based on the personal monthly budget templates available in these applications. Aim to use what's available to you (instead of trying to re-invent the wheel). The logic, charts, and formulas which have been integrated into these templates are designed to be modified - so that's what we've done for you. You'll notice that we've added some revenue and expense categories (Cost of Business) that relate to your creative freelance business and ensured that they integrate into your personal cash flow (Cost of Living). Please feel free to edit, format, or adjust these templates as you see fit.*



# GETTING STARTED WITH EVERNOTE®

The Business Action Planner has been formatted exclusively for Evernote® users to use anywhere, anytime, and on any device.

New to the Evernote® service? No problem. Here's a brief rundown of how to get started, as well as the steps to import the Business Action Planner.

1. Sign up for a free [Evernote.com](#) account.

***Evernote® Keyboard***

***Shortcuts***

*Make the most of this amazing service and learn which keystrokes can make you at least look like you know what you're doing.*

2. Install and sign in to the desktop client application:
    - a. [Mac](#)
    - b. [Windows or Windows 8 touch](#)
  3. If you haven't done so already, download the Business Action Planner Evernote® Notebook (.enex file format) from your confirmation purchase email and save it to a desired location on your computer's hard drive.
  4. From your Evernote® desktop client application:
    - a. Click *File > Import Notes* from the top navigation bar and browse to the .enex file you saved earlier.
    - b. When asked "Would you like these notes placed into a synchronized notebook?" select Yes.
  5. Install and sign in to the free app on your mobile device:
    - a. [Apple](#)
    - b. [Android](#)
    - c. [Windows](#)
    - d. [Blackberry](#)
  6. From your Evernote® desktop client application, on the top navigation bar:
    - a. Click *Evernote® > Preference > Sync* and complete the steps to connect your mobile device.
  7. Finally, from the main dashboard of your mobile app select the Settings icon (gear box) then select the Sync Now text link to complete the process.
- You're now ready to start working on your very own Business Action Plan! Feel free to modify it to suit your needs. If you ever need to start over, simply upload a fresh copy.

# QUESTIONS YOUR DREAMS NEED NOT BE IN JEOPARDY

Freelancers who are trying to tackle a business issue typically make one of two mistakes: they allow themselves to become paralyzed with fear and indecision or they look for answers to the wrong question(s). Every freelancer comes across issues with their business, no matter how talented, lucky, or privileged they may appear to be. The best thing you can do is to make sure you're asking the right questions and that you're pursuing the answers with the same ferocity with which you express your creativity.

I've contributed to, and been exposed to, a lot of creative businesses, and this is my chance to guide you towards the business management and marketing approaches and practices that I feel will be the most helpful. Knowing what questions you have yet to ask yourself, or honing the questions you already have in mind, is the most important part of establishing a manageable Business Action Plan.

As I've mentioned, this toolkit includes a lot of questions for you to consider. In our work, before we can successfully consult and support the business management and marketing needs of our clients we spend time and energy getting to know them as humans and as artists, and we dig and poke into their operation in order to create clarity. To one client or another I have asked every single question stated here; I've never fire hosed them with every single question you'll find in this toolkit—that's a special treat I've saved just for you.

Don't try to answer every question. Some questions are simply catalysts for you to craft a more pertinent question that better relates

to you and your plan. In fact, one of my hopes here is that I'll help you find your own questions. These questions are a starting point; if you have a concern of your own then phrase it as a question, write it down in your Business Action Plan and work to address it. Rolling up your sleeves and digging into the guts of your business and your creative work is the mature way to plan your business.

Also, due to my exposure to numerous creative fields and industries I attempt to relay the transferable elements that are applicable to any kind of business, as well as give you some fresh perspective, or better yet, inject some immunity to "industry-itis"—a horrible condition that produces unsightly competition, bad-mouthing, and limited creative vision.

**“ SOONER OR LATER THE ANSWERS WILL HIT YOU IN THE FACE. KNOWING WHAT QUESTIONS THEY ADDRESS WILL HELP KEEP THE SWELLING DOWN.**

---

# TASKS EVERY GOOD PLAN SHOWS UP WITH BELLS ON

One of the sweet things about planning your business within the Evernote® service is that whether you have 19 seconds or 19 minutes to work on your business you can still accomplish something. Changing a note's status, priority, reminder, or assigning a tag is all planning. Even the smallest efforts mean that you're giving your business the respect it deserves.

Good planning is good planning; there are only so many ways you can skin a cat. Here are a few principles and tactics of good action planning to take into account when

working with your Business Action Plan within the Evernote® environment.

## **Business Planning for Busy People**

### **Tags**

A little logic can go a long way. When you categorize your business action notes you can quickly and easily view them in a collection that makes sense. Especially as your plan begins to grow and morph, when you add notes and import other elements like images, documents, and hyperlinks, your Evernote® workspace can become a little chaotic. Tags are listed in the bottom left of the dashboard (web browser/computer application), or they reside under the Tags category on the home screen of your mobile edition.

*As you become more familiar with the Evernote® service you'll discover amazing features that will increase your enjoyment of the planning experience.*

[Learn more about how to rock Evernote®.](#)

We've created some tags to help keep you organized and help you structure your plan so that it's more manageable during those crazy times. Here are the tags you'll find in the Business Action Planner notebook:

**ELEMENTS.** These are top-level categories of the plan. Each subsection rolls up nicely into a parent category:

- |               |              |
|---------------|--------------|
| 1. Foundation | 5. Buyers    |
| 2. Goals      | 6. Offerings |
| 3. SWOT       | 7. Marketing |
| 4. Identity   | 8. Money     |

**PRIORITY.** Aim to always have three action items starred as a priority. It's easy to be overwhelmed with the business building effort so it's important to identify and focus on only the items that will create the greatest amount of momentum or clarity, or remove the most stress if addressed.

- High
- Medium
- Low

**STATUS.** Using traffic light colours, you can quickly assign the current condition of your action items. If you have limited time but don't want to neglect your business for another second, you may want to update the statuses so that during your next business planning effort you can focus on the most urgent items. The colours can be used as follows:

**GREEN.** Everything is on track. You might be working on it, you might not, but the action item doesn't require your immediate attention or you simply don't have any concerns about its progress.

**YELLOW.** You have a concern, an outstanding question, or you're waiting on something to happen before you can move forward. It's on your radar and you have scheduled time to address it within the next seven days.

**RED.** The item is off track and momentum is lost. The action item has stalled, or there's a significant issue with getting it addressed and this poses a major problem. This item should be assigned a top priority.

**Colour-free**

*At the time of this guide-book being published the Evernote® service does not allow users to assign a colour to a tag. A work-around is to simply change the font colour of the associated note.*

## **Shortcuts**

It's always a good idea to cut to the chase with the piece of your plan that you have the most energy and excitement to deal with. There will always be one thing, one idea, that stands out from the rest—don't let this gem die under a pile of notes.

You prioritize a note by either dragging it to the Shortcuts area in the top left corner of your dashboard (web browser/computer application) or by wiping the note to the left from the home screen of your mobile edition (this reveals the quick menu) and then selecting the star icon to assign it to the Shortcuts category.

## **Reminders**

Milestone dates and/or deadlines are extremely valuable in providing the self-inflicted accountability necessary to get things done. Good ideas die a slow death when their completion is not associated with a moment in time.

Within the Evernote® service, through the clever use of their clock icon, you can pin notes to the top of your Business Action Planner. These in-app timed alerts trigger a reminder to get something done (and in the case of your mobile device, depending on your badge settings, can also pop up on your display to remind you when you're not actively using Evernote®).

There's no better time to start planning your creative business than right... now!

“

**BACK IN THE OLD DAYS, LIKE AS  
IN 2011, WE WOULD SCRIBBLE  
ON A STICKY NOTE AND SLAP IT  
ON OUR BATHROOM MIRROR.  
TIMES HAVE CHANGED.**

---

# **1. FOUNDATION**

---

**CLARIFYING  
WHAT IS AND  
WHAT WILL BE**



---

# 1.1 REALITY CHECK

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***Summarize your past, and more importantly, your present situation as a (potential) business owner: a reality check.***

Actively planning for your future can only be done in light of your current situation. When an emerging business owner comes to terms with where they're at right now, both in terms of their creative skill and their ability to deliver on a promise, they'll make more mature decisions. No matter where you're at in the development of your business, a little self-reflection and objectivity is the mature thing to do.

You could choose to reflect on any number of things—money or creative skill, availability or

a cool opportunity—it doesn't really matter. Just make sure that you're being honest with yourself about how you're feeling about your life, and your work life, prior to starting this focused planning effort.

**“BEING HONEST WITH YOURSELF ABOUT THE PRESENT WILL HELP YOU MAKE FEWER DUMB-ASS DECISIONS IN THE FUTURE.”**

---

In a “dear diary” fashion, respond to the following questions as you see fit, keeping in mind that the goal is to simply state where you’re at right now, in this moment.

# How would you describe the humble beginnings of your business (or business idea)?

Embrace some nostalgia for a moment and think back to how it all began (or maybe it's starting right now). As you document the story of why you've decided to make a go of this business effort it's important to remember that you probably didn't get here by yourself, and that your entrepreneurial spirit didn't just happen, it grew out of experiences connected to your talent and career path.

# What five things do you most value—or are you most excited about—with respect to your creative work?

It's very common for a busy freelancer to look up from their hectic work life and suddenly realize that they're spending most of their time creating work they're not proud of. Sacrificing your creative spirit for the almighty dollar should only happen when the benefit outweighs the cost and that should be an exception to the rule. Jotting down a few key thoughts about what aspects of your creativity, in either their vision or execution, will help you steer your business towards a more fulfilling endeavour.

# **Can you describe a big break you've had? If you don't feel you've had one, describe one you'd like to have.**

A tipping point is often present in a successful business. Whether it's lucky or hard-fought, describe a moment in the past that, as you look back upon it, you can't help but appreciate just how much of a positive impact it had on your path as a freelancer. If you haven't had a big break yet don't worry—you can scheme one up in the Goals section later on.

# If you could emulate someone's business, whose would it be and why do you feel it is a realistic example?

When it comes to business there's nothing new under the sun; when it comes to creativity the sky is still the limit. However, aspiring to become a celebrity within your industry is not a helpful business exercise. Set your sights on someone you admire and respect, and whose talent and business operation represent reachable goals for you within the next five years. Realistic admiration is more valuable to your freelance business than idolism.

# **What has taken place recently that leads you to believe you're in a good position to pursue a freelance business?**

You should always be looking for signs of momentum. Take a moment and look back on this past year to assess your creative development, education, time commitments, events, relationships, employment situation, or whatever stands out to you. Some of these activities have helped prepare you to move forward with your business and it's a good idea to remind yourself of their impact.

# How much business revenue, and most importantly, net revenue have you generated in the past six months?

If you've been working at this for a bit and you've started to generate some revenue, that's great! Knowing how much you've put in your pocket (after expenses and taxes) is always a good number to be aware of. It's a reality check that every good business owner should self-administer.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Now that you've reflected on these questions, write a candid and short paragraph that summarizes your current status as a freelancer.

## Next Step(s):

- Share this paragraph with two (2) trusted humans and ask them if they agree with your assessment and if they have any insights or feedback regarding your previous business efforts.

## Success Indicator(s):

- Your trusted humans agree with your assessment of your current situation and you're motivated to push forward.

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# 1.2 VISION STATEMENT

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***Outline the ideal future for your business, and decide on when you can realistically picture this vision becoming a reality.***

This is all about the big pie-in-the-sky kind of stuff. Stating what you want to accomplish with, and through, your freelance business, has an amazing effect on your ability to actually turn your dream into a reality. Considering the sometimes herky-jerky nature of freelance work, a vision statement can help guide you through the chaos. A healthy business should have a brief and succinct vision statement that keeps it grounded, on track, and laser-focused on what's ahead.

A vision statement is a dynamic, ever-evolving description of the direction you're taking your freelance business in. As your operation shifts and changes, you will want to revise or rewrite your vision statement based on the goals and dreams you have. Ultimately, you're looking to state the problem your company exists to

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**YOUR IDEAL VISION FOR  
THE FUTURE SHOULD LOOK  
MORE LIKE A JOURNEY THAN  
A FINAL DESTINATION.**

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solve, what your company hopes to achieve in the future, and whom you wish to serve. Your responses to the following questions will help shape your vision statement.

# What characteristics and values are important to you as a creative business owner?

Your character lays the foundation for your business. The total sum of your personal traits shapes the very nature of what you sell. The values behind what you say, and most importantly what you do, create a code that buyers translate into the qualities they're looking for in an artist and service provider. Your reputation will be your single most valuable marketing tactic, so knowing what you want to be known for is an important step in becoming an entrepreneur who is no longer "faking it until they make it".

# Can you list ten words that describe what your business does?

Sometimes all you need is a short and sweet list. Making a list of the keywords that describe your creative talent and your big ideas can be a great launching pad to drafting the kind of sentences and phrases you need to help demystify your freelance business.

# How do you define and describe your creative and technical talent?

Your freelance business will be built on you and you alone. Your ability to deliver the goods is what makes you valuable in the marketplace.

Your craft has a vocabulary associated with it and you need to know how to wield it. Being able to intelligently use the language of your industry to bring to light what you do (and how you do it) is a key component of being a professional.

# What is the primary focus of your business?

Taking a moment to imagine your creative legacy can be powerful thing. Your legacy will grow as you help others around you become more successful themselves. When there is an economic exchange it's never about the money in the end—it's about reciprocal trust. As you develop the habit of doing and saying things that make people curious, you will be successful, so find the words to describe your end game and you'll be happier for it. The focus of your business should reflect the legacy you want to leave behind.

# Whom do you wish to do business with?

In a broad stroke it's good to always know whom it is you're aiming to serve. Too often, freelancers tell me that they're trying to spread the word to "the Internet" or "everyone out there". Although target market planning is a bit further along in the process, it's helpful to ask yourself to define whom it is you're hoping to do business with.

# By what year do you want to be fully dependent on, and content with, your business income?

Brass tacks here! Establish an ideal timeline for your venture. Put it in the calendar and work towards that date. I specifically called out “year” not month because I feel it’s safest to build up to a bigger timeframe. Cutting the purse strings and taking an arbitrary leap of faith on some magical day can be exciting, and maybe your situation warrants it, but my encouragement is to plan in advance and aim to achieve this vocational freedom without causing undue stress.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Write an inspiring one-sentence description that defines the fire in your belly.

## Next Step(s):

- Memorize your vision statement, share it with an industry peer, and ask for their candid feedback.

## Success Indicator(s):

- Six months later you still feel confident about the direction you're heading in.

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# 1.3 BIOGRAPHY

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***Communicate your passion for your work, share your unique value, and inform prospects of your expertise and relevant history.***

The words you use to describe yourself will either create interest or apathy, clarity or confusion, trust or scepticism. A well-crafted biography puts words to your work; it helps convey the “why” and it gives enough history so as to establish credibility.

So often, I hear a creative person tell me their craft instead of what they do. Answering the prosaic question, “What do you do?” with “I’m a photographer.” or “I’m a graphic designer.” is a dangerous reply—that’s right, dangerous. The risk that’s present here is that perception is reality in the marketplace. What you say about yourself and your work will either spark interest

and establish like-mindedness in the reader, or you will simply be perceived as no one special.

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**YOUR BUSINESS IS ONLY  
AS LEGITIMATE AS YOU  
ARE CONVINCING.**

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In the art world, artist statements are imperative in the marketing of art because no buyer would pay thousands of dollars for a piece of work that was simply “done by a painter”. A freelance service provider must describe themselves, their work, and why they do what they do in a manner that communicates expertise, professionalism and a little “somethin’-somethin’”.

My encouragement here is to stay away from overused or cliché phrases and words (e.g. the descriptor “storyteller” doesn’t actually convey a whole lot and the word has been abused for a few years now, thus losing all meaning in the marketing of creative services).

# What have you done that would inspire a reader to want to learn more about you and your work?

A chronological tale from birth—and remember, your childhood or early days are not as interesting or helpful as you might think. A great way to get started is to create a short, potent list that's rich with the details of your accomplishments and success. The expression “the proof is in the pudding” is still true whether you have a small or a large bowl of pudding, and no matter what flavour or ingredients are used (okay, this is getting weird—you get the idea).

# What kind of schooling, industry training or transferable experience do you have?

If you've gone to school or completed an education program, make a few notes about that experience, such as who taught you, and the credentials (official or not) that you've gained. Think about the jobs you've had, the volunteer positions you've held, document the skills and attributes of your work history, and look for the things that illustrate just how capable and knowledgeable you are about your craft and about the types of subjects and industries you're interested in.

# **Do you have methods or processes that are unique and interesting?**

What you do is probably not as interesting as how you do it. When it comes to the technical part of your craft the end result of your efforts may in fact be fairly similar to your peers, so finding a few words to describe your approach and/or your process can be very helpful for digging a little deeper into what makes you noteworthy.

# **Do you have strong opinions or rogue ideas that drive you to do things a certain way?**

Seriously. List the things in life, in your work, in your craft, in your industry, wherever, whatever... that boil your bottom. Document your crazy ideas or positions on controversial subjects as a way to spark something meaningful. You can get poetic later. For now just rant about the good, bad, and ugly around you (and make sure you can defend the inflammatory ones).

# What kinds of questions do you want your target audience to ask as a result of engaging with you?

My advice to every emerging entrepreneur I consult with is this: inspire further inquiry. This may be a bit abstract but hear me out. After reading more about you, and then maybe following you and your work for a while, a prospect or buyer should really be thinking something along these lines:

- Who is this person?
- Why did they say that?
- Who are they working with now?
- What would they say about this?

If you're able to generate this line of questioning it means you're doing something right.

# How can you convey your history in a way that tells your target audience that you're like them?

You may need to come back to this one depending on how far along you are in your endeavour, but when you imagine the types of people and clients you'd like to work with, imagine for a moment what you imagine you'd have in common with them. Whether it's based on activities, hobbies, goals, dreams, pursuits, ideals, ethics, morals, you name it—what you want to establish over time is a way to describe yourself so that your ideal clients are in fact like-minded.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Craft three marketable bios (10 words, 50 words, and 200 words) that inform potential clients about who you are, what you do, and how you can serve them through your creative business.

## Next Step(s):

- Have them copy edited by a friend and then add your bio to your social network profiles and/or website.

## Success Indicator(s):

- Within one year you receive an interview request from... well... anyone.

**“**

**YOU ARE A LOT MORE  
INTERESTING THAN  
YOU REALIZE.**

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# INTERVIEW

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## SEAN CARTER





## **What was the tipping point, or catalyst, that helped you make the transition into full-time design?**

*It's a good question. The bare truth at 22 years of age is that I had spent three years in a pretty uninspiring t-shirt printing art department yearning to set myself free. My college portfolio hadn't really prepared me adequately for a spot in a credible design studio so I simply set up my own shop. In hindsight it was lunacy. If I knew at the outset what paths I would travel and what stumbling blocks were directly in my path I likely wouldn't have had the courage to begin. In my case naiveté was bliss.*

## **If you could start your business over again what is one thing you would do differently?**

*I had the absolute joy of starting my business over. In 2011 I left the firm I cofounded in 1996 (Hangar 18 Creative Group) with the goal of taking the 20 plus years of experience of running a*

*design studio and creating a firm with the strength of the best years without the inefficiencies of the worst years. My partner Ross & I asked ourselves this question: If we were to take 3 steps could we ensure they were all straight ahead? We had no interest in taking one or two steps backwards. We have been relentless in our pursuit of perfection. Perfection? Really? See above. Naiveté is bliss.*

## **How has your business changed over the years?**

*Having spent the first three years of my self-employed life flying solo I discovered that partnering with people with varied skillsets leads to a better service offering. It was really quite simple and obvious. The unspoken truth is that solo designers are in many ways in partnership with their suppliers and clients regardless of the formalities. Also for me I like to learn from brighter minds than my own and to be surrounded within a warm and vibrant studio environment.*

You get that with partnerships and a dedicated and multitalented team.

In my first go around with Hangar 18 we grew the firm to 26 employees at its peak while Ross and I had fondly recalled our sweet spot being 10-12. We were at our creative best, financially most profitable while providing our best value to our clients. This size allowed us to tackle all kinds of assignments while not being bogged down with too much overhead. At Carter Hales we are committed to staying at the ‘sweet spot’ size. We are happiest there.

## **What is a business practice you feel is imperative to your success?**

We are very keen to establish meaningful relationships that transcend the scope of a project. It’s a cliché statement but one that is easier said than done. It is a studio-wide commitment that is best embodied by my partner Ross. He lives and breathes it whilst

the rest of us merrily join in. Besides, it is more interesting to work with, and for our friends because the outcome of our work is that much more personal. We know that the work we are currently doing, for the people we are currently working with, will get us more of the same if our performance is notably strong and get this: if our clients actually like us.

## **Which marketing activities consistently help you attract new clients?**

It’s hard to say which single practice is most responsible for our continued workflow. We feel we need to lock down every single touch point within our client’s experience working with us. Let’s assume they hire us because they are anticipating a very strong design outcome. Let’s say that is a given. What are we doing in proofreading? What are we doing in response time to requests and calls? Do we quibble over small things? Are we meeting ev-

*every deadline whether internal or external? Are our invoices accurate? Are we fully engaged with our client's input or are we just giving lip service? Are our clients looking like stars to their bosses or clients? That means paying attention to every detail in the complete process, every single time.*

## **What is the most common piece of advice you give to emerging designers?**

*Learn the craft—the new and the ancient. Never stop exploring. There is so much to learn, so be a continual student. Know that the outcome of your work is what determines your success.*

*Understand that most design firms serve commerce and business first. It is not to be avoided but embraced. Lastly learn to despise failure. We are able to learn as much from our successes, so aim for that.*

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**IF I KNEW AT THE OUTSET WHAT PATHS I WOULD TRAVEL AND WHAT STUMBLING BLOCKS WERE DIRECTLY IN MY PATH I LIKELY WOULDN'T HAVE HAD THE COURAGE TO BEGIN.**

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**SEAN CARTER**

# 2. GOALS

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**TAKING AIM  
AND PULLING  
THE TRIGGER**



# PLANNING FOR SUCCESS

***Clearly define the objectives and key components of your goals using the S.M.A.R.T.E.R. approach.***

Too often, goal planning looks a lot more like a wish list, and that's a sad thing because an important goal deserves so much more than just a few words or a well-drawn, but empty, checkbox.

I hear it all the time. Freelancers tell me their so-called goals but really all they're doing is hoping for a miracle or pining in such a way that it actually sounds more like complaining: "I want more clients. I need more money. I want more people to like my stuff." These are not goals.

**“FREELANCING IS NOT A SPECTATOR SPORT. SET YOUR SIGHTS ON THE PRIZE, TIE YOUR LACES NICE AND TIGHT, AND RUN LIKE THE WIND.”**

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Successful goal planning happens when a lot of energy and resources are applied to the most pertinent objectives. By focusing on what's most important and what's accomplishable, then working feverishly to achieve those goals, you are actually planning your own success.

My hope for you is that you aim to keep your goal planning efforts to just three goals. It's healthier to have a few well-planned goals in the works than a laundry list of hopes and dreams. Being laser-focused on fewer goals is more manageable, and therefore more beneficial, to your business.

To be completely honest with you, in nearly all of the successful business owners I've come to know, most have a long history of well-planned goals that produced lackluster or completely unexpected results but the magic was in the process; they trained themselves to work smart and hard. The habit of being an exceptional goal planner will be of value to your business above all else.

**S.M.A.R.T.E.R.** is an acronym that outlines the seven steps of a well-developed goal. I've broken this down as a series of questions to help explain the steps and give you a fighting chance of defining your goals in this structure.

## **SPECIFIC**

Nail your goal down to something explicit—the more precise you are, the better. Fuzzy goal setting is extremely dangerous to your future: refine your hopes and dreams into something clear and tangible.

### ***What do I want to accomplish?***

A good goal has more to do with stating something that you can do versus something that

**Goals vs. Objectives**

*For the sake of this action planning effort, it's all semantics.*

*Categorically a goal is broader in scope and definition, and an objective is more specific in nature. However, don't worry about this. Just focus on getting what you want, or at least trying to get it, as professionally as possible.*

happens to you (if you're lucky). Ensure that you have the emotional energy and resources you need to pursue this goal, otherwise you're up against the wall before you even start. Try to avoid pumped-up language and make sure you have realistic expectations.

### ***Which requirements and/or constraints will impact my goal?***

Before you get working on your goal you'll want to identify the parameters or barriers that could impact, or stall, your efforts. There are always things that stand in the way of getting important things done. Dig deep and ask yourself what things, or people, have gotten in your way in the past and find a way to minimize their impact on your achievements.

### ***Who should be involved in helping accomplish this goal?***

Being a freelancer doesn't mean you should always go it alone. Identify the friends, collaborators, supporters, or service providers that you need to leverage in order to get this done.

## **MEASURABLE**

A goal must be measured otherwise it's just a dream. Numbers are important in business, and when you assign numbers to your goals you give credence to their value; it's how you actually know that you're on track and it keeps you from making gut decisions or changing course on a whim.

### ***How much? How many?***

Try to quantify your goal using the words, terms, and values that make it plain as day as to whether or not you've been successful. Money (\$), customers (#)... whatever suits you, but be sure to attach a value to your goal. Identify a range to give yourself some leeway if you feel there are a lot of unknown factors at play.

### ***How will I know when it is accomplished?***

Establish the criteria you will use to determine if this goal has been achieved, or at least how far along you are in achieving this goal. Every goal needs a success indicator and though it may simply be a definitive number that you reach or don't reach, it is important to imag-

ine early on how you plan to measure this goal when it's all said and done.

## **ACHIEVABLE**

Healthy goal planning focuses on systematically working to accomplish something realistic. You and your business must be in a position to actually attempt your goal in order for its desired outcome to be a viable solution to a business problem.

### *Based on my past successes and failures how likely am I to achieve my goal?*

Just because someone wants to climb Mount Everest doesn't mean that it's an appropriate goal if their conditioning, experience, or other factors aren't at a level to realistically achieve it. Knowing if a goal is actually achievable is an important part of the process of being taken seriously as an entrepreneur; it also gives you a chance to acquire some goal planning acumen—an art that requires a history of success in order to be validated. Just because someone needs or wants to double their income next year doesn't mean that it's a very good goal. Catch my drift?

## ***What resources do I need in order to accomplish this goal?***

Detail the requirements of achieving your goal, such as supplies, deliverables, finances, talent, relationships, etc. Outlining the things you need or want in place in order to move forward will make accomplishing your goal a more reasonable effort.

## ***What knowledge, or skills, should I bone up on in order to make it easier to accomplish this goal?***

If you already had the know-how you likely wouldn't be wrestling with a goal in the same way; often a business owner needs to do some research or bone up on a subject or skill in order to move forward—it's healthy to identify that early on and adjust your timeline accordingly.

## **RELEVANT**

There are realities in your world, in your industry, and in the market that your goal planning may need to take into consideration. Once you state your goal, challenge yourself to assess its origin and its importance to your future.

## ***What was it that triggered this goal in the first place?***

Your motivation for establishing a goal is important. Freelancers get disillusioned for a number of reasons; envy of their successful peers or of industry icons is just the tip of the iceberg. A great goal needs to be free and clear of the must-haves and the should-haves. A great goal originates in your heart and in your mind as a response to something powerful and meaningful, and its pursuit is absolutely necessary to your happiness as an artist and business owner. I dare you to plan important goals that don't look, taste, or smell like anything anyone else is doing. Identify what brought on a goal in the first place and test for yourself if you feel it's worthy of your hard work.

## ***Why am I planning for this goal instead of something else?***

If it makes good business sense to pursue your goal at this time, you know you're on to something great! A relevant goal is one that would cause your business harm should you not pursue or, especially, accomplish it. A relevant goal is an imperative one. It's always a good idea to

know why one goal gets your attention and resources over another—it helps buffer you from jumping ship at the first sign of trouble. And hey, if initiating a goal down the road makes more sense, then great—put it on the backburner and focus on something more imminent.

### ***Why am I working towards this goal now and not next year?***

A relevant goal should embody, to some degree, a sense of urgency, strategic importance or even opportunistic timing. For this reason I'm not a huge fan of epic goal planning of five or ten-year plans—too many variables will come into play over that time period to make it a valuable effort right now. Set your sights closer, and if you know why a goal needs to be achieved in the near future then you're doing it right my friend—you're doing it right.

## **TIME**

It's a plain fact: business goals don't get done when there's no timeframe associated to the goal-setting process. Time is a powerful tool in the hands of a good planner. No matter what the scope of your business goal is, make sure

to recruit Father Time; he's a good guy and he can help.

## **Evaluation x 2**

### ***When do I want to start and complete this goal?***

Urgency creates momentum. The best thing about a timeline is the positive pressure it puts on your energy and resources. By defining and scheduling in the start and finish dates, along with any key milestone dates along the way, you will be freed up from the stress caused by procrastination. There are of course other kinds of stress, but inaction is by far the most crippling. By engaging your calendar in the goal planning process you're implementing a very important safe guard against the usual delays and excuses.

*The final steps of this goal planning structure are for post-mortem purposes and are to be completed once the goal effort has been completed. Looking ahead at how you'll evaluate your completed goal is a great practice but be sure not to over-plan early on.*

### ***Who can I share this goal with in order to create a level of accountability?***

A great goal will die a slow death if it's not shared. Accountability can protect you from inaction because of one simple factor: peer pressure. Depending on the level of your relationship, an informed friend or colleague can give you the gentle nudge, or the kick in the ass, that you need to keep your foot on the gas.

## EVALUATED

Honest reflection and assessment is an activity that can have an invaluable impact on your freelance business. Once a goal has been achieved, or it's been deemed dead on arrival, it's time to evaluate its success or failure.

### ***How would I rate the success of this goal: 1, 2, 3, or 4 stars?***

Depending on the specifics of your goal, you might very well be able to establish a definitive result—it worked, or it didn't work—but many goals have a subjective element to them. Especially over time, rating your goals can give you a more reasonable way in which to measure their impact on you and your venture.

### ***Of the decisions I made, which ones helped, and which ones did not help?***

Decision-making is a huge part of goal planning; knowing which decisions you made and how they fared in light of the end result is very helpful. Hit the rewind button and evaluate the choices you made and you'll be able to better understand the journey.

### ***How did I behave as I pursued this goal?***

As I’m sure you would agree, sometimes it’s not always what is said but how it’s said. The same is true when it comes to the way in which we conduct ourselves during an important effort. Think back to how you handled yourself during the associated time period—consider the things you said or the actions you took that may have affected the likelihood of achieving your goal.

### ***Was the goal too grand or too comfortable?***

Goals are not all the same. Sometimes it’s good to realize that the scope of a failed goal was simply due to overreaching; it means you can cut yourself some slack. It’s even more valuable to realize that you should probably challenge yourself more if you’re breezing along without any resistance. Creatively, your greatest and most important work probably comes when you take yourself out of your comfort zone. Your business planning should have the same level of friction. Knowing how to identify and solve important business issues is a skill set that grows over time. The key to being suc-

cessful is building up a history of accomplishment. When you pursue important yet manageable goals, you will foster confidence and momentum.

### ***Were there any unforeseen barriers that caught me by surprise?***

There are always hiccups along the way—it's how the world works. Think back over the course of your goal effort, and if there were issues or situations that took you by surprise, it's important to document those instances. Some barriers are inflicted upon us, some we simply steer towards because we don't know any better or don't take them as a serious threat.

## **RE-EVALUATED**

Revisiting the merits of a past goal within the context of developing a new goal will make the next planning effort more successful. The heart and soul of your next goal should not be rooted in simply your hope for success; you need to look back at the things you once pursued and reflect on what you did well and what would you do differently. Going off your gut doesn't cut it anymore.

***Which goal(s) from the past are similar to this new one and what could I do differently this time around?***

As your goal planning history increases you'll have more and more information and experiences to draw from. Knowing which previous goals are similar in scope, focus, timeframe, level of sophistication, or the resources needed for them to be accomplished can be a great starting point for making the necessary course corrections.

Okay! So there you have it. An acronym for the ages! Now you can intelligently create well-developed goals—just remember that every element of a goal can, and should be, broken down into bite-sized pieces so that you can understand and pursue what's important.

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# 2.1 BIG BUCKS LIST

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***Identify and describe the successes that would dramatically improve your financial wellbeing.***

You've probably heard of a "bucket list" (a wish list of things to accomplish before you die). Well, in a less morbid fashion—and with a lot more intentionality—what big financial goals do you have for your creative business? Success is most often equated with financial freedom and an entrepreneur will always benefit from scheming up the kinds of ideas—or imagining the kinds of events or activities—that if accomplished, would dramatically improve their own economic condition.

Often the difference between being successful and just being a martyr is simply the ferocity

by which one pursues one's goals. Some goals are grand in scale or scope, others are wildly optimistic or downright insane, as long as they are focused and plausible there's always an opportunity in the making.

**“ DREAM ABOUT MAKING THE BIG BUCKS, IT'S OKAY... WE ALL DO IT. BESIDES, THE FIRST DREAM IS FREE.**

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A “Big Buck” item is a wildly ambitious, lofty and inspirational goal that will bring in, well, the big bucks. When applied to the S.M.A.R.T.E.R. workflow, a business-first goal like this can give you something remarkable to aim for no matter how your daily work life unfolds. Dreaming the kinds of dreams that could fill your bank account is normal for a business owner. If, due to financial success, you’re happily making and sharing your art with few constraints, then I think you’ll be enjoying the freedom you’ve always wanted.

# **Whom do you know, or know of, that has had an entrepreneurial dream come true? What was their goal?**

I believe it's important to carefully look at how successful freelancers and business owners got to where they are today. When you are able to learn about their failures and victories it can be some of the best business training you could ever hope for. When something remarkable happens to a small business it's almost like mountains were moved for them. Find a great story that excites you and learn what you can from their journey and from their big break.

# What would constitute a big break for you?

Most emerging creatives don't yet feel they've had that break. Start making some notes (scribbles and awkward drawings on a napkin are totally okay) about the kinds of events or scenarios that you could visualize as being game changers for you. Brainstorm a list of vocational game changers so you can start to think of your creativity as a means to a more lucrative end.

# What kind of success could you have in the future that would absolutely scare you silly?

Fear is a powerful motivator. When dreaming about a life-changing event it's easy to simply focus on all the kittens, rainbows, and piles of money; but what about a goal that, should it become true tomorrow, would totally freak you out? We don't have to agree on this but I think it's healthy to explore the extreme edges of your vision for the future. Besides, by thinking about it you might actually find you're more prepared for it when it happens, and then it won't be so scary.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Detail the S.M.A.R.T. elements of your three Big Bucks goals.

## Next Step(s):

- Revisit your Big Bucks list every year on the same day to see if you're any closer to achieving them, or if you want to make any changes. Schedule that day in your calendar right now.
- Upon completion, evaluate and re-evaluate your goal as you see fit.

## Success Indicator(s):

- One (or more) of your Big Bucks items comes to fruition and you replace that goal with a new one.

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# 2.2 PRIMARY GOAL

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***State a goal you wish to accomplish in the next month. This should consume the majority of your business building efforts.***

Making a realistic plan to tackle a short-term goal will proactively shape the growth and development of your freelance business in more ways than you probably realize. Freelancers often feel they have to deal with every single aspect of their venture at the same time, but that is simply not an effective way to build a business. Put some blinders on and decide to focus on one goal, your primary goal, and pursue it relentlessly.

Identifying one clear goal that aims to solve an immediate business problem is a good way to determine the kind of goal that should be your primary effort. Focusing on a realistic opportunity, or an outcome that is manageable, is essential to generating momentum. Again, be as specific as possible in your planning since vague goals produce mediocre actions and cause you to spin your wheels. Short term goals are best served by taking quick action, so focus this week on the first few tasks that get you going on your primary goal and make it happen!

## **Your Top Three Goals**

*The previous section (Big Bucks list) was geared toward letting you think big and bold (and purely about money). These next three sections are about the more urgent goals that you have control over in the short term, are more manageable, and will have an immediate effect on the development of your freelance career.*



**A GOOD GOAL IS MORE THAN JUST A GOOD IDEA, IT'S JUSTIFICATION FOR YOUR MOST RECENT ACTIONS.**

# **What are some of the potential distractions that could hijack your time, energy, or resources over the next few weeks?**

Distractions are everywhere. Some are self-inflicted while others are inflicted upon us. Write down some of the things and/or people that could cause you to lose focus or energy as you pursue your primary goal. Look for opportunities to get yourself out of harm's way and strategize ways to not let your bad habits pull you down.

# What are some of the potential barriers that could negatively impact your ability to pursue your primary goal?

Roadblocks can pop up for sure, but many are right in front of us and we simply slam into them because we don't implement some forethought. Think ahead to the next few weeks and ask yourself about how you can dodge the things and/or people that may cause your goal effort to stop in its tracks.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Detail the S.M.A.R.T. elements of your primary goal.
- Create a checklist of your first five tasks and/or deliverables.
- Schedule time over the next seven days to accomplish them.
- Then plan and schedule five more tasks.

## Next Step(s):

- Act on, and update, your checklist and schedule each and every day.
- Upon completion, evaluate and re-evaluate your goal as you see fit.
- Promote your secondary goal up to the primary level.

## Success Indicator(s):

- You feel confident that you planned, executed, and evaluated your goal as effectively as possible.
- Your objective was achieved and/or you learned something about future goal planning.

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# 2.3 SECONDARY GOAL

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***State a goal you wish to accomplish in the next three months. This should consume the margins of your business-building efforts until it's promoted to the primary level.***

Your secondary goal is ideally one that requires more time to accomplish and thus is not yet your primary goal. Whether it's due to the creative process, resources, or needing to leverage an opportunity, this goal simply requires more planning. With some constraint applied, a bit of time to percolate or gather information can be extremely helpful.

Once you've established your plan and have started to take some action you can think of this effort as priming the pump. Once you've completed your primary goal you can promote your secondary goal and you've already got a head start. What's really great about having this secondary goal in the hopper is that ex-

**“THINK OF YOUR GOAL PLANNING EFFORT AS A HOBBY; FIND WAYS TO MAKE IT FUN... BESIDES, ROLLERBLADING AIN’T COOL ANYMORE.**

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tra time or bonus energy can be applied to it without the immediate pressure to accomplish something spectacular. Having a work in progress is like having a hobby without the glue and the glitter (well, maybe there's some glitter).

# If accomplished, what goal would help you to feel more professional?

Goal planning can be tough sometimes. Identifying a goal that will take a bit more time to accomplish means that you can aim towards something that could really have an impact on how you feel as a freelancer. Professionalism is not often a trait that I see freelancers exude so my recommendation is to select a secondary goal that will give you a boost, a kind of get-serious or take-me-seriously effort.

# What kinds of things can you do if/when you get stalled?

A secondary goal will always move forward if at the very least you plan a little more. When a goal is scheduled a little further off in the distance it can be easy to take your foot off the gas or allow a small hiccup to act like a ton of bricks in your way. If you're stuck then get planning. Make detailed checklists of the things you want/need to do. Ask a friend for help. Watch a documentary. Make a list of the activities you can do to help you get unstuck.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Detail the S.M.A.R.T. elements of your secondary goal.
- Create a checklist of your first three tasks and/or deliverables.
- Schedule time over the next fourteen days to accomplish them.
- Then plan and schedule three more tasks.

## Next Step(s):

- Act on, and update, your checklist and schedule once a week.

## Success Indicator(s):

- You feel confident that you planned, executed, and evaluated your goal as effectively as possible.
- Your objective was achieved and/or you learned something about future goal planning.

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# 2.4 TERTIARY GOAL

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***State a goal you wish to accomplish in the next six months.***  
***Work on this goal when other goal efforts are in limbo or when you have extra time.***

Six months is a goal-planning sweet spot in my mind. In my experience, a one-year goal is as likely to be achieved as a five or ten-year goal when it comes to business development so my encouragement to you is to keep the big goals closer and more manageable. Remember, accomplishing goals is more important than how grand they are.

What you want to do is plan a goal within a timeframe that can take advantage or consideration of your current situation and circum-

stances—a big goal planned six months out is about as much planning as any freelancer should expect from themselves. Moving forward within your present limitations is always better than hoping or trying to adjust for changing relationships, scenarios, finances or time constraints. If you find yourself not moving forward year after year then maybe you need to set your sights closer.

**“*MOST FREELANCERS HAVE NO IDEA WHAT THEIR BUSINESSES WILL LOOK LIKE ONE YEAR FROM NOW... AND IF THEY DO, THEY'RE LYING.***

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# What goal could you set that, when said out loud, would put a smile on your face?

I have yet to meet a content freelancer; however, I've met many happy ones. Joy is infectious and when you plan to accomplish something that brings energy and optimism to your creative work life you will enjoy the journey so much more. People, including clients, want to work with happy people. As you work on your business don't allow the intensity to squelch the fire. No one will ever be as passionate about your business as you are, so plan accordingly.

# Which goals from your past do you need to abandon?

Sometimes the best thing to do is to wipe the slate clean. Creative people are notorious for making lists of things they want, but a freelancer can become buried by their past failure or inaction. Start fresh and make your six-month goal something new and exciting. If you feel you need to resurrect one of those older goals then fine, pursue it after you've accomplished this one.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Detail the S.M.A.R.T. elements of your tertiary goal.
- Brainstorm a checklist of tasks and/or deliverables that come to mind and detail one task.
- Schedule time over the next thirty days to accomplish your initial task.
- Then plan and schedule two more tasks.

## Next Step(s):

- Act on, and update, your checklist and schedule once a month.

## Success Indicator(s):

- You feel confident that you planned, executed, and evaluated your goal as effectively as possible.
- Your objective was achieved and/or you learned something about future goal planning.

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**NO ONE WILL EVER BE AS  
PASSIONATE ABOUT YOUR  
BUSINESS THAN YOU ARE,  
SO PLAN ACCORDINGLY.**

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# INTERVIEW

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## IVAN MEADE





## **What was the tipping point, or catalyst, that helped you make the transition into full-time design?**

*Coming from another country I was able to see a gap in my community in which I could bring something unique and something that could make me different from my colleagues. My grandfather, who was a very smart businessman, always said that in order to succeed in a business you always have to have two businesses in the same business. One of my first projects was to create the interior design of a small restaurant. Once I got the job I was able to sell the idea of consistency/flow to my client, and that we needed a logo/brand to reflect the business philosophy and brand idea. It was a natural progression to create a multidisciplinary studio with the idea of a one stop shop—you need interiors for your restaurant or business, you get them with us, but you will also need a brand identity and we can also provide that*

*to create a seamless concept. At the time I was the only multidisciplinary studio in Victoria and that alone made me stand out.*

## **If you could start your business over again what is one thing you would do differently?**

*This is a very interesting question. When I started my business the web was not what we have now. If I were to start again I would read more about how the business side of my industry works—now you can find this information in websites or blogs or even e-books. Knowledge is always the best base to have and to create a solid business model with; as they say, knowledge is power. Expanding on this idea I would also find a mentor or hire a professional to help me see things outside my environment and help me improve my business practices from a different perspective.*

## **How has your business changed over the years?**

*Drastically—the type of work I do today is definitely more sophisticated and interesting than the type of work I did when I started my company 12 years ago, but in order to be able to do what I do now I had to learn all aspects of my business and most importantly, set a couple of rules to identify my ideal client. Once you identify your client you can really do work that enriches you and enriches your clients' lives. Of course, technology has also tremendously affected the way I do business and produce my work. Nowadays the majority of my clients don't even live in my city so we are always embracing technology in any way to help the business move ahead.*

## **What is a business practice you feel is imperative to your success?**

*I will say that the best business practice for me has been learning how to say no to clients who shouldn't be my clients. Of course, now I am able to do this because I have built a good reputation over the years. The ideal client understands why they have hired you, and understands that they need to pay for the service in order to get what they are looking for. Why? Because with this type of client I can produce better quality work and get paid what I deserve. The other big thing after this is flexibility; if you maintain an organized structure for every project and you manage your clients' expectations correctly, there is always room to be flexible and either delay aspects or improve aspects of every project.*

## **Which marketing activities consistently help you attract new clients?**

*I will say a solid web presence in which social media plays an important role has been a good reference point for my business. Again, once you identify who your ideal client is, you can plan strategies that are directed to that specific market. I will also say that is important to always have good relationships with all of your colleagues, trades or just people around you, as they can be an important source of referrals. Again, once you identify who your client is you can identify who can refer you new clients. Being in a multidisciplinary type of business has brought clients from one side to the other and vice versa.*

*books about how the design business industry works and how to sell services and goods to your clients. You can be an amazing designer, but if you don't know how to sell your services and have a clear understanding of the business side of your business you will have a hard time making it in this business (or any business at all).*

## **What is the most common piece of advice you give to emerging designers?**

*You need to know how to sell yourself and how to sell your services. I always recommend that emerging designers read*

“

**ONCE YOU IDENTIFY YOUR  
CLIENT YOU CAN REALLY  
DO WORK THAT ENRICHES  
YOU AND ENRICHES YOUR  
CLIENTS' LIVES.**

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**IVAN MEADE**

# 3. SWOT

**ANALYZING  
YOUR  
POTENTIAL AND  
YOUR PITFALLS**



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# 3.1 STRENGTH

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***Identify your top quality or skill that you feel gives you a competitive advantage.***

This is your creative business. Your creativity and talent are the heart and soul of your venture. As a business grows and becomes more sophisticated in its operation this may change, but for the foreseeable future your freelance operation must be built exclusively on the best that you have to offer.

This element of your business is an internal one; it's all on you and guess what: talent matters. As a service provider your qualities, likely your skills, are what make you a viable option in the marketplace. Your efficiencies and price point are further down the list when it comes to im-

portant factors that affect your marketability. You're not setting up a business from a manual and you are not opening a fast-food franchise—you're dishing out creative awesomeness, which is exactly what you bring to the table.

**“ IF YOU'RE GOOD AT WHAT  
YOU DO THEN GET A DAY JOB.  
IF YOU'RE FREAKIN' AWESOME  
THEN BE YOUR OWN BOSS AND  
KICK ASS.**

---

# **When you look back on your past as an artist, which projects produced the most affirmation?**

Facebook “likes” aside, what creative endeavors from your past have contributed to that feeling of awesomeness? Writing down the details, documenting your experiences, jotting down names of people who “get you” is a great exercise to help you establish your primary talent, and in effect, your business’ core offering.

# What things do you most value—or are you most excited about—with respect to your creative work?

Knowing what things you love to do, or what kind of results are most important to you, is such a valuable part of the business development process. This is fire-in-your-belly stuff. Identifying your passions will help protect you from a common mistake: starting freelancing as a form of escape from a job you don't like. That's not a reason to start a business. What you value, and what excites you, must be a driving force behind your venture.

# BUSINESS ACTION PLANNER

## Action Item(s):

- List the top ten traits (strengths) you offer your business as its only employee and then narrow it down to your primary strength.

## Next Step(s):

- Find resources to help you increase your competency in one of your top three skills.
- Create one new business offering that centers exclusively on your top strength and assign a premium price tag to it.

## Success Indicator(s):

- Your strength is affirmed through the generation of new business within six months.

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# 3.2 WEAKNESS

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***Identify a primary shortcoming that is likely to put you at a competitive disadvantage.***

Freelancers rarely feel free; they usually feel trapped because they perceive their limitations as barriers to success. This is simply not true. Just like a river needs banks to hem in the water to keep it flowing, an independent business will only succeed in their industry when they embrace their constraints. Sure, some of these factors may be shortcomings (professionally and/or personally) but the reason for their existence in your work life means less than your ability to neutralize them.

Emerging freelancers often tackle this area of analysis with some measure of neglect. They say to themselves that they're not good at something and they move on. I feel very strongly that the process of elimination is an important and clarifying one—a compelling vision and a powerful artistic niche doesn't come from being okay at a bunch of things, and it certainly doesn't come from inflicting chaos and a lack

**“WASTING YOUR DISCRETIONARY TIME DOING SOMETHING YOU SUCK AT IS LIKE SABOTAGING YOUR OWN BUSINESS. SO DON’T DO THAT.**

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of professionalism on your clients. I encourage you to be harsh with yourself and try to identify the primary things that as an artist, service provider, and business operator, are acting like a drain on your operation.

# What aspects of your business cause you the most stress or require the most work?

It's possible that you are good at something you don't like doing. Or, it's also possible that you offer clients something you're not very good at. Both are bad; the latter is actually tragic. Don't allow yourself to believe that you can, or should, do everything. Things like stress, anxiety, and failure are clues as to the areas that you are not best suited to handle. Identify these forces and start to brainstorm ways you can eliminate or diminish their impact on you as an artist, service provider, and as a business operator.

# If you could start over, what five things would you do differently with respect to your business?

I asked this question of all the interviewees. It's a great question for you to answer as well. No matter what stage you're at in the development of your freelance career, knowing what you'd do differently, and then using that as motivation for making changes from this point forward, is the mature way to hit the reset button. What I most often see in this regard is that mistakes are repeated instead of learned from. My hope for you is that you'll be able to stay clear of the decisions that drain joy from your business building effort.

# What business activities are you inefficient at?

The tasks you perform easily and with the most efficiency are likely strengths of yours. So... think about the opposite side of the coin; think about the things that you do inefficiently. When you make a mess Of things, cause other people frustration, or fail to meet expectations, these are indications of the types of tasks that your business should either address, or stay away from.

# BUSINESS ACTION PLANNER

## Action Item(s):

- List the top three liabilities (weaknesses) you bring into your business as its owner and then narrow it down to your primary weakness.

## Next Step(s):

- Assess your business offerings and modify your sales process and workflow to limit the impact of your liabilities.

## Success Indicator(s):

- You feel less stressed and are more profitable as a result of only doing what you're good at.

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# 3.3 OPPORTUNITY

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***Identify an external situation  
that presents your business with  
a significant chance for success.***

The magnetic force that drew you into becoming a self-proclaimed freelancer was likely the sense of opportunity. Early on you felt there was a reason to stop being a hobbyist and transition to something more serious; that reason surfaced because your eyes and ears were open and you likely didn't take that opportunity lightly. Back then you were aware of the ways in which you could serve (or captivate) others. Now the task is to look around and listen yet again for a new chance to bring the Wow.

“

**THE HARD WORK OF  
FREELANCING ISN'T DOING  
THE WORK—IT'S FINDING  
THE WORK; MAKE SURE YOU  
DON'T OVERLOOK WHAT'S  
RIGHT IN FRONT OF YOU.**

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The freelancers I know who felt they had failed really only failed in one way: they didn't work hard enough to find the opportunities around them. Working to leverage an external opportunity is your task here. When you're faced with an opportunity it means you have a chance to improve your position in the market, and yes, generate more revenue; your marketing effort starts right here.

# **Whom do you know that, if asked correctly, could provide you with a great opportunity?**

The best place to look for your next big break is at those who already know and trust you. Assess the relationships you have and work to understand the needs of the people you could ask to have a meeting, to consider a proposal, or to provide you with a key referral. Your biggest asset as a business owner will always be who you know, and the degree by which you're willing to serve them.

# In what way could you continue to serve those you've already won as clients?

The breadth of your client base matters a lot less than its depth. The hard part for a freelancer is finding new business; once they have it the goal should be to keep making them happy over and over again. Just like the wedding photographers who get re-hired to photograph children when their clients start their own families, and the logo design gigs that turn into packaging or website design gigs, when work has been proven and trust has been built, there is no need for the client to look elsewhere. Ask yourself how you can limit the number of one-off clients; organize yourself to build a loyal customer base and opportunities will present themselves.

# In what ways are your competitors underserving your target audience?

Again, don't spend too much time worrying about your competition but sometimes it's helpful to look closely at what they don't offer or do very well because you may find an opening in the market. Ask friends and family who have worked with service providers like yourself in the past what they wish would have been different during that project.

# What creative, stylistic, or technical trends are you excited about that you feel are on the rise but are not yet popular within the market place?

This is the question I wish more freelancers were asking. Smart business people are opportunistic by nature and as a creative service provider, as an artist, I believe you have an amazing opportunity to experiment with your craft and challenge the status quo. If you're going to obsess about your future then worry about emerging trends—it's time better spent.

# BUSINESS ACTION PLANNER

## Action Step(s):

- List up to ten scenarios or relationships (opportunities) that come to mind.
- Rank them in order of likelihood of success.

## Next Step(s):

- Research the top opportunity, collecting as much detail, history, and context as you can.
- Make the top one your secondary goal and flush out your plan.

## Success Indicator(s):

- New business is generated as a result of you pursuing this identified opportunity

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# 3.4 THREAT

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***Identify an external barrier  
that could potentially harm  
your business.***

A freelancer's work is always at risk because it has no buffer. On the surface, it's easy to assign risk to things like having no staff (or no bankroll) but those challenges are for another time. A healthy SWOT analysis concludes by taking an honest look at the obstacles that you and your business face that are outside of your control. When there are forces at work that can interrupt or destroy your venture it means you need to find a way to steer clear of them sooner rather than later.

There are situations, and dare I say people, that could cause your business harm. These are not in your mind—they're real—and hoping for the

best or turning a blind eye isn't going to cut it this time. Asking yourself to imagine which external forces could get in the way of you living the dream is a valuable exercise—one I wish more freelancers would take to heart.

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**THERE ARE ALWAYS NEGATIVE CONDITIONS THAT AFFLICT THE MARKETPLACE; STAYING AWAY FROM THE ONES THAT COULD SINK YOU IS AN EFFORT WORTH TAKING.**

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# **What potential obstacles do you feel could seriously threaten your ability to generate revenue down the road?**

I'm leaving this question wide open for a reason: I don't want to put words in your mouth. Take a moment to remind yourself of your vision for your freelance business; ask yourself what kinds of things could happen that could seriously impact your ability to earn a living and continue building a successful business. It's like a bucket list from hell, really.

# Who might cause you problems in the future and how?

I'm not encouraging a witch hunt here but I just need to call the moment and say that it's possible that not everyone in your life, at present or in the future, will fully support your creative venture. Dare I say you may even have enemies or malicious competitors. If you have people within your network that you fear as a threat to your business, then work to get away from them. Whether it's negativity, unethical behavior, mean-spiritedness, or something else, find a way to remove them from your work (and your life).

# What are the negative issues or downturns within your target market that could cause problems for you?

The financial crisis of 2008—an event that caused a lot of freelancers to lose work due to strained budgets, job loss, and bankruptcy—is an example of a macro, unimaginable widespread threat. Massive events like that, or like an act of God, are things you shouldn’t take into consideration. Instead, think of your target market and the challenges those industries are facing today. More importantly, think of your ideal clients and the issues they are likely struggling with now. Thinking of situations that you have no hope of solving will give you fresh resolve in making the kinds of decisions that may in fact protect your business from calamity.

# BUSINESS ACTION PLANNER

## Action Item(s):

- List three scenarios or relationships (threats) that would likely cause your business harm if you were to make no changes.
- Rank them in order of likelihood of sinking your battleship.

## Next Step(s):

- Reflect upon and research the primary threat, then seek advice and choose a course of action that steers you away from this threat.
- Depending on the severity of the threat, consider making it a tertiary goal.

## Success Indicator(s):

- Trusted humans agree with you and you feel you've done what you can to limit the potential risk.

# INTERVIEW

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## TOBIAS OTTAHAL





## **What was the tipping point, or catalyst, that helped you make the transition into full-time design?**

*Working at a bagel shop after university being somehow both bored, stressed and financially anxious at the same time. The bagel job was supposed to give me peace of mind and pay the rent until the time was right to take the leap. When I realized that it actually did very little of either (minimum wage + unpredictable schedule), it dawned on me that life wasn't going to give me the perfect moment to transition over my ideal design-job, but that the leap would be awkward no matter when I did it. So if was going to be anxious about my existence, I was better off being so while doing something I loved, than doing something I definitely didn't love.*

## **If you could start your business over again what is one thing you would do differently?**

*I would enlist someone to help me create a business plan. Creatives are so comfortable with acting on gut, but are not always very strategic.*

*If you can combine your killer creative instinct with a sensible, thought-out strategy on how to achieve those non-creative goals that are always floating in the back of your mind (renting an office space, saving some funds, getting new equipment...), you will have a leg up on everyone. Getting over the icky-ness of a business plan will help you measure progress and also sound better at family dinners when they're asking you what it is that you are "actually doing".*

## **How has your business changed over the years?**

Tech, tech and more tech. Every age is marked by its own, unique technological breakthroughs. Every new medium has its own specifics that grow from novelties to conventions as the medium itself ages. Find out what the tech of your age is, and get at least a basic understanding of it and how it applies to your design practice.

## **What is a business practice you feel is imperative to your success?**

Respecting myself and my work. Being honest about risks and knock-on issues early, explaining them to the client despite that it might make me seem less attractive. I don't try to do everything. I constantly try to define the one thing I do really well, and become world-class at it.

## **Which marketing activities consistently help you attract new clients?**

For me it was socializing. Like so many creatives, I am an introvert. My batteries get completely drained by being around people for too long, and I need to go home and shut the door around me to recharge. For the longest time I didn't realize that this was my pattern, and I simply carried on working in isolation.

Until you are in such a position that you have a few trusted clients with whom you have reciprocal respectful relationships and they provide you with a steady stream of well-funded projects, work most likely will not fall into your lap.

Sure, your work should speak for itself, but it's only half the equation. The first half is the content, the second half is people's awareness of it. Unless you're in a situation as described

above, chances are you need to keep the work pipeline loaded.

As much as I hate it, meeting people face-to-face has been the single most effective way of digging up leads for new work and detecting early on if they are worth working with.

## What is the most common piece of advice you give to emerging designers?

1.) As soon as you receive payment from your client, immediately deduct the money for this month's overhead expenditures. Put the money away immediately into your bills accounts. Don't look at it. Then, take off an extra 30% for unexpected end-of-year taxes. Again, lock it away and don't look at it until the end of the fiscal year. What you have left is your pocket money.

2.) Don't assume any client will understand what it is that you do. Assume

that you will have to justify your entire choice of profession each time you meet with someone. Be prepared to give a succinct and easily digested explanation of your creative process, and billing structure. Understand that you will have to repeat and justify these arguments again and again, but you will get better at it, and eventually they will accept your strange witchcraft.

3.) Know thyself. Admit that you have physical and mental boundaries. Understand and systematize what makes you happy and healthy and make your priorities around that. Do you need to have a jog mid-day to get rid of stress? Structure your meeting times so that you have that space. Need time with your significant other? Draw a hard line at 5 pm. Respect your body.

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**GETTING OVER THE ICKY-NESS  
OF A BUSINESS PLAN WILL HELP  
YOU MEASURE PROGRESS**

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**TOBIAS OTTAHAL**

# **4. IDENTITY**

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**ESTABLISHING  
AND  
LEVERAGING  
YOUR UNIQUE  
BRAND**



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# 4.1 UNIQUE SELLING PROPOSITION

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***Define what your business  
is known for and how you're  
unique in the marketplace.***

To build a more marketable freelance business you need know what separates you from the rest. Other people do what you do, other businesses offer similar, if not the exact same, tasks or talent—you have to have something more. Your business' attributes, quality level, and contextual experience are what make your service economically viable. Crafting and act-

ing on a Unique Selling Proposition (USP) will, over time, create a legacy of trust.

You do what you do because you're passionate and talented, but a potential buyer needs to know more—they need a reason to believe you're the answer to their problems. Think of a USP as a tagline, but don't fall into the clever or cute trap. It should be a clear and compelling statement that has meaning, not a stop-in-your-tracks-I-don't-get-it statement.

“

**MARKETING IS JUST NOISE  
IF YOU'RE NOT PRESENTING  
AN EXCITING ALTERNATIVE.**

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# How many ways can you describe your work and your creative process?

I know this might sound like an exercise in futility but trust me, it's not. Knowing what words best illustrate your creative offering and knowing how to build cohesive, descriptive sentences that convey the guts of your business is the hard work of building your narrative. Your legacy is built on repeated actions; your business model is built on the premise that you actually know what the heck you're doing.

# What specific areas, niches, or specialties are you most effective at serving?

Though it's a bit unpopular to say so, I think a freelancer needs to shelve their passion once in a while and honestly evaluate how they can, or could, benefit people or companies through their work. Your effectiveness in an area might not be sexy but it could be something you can leverage to grow your business.

# What expertise do you have that separates you from your peers?

It's very common for buyers to compare service providers based on the facts, such as the cost estimate at the end of a proposal or the quality and fit of the portfolios. However, buyers also make decisions based on subjective information and your expertise is at the top of that pile. All things being equal, a buyer is more likely to hire the service provider who has done something more, or more expertly, than the other. If you're feeling like you're a little light on expertise then consider making skill development a goal of yours.

# How do your peers talk about their businesses? How do you differ?

It's pretty common for artists to struggle at describing their work, so take a page from those who have already stuck their neck out. Copying is stealing so don't just grab someone's bio. Instead, when you're creeping on your peers (or competitors) make notes regarding the why and the how of their businesses and then create a comparison for yourself. Which elements resonate with you? Which do you feel differently about? Again, focus on words, not visual work here.

# What kinds of activities are you accustomed to performing that have created exceptional value and seemed to be deeply appreciated?

Freelancers tend to develop their businesses with the wrong person in mind: themselves. They have fun with their craft, produce work they are proud of, tell some people about it, and then hope to be paid to do more of it. From a business development standpoint, that self-centered approach will only get you into trouble. Pushing your creativity is not the same as selling; the goal of a successful business is to make the most meaningful contribution you can, and that happens only when you offer solutions.

# How can you create memorable experiences for your customers or clients?

In order to thrive, you're going to have to go beyond being a great artist, and you'll definitely have to go beyond delivering great value—you'll need to ensure you've got a plan in place for creating a great memory. The experience of the buyer can be elevated by even the simplest thing, and when you string together a bunch of small gestures and unexpected benefits you will leave a lasting impression. If your USP can allude to this then that's great, but this is really about your integrity and character as a service provider, so put your thinking cap on.

# BUSINESS ACTION PLANNER

## Action Step(s):

- Craft an engaging and/or explanatory tagline that connects your target audience with your business.

## Next Step(s):

- Add your tagline to your marketing collateral (website, business card, proposal template).
- If it's a long statement, aim to make it shorter so it's easier to share, then consider registering its related web domain name and/or trademarking it.

## Success Indicator(s):

- Within one year you are confidently talking and/or writing about this differentiating factor at a high level (non-promotional) this is how you develop your voice within your industry.

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# 4.2 BUSINESS NAME

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***Create a business name that is both memorable and meaningful.***

Your creative work reflects (at minimum) your style, your point of view, and your visual approach—this is why an emerging freelancer with an underdeveloped portfolio has such a hard time winning business. The name of your

**“THE STRENGTH OF YOUR BRAND WILL REST FIRMLY ON YOUR REPUTATION, NO MATTER WHAT YOU CALL IT—UNLESS YOUR BUSINESS NAME IS JUST PLAIN STUPID.”**

---

business can be very helpful in communicating these elements.

A great business name can help your cause as you aim to make a great first impression. With time and experience your freelance business will be an increasingly viable alternative within your given market. Your business name, no matter what you call it, rides on the coattails of your reputation, your character, and your professionalism.

## **Company Name vs. Your Given Name**

*This section has been written with the assumption that you're crafting a business name other than that of your own. However, the latter is totally fine—even great. Your goal is to create a connection with those whom you're trying to extract money from. Whether a unique business name or your own given name communicates that, it doesn't really matter—especially as an independent freelancer. Just know this, the two most common naming mistakes are: 1) trying to make your operation look bigger than it really is, or 2) trying to be cute. Your business name should be clear and concise, not tacky.*

# Which words, or phrases, appeal to you?

My guess is that you've already got something in the works—most emerging freelancers do. Regardless of what stage you're at, it can be really helpful to identify some of the words and phrases that are attractive to you as a way to develop some business naming fodder. No one will use your business name more times than you, so when you say it, write it, and read it, you want it to conjure up emotion or excitement in your own heart. If you need a nudge here, consider making a word cloud in your journal over the course of a week and see what jumps out to you.

# What key words or familiar phrases do your potential buyers use on a regular basis?

This is a spin off the previous question, but quite different in approach. Here you want to assess the type and style of language used in the market, industry, or target audience that you're hoping to sell to. There might be a common word or phrase that you could use to craft a business name that would immediately trigger goodwill or familiarity, and help establish your ability to meet the needs of a niche market.

# Is your business name short, easy to spell, and pun-free?

I don't think I need to beat this drum very hard, so I won't. Basically you'll want to make it approachable. Make sure your business name is easy to understand—your potential buyers are less likely to buy if they "just don't get it".

# Is your business name memorable and/or credible?

Some business names are really hard to forget, while others lend themselves to being more trustworthy. Sometimes you can only do so much with a business name but consider this: is your name unmemorable or does it make your business seem cheap or silly? There's some food for thought—if you needed it.

# Does your business name relate to your primary offering?

I didn't want to scare you early on, but this is where the rubber hits the road. If your USP covers this off then maybe you have a little more freedom to play around here, but your business name should spark some level of interest in what you do and/or how you serve your clients.

# BUSINESS ACTION PLANNER

## Action Step(s):

- Brainstorm and wordsmith three or more business names that excite you. If you're using your personal name then rock it.
- Select your top choice (but keep it a secret until you have feedback).

## Next Step(s):

- Get feedback from four people: two that represent your target audience and two independent business owners and/or peers.
- Register the domain name (or an iteration of it, or your USP/tagline).

## Success Indicator(s):

- You notice that your business name has become a part of your clients' and prospects' vocabulary.

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# 4.3 LOOK AND FEEL

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***Determine the text and visual treatments that will graphically convey the personality of your brand.***

Your marketing and business collateral should have a cohesive aesthetic, just like a successful portfolio does. With some guiding principles in place you'll be able to more easily create compelling and consistent materials, both digital and print, that fully support your brand. A successful brand brings together all the elements that make up a creative endeavour into one cohesive package that clarifies your reason for working, and serves as a catalyst for action.

Your business is not just about delivering good work; it's also about doing it in style. You're an artist for hire and the look and feel of your collateral (website, email campaigns, business

cards, social networks, proposals, estimates, envelopes, etc.) is the cookie to your white icing filling—yes, that just happened, I compared your talent and your branding to an Oreo cookie (just let that one soak in for a moment—hehe). Your goal is to create an exceptional, visual experience that is sandwiched between personality and trust.



**AS A FREELANCER YOU'RE SELLING TRUST, WHICH IS A RELATIONAL QUALITY; MAKE SURE YOUR VISUALS INSTILL CONFIDENCE.**

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# How would you describe your personality as a business owner?

Don't worry, I'm not going to psychoanalyze you (and I certainly don't want to pigeonhole you either, as there are many different types of creative entrepreneurs). However, I strongly encourage you to consider your personality traits—your actions, behavior, and attitudes—because they have a significant impact on how you conduct yourself and deliver your services.

# How do you want your target audience to feel when they engage with your brand?

Put yourself in the shoes of your potential clients and contemplate what you would want to feel as a result of working with a business like yours. Once you can identify feelings you can better assess felt needs—an invaluable component of business development. Look over this [list of adjectives to describe tone, feelings, and emotions](#) and identify the three feelings you want to instill in your buyers.

# What is your style of writing or tone of speaking?

Your brand vocabulary is a key component of your communication style. The tone of your writing or how you speak, the way you approach a subject or issue, and the words and phrases you choose add up over time and create the language of your business. Add on top of that spelling, grammar, syntax, and punctuation and you've got a lot of things to consider. For now, think about the four primary styles and which one resonates with you, and then find some examples that you can draw from:

- Expository style (subject-oriented, opinion-free)
- Descriptive style (elaborative, sensory, full of detail)
- Persuasive style (reason-based, convincing, strong conviction)
- Narrative style (objective, storytelling)

# What shapes resonate with you (and your target audience)?

Regardless of your experience in high school, geometry is your friend. You may want to consider allowing a particular shape to help provide structure to your visual materials. Consider doing a search for “shapes” on [Google Images](#) or “patterns” on [Shutterstock](#) to get the juices flowing.

# What colours resonate with you (and your target market)?

Colour is a beautiful thing. Colour grabs our attention and draws our eye to things. And when it comes to the reverse, the absence of colour can create a totally different narrative. How you use colour in your collateral matters. Establishing which three colours you are going to consistently use is a great start; choose a primary colour, secondary colour, and a highlight colour. You can of course select more, but these three will be the foundation of your visual dashboard. Remember to write down the six-digit hex code and/or RGB values for each

colour. To get the ideas flowing, check out the [Adobe Kuler Color Wheel](#).

The truth is that a lot of stock gets put into the meaning of colours and I believe we can overthink it if we're not careful. The prescriptive approach to colour is only as helpful as you make it. Just consider for a moment that the colour orange can mean joy and creativity to one person and deceit and distrust to another simply by how dark they perceive the saturation level.

# Which typefaces reflect your tone and style?

The fonts you choose for your brand will make up an important part of the visual assets required to establish a compelling and convincing look and feel. When you intentionally select and then consistently use a set of fonts, you will have created a convention for your marketing that many in your industry have not (freelancers are especially notorious for flippant font-age). Want to shop around for a great font? Check out [fonts.com](http://fonts.com).

Some things to consider when selecting your typefaces are:

- Choosing a serif and a sans-serif font (with or without decorative strokes) or an old typeface and a modern font can help create contrast between things like headings and body text, or logo and tagline.
- Font selection should help convey the feelings you want to instill in your buyers. Be creative with your choices while still aiming to use time-proven fonts that display well both in print and on the web.

# Which typefaces reflect your tone and style? (continued.)

- Use fonts that have plenty of space between each letter. You don't want to get married to a typeface and realize that in some situations the letters can get really mashed together.

My hope is that you'll at least consider selecting four fonts to use consistently for the following elements:

- Primary/Heading 1 font
- Heading 2 font
- Body font
- Note font

# What is your image style?

Photographs, illustrations, and graphic treatments can help you communicate the heart of your brand at a glance. The types of imagery you use, or don't use, should be intentional across all your marketing and communication collateral. Whether an image is prominently featured or used as a background, a consistent aesthetic to your imagery is imperative because the alternative, a ragtag collection of visual chaos, will distract and annoy the viewer and that's not a great way to make an impression.

I say it this way because I see a lot of visual artists use random images clipped from the web in their blog posts, or proudly display heavily watermarked photographs. Outside the portfolio environment, I see a lot of collateral that does more to offend me than engage me and my hope for you is that you'll make intentional choices about what images you use not only in your portfolio but on everything you share.

# What pieces of collateral do you need to put into place this upcoming year?

Sometimes you just need to reverse engineer things. Think ahead a bit and begin to make a list of the kinds of documents and marketing pieces you'd like to create. The tangibility factor can help shape your brand identity so spend some time thinking about analog ideas that could help your target audience engage with, and experience, your creative work.

# If you were to imagine your business as a larger company, what would you want the corporate culture and identity to look like?

Take it a step beyond the here and now and picture a bigger operation:

## *Initiate daydream sequence.*

You are the CEO of a company you founded; this organization has a personality of its own. The corporate culture flows through the staff like a river through a canyon; this culture is made up of values and attitudes, words and pictures, colours and shapes, visual style and lasting impressions. Everything is deliberate; every physical and emotional expression is intentional.

## *End dream sequence.*

Being able to visualize your business in light of success, or in a different context, can help you establish guiding principles in your present situation.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Create a branding style guide that outlines all your aesthetic decisions:

- \* Top three customer feelings
- \* Style of language/example
- \* Choice of shape
- \* Primary colour
- \* Secondary colour
- \* Highlight colour
- \* Heading 1 font
- \* Heading 2 font
- \* Body font
- \* Note or sidebar font
- \* Feature image(s)
- \* Background image(s)

## Next Step(s):

- Update all your web spaces and print places so they reflect your new look and feel.

## Success Indicator(s):

- A new, or existing client comments on how professional your marketing and/or business collateral looks.

# 4.4 BRAND MARK

## ***Design a logo that creates visual interest and re-enforces your USP.***

A logo is a snapshot of your brand, it helps you present a professional image and it supports your actions and beliefs. An interesting logo makes people take notice and it gives your buyers a sense of how you communicate visually. After all, you are a visual artist.

I believe a logo is helpful; it can be a valuable component of one's marketing effort. However, you don't need a logo in order to exude a great brand. Evidence of this is everywhere—it often comes in the form of a text-treatment, lower-case Helvetica "logo" (I kid, I kid).

## ***Being On-brand***

*More than anything, your brand is a historical account of how you've acted in relation to your professional values. How you conduct yourself is what needs to be on-brand. When a freelancer is on-brand it doesn't mean they are on-logo, it means they follow through on their promises. Think of it this way: everything Woody Allen does in the making of his films is on-brand (and he doesn't have a logo).*

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**A LOGO IS NOT YOUR BRAND;  
IT'S SIMPLY A VISUAL TRIGGER  
TO REMIND YOUR BUYER OF WHO  
YOU ARE AND WHAT YOU OFFER.**

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# How do you want your buyers to identify with you?

Your logo is just like the Bat-Signal, though hopefully instead of being a call of distress it is in fact a beacon of hope. That hope, however, only comes when your brand mark helps your clients identify with you. Your logo needs to be a reflection of those you're trying to serve. The development of a niche can aid this process. Familiarity and comprehension happens when your visual elements, primarily your logo, connect on an emotional level. If, after some research, you know that your potential buyers are looking to fulfill a specific feeling or need (fun, happiness, love, creativity, growth, success, you name it) then you'll want your logo to reflect those values. I've restrained myself from including a cliché joke about Comic Sans.

# **What kind of visual symbolism could be derived from your Unique Selling Proposition (or your vision statement)?**

Again, think back to your USP (or even your vision statement if need be) and ask yourself what kind of icons, symbols, or pictures can help tell the story of why your freelance business exists. Your logo should reflect the heart and soul of who you are and how you serve people with your artistic services, so take your time on this—you can't do a half-ass job on this one.

# Have you collected a sample of logos and visual treatments that excite you and that you feel relate somehow to your style of creative work?

This one should be fun. I strongly encourage you to create a visual mood board (collage) of icons, logos, and pictures that reflect your values, style, and the attributes of your business. This can be a very exciting and entertaining process that if given enough time can really start to illuminate the branding process far beyond the creation of a logo.

## ***Fire Yourself***

*Sometimes the best business decision you can make is to fire yourself. Consider working with a freelance designer in the creation of your logo (and your visual brand), but do your homework. Pursue a designer who has not only a great portfolio but ensure they have a clearly defined design process. Your money and energy will be best spent on a designer who walks you through a proven process; this is usually evident by how many questions they ask you prior to providing initial concepts.*

# BUSINESS ACTION PLANNER

## Action Step(s):

- Interview at least two freelance graphic designers and choose the one you're most comfortable with; or
- Create three versions of your logo, select your favourite, and percolate on it for seven days (cooling off period).

## Next Step(s):

- Ask two peers and two designers for their honest feedback of your logo.
- Create a square web-friendly version of your logo.
- Update your marketing collateral (and spaces) accordingly.

## Success Indicator(s):

- Two years after finalizing the design you are still proudly using the same logo and have no intention of changing it.

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# 4.5 HEADSHOTS

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***Put a professional, human face  
on your business.***

Your marketing efforts start and end with trust and no matter how spectacular your portfolio is, or how awesome your marketing materials are, there is always a place for your face. Allowing buyers to get to know you as a person—to recognize your face and associate you as a source of expertise—is an important part of a freelancer’s marketing strategy.

**“ AS A FREELANCER YOU MUST HAVE A PERSONALITY BEYOND YOUR WORK; YOUR FACE IS THE FACE OF YOUR BUSINESS.**

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I cannot even begin to express in words just how important it is for you to have high-quality photographs of yourself. Too many times, I've seen a designer's social profile picture or bio photograph look more like a "wanted criminal" advertisement than someone who is trustworthy; this of course reflects poorly on their craft, making them look unprofessional. Some designers commonly fall into a different trap—a mug shot would probably be an improvement! They tend to refrain from showing their face at all, leaving buyers to question who is behind the curtain. Whether from a marketing or public relations standpoint, it's always a good idea to have a set of great headshots in your back pocket.

### **Regarding Selfies**

*A self-portrait photograph taken with your hand-held digital camera or camera phone has its place. The casual look, especially for social networks, is appropriate assuming the photo is high-quality and well-styled. However, most selfies are not what most people would consider a headshot and, out of respect for the buyer and your potential referral network, professionally-looking headshots tend to do a better job of communicating trustworthiness.*

# Do I need to work with a photographer or should I take my own headshot?

The answer is easy: maybe. Make the decision that will produce the most authentic, quality headshot in the most advantageous time-frame. Most of the successful photographers I know have had peers or assistants take their headshots, and most of the successful designers I know have worked with a photographer to do theirs. Consider the next couple years of marketing and brand-building, and then make the decision that will produce the on-brand photographs you need in order to present a professional image. If cost is a concern, then see if you can trade services.

# Which of my personal/ professional qualities do I want to capture?

Drawing from your biographical efforts and all that previous naval-gazing, consider making some notes about which parts of your personality, talents, character you feel would be helpful to the cause. That's right—go beyond deciding which is your “good side”. You may feel this isn't relevant, but think of it this way: if your business relies on your ability to make people excited or put them at ease, then a static smile isn't enough, you should probably have a headshot where your mouth and eyes are smiling after laughing. The same would be true if your work had an edgy tone—a raised eyebrow or snarled lip would help your cause. The point is, don't look like an accountant unless you specialize in serving the needs of accountants.

# What kind of mood do I want to convey with my headshots?

Think about the aesthetic feeling or attitude that you want the reader to experience. Photographs should be shot and edited in such a way as to elicit a mood that is consistent with your brand. I say this because a headshot's mood, though elusive at times, is always present and when a more creative approach is taken with a headshot it should be done with intention. I'm seeing a lot of heavily stylized photographs on freelancer's web spaces these days (obviously thanks to over-processing) and I am not convinced that buyers are as intrigued by dark vignettes, magic hour or cross-processed looks as one might think. As a quick aside, young freelancers who need to instill a sense of credibility may want to consider using black and white as a treatment—it helps add a few years (nudge, wink).

# Do I need a setting, props, or a background to help communicate what my business is?

Whether you have a seamless background or an elaborate scene, the decision must be intentional and authentic. Why do you think real estate agents always have headshots taken with their dogs? They're trying to communicate friendliness and an energetic, domestic lifestyle—that, and everyone loves dogs. Choose a setting that is reflective of your lifestyle and/or your work environment and from there, decide how you want to style the background. The aesthetic quality of the blur that comes from having some parts of the photograph out-of-focus (the bokeh) can help focus the viewer on you. This is especially valuable if the background doesn't help convey you or your business. Also, it's a great way to inject some colour and texture into a photograph without distracting the viewer.

# What kind of grooming, clothing and accessories should I plan for in order to communicate my personal style?

How you look matters. In preparation for a headshot session make some notes about how you'd like to communicate your style and personality by making intentional choices about what you wear and how you wear it. And consider this: photographs are of such high resolution that they show everything—take your grooming seriously. I'm really talking to men here as they are notorious for being flippant in this regard. I've seen too many cool, creative people end up with photographs of themselves in crumpled blazers, with razor burn or a

beard that looks like they "missed a spot". Regardless, this attitude about your appearance applies beyond your headshot of course. The cliché phrase "dress for success" is quite true when it comes to convincing a client that you're the freelancer for the job. When you're with clients you need to look the part of a trustworthy professional. Whether your style is more casual or more formal you should aim to look your best. It adds confidence and it conveys an attention to detail and pride in your work.

# Which portrait styles do I need?

Your target market, and more importantly, your marketing needs will determine your style selection; however, I think a freelancers should always have more headshots than less. For your web spaces you'll want to mix things up every few months. For the occasional interview or a speaking engagement you'll also want to be able to keep things fresh and interesting. Regardless, you don't really know what style of headshot you need until you need it, so it's always better to have several styles in hand. In my opinion, a

business owner should have three "looks" in their back pocket.

- Professional face. Seamless background, clean and smart-looking (looking at the camera).
- Creative face. Colourful background, casual-looking (looking at the camera).
- Lifestyle face. Location setting, candid, relaxed-looking (looking off-camera).

# BUSINESS ACTION PLANNER

## Action Item(s):

- Find five examples of headshots that you feel are similar in style and that you feel represents your personality and brand.
- Photograph three high-quality headshot "looks".
- Post-process as necessary; create print/web versions (including square format for social profiles).

## Next Step(s):

- Update your social sites and your website sidebar/contact page.
- Don't take yourself too seriously; do something fun with your headshot (put it on a cellphone case, make a sticker of your head, create a trading card... whatever makes you smile).

## Success Indicator(s):

- Your headshot is well-liked online.
- You feel more confident as you engage with prospects thanks to your refreshed professional appearance.

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# 4.6 MESSAGING

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***Create standard replies to common questions about you and your business.***

Like I've mentioned already, one of your primary goals as a freelancer is to remove the mystery associated with your creative work. Being a little mysterious can be an asset as an artist but it rarely helps the cause of a service provider. Every business owner eventually discovers their talking points but you can achieve this clarity sooner than later if you craft replies to the most common questions you come across.

It's common for entrepreneurs to craft an elevator pitch—a 30-second summary to define who they are, what they do, and their value proposition. Preparing this kind of sales pitch has its place for sure but I haven't seen it be as helpful for creative freelancers as one might

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## **HOW YOU RESPOND TO INQUIRY MATTERS MORE THAN HOW WELL YOU MARKET YOURSELF.**

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think. Instead, a summary that is more conversational is likely a better message for you to prepare. You'll have to discover for yourself what the most common questions are within your industry or market, but I'll get the ball rolling here and say that the three questions I hear freelancers screw up the most are: 1) What do you do?, 2) How much do you cost?, and 3) Who have you worked for? Your goal is to create scripts to questions such as these so you can speak with confidence and turn the line of questioning into something more productive than flippant interrogation.

# How can you answer the question “What do you do?” in such a way that you spark further inquiry?

Again, drawing from your biographical efforts, being able to answer that prosaic question with something more than a simple title will make this kind of conversation a lot more interesting. If you answer with, “I’m a photographer/designer” then you’ve told them nothing really. When a dental hygienist answers this question their title really tells the whole story. As a creative freelancer your craft is simply the medium of your art, it doesn’t define who you are, nor does it explain what you do. From a messaging standpoint,

your goal should also be to find a way to spark a follow-up question. Whether it’s a brief description of a recent project or alluding to a subject that has grabbed your attention as of late (one that relates to your work of course) you’ll want to script for yourself a short, teasing remark that you feel is likely to keep the conversation on you without it being sales-ish.

# **When a prospect asks you “How much do you cost?”, what statement can you make that puts them at ease; then which three follow-up questions can you ask in reply?**

More often than not, this question is asked prematurely and the only mistake a freelancer really makes in this situation is that they actually try to answer it. Your goal is to learn as much as you can about their needs and get back to them at a later date with a proposal. Your initial response is critical, you want to ensure you don't put up any unnecessary barriers but protect yourself from quoting on the spot. First, script a short statement to use in these situations, one that re-assures them that you have an estimating process. Second, script three important questions you'd need answered, at minimum, in order for you to prepare an estimate.

# How can you best steer the question “Whom have you worked for?” into a conversation about your most recent projects?

Emerging freelancers rarely have a notable client list so if you’re in this situation then you’ll want to casually reply with something that directs the inquirer to learn about your creative work instead. Script a reply to this type of question that energetically conveys the tenets of a personal or client project that you’re really excited about. The most successful answer I’ve heard in this situation was something that went like this: “I’ve just started making myself available to a few select clients; my latest project was really cool...”. Anyway, the point here is to prepare a trigger statement to use as a default reply and then focus the conversation on what you’re working (on not whom you’re working for).

# BUSINESS ACTION PLANNER

## Action Step(s):

- In light of the Kick Start work done previously, create short scripts for the following three questions:
  1. What do you do?
  2. How much do you cost?
  3. Whom have you worked for?
- Alternatively, define and answer three questions you feel are common to your business.

## Next Step(s):

- Memorize your scripts so that you can repeat them verbatim, then practice more candid variations so you don't sound like a robot.

## Success Indicator(s):

- You feel confident that, when in a face-to-face conversation, you're able to satisfy a business question while at the same time learn more about the other person's needs.
- You see an increase in the number of proposals you're preparing.

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**YOUR CRAFT IS SIMPLY THE MEDIUM OF YOUR ART, IT DOESN'T DEFINE WHO YOU ARE, NOR DOES IT EXPLAIN WHAT YOU DO.**

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# INTERVIEW

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# ANTHONY HOOOPER





## **What was the tipping point, or catalyst, that helped you make the transition into full-time design?**

I was in between my fourth and fifth year of university; it was the home stretch of a bachelor's degree in business admin. I realized what I really wanted was to be sitting on the other side of the boardroom table—the side with the 'creatives' not the 'suits'. I dropped out and took a year off, worked on my portfolio and applied to design schools.

## **If you could start your business over again what is one thing you would do differently?**

Don't be afraid to make mistakes. Mistakes force me to grow, both as a designer and a business owner. Often I find myself pursuing a direction that's unfamiliar and that can be difficult. Of course, it's much easier to play it safe and avoid taking risks; however, I think that can lead to a very predictable result. When I fail, I own it and I grow. I

remember designing a logo for a theatre company named *Exit 22*. I was typing it into my font directory and I misspelled the word, "Exxit"; it was a careless mistake, I keyed one too many "Xs". But that mistake led me to the final solution: incorporating the roman numerals for "22" into the name. It was so clear once I saw it.

## **How has your business changed over the years?**

When I was first starting out I was fixated on leaving an impression, with clients, leaders in the industry or just fellow creatives. I realized pretty quickly that what I thought mattered, really didn't at all. Once I let go of that misconception, I began enjoying the work so much more.

## **What is a business practice you feel is imperative to your success?**

Taking days off. It's easier said than done, especially when you've got momentum with projects. At a certain

point, though, my work begins to suffer and becomes more a task than a labour of love. So I try to make sure I'm taking a day off here and there.

## Which marketing activities consistently help you attract new clients?

*It's a cliché, but I think it's my body of work. Full disclosure: I'm terrible at self-promotion. I just can't find the time. So I strive to make the work I produce, as well as the process of creating it, indispensable to the client. Word of mouth is such a powerful tool when it comes to marketing.*

## What is the most common piece of advice you give to emerging designers?

*Be patient, methodical and confident in everything you do. I understand that most clients do not have formal design training; it's my job to be patient and articulate my process and my ideas clearly. Educating the client helps me*

*to qualify myself as an expert in what I do. This tact requires a little bit of extra leg-work, but in the end it almost always results in a stronger working relationship—one that's built on an established respect and trust. A great example is the initial meeting with a prospective client. Without fail, the client will want to skip ahead and talk about the final product: "it needs to look like this...", or, "It needs to have this..." and when I was a junior designer it was really tempting to take the bait. Of course, it's crucial to consider all of your client's needs, but there's a time and a place for that conversation. My approach to these meetings is very different now. I almost always begin by explaining how I work—my creative process; I find that this creates a rapport with the client right off the bat, and affords me the opportunity get a read on the client.*

# **5. BUYERS**

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**FINDING AND  
UNDERSTANDING  
YOUR CUSTOMERS**



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# 5.1 TARGET MARKET

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***Identify the type(s) of buyers  
you wish to serve.***

Every business, big or small, needs to have a specific, well-defined segment of buyers in mind so their offerings, as well as their marketing, can be tailored to suit. Creative freelancers are more successful when they focus on a group of reasonable potential buyers because opportunities are found in the incremental growth within a target market.

Think of a target market as a profile: a general description of buyers you feel are the most likely to benefit from your services. Whether you're researching demographics (location, vocation, gender, age, or knowledge) or psychographics (personality, values, opinions, attitudes, interests, and lifestyles), the most important thing to remember is that when you know more about the types of buyers you want to pursue, you are more likely to become more attractive to them.

**“VAGUE REFERENCES TO “PEOPLE ONLINE”, “MARKETING DEPARTMENTS”, OR “WOMEN BETWEEN THE AGES OF 19 AND 45” JUST DOESN’T CUT IT.”**

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# What kinds of creative problems do you like to solve?

Your craft can be applied to a nearly infinite number of scenarios but because of your particular experience, expertise and passion, you've already begun the process of elimination. Now as you ponder your target market, it's important to start to document which problems you feel you're best suited to address. As you can tell, I'm steering you away from art for arts' sake—trying to focus you on meeting the needs of others. You very well may be satisfying creative, emotional, or decorative desires, but you'll benefit more from having the perspective of solving problems. I say this because prospects who are looking to overcome a need are always more motivated to become buyers.

# Are there sectors and/or industries that you are best suited to serve?

This kind of clarification and/or distinction is helpful for certain types of freelancers. If you're operating a business-to-business model, then understanding both the sector and its associated industries is an economic imperative. By digging more deeply into the categorizations of the types of companies you feel you are capable of serving, you will invariably discover new opportunities. One of the best examples I've seen of this type of effort was an emerging graphic designer who wanted to focus on the skateboarding in-

dustry because he skated and he loved the culture and brands associated with his sport. After researching the editorial and manufacturing market he learned about the commonality of needs and wants, and most importantly the sensibilities of the end-consumer. He discovered how he could apply his aesthetic and approach to all kinds of events, activities, and apparel projects. His design concepts didn't need to be as niche as he once thought.

# Can you list some examples of companies, organizations, or people you have some sort of affinity with?

Without getting too specific, or emotionally attached, it's valuable to start thinking about the potential buyers you'd like to attract. Don't start your prospect list just yet, but with a few potential buyers in mind, ask yourself about the elements of their needs, wants, and desires and define for yourself which of those things you identify with the most. Whether it's like-mindedness or feelings of empathy, it's important to be able to articulate the part of their world that you feel a connection with. Basically, make some notes about why you want to work for them.

# How can you best describe your target market?

It's always a good idea to boil things down to their essence. In the case of target market planning, regardless of its make-up, it's valuable to describe it as succinctly as possible as your business matures. If your ideal buyers exist within a sector or a selective group of industries, then describing them in as few words as possible can help keep you focused as you make business and creative decisions. Think of how a music artist is categorized into a genre, such as Alternative Country, West Coast Hip Hop, or Acid Jazz. In a similar way,

your target market should be categorized and definable in relation to your work. In the earlier example where the designer was focusing on outdoor sports, he could categorize his target market as "board sports", or something to that effect. This description need not be public; it's not a tag line. If things feel fuzzy for you in this respect don't worry—over time your target market will become easier to define as you carve out your niche or clarify your unique value.

# BUSINESS ACTION PLANNER

## Action Step(s):

- List the industries that you're most likely to consider as your target market.
- Create a short description of your target market.
- Describe five traits that your ideal types of buyers have in common.
- List three problems that exist within your target market that you feel your freelance business is suited to address.

## Next Step(s):

- Over the course of three months research potential or ideal clients and learn more about the needs and wants present within their industry (observation only).
- Produce a personal project that illustrates how you can address one of these business issues.

## Success Indicator(s):

- You feel knowledgeable about your target market and you're beginning to feel a niche coming into view.

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# 5.2 SPHERE OF INFLUENCE

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***Evaluate and strengthen the breadth and depth of your professional contacts.***

Your target market is made up of those who are within your grasp socially and professionally. By way of definition, your sphere is the social space that encompasses all your relationships and your influence is the level of direct or indirect control you have upon those people.

Think of the various relationships you have; these private and professional contacts act like a cluster of concentric circles with you at the centre. Your network is made up of these people. Work to understand who exists within

your sphere and whom you'd like to add and identify the degree by which you can leverage their interest, support, or like-mindedness. A mature freelancer looks to their network first when trying to generate demand for their services, rather than sending cold emails to perfect strangers.

**“INTENTIONALLY STRENGTHEN YOUR NETWORK AND YOUR STOCK WILL GO UP BECAUSE THE MORE KNOWN YOU ARE, THE MORE IN THE KNOW YOU ARE.**

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# How would you define your sphere of influence?

Consider categorizing all your contacts based on the degree of how likely they are to endorse or hire you. Though I realize this sounds a bit prescriptive, grab a pen and paper and draw five concentric circles, with your name at the centre. Now title each of the four rings with categories that make sense to you, such as 1) Fans & Followers, 2) Peers & Collaborators, 3) Acquaintances & Business Contacts, and 4) Industry Movers & Shakers. Now go through your contacts and write their names into each of the rings based on how close

they are to you. If you struggled with the location of a few names (as in, a business contact of yours is also a fan and a follower), then you've got yourself a great problem. The closer rings will be fuller, obviously, and it's those people whom you have greater clout with. The goal here is to simply get you thinking about the opportunities and needs that exist within your network. You cannot sell to people you don't know, understand, or have some level of affinity or connection with. Period.

# Which of your personal contacts are likely to convert into active referrers if intrigued or motivated?

Those within your network who are fans and followers are the types of people that are likely to help connect you with those within your target market or with those who can help get you a step closer. In preparation for some marketing activities down the road, consider who would make for a great ambassador of your talent and services. By identifying them early on, you'll find yourself more prepared to tailor marketing tactics that are easier for them to pick up on than if you didn't have them in mind.

# What kinds of activities could you participate in that will increase your chances of gaining industry contacts?

This is the million-dollar question. Let's face it, you're not going to work for The Coca-Cola Company or Nike, Inc. tomorrow but maybe a local coffee roaster or a small eco-friendly athletic apparel designer at the outdoor street market is the right kind of contact to begin pursuing. Once you've got your target market lined up, start looking for people and companies at the lower rungs and find ways to engage with them. Support their businesses and/or their charities, become an ambassador of their

products or services, refer them to your family and friends, reach out to their subordinates, and encourage them. I know this all sounds very evil or exploitative but I don't mean it that way; simply try to find ways to connect and though you can always try the front door (phone call, email, walk-in), sometimes the long game is better. Your network grows as you reach out and take chances.

# BUSINESS ACTION PLANNER

## Action Step(s):

- Create your own sphere of influence diagram.
- Categorize your contacts based on how supportive they are of your creative work.
- Clean up your digital address book (e.g. Mac Contacts, Microsoft Outlook) and create accurate contact profiles for every potential buyer or referrer.

## Next Step(s):

- Engage with your most supportive contacts and inquire if they have a connection with someone who they think may need your services.
- Whether through a referral or unsolicited means, make coffee or lunch plans with three potential prospects.

## Success Indicator(s):

- On a monthly basis your network (online and offline) is growing filling the gaps of your human network as they relate to your primary audience.

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# 5.3 PRIMARY AUDIENCE

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***Develop and pursue a short list of approachable, potential buyers.***

When you’re able to break down the big, scary marketplace into a short list of people (and their companies) that are already within your sphere of influence, it means you have the makings of a sellable audience. Then as you make future decisions about offerings, pricing, sales process, and marketing efforts, you’ll be able to confidently engage with those you’re looking to serve.

I prefer the term “primary” audience versus the more commonly referenced “target” audience

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**YOU GAIN OPPORTUNITIES WHEN  
YOU BUILD TRUST AND RAPPORT  
WITH HUMANS. MARKETING  
WIZARDRY IS NOT REQUIRED.**

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for one simple reason: it more accurately defines the narrowing effect of one's marketing energies on those who are already listening to what you're saying. Think of it this way: an audience is already paying attention, so those are the people I want you to focus on serving. Your role as a creative service provider is to make your expertise attractive to those who are interested and in need of what you have to offer.

# What assumptions are you making about your primary audience?

I'm really just asking you to apply a bit of caution here. Every freelancer brings with them a whole pile of assumptions about their primary audience, most of which are totally accurate assertions that don't really need a bunch of research. However, from time to time a misguided assumption can cause problems, so consider making some notes about why you feel a prospect wants and needs to work with a provider like you. Then as you continue to serve their industry you'll be better prepared to validate or negate your assumptions.

# Who has already bought from you?

Dare I say it, but most freelancers tend to loathe the first few clients they have because they feel they're "small time" or less than ideal. And though the concern may have some merit, if you feel you're in this situation, I encourage you to consider who in your client list was your best so far and see if you can't build on that experience. There's usually something left on the table early on in the development of a new business, so go back in time a bit and evaluate why they hired you, which in-

dustry they represent, who their professional contacts are, and any other hidden nugget that you can springboard from. Go back to the well, my friend. Find ways to continue serving clients you enjoy working with (and that pay on time). Sometimes an emerging audience or niche is sitting right under our noses.

# What kind of homework can you do about your prospects that will help you engage with them down the road?

Developing robust prospect profiles is an invaluable part of growing your target audience. Identify a few individuals with whom you want to engage down the road and start doing research: company info, contact information, website(s) and social networks, title, bio, recent projects, charity work, industry events, publications, topics of concern, restaurants/cafés near their office, or whatever you can find. Over time, developing these profiles will help encourage you to stay informed and aware of what's happening in their business.

# What are the common threads that exist between those you've identified as your primary audience?

Your audience has more in common than their need for a service provider like you. As you identify their mutual business needs or concerns, the similarities in their business activity or customers, and the service providers or resources they share, you'll be better able to convey your ability to serve them all. This type of effort will aid in the development of your business offerings, your pricing, and your marketing, as well as help you address any erroneous assumptions.

# What can you do to serve your audience without trying to sell them?

I wish more freelancers asked this question. In short, this is why a lot of creatives blog and/or share content and experiences online—because they’re looking to connect with, support, or entertain the very people they want to work with. This type of effort is called a “soft sell” and it works if you’re in it for the long haul. As a freelancer consistently shares insightful, candid, interesting, opinionated (and substantiated) remarks, they are exposing their primary audience to their creative contribution. That’s gold, my friend, gold! Blogging aside, spend some time thinking of your primary audience and ask yourself if you can find your own unique spin on making their lives better without asking for a dime.

# BUSINESS ACTION PLANNER

## Action Step(s):

- Create ten prospect profiles (detailed contact v-cards) of potential buyers who are reachable from within, or through your sphere of influence.
- Create a list of three previously missed opportunities (if applicable) and assess what you could have done differently. Brainstorm how you can re-engage with them in the future.

## Next Step(s):

- Reach out directly (or ask a mutual contact for an introduction/referral) to your top three prospects with an invitation to lunch.

## Success Indicator(s):

- You connected with these top prospects in person (or on the phone) within three weeks of being introduced.

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**CONSISTENTLY SHARE  
INSIGHTFUL, CANDID,  
INTERESTING, OPINIONATED  
(AND SUBSTANTIATED)  
REMARKS, AND YOU WILL  
EXPOSE YOUR PRIMARY  
AUDIENCE TO YOUR  
CREATIVE VISION.**

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# INTERVIEW

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## ANDI MORTENSON





## **What was the tipping point, or catalyst, that helped you make the transition into full-time design?**

*Ever since I graduated from design school, having my own design studio one day was always on my mind, but I knew I needed to get some experience under my belt first. After three years in a few different design roles, I started my freelance business, Epic Design. Shortly after, I landed a job with the Canucks! I was ecstatic—definitely a dream job, and I loved the five years I spent there. With that said, in the back of my mind was always the draw of freedom and fulfillment that comes with running your own business, which I was still doing on the side—and which was getting so busy that something had to give.*

*I actually did have an 'aha' moment at 3am one night. I wrote it down and went back to sleep. It was something*

*like this: "full time biz, contract for Canucks". That was the moment I had decided what I wanted to do—I could still maintain my connection to the Canucks, and pursue my goal! It certainly didn't hurt that I had freelance work with the Olympics that I could now ramp up. Moral of the story here is that the transition really was years long—I ramped up my business on the side to be sure I would be busy, but gained tonnes of great experience along the way. It did take that one moment and some encouragement from a good friend to help me jump in with both feet though!*

## **If you could start your business over again what is one thing you would do differently?**

*I think some of the most valuable knowledge I've gained over the years has come from other people. If I were to start over again, I think something that would have helped accelerate my*

business and avoid a few headaches along the way would have been to seek out a mentorship program. I'm actually still considering doing that!

## How has your business changed over the years?

When I first started my business, it was something I did on the side of my full-time job. After it evolved from a side gig into my full-time freelance job, now it's evolving again from freelance into more of a small agency. With each new stage comes a learning process, and a lot of hard work, but when more work starts pouring in and it's too much for one person to handle, you have to start making decisions on whether you will hire more people, or start being more selective with the projects you choose to take on. My business will continue to change as I discover new skills, meet new people and form new ideas.

## What is a business practice you feel is imperative to your success?

I think in addition to the obvious—have great customer service and do great work—you need to be fair. Charge people what you honestly believe you are worth, treat people fairly, including clients and people doing work for you, and always look at things from their side and think of how you would want to be treated. I also think being a positive person makes people want to work with you and certainly doesn't hurt with recommendations!

## Which marketing activities consistently help you attract new clients?

For me, the biggest asset is my network—I've proven myself time and time again, and the strongest recommendation a potential client can get is from someone they know and trust. I try to stay in contact with people I have worked with in the past and go

for lunch and coffees and try to stay in touch. I also make an effort to show my appreciation for current clients.

Within my network I have established myself in a niche, as a sports branding & design expert, so I'm the first one they think of when a suitable project pops up. LinkedIn is an important tool for me to get found and to keep in touch with my network as well.

you to understand that, and it's great knowledge for how to best set up your own company. The other important aspect is honing your design skills from other experienced professionals and observing how they deal with clients on a daily basis. I feel I've learned a lot more on the job than I did in school!!

## What is the most common piece of advice you give to emerging designers?

If they want to freelance, I tell them to get some experience in a full-time job before going out on their own. The amount of things you learn on the job is incredible—how a department works and keeps itself organized, how people communicate with other departments internally, how a large or a small company runs, how job queues work, the list goes on. Your future clients will be living in this world so it's important for

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**I FEEL I'VE LEARNED A LOT  
MORE ON THE JOB THAN  
I DID IN SCHOOL!**

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**ANDI MORTENSON**

# 6. OFFERINGS

**CREATING AND  
COMMUNICATING  
YOUR VALUE**



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# 6.1 SALEABLE EXPERTISE

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***Describe the skills/assets available to you that you wish to use in order to generate revenue.***

Like a paramedic, a freelancer is called in (usually later than they should have been) to save the day. They play the part of the temporary hero because they have been contracted to create something that their clients can't do, or don't wish to do, themselves: be creative on demand. Your expertise and skills are what separate you from the alternatives available to buyers.

A lot of freelancers are quite unaware of the alternatives that are available to their clients. I've

witnessed secretaries ask their teenage nephews to take some product shots with payment being a bag of schwag; I've seen longstanding friendships trump due process in a formalized procurement process. Situations like these will always surface but one thing must never be a variable in your business: you need to make intentional decisions about what you do and do not offer your clients, and you need to know why your business' attributes are valuable.

**“ IF YOU'RE GOOD AT WHAT YOU DO, THEN MAKE SURE YOU KNOW WHY YOU'RE GOOD. OTHERWISE YOU'RE SIMPLY OFFERING FALSE HOPE TO AN UNSUSPECTING BUYER.**

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# What experience, knowledge, or insight do you have that you feel your primary audience would find valuable?

I like to think of these attributes as human capital. I know that sounds cold and business-like, but let's face it, there's economic value in what you've learned and the context in which you've learned it. This is what separates you from the traditional workforce; otherwise you're just a contractor-for-hire, not a freelance business operator. Your unique experiences and the makeup of your intelligence is what buyers want to tap into. This plays a huge part in helping you differentiate yourself from your competition. Be sure to consider which elements of your history are the most easily understood and marketable, as these will eventually contribute to your higher-value pricing schemes.

# What talents, skills, and capabilities do you have that you feel your primary audience would find valuable?

To continue on with the idea of human capital, not all labour is equal. Not only is skill expendable but some talents are simply not worth as much as others. As the sole employee of your company, it's important to acknowledge which of your technical skills are most valuable, which of your creative talents are more specialized, and which professional capabilities you can wield with ease. Evaluating your strengths in terms of how they can be monetized is a valuable exercise. As you continue to learn about the expectations and needs of your primary audience, compare those factors to your skill set—knowing where there's a match and where there isn't will help shape your business offerings.

# Which skills or tasks do you not want to do? Which ones are you not willing to include within your business offering?

I don't want to beat you over the head with this one, but as you've been evaluating and applying your personal strengths, keep an eye out for the ones that you hate doing or do reluctantly. When you perform services that you don't enjoy, or are not proud of, it creates room for mistakes and frustration—bad omens for your brand. Freelancers have to juggle a lot of things and early on you'll find yourself doing a lot of things you don't like doing. By way of establishing your niche, it's also helpful to identify the tasks and duties you simply will not offer. The process of elimination can be very freeing.

# What expertise or skill do you have access to?

There is plenty of talent to go around and it's very likely that your business offerings would benefit from the inclusion of outside talent. Consider which service providers or freelancers are available to partner with you on a case-by-case basis. This extension of talent means you can more easily focus on working within your wheelhouse and spending valuable energy creating a great experience for your clients instead of running around doing all the work. The outsourcing model, when handled carefully, has a lot of benefits in the long run.

# What, if any, physical assets do you possess that have market value?

If you have items that you can conveniently leverage in order to meet the needs of your clients, your business may be a simpler option than hiring a freelancer who needs to source those same things. Whether it's specialized equipment, gear, software, land, vehicles, furniture, studio space, or whatever, being able to charge clients for assets that you already have can be a great way to generate additional revenue. A word of caution here—going into debt in order to buy turnkey assets is not recommended.

# BUSINESS ACTION PLANNER

## Action Item(s):

- List four areas of knowledge or professional expertise and describe why you feel buyers would value your experience.
- List eight talents, skills, or capabilities that you feel clients would value.
- List four client-oriented (project) tasks that you would like to outsource and determine the associated costs and mark-up.

## Next Step(s):

- Organize your strengths into two categories: high-value and low-value.
- Define the types of tasks, logistics, and processes of your high-value efforts; these are your services.
- Brainstorm ways in which you can limit the number of low-value efforts you apply to future offerings.

## Success Indicator(s):

- Your buyers clearly understand the benefits you offer.
- You are a high-functioning, hardworking, happy freelancer who feels valued.

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# 6.2 PACKAGING

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***Develop distinct offerings so that your creative services are easier to sell.***

Talent is not enough; you already know that. Consider then, for a moment, what it's like to hire a creative freelancer: the buying process is often confusing or overly simplistic and professional. You'll create a more sustainable business as you work to address the creative and economic concerns of your clients by making your benefits and your value known in plain language.

As your business develops, and as you define and describe what it is that you offer, you will remove the mystery that's commonly associated with creative work and become more at-

tractive to buyers. A mature freelancer never gets out of the development phase; they're always adjusting what they do based on what their buyers are telling them. By listening to your buyers, you can become attuned to the needs of a smaller segment of the general market, and your efforts will be more easily recognizable and consumable.



**HAVING A SERVICE OFFERING IS MORE THAN BEING AVAILABLE FOR HIRE; MAKE YOUR TALENT EASIER TO CONSUME BY CREATING PACKAGES THAT BUYERS WANT.**

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# How can you best define the benefits of your services?

Picking up where you left off with your sellable skills, make sure you've dedicated some time to defining the types of tasks, logistics, processes, activities, and deliverables that you plan to offer your clients. These are your services and it's great to know what's exactly in your toolbox. That's just the beginning. The most important step is to define what the benefits of those services are. Nobody ever says, "Man, do I ever need a logo with a tagline" or "Gosh, I could really go for a box of business cards I'll never use." I'm being silly here obviously, but I want to align your thinking more along the lines of how your efforts connect to your buyers' desires.

# What combination of services does your primary audience most commonly need?

The magic happens when you can combine your talents, tasks, and deliverables into a grouping; a cohesive effort that makes logical sense in relation to known needs within your ideal clientele. With knowledge of their expectations and priorities, your combinations of services will be much easier to determine. Your goal here is two-fold: 1) to document your value, and 2) to create two to five distinct service packages. Don't worry about the realities of these packages just yet. Allow yourself the freedom to create some "cookie-cutter" combinations and then tweak from there.

# Can you create different service levels for one or all of your service offerings?

With standard offerings in place you can start to create various levels of service. Assuming that your cookie-cutter offering is smack-dab in the middle of a common scope of work, consider what you could add that would elevate the experience as well as the project benefit. Photographers are great at this, adding assistants, catering, transportation, and stylists to a photoshoot. This approach is especially valuable when you need to help your clients impress their clients. Conversely, consider which components of your offering you

could decrease in order to make it more affordable without causing the end result to suffer. Graphic designers are great at this; they put the bulk of their efforts into the creative ideation and execution of a brand but leave out a bunch of common deliverables (envelopes, letterhead, etc.) in order to keep the price down. This approach is especially valuable if your primary audiences are made up of buyers who are likely to have limited budgets. Regardless of your approach, always present more than one offer; buyers want choices.

# Can you educate others on your process or train your peers?

Though you may be a service provider you can also develop offerings that are products. As your expertise grows in application, and as you become notable within the industry of your craft, consider documenting and packaging your insights and processes to make your knowledge available to others; eBooks, workshops, whatever it is... just find ways to turn your know-how into something that can make you money while you sleep and you'll have just added a revenue stream that you only need to service at your convenience. I

know a graphic designer who, in the margins of his life, trains other graphic designers in how to start a graphic design business. It's a distinct offering that expands his target market and adds an alternative revenue stream.

# BUSINESS ACTION PLANNER

## Action Step(s):

- Give your packages names; these short titles need not be public but they're helpful for internal reference.
- At the top of each offering, state the primary need that it addresses and the primary benefit it offers.
- Create a 200-word description for at least two packaged offerings.
- Categorize the services you'd add/remove based on the various service levels.

## Next Step(s):

- Ask a trusted peer or target market contact to review and critique your offer sheet.
- Adjust the scope of offerings based on trusted feedback.

## Success Indicator(s):

- You successfully win new business using a package offering as a foundation for your scope of work.
- You create an additional package based on further industry insights.

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# 6.3 PRICING

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***Establish a pricing approach for each service offering.***

Pricing scares a lot of creative people. Whether it's because of their artistic sensibilities or because they're still a little short on business savvy, asking for money can be hard. If this describes you, I am sympathetic—I really am. Acumen in this situation comes with time, no matter who you are. You could of course come

**“ DON’T BE SHY ASKING FOR A REASONABLE RATE. ASKING FOR MONEY IS PART OF YOUR JOB AND YOU SHOULD REAP THE BENEFITS OF YOUR HARD WORK.**

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out swinging for the stars with exorbitant prices and hope for the best, but that kind of bravado is rarely rewarded. Establishing a pricing approach so that your fees grow as your availability and demand allow is the sensible thing to do.

One of the most frequent questions I get asked is, “How much should I charge?” Well, as you can guess, that’s not a very mature question. Instead, it’s the freelancers who ask, “How much am I worth?” that find themselves arriving much closer to a manageable answer.

# How can you establish a pricing baseline?

The pricing of creative work, or better yet, of a defined service offering or package, should have a baseline—a standard price that accurately supports your service claims. With a baseline in place, you can focus on learning more about a project, its scope and complexity, timelines or budget expectations; and then you can quote a project more accurately by fine-tuning your fees. As the complexity or budget potential change, so should your fees. Selecting a baseline price is usually a process of trial and error, but if you’re able to say your fee without flinching or negotiating yourself out of the picture, then you’re off to a great start.

# What's your minimum price?

I think every freelancer needs a basement fee in place, a number they won't go below. Establish what that fee is, and what the associated work effort looks like, so you can say "No, thank-you... maybe try Craigslist.org." to those erroneous opportunities. There are a lot of reasons why buyers feel justified in grinding a freelancer down in price, but don't take that pressure on—it's their issue, not yours.

What you want to see happen is a worst-case scenario of someone rejecting a proposal, rather than you begrudgingly doing work for

someone. Trust me when I say bad money is not worth it. If you're going to work for cheap or free it had better be because of an unbelievable marketing opportunity, or because you've made the decision to donate your talent to a charitable cause that can't normally afford creative services.

# What is the going rate among comparable offerings by equivalent providers?

Your peers and competitors have prices and your industry associations have suggestions. My recommendation is for you to do your homework and discover what the prices (or price ranges) are for similar services provided by similar freelancers, based on your target market. Don't look too hard at those who are a lot more experienced than you; it's not a fair comparison. After doing your homework, you can either toe the line or create a new pricing structure that better fits your unique offering. If you're going to rock the boat, either with discounted fees or premier fees, at least you're doing so based on the information you have. What matters most is that you present a price you're proud of.

# What pricing ranges should you assign to the various service levels of your packages?

Assuming you dig the idea of creating a low/standard/high version of your service offerings, it's also a good idea to have a clear picture on how best to determine the percentage difference between them. Again, adjusting the scope of work up or down relative to the complexity and budget potential of the client, you will probably want to keep all the packages within 75% of each other. Consider this scenario: if your standard package represents your baseline, then it's at 100%; your low-cost option should be no lower than

75% of that, and your high-cost option should be no higher than 50% above your baseline. Based on my experience, this range will make it easier to present all three levels without too much disruption to your core offerings. When it comes to winning new business, you will increase your chances of selling packages when clients consider a higher option but take a lower one. Allowing the client to downgrade your fees gives them the feeling that they negotiated (but without all the haggling).

# How can you charge a fee based on the completion of deliverables instead of hour or day rates?

Creative work has less to do with time and more to do with inspiration and execution, so discussions about billing for your time don't make a lot of sense. Try to steer your offerings and associated fees to centre on the milestone efforts and the end results. This way, as you become more efficient, you earn more per hour without changing your rate, and as your expertise grows, you can charge more because the quality of your work (rather than time spent) warrants it.

# How can you demonstrate value without having to justify your time?

If you're trying to steer clear of the watchful eye of your clients, you can demonstrate value by creating milestones throughout the life-cycle of the project that show your progress. As a part of your proposal effort, establish some deadlines, ensure that the client is on board (and that they know what they need to contribute in order to meet those deadlines), and then focus them on those key dates. The tighter the link between your service and your timeliness, the greater they'll understand the benefits of working with you.

# Should you secure a deposit or just get working and send the first bill later?

This is a great question to ask. The answer is of course subjective; however, by convention, it's a common industry practice to secure some initial funds (10-50% of the total estimate) in order to ensure both parties are committed to the effort. Considering your work is deliverable-based, a lot of work—and potentially even some out-of-pocket expenses—happens in advance of the end result, so having some money up front is a good way to move forward.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Select a minimum, as well as a standard, price point.
- For each package, list the required and negotiable deliverables and attach a price to each one.
- Create a competitors' rate sheet and keep track of what you believe their fees are.

## Next Step(s):

- For each package, list five factors that should trigger an increase in price.
- Ask an established industry peer to give you feedback on your package pricing.

## Success Indicator(s):

- You can state your fees verbally with conviction and confidence.
- You increase your new business retention rate over the previous fiscal year.

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# 6.4 SALES PROCESS

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***Define the steps you will take  
secure new business.***

Your creative legacy will be shaped by how you produce and share your ideas. Your entrepreneurial legacy will be built on the historical evidence of goodwill that you've built up with clients. This professional rapport is developed

**“ BUYERS SHOULD FEEL LIKE  
THEY’RE AT THE BEGINNING OF A  
CREATIVE ADVENTURE, NOT AS IF  
THEY’VE UNWITTINGLY STUMBLED  
INTO DANTE’S INFERNO.**

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over time and it starts with a sales process that benefits everyone.

You never want your clients to ask, “So how does this work?” When you guide them confidently through your process, it increases the chances of them providing you with recurring work and/or invaluable referrals. The creative technician in you doesn’t care about this, but the business owner part of you needs to wrestle this to the ground; otherwise, you’re destined to be a contract employee instead of a thriving small business owner.

## **What About the Nine Levels of Hell?**

*It was a very intentional decision on my part not to include a prescribed sales process that’s a sequence of steps. If you need one, then open up a Google search bar and go for it. This effort needs to be organic, it must be authentic to you, and it will only work when you have the personal conviction to see it through. Hopefully the following questions will help you fill in the gaps.*

# **Who is most likely to be interested in your service offering?**

Drawing from your earlier efforts as you worked through your primary audience, dig deeper into that defined group and start to make some selections of those you wish to actively pursue. Many factors must be taken into consideration during the prospecting process. To ensure you're making an intelligent advance, the following factors should be looked into: whether the client you are pursuing has a marketing department or creative staff, whether they have worked with similar service providers in the past, whether they have an established procurement process, how successful their creative work has been in the past, and/or whether you know anyone within their operation (or who could refer you to them)?

# What are the particular needs and wants of the decision maker?

Your goal is always to capture the needs of the decision maker, but first, remember that you always want to sell to them. You may need to jump through hoops with their subordinates, but you'll only start to truly qualify them as a lead once you have a good grasp of what the decision maker is looking to gain from working with you.

Hopefully with a supportive referral or introduction from a mutual contact, you can reach out to the decision maker and see if they'd like to connect and talk about

you potentially helping them on an upcoming project. Whether through a phone meeting or email questionnaire, collect as much information as you can so that you can determine their needs. Document your questions so that you can create a reusable template in future situations. Once you have learned as much as you can, ask if they'd be interested in receiving a proposal.

# How can you present an exciting proposal in both written and verbal form?

In most cases, friendly banter over coffee isn't enough to convert a lead into a client... For that, you'll want to put together a more formal presentation so you can illustrate in creative and economic terms how you can serve them. A proposal document should be a well-designed document (created at minimum in Microsoft Word or Mac Pages) that includes: a visually captivating and custom cover page, an overview (summary), a clear table of contents, one-to-a-few brief pages outlining the objective(s) of the project (as you

understand them) and any creative approaches or details you feel would help alleviate their concerns, and finally the cost estimate. Beyond that document, consider preparing a short script, a few intentional statements (talking points) that you lead off with should you have the opportunity to present your proposal in person. A 30-second, well-rehearsed "speech" will be welcomed, trust me; buyers are used to flippant and casual freelancers so go ahead, be the nerd—they'll love you for it.

# In what way do you need to modify the scope of work and estimate so that the buyer will decide to move forward?

Proposals are rarely accepted at first glance. Listen to the decision maker's feedback, concerns, issues, new ideas, and take copious notes—ask as many reciprocating questions as appropriate because this is your chance to qualify them as much as it is a process for them to evaluate you. With everything in hand, provide a new estimate within 24 hours. The ball is now in their court to approve or reject your proposal.

When it comes to presenting your fees, seriously consider putting

a time limit on your estimates. A condition that states that your fee estimate is valid for 30 days is very common and appropriate, considering you've quoted them with the information presently available. Things tend to change, and you don't want to feel trapped by a price that isn't appropriate a month down the road if something new comes to light on their end or yours.

# What is the best way for you to close the deal and get started?

There are a couple of things to consider as you evaluate how best to guide your buyers through to the point of getting started. Your goal is to have them approve your estimate and initiate a deposit payment, the latter being, of course, a very clear sign that they're ready to move forward. But if you want to create a more formal process, then try a more human approach.

Prepare, at minimum, a one-page memorandum of understanding (MOU), a plain-language letter that simply outlines what you will do and what you expect from your client, sign it and request they do the same. If they refuse, then walk away. If they ask you to sign a contract of theirs, take it home, scan it, annotate it (mark it up) in Adobe Reader with your questions

# **What is the best way for you to close the deal and get started? (continued.)**

and concerns, and email it back to them. Once you're satisfied, sign it. If the contract seems unfair to you, then walk away.

With the help of a lawyer you can of course create a more sophisticated contract. Be careful of prefabricated legal documents you find online or through an associate; they will not provide you with sufficient legal recourse since they have not been prepared in the context of you or your business, and if you have to defend your case, you'll want a lawyer who was involved in creating your legal position.

# How can you ensure the client is proud and motivated to refer you to their peers or colleague?

As you deliver on what you promised to do, as you deliver excellent creative work, and as you engage with your clients in a giant freelancing love fest... be thinking about how you can inspire them to spread the word. Their networks represent the very life blood of your future happiness and so you'll want to plan some tactics and create some opportunities that make it easy for them to actively endorse your creative services. On the flipside, you reap what you sow. Freelancers should be referral machines. You should be an active referrer, passing along great people and companies on to those in your network.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Document the steps of a sales process that fits with your style of networking and selling.
- Sign up for a FreshBooks account and set up your active prospects, clients, projects, tasks (and rates if applicable).
- Draft a proposal template including boilerplate (scripted) information and details, as you're able.

## Next Step(s):

- Using FreshBooks, create a fake client and then prepare an estimate template for each standard offering (save as drafts; copy them to use for a real buyer).
- Organize your standard offerings in the form of a scope of work document, outlining the project parameters, working arrangements, timelines, and deliverables, as well as what the client will need to provide you with, such as required access, source documents, and timely payment.

## Success Indicator(s):

- When you engage with your next prospect, you feel confident guiding them through the process of starting to work with you.
- You secure new business based on a new sales process.

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**BE AN ACTIVE REFERRER!  
PASSING ALONG GREAT  
PEOPLE AND COMPANIES  
ON TO THOSE IN YOUR  
NETWORK WILL BUILD UP  
RAPPORT AND PRESTIGE.**

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# INTERVIEW

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## LUKE TAYLOR





## **What was the tipping point, or catalyst, that helped you make the transition into full-time design?**

*I'd say it was reaching a critical mass of the "right" people. I found that my circle of friends and influence when I started out were all in their early twenties like I was. Great for social events and board game nights, but not so great for generating quality referrals. Now, three kids and four part-time jobs later, I finally have a network of people positioned in the right places to provide me with solid leads and great clients.*

## **If you could start your business over again what is one thing you would do differently?**

*I would recognize how terrible I am at sales, and build a network of connected colleagues with a referral commission so everybody can win. I'm not a greedy person; my only requirements are that my family is taken care of. After that, I'd rather give a bonus to my friends*

*who are invested in the success of my business than buy a new tv, or a vehicle that isn't a minivan.*

## **How has your business changed over the years?**

*Originally, I was obsessed with branding and print design so much that I refused to branch out at all. I'm still a branding specialist, but I've spent the last couple years diving into front end website design, style boards, and even dipping into the great wide world of Google AdWords. If I hadn't opened up to the digital side of graphic design, I don't know how much work I'd have missed out on.*

## **What is a business practice you feel is imperative to your success?**

*Honesty, integrity, and flexibility. In that order. The order is important. I'm honest about everything with my clients from the onset, so that no matter what I tell them, after they get to know*

me, they will know it is the truth. Integrity is next. I need to stand up for my creative vision, because I spend a lot of time on researching the target market of my clients to make sure the result will speak to them better than anybody else. Sometimes the client isn't even in the target market. If they tell me I need to change the font to comic sans because it seems friendlier, I need to tell them that the reasons I won't do that are as follows...and they will know that I'm telling the truth. Finally, flexibility is important. Because making clients feel autonomous and important is critical to getting repeat business and quality referrals. "I won't change the font to comic sans, but I can think of four off the top of my head that will make this feel friendlier without compromising the professionalism of the design. Is it alright if we try that instead?" You get the picture.

## Which marketing activities consistently help you attract new clients?

Branding is my passion and specialty, so I wish I could say my site or social media presence, but the truth is that at the moment, 98% of my new clients are via word of mouth. Networking is critical.

## What is the most common piece of advice you give to emerging designers?

It is ACTUALLY who you know. I recommend walking in to a number of major non-profit organizations and offering pro-bono work, or design as gifts in kind. As long as your portfolio is solid, many will be happy to receive this kind of offer, even if they don't take you up on it. The goal is to get executive level eyeballs on your work. Also, when you are emerging, there is nothing wrong with being a jack of all trades if it means you can get a paycheque and build your network of happy clients.

*But this is the most important advice: identify your top clients, and stay in contact with them, especially over the first 100 days. Make sure you have a positive touchpoint with them once a fortnight or so. "Hey, Jack, just checking in to make sure you were happy with everything. If there is anything I can do, just let me know.", "Hi Dana, I'm looking for ways to refer business your way. What does your ideal client look like?", "How's it going Derek? Coffee soon?"*

**“98% OF MY NEW CLIENTS  
ARE VIA WORD OF MOUTH.  
NETWORKING IS CRITICAL.”**

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**LUKE TAYLOR**

# 7. MARKETING

ELICITING  
CURIOSITY AND  
GENERATING  
DEMAND



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# 7.1 MARKETING MIX

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***Better understand, and then diversify, your marketing efforts so you can discover your primary promotional tactic.***

You feel the pressure to self-promote but you hate doing it. You hate marketing because you feel it's either egotistical and it stands in contrast to your artistic sensibilities, or you simply despise the idea of whoring yourself out using tactics and tools you loathe. Either way, I have good news for you. Your goal isn't to be a great marketer; your goal is to simply find the most enjoyable and effective method by which to present your creativity to those who have a creative problem.

A marketing mix is defined as a set of complementary marketing efforts that you've intentionally chosen to leverage as a means of communicating the value of your offerings. Your marketing plan will be more approachable as you work hard on sharing efforts that are manageable, affordable, and are an honest reflection of your personality.

**“SHARE YOUR WORK IN WAYS THAT EXCITE YOU... AND IGNORE EVERYTHING ELSE.”**

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# Which marketing deliverables, or actions, do you enjoy putting time and resources into?

Marketing a freelance business requires some decision-making and knowing what you like is an important distinction to make. For example, if you like connecting with people, then an event strategy could feel fairly natural; if you're more private, then a writing strategy is ideal. By way of example, if you're not a blogger, then don't try to start (or at least don't have high expectations right out of the gate), or if you don't have an extensive sphere of influence, then it's likely that printing a big batch of mailers isn't the way to go.

There are a lot of marketing ideas out there for freelancers looking to self-promote, but don't chase after what others are doing just because they seemed to land a cool gig as a result. No one will be more excited about your creative work than you are, so make sure you choose marketing efforts that match that passion; otherwise, the disconnect will cause inverse effects. More marketing isn't better marketing—passionate marketing is way, way better marketing.

# Which marketing tactics can you use in an expert manner?

Your marketing mix is the toolbox of tactics that you feel you can leverage in order to bring about the desired results. Every creative small business owner has a unique collection of tools. The tools in your kit should reflect your skills, knowledge, and your access to the right people or resources. When you put your time and energy into marketing tools that are inconsistent with the best you have to offer then you'll waste time and money. Focus on marketing efforts you feel you can really do well—it's how you communicate who you are and what you do, and you'll feel far more successful.

# **Are you willing to build a platform first, then market to your primary audience after the fact?**

I realize this is a bit of a leading question, but I couldn't help myself. Like I alluded to earlier, find ways to entertain, inform, encourage, or educate your target audience and you'll build some serious brand loyalty. Once you've built up a genuine and engaged following (a.k.a. your platform), you can more easily present your work and share interesting opportunities or offerings within the very channel you've created. Consider ways in which you can serve your target audience without selling them something, and then down the road you'll be in a better position to soft-sell your freelance business to someone who is in your sphere of influence.

# What marketing efforts have under-performed for you in the past?

If you've been doing this for a while and things haven't been working out, stop going back to the same old tricks! One of the most common mistakes that freelancers make is that they rely on one marketing tactic to the point that it causes audience saturation, or they stick with a positive result that was circumstantial and thus put false hope in a bad marketing idea. Bury any of your old, under-performing marketing ideas and start to imagine doing something different to ensure different results.

# Do you have a big-picture idea of what your marketing strategy looks like?

Included in your *Business Action Planner Toolkit* is a worksheet call the *Marketing Mix Worksheet*. Open it up and get familiar with the workspace. As most spreadsheets go, it's a bit overwhelming at first, but consider this: it's for you and your eyes only. Feel free to delete or modify anything or everything; it's a template that's really meant to be a starting point to get you moving forward with some intention, and to help you see all of your marketing efforts at a glance. For the sake of your action plan, focus on your primary marketing effort, which you can do in Evernote® of course.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Review the tactics and tools in column A of the *Marketing Mix Worksheet* (spreadsheet included in toolkit).
- Choose up to five tools or tactics you want to focus on over the next twelve months.
- Select one marketing effort as your primary tactic and create a short-term marketing plan to ensure you accomplish it within two months.

## Next Step(s):

- Evaluate your marketing effort based on the expected outcomes.
- Gather feedback from five individuals who are a part of your target audience.
- Flesh out your Marketing Mix Worksheet in detail so that you have a more robust snapshot of all your marketing efforts.

## Success Indicator(s):

- You didn't spend a lot of money on your marketing idea and you enjoyed the experience.
- You are able to attribute gaining one new client in the first four months to your marketing effort.

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# 7.2 WEB SPACES

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***Create a digital ecosystem for your freelance business that encourages interaction.***

The web is an amazing place, but for most freelancers it's the bane of their existence. Half-finished websites and out-of-date portfolios, abandoned blogs and broken links—there are all sorts of situations that cause digital calamity and all I can say is this: you must get your digital house in order. Your website is where prospects and referrers go to evaluate your work and assess the credibility of your operation—if it doesn't showcase your professionalism, then you're missing out on an opportunity to make a compelling case for action. Your social networks are where your target audience expects to be able to engage with you; it's the

environment by which they'll come to either be inspired or disinterested—there's no middle ground.

Whether with a mouse-click or a finger-flick, your freelance business can be discovered or forgotten in a flash. The spaces where you dwell online should reflect your creativity, personality, and business acumen; otherwise you're simply putting up an unnecessary barrier to buyers.

**“THANKS TO THE INTERNET  
YOUR FREELANCE BUSINESS  
CAN BE LOVED, OR IGNORED,  
FASTER THAN YOU CAN TYPE  
THE WORD “EMOTICON”, BUT  
YOU DON’T GET A LOT OF  
CHANCES TO BE “FOUND”.**

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# How can you optimize your website to create a “wow” experience?

I thought I'd approach this question by sharing with you the five things I wish every creative freelancer took seriously when it comes to their website:

- 1. One-second rule.** Everyone expects a quick-loading website. When buyers see a blank page or a “loading” status countdown, they rarely make it past six seconds.
- 2. Big and beautiful.** A dynamic website that scales images and content to match the viewing device and gives visual work maximum real estate (full-width) are what buyers are expecting to see.
- 3. Curated portfolios.** Having fewer pieces of work that fit well together is better than

# How can you optimize your website to create a “wow” experience? (continued.)

overwhelming the viewer with a smorgasbord of mediocrity; buyers want to familiarize themselves with your talent, not your archive.

**4. Easy to contact.** Buyers shouldn't have to search for your info, fill in a clunky form, or hunt you down. Your name, phone number, and email address should be easy to find.

**5. A human face.** People want to know who the freelancer is. A simple bio and a great headshot are two things that make a buyer feel more comfortable. Connect your headshot to your Gravatar account so that when you leave comments on a blog or forum, your face is displayed.

# What is the best possible way for you to actively display your creative work online?

The viewing experience, whether from image to image or between collections, is an important component to consider for a creative freelancer who is trying to demonstrate their talent and commercial viability. Take some time to evaluate your online portfolio, how you've organized your work, how it loads and displays on multiple devices, and what changes you need to make to ensure a viewer enjoys looking at your work. Now, I'm compelled to remind you here that the platform you choose doesn't really matter: Wordpress, Photoshelter, Squarespace or the like are all great options—just make sure you use a portfolio tool that is easy for you to update regularly and that you are proud to share.

## ***Use Slugs***

*Individual photographs (or images of your work) should have a unique and user-friendly web URL (it's called a slug), as this makes the image more shareable, self-evident, and increases search engine ranking.*

# Which online habits can you change in order to ensure that you're viewed as professional and engaging?

Think of your life online: how you act, what you share, where you look, who you support; these activities make up your habits—some are good, some probably aren't. Consider evaluating which activities are most important to your freelance business and how you can put more energy into them. Before you can do that, get rid of any bad habits, like these three common marketing faux pas:

1. Out of sight, out of mind. You may have an okay website or social following but, whether it's due to an unfinished page, out-of-date information, or inactivity, when buyers have an "I knocked but no one was home" feeling, it leaves a bad impression.

# **Which online habits can you change in order to ensure that you're viewed as professional and engaging? (continued.)**

2. Overactive equals noisy. The flipside is that if you're not very busy or you're pining for new work and you aggressively take to the web it means you're likely saturating your audience with too much information or sharing unrelated details, which pushes your target audience away.
3. Shameless self-promotion. Sales-heavy or self-focused efforts act like client repellent. Asking people to vote, like, or share something of yours comes off as desperate. Bragging about recent accolades, achievements or new business simply communicates a lack of humility.

# On which social network are your ideal clients most active (and how can you increase your efforts on that network)?

First, stop spreading yourself so thin. Just because you can have profiles on every network doesn't mean you should. You do not need to be active on the big five: Instagram, Facebook, Twitter, LinkedIn, and Google+. If your activity is casual or non-existent on some of these networks, that's totally fine—don't publicly promote them or even consider deleting those accounts. If you feel a multi-network approach is required, then use Hootsuite to manage your accounts—it's a great cloud-based dashboard that will make this effort a lot more fun.

Second, the most important thing is to promote and actively engage on the one network that you believe has the highest frequency of engaged prospects. Put time and effort into consistently sharing and commenting in such a way as to communicate your skill, industry knowledge, and character. I encourage you to maintain a brainstorming list of status update ideas and to collect images so you can build up a library of things to share when "inspiration" is in short supply.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Identify three things you can change on your website in the next two months that will better showcase your creative work.
- Select your primary social network and create recurring calendar items to remind you about publishing weekly updates.
- Brainstorm ten status update ideas (and collect associated images).
- Sign up for and set up a Hootsuite.com account; use the scheduler to prepare one update for next week.

## Next Step(s):

- You visit your own website (front and backend) at least once a week.
- Actively share links to your creative work on your primary social network.
- Schedule regular website updates (especially blog/portfolio) in your calendar.

## Success Indicator(s):

- You're proud of your website and you consider it your primary marketing tool.
- Based on server statistics, the length of the average website visit increases by 25%.
- You receive an unsolicited request from a potential client within eight weeks.

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# 7.3 EMAIL COMMUNICATIONS

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***Send professional emails that inspire confidence and further inquiry in your business operation.***

Your email etiquette says a lot about your professionalism. Email as a marketing tactic is two-fold—it's used as: 1) a method of personal communication, and 2) a broadcasting tool. Both are strategies for marketing your creative freelance business. I am a firm believer in making these efforts a major part of one's marketing plans to ensure that the right things are being said at the right time, and that they're

being delivered directly to those who want to hear from you. Business can be won, or lost, based on the way in which you conduct yourself via email.

It's truly amazing how many business activities take place, or are recorded, through one's email inbox. A well-crafted timely email can be a powerful communication tactic, or it can come off as impersonal, inappropriate, or simply annoying. It's game on, my friend! No matter how sophisticated your marketing is, what and how you send email is important.



**YOUR BUSINESS WILL RISE AND FALL VIA YOUR INBOX; MAKE EVERY EMAIL COUNT.**

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# When connecting with active prospects or clients, do your emails look and sound professional?

I realize professionalism is a bit of a subjective term, so here are four best practices you can consider when evaluating your email communication:

- 1. Domain aliases are better.** Gmail aliases (and the like) are not deemed as appropriate for business communications; register a domain name and set up an email server.
- 2. Shorter emails are better.** Long emails don't get read, or at least they don't get replied to in short order. Keep your messages short and, if applicable, highlight action item(s) right off the bat.
- 3. Text-based signatures are better.** Logos end up looking weird or come through as attachments. Instead, use a detailed, text-

# When connecting with active prospects or clients, do your emails look and sound professional? (continued.)

based email signature in every message you send and reply with a shortened version of the same signature. Be sure to include contact info and social links.

**4. Morning emails are better.** Freelancers who often work in the margins tend to work late on client work; fine—don’t send emails late at night. A nocturnal email gets trumped by all the other incoming email that traditionally fills a business person’s inbox prior to the start of their day, thus pushing your message to the bottom of a long list of unread emails. Send messages in the morning so that you’re on top of the pile—besides you’ll likely have fewer spelling and grammar errors this way.

## **Say NO to Inbox Planning**

*Spending a lot of energy organizing your email inbox tends to create an unhealthy dependence on it. Keeping important client or project details in a cloud-based service (like Evernote®, Basecamp.com, Smartsheet.com) is a more professional way to handle important information.*

# How can you create your own marketing platform?

I'm cutting to the chase on this one—you need to seriously consider developing an email marketing strategy. It doesn't need to be fancy, but leveraging permission-based email publishing will increase your chances of staying top-of-mind with your target audience. Here are a couple things to think about:

**Mailchimp is better.** I know there are a lot of tools out there—and if you're seeing great results from the one you're using... great! Otherwise, sign-up for a free [Mailchimp.com](#) account and give it a whirl.

**Double opt-ins are better.** It's easy to initially build a marketing list by mining the Internet or your address book, but this won't work in the long run (and in some countries it's illegal). Instead, place a "list" embed code snippet on your website or share a sign-up URL in your social updates and email signatures. This way, you can build a subscription list organically and with full permission. Besides, the size of your list doesn't matter—your click-through rate (the number of unique user clicks your email campaign receives) is the telltale sign you're doing something right.

# What kind of email campaigns do you think your target audience would want to receive?

This question is very important. Though you'll have to decide for yourself—based on what you learn as you serve your market—I can tell you this: you'll never find the answer you're looking for if you're sending historical newsletters. I realize this may be yet another example of my bias or inability to overlook a semantic but, your target audience is not likely very interested in what you've done... they're far more interested in something new. Here are three ways to evaluate whether you're creating email marketing campaigns that are worth sending:

**1. Exclusive content is better.** As I've just alluded to, don't send email announcements about stuff you've already relayed via your social networks or put on your blog. Reserve creative work, behind-the-scenes details, special articles, or interesting news for those on your subscription list—reward them for their attention and they'll open, click, forward, and reply to your emails.

**2. Exclusive value is better.** A great way to engage with your audience is to give them some-

# What kind of email campaigns do you think your target audience would want to receive? (continued.)

thing only they have access to.

Promotions, access, limited opportunities, whatever... go out of your way to compensate them for their action.

**3. Pretty emails are better.** Campaigns that arrive in someone's inbox with strange formatting or out-of-place graphics get deleted very quickly. Don't try to be too clever—use a pre-existing template so that everything looks great no matter what device it's received on, and make sure to test your campaigns first.

# BUSINESS ACTION PLANNER

## Action Step(s):

- Create two text-based email signatures (detailed/simple) in your email client application (such as Mac Mail, Microsoft Outlook, or your cloud-based service).
- Sign-up for a free [Mailchimp.com](https://www.mailchimp.com) account and/or check out their resource guides.
- From your Mailchimp dashboard, once a list is started, create and install embed codes (or get the sign-up link) for your website (or email signature) by going to Lists > Sign-up Forms.

## Next Step(s):

- Brand your email campaign with a title (something other than "newsletter") and create a header graphic that reflects your brand.
- Create a small list with a few personal contacts and send a beta email campaign to ask for candid feedback.

## Success Indicator(s):

- You feel confident that your email etiquette has increased in professionalism and you have clearer communication with prospects and clients.
- Over the first three email campaigns, your open rate (the number of times your email campaign was opened/viewed by recipients) exceeds 25% and your click-through rate exceeds 1%.

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# 7.4 PORTFOLIO PROJECTS

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***Strengthen your style and expand your network by producing both a personal and a collaborative portfolio project.***

The body of work you choose to show potential clients acts like a resume and, no matter what one's experience is, there is always room for producing new and inspired creative work.

Whether you're taking a fresh approach on common subject matter or you're pushing the creative envelope of a particular style, your portfolio needs to reflect your passion and talent, and connect with the felt needs of those you're trying to serve.

Similarly, collaborative projects help develop your portfolio, but they also expose you to other kinds of talent and methods, thus expanding your knowledge base. A successful collaborative project also deepens your network, strengthens your creative community, and gives your peers something to brag about on your behalf.



**YOUR PORTFOLIO SAYS A LOT  
ABOUT HOW CREATIVE AND  
PRODUCTIVE YOU ARE—  
SHOWCASE WORK THAT  
HIGHLIGHTS YOUR TALENT AS  
WELL AS YOUR WORK ETHIC.**

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# What style, aesthetic, subject matter, or application do you feel is missing from your portfolio?

You're an artist, which means you're not happy with your portfolio. Okay, so I'm being a bit silly, but my guess is that you'd love to add some creative work to your repertoire and that's a great feeling to have; it's called productive angst (careful though—let that feeling go on unfulfilled and it turns into martyrdom). With a great portfolio in hand, you're a lot more prepared to roll up your sleeves and grind it out; it makes the hustle part a lot more fun when you're actively filling your portfolio with work you love. Consider making a brainstorm list (or a visual mood board) of the type of work you'd love to see in your portfolio over the next few years.

# **Looking at the gaps in your portfolio, can you think of one personal project that can address a few of these missing pieces?**

In lieu of client work that specifically addresses those gaps, personal projects are an important way to illustrate for potential clients the kind of creative work you're good at producing (and that you want to do for them). As you likely have limited time and money, consider which missing elements from your portfolio could be addressed by just one personal project. Pooling your energy into an effort that gives you multiple additions to your portfolio is a great way to move forward.

# **Do you have any creative friends or acquaintances that have complementary talents and/or common interests regarding your target market that you could collaborate with?**

Though you may very well want to address a creative need in your portfolio with a collaborative project, the reality is that your business development effort can also be served through a collaborative project. Instead of recruiting friends to help with a personal project (a common mistake by emerging freelancers), aim to find a group of likeminded freelancers or business owners who want to share the results as well as the hard work. Select from that group one or two trusted souls whom you can gather together to see if a

manageable and equally beneficial creative portfolio project comes to mind, and get started. Like I mentioned earlier, your sphere of influence grows as you share your network with those who also want to serve your target market and target audience. Your marketing potential here is derived nearly exclusively from each collaborator's willingness to actively endorse the other, not from the creative project itself.

# How could you best replicate the conditions, demands, and creative needs of a client project?

Whether with a personal or a collaborative project, consider doing something for your portfolio that looks and smells like a client job. Maybe you manufacture those conditions yourself or do a pro bono gig for a deserving charity; regardless, don't just let all your non-client portfolio efforts be a result of creative musings; put some heat on yourself so you can also practice producing on demand, in less than ideal conditions (that can be part of the narrative too since these types of projects are great fodder for email campaigns and social sharing).

# BUSINESS ACTION PLANNER

## Action Item(s):

- Make a list (or create a visual mood board) of the type of work you'd love to see in your portfolio down the road.
- Identify one personal project that you can accomplish in the next three months.
- Identify at least one person with whom you could create and promote a mutually beneficial personal project within the next six months.

## Next Step(s):

- Schedule a brainstorming meeting with a potential collaborator.
- Use the S.M.A.R.T.E.R. goal planning approach to plan out both your personal project and your collaborative project.

## Success Indicator(s):

- You add ten new, non-client work pieces (from one or more projects) to your portfolio within one year.
- You add five new industry contacts to your sphere of influence.
- You discover one new opportunity within your target market.

# INTERVIEW

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# CYMONE WILDER





## **What was the tipping point, or catalyst, that helped you make the transition into full-time design?**

I'm not a full time designer yet, but I will be taking those steps as soon as I graduate from school! I knew I wanted to do this for a living when people started telling me I should charge for the stuff I enjoy doing. I really just love the work that I do. Not every client is an angel and I'm not absolutely in love with every piece I create but I am thoroughly enjoying every part of the process. Why not make a little cash doing the thing I love?

## **If you could start your business over again what is one thing you would do differently?**

I would definitely set guidelines for myself. How many hours do I work? What kind of clients am I trying to attract? What kind of work do I want to create? Where do I draw the line with clients/work? How much will I charge? When

should I get paid? Etc. I'd also like to sit down with a lawyer and draw up an airtight contract to protect myself. Sometimes I get so involved in a project I'm not thinking about the business logistics and I've been screwed over many times for that reason.

## **How has your business changed over the years?**

I've only been in business for a year, but I'm really settling into a flow. I kind of know what to expect a lot of the time from clients, and can prepare myself accordingly. I'm learning to follow up with clients more often, just keep things on track and to make sure everything's running smoothly on both ends. I try not to fall into the motions too much, and continue to remain personable with each client. Things aren't necessarily easier; I've just become more prepared.

## **What is a business practice you feel is imperative to your success?**

*For me it's all about the contract. Making sure guidelines are set from the very beginning and all things are clear from both sides of the project. I've found that clients tend to appreciate when you're up front with them about everything. I don't love to be a stickler for the rules but like I said it protects the client but it mainly protects myself as the designer.*

*Networking is pretty important to me as well. It may sound cheesy, but Instagram is my go to marketing tool. I'm able to get my work out to a large and diverse audience and am able to chat with other creatives. Pinterest is also another big one for me. A lot of time my work gets out there without me even having to personally upload it, and a large majority of the time it's got my name on it!*

## **Which marketing activities consistently help you attract new clients?**

*See answer to question 4. Instagram is where I attract most of my clients from! It's all about the hashtags!*

## **What is the most common piece of advice you give to emerging designers?**

*CONTRACT CONTRACT CONTRACT. It's the most important tool you have. Networking is key. Everyone is always saying, 'it's all about who you know'. Well they're right. Meet a lot of people and you'll find yourself with more clients. Don't be afraid of social media; embrace it as your dear friend.*

# 8. MONEY

MANAGING  
AND ENJOYING  
FINANCIAL  
AUTONOMY



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# 8.1 CASH FLOW

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***Become intimate with your day-to-day finances and ask for money like a professional.***

In the early years of your career as a creative freelancer, your lifestyle will need to be leaner because you're putting time and money into a longer-term investment. You already know that. But it's important to remember that freedom can be defined a lot of different ways.

“

***SPEND ONLY THE MONEY YOU HAVE AND ASK FOR MONEY SOONER THAN LATER; THESE ARE THE ATTRIBUTES OF A SUCCESSFUL FREELANCER.***

Enjoy your independence in whatever shape it comes in, and work hard at being fiscally responsible. Your muse will thank you for it.

Freelancers are often short on time or find themselves so deep in their work that at first, their finances start to slip, then they lose touch with the ins and outs, a series of bad decisions start to pile up, and eventually vocational tragedy sets in. If you’re employing a “strategy of hope”—such as, you’re hoping your next gig will save your ass—then it’s time for a serious reset button.

# What are your biggest fears about making money?

The subject of money causes freelancers a lot of anxiety. My heart aches for those artists who couldn't maintain an independent business (big or small), not because they lacked talent or opportunity, but because they allowed their fears to be realized. Call the moment, make a list of the things that keep you up at night and then seek out advice, or start making habit-changing decisions to guide you towards a healthier, happier life. Worry doesn't solve a problem—action does.

# Do you have separate banking services for your freelance business?

This one is pretty simple. Regardless of the size of your operation, or the volume of your transactions, make sure you maintain a separate bank account. For the sake of tracking your revenue, expenses, and especially project-related costs, having an operations account with a free or low-fee banking service is imperative. Set up a second bank account exclusive to your online payments, such as withdrawals from your PayPal account. As well, have a dedicated pre-paid, or low-limit credit card for project expenses or planned expenditures. These accounts will go a long way into helping you know what the flow of money looks like in your personal and work life.

# How can you stay on top of your financial status?

If you're asking this question it means "money stuff" isn't your strong suit, so it's time to leverage a tool that makes it easier on you. I highly recommend using [Mint.com](#), which is a cloud-based app/software that integrates all your bank accounts and credit cards into a dashboard. Once set up, your Mint.com account can be accessed from any web-friendly device and you can easily create a budget, add savings goals, and of course have real-time access to your day-to-day balances. Regardless of what method you choose, find the tools that remove the chaos and mystery from your finances. You should always know your account balance and know when you're expecting money to come in or go out. You never want to have to ask a client to pay for coffee because your debit card was declined.

# How long can you wait before getting paid for a contract?

Kind of a cheeky question really. Not many freelancers can wait an indefinite period of time before they get paid. I phrased the question this way in order to make my point: you deserve to be paid sooner rather than later, so ask for money sooner rather than later. Seriously consider using an invoicing system like [Freshbooks.com](#) so that you can ask for money in a professional manner and increase your chances of getting paid faster. This cloud-based accounting application will make it easier to send accurate, timely invoices by email. When presented with an

invoice, managers will want to process it faster or simply pay it by credit card (assuming you've connected your PayPal account) in order to quickly get it off their plate and out of their inbox. The less often a client has to wait for your invoice to be processed and mailed, the better.

# BUSINESS ACTION PLANNER

## Action Item(s):

- List your top three fears or concerns you have about your finances.
- Set up two dedicated bank accounts (operations, online payments).
- Apply for a dedicated pre-paid or low-limit credit card.
- Sign up for Mint.com and set up your account.
- Sign up for a Freshbooks.com 30-day free trial.

## Next Step(s):

- Every morning, log in to your Mint.com account to familiarize yourself with your financial status.
- Set up your clients, projects, tasks, and rates in your Freshbooks.com account.
- Prepare and send an estimate and invoice from Freshbooks.com.
- Ask your client for feedback regarding their experience in receiving a digital estimate/invoice.

## Success Indicator(s):

- You feel less stressed about the money you don't have.
- You experience less stress preparing and sending estimates and invoices.

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# 8.2 FISCAL PLANNING

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***Create a monthly financial plan that takes into account both your personal and your business finances.***

Money is money. Whether an employer pays you or a client pays you, it is still revenue. Whether you spend money on things you need or want, or you spend money on things your business requires, they are still expenses. In the absence of shareholders or stakeholders, your financial operation is likely very personal and that's okay... just make sure you earn and spend within the confines of a financial plan.

“

**YOU ARE LIKELY SPENDING  
EVERYTHING YOU'RE MAKING  
AND THIS MEANS YOUR  
FINANCIAL OUTLOOK NEEDS  
TO BE ALL-INCLUSIVE.**

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Early in the development of your freelance business, it's important to have a good financial plan in place so that as you grow, you can be informed about the fiscal impact of your independent work. Freelancers confess to me all the time just how strapped they are, how they don't make enough money, how they need more clients, and how uncertain they are about the year to come. I only empathize with those who can prove to me they're complaining in full knowledge of the truth; otherwise, they're probably far worse off than they realize. Financial planning will free you up to be a more productive and inspired freelancer.

# If you had to grade your financial health for both your personal life and your freelance business, what marks would you give yourself?

I phrased this question as such because I want you to be honest and I want you to be unsatisfied unless it's an A+ in both departments. I want you to feel content, debt free, and enjoy the process of being a creative service provider. If you're like most freelancers, it's going to take some time to get there—no problem; just be sure you're proactive about solving your money problems. If you scored yourself below an honours level, then start looking for professional help as soon as possible. If you don't know who to reach out to, ask a successful business owner from within your sphere of influence for a referral or an introduction.

# How can you create a financial plan that works for both you and your spouse or partner)?

In the early years, the cost of living and the cost of freelancing are usually integrated so when you're looking ahead, you want to take into account the realities of your financial needs. Regular businesses produce month-end reports and year-end financial statements; these help guide their future plans. As it pertains to your freelance business, it's not likely that you have a lot of relevant financial history to apply to this process. However, you do have all your cost-of-living details, so start there and flush out the cost-of-business items as

you're able. Check out the monthly budget worksheet included in the toolkit and start getting more familiar with the different elements that are important to consider. Be sure to break down big financial goals or expenditures into monthly increments to help keep you focused and on track; scheming up a big number that is off in the distance isn't very helpful.

# What changes in your spending habits are you making to ensure you don't add to your debt?

I won't beat you over the head with this one, but I will say this: if you're building up a pile of debt each month, then it's going to be very hard to be creative and have the time, energy, or resources you need in order to focus on building a viable business. I've always believed that it's ten times harder to make money than it is to spend money, so it's important to understand that profit is the measure by which you know you're successful, not revenue. Consider making a list of the decisions and actions you're going to implement in order to stop using credit, and share them with your partner or a close friend in hopes of adding a bit of accountability.

# If you have debt, what is your debt reduction plan for this coming year?

Debt happens. The trick is to ensure you've got a plan in place to deal with it. Whether it's providing a debtor with post-dated cheques, setting up pre-authorized payments, selling things you don't need in order to bring down the principal in bigger chunks, taking extra work; whatever it is, just know that debt will always limit your ability to take action on future business decisions. Take a look at this next year and simply make sure the principal (and hopefully the interest rate) is decreasing over time. Just do what you can do my friend, and do it well.

# Do you have any big purchase(s) planned this year?

Whether you're scheming about some new equipment or travel or other kinds of necessary costs, it's always a good idea to identify those expenses as far out as possible. The best-case scenario is that you save up small amounts along the way in a separate bank account. I don't want to preach at you, but I will say that shiny stuff (like business equipment and software) depreciates very quickly—don't be enticed by something that isn't an absolute imperative (as verified by industry peers and/

or fellow business owners). And please don't use credit to make these kinds of purchases. Though it's easy to justify the costs early on, you'll almost always be better off renting or borrowing until it's an economic imperative instead of serving a debt you'll quickly come to despise.

# How much money should you set aside for government taxes?

That's a great question to ask your financial planner or tax accountant. The transition from your day job (payroll) to revenue income can be a big transition because you likely don't have enough revenue in light of your cash flow and you end up spending it all before setting aside a reserve, which you'll have to pay out come tax time. A big, bad surprise at the end of the year is hard to swallow, so dedicate a separate savings account, which is not linked to a debit card, and squirrel away a minimum of 15% every time money comes in. As a word to the wise, your legitimate business expenses are likely less than you realize, so be sure to fully explore all of this with an accounting professional.

# What system can you put in place to create a simple, daily process of preparing for the year-end tax filing?

If you have a shoebox of receipts and/or have disorganized piles of paper that you know your “tax stuff” is buried in, then you need some serious chaos killing. Your entrepreneurial effort will be more focused when you get rid of the paper in your life. First, let me encourage you to have a portable filing “system” with you at all times. Whether in your wallet or laptop bag, have a dedicated area or envelope that you put business-related receipts into. Second, have a storage system at home that is well-labeled by month so that your receipts have a home. An accordi-

on file is the most common solu-

tion for this. Third, put everything into a digital environment that’s cloud-based, secure, and easier to share with your tax professional. If you have a flatbed scanner then great; however, you should seriously consider using a mobile app like Genius Scan, so you can get your paperwork into the cloud on the fly. In conjunction with Evernote®, Google Drive, OneNote, Expensify, or Dropbox, you can use Genius Scan to snap plain text, black-and-white PDF files of your receipts and documents. Once uploaded, you should organize, tag, and rename them so at the end of the year they’re easy to hand off.

# BUSINESS ACTION PLANNER

## Action Item(s):

- Perform one money planning task that you feel gives you a grade bump (from a C+ to a B for example) within the next two months.
- Fill in the monthly budget worksheet or work through the budgeting tool on [Mint.com](#).
- List your three new "conservative" spending habits and/or debt-reduction tactics.
- List the out-of-the-norm purchases you're planning for the upcoming year.
- Download Genius Scan to your mobile device.

## Next Step(s):

- Discuss your monthly budget worksheet with your financial advisor and/or your partner if applicable.
- Set up a cloud-based monthly folder structure for all your digital receipts and paperwork.
- Arrange to meet with an accountant and/or a tax professional and ask them for insights regarding year-end preparations.

## Success Indicator(s):

- Your year-end tax filing is stress-free.
- You are shoebox- and pile-free.

*Both Microsoft Excel and in Mac Numbers have template galleries. The worksheets you see here are simply based on the personal monthly budget templates available in these applications. Aim to use what's available to you (instead of trying to re-invent the wheel). The logic, charts, and formulas which have been integrated into these templates are*



**YOUR COST-OF-BUSINESS GREATLY AFFECTS YOUR LIFESTYLE SO ONLY TAKE BUSINESS RISKS THAT YOU'RE WILLING TO LIVE WITH.**

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*designed to be modified - so that's what we've done for you. You'll notice that we've added some revenue and expense categories (Cost of Business) that relate to your creative freelance business and ensured that they integrate into your personal cash flow (Cost of Living). Please feel free to edit, format, or adjust these templates as you see fit.*

# INTERVIEW

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## MICHAEL-ANDREW SPALDING





## **What was the tipping point, or catalyst, that helped you make the transition into full-time design?**

*The tipping point that helped me make a transition into full-time/part-time design would definitely have to be my friends. They saw that I was good at what I do and encouraged me to start charging for my services. I'm not inherently business minded so it was nice to have that little push in the right direction toward working as a full-time/part-time designer goes. I say full-time/part-time because I am still a student and that plays a significant role on how many jobs and what type of jobs I can take on.*

## **If you could start your business over again what is one thing you would do differently?**

*If I could start my business over again, one thing I would have done differently would have to have been to do more*

*research before starting. I would have liked to know all the terminology used when talking to clients. I had no idea what an invoice was, what a retainer agreement was, or anything like that before I started.*

## **How has your business changed over the years?**

*We're a relatively new business, but I can say there have been a couple changes that have happened since we've started. Initially, Cymone was doing freelance design/photography by herself as "Simon and Moose Creative" and then I came along and asked if we could team up because I was doing the same work just without a brand. Since then, we've agreed on rates that work best for us across the different services we offer which is good for consistency in branding and we understand the "business scene" a little more with each job we acquire.*

## **What is a business practice you feel is imperative to your success?**

*A business practice that I feel is imperative to my success (that I need to work on) is definitely communication skills and promptness in responding to clients. Making sure that I respond in ample time to their desires is the best way that you can make the client feel you are invested in them. They are entrusting me with their dreams and ideas and it's my job to help them come to fruition, and that looks like communicating as best I can with them.*

## **Which marketing activities consistently help you attract new clients?**

*Having a good presence on social media is how I'd say we've obtained most of our clients. Contrary to popular belief, Instagram is not just a place to post pictures of food. Cymone and I, and many others, use it as a portfolio. Participating in different challenges*

*and posting daily allows our work to potentially be viewed by hundreds or even thousands.*

## **What is the most common piece of advice you give to emerging designers?**

*The most common piece of advice I could give to emerging designers would be to learn from your mistakes and use them to grow. If you had a bad experience with a client look back at everything that happened and see what you could have done to make the experience a better one for both of you. Another piece of advice I would give is that "comparison is the thief of joy." If you're just starting out, don't compare your work with someone who has been designing for way longer than you have. They had to start somewhere too.*

# CONCLUSION

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ACTION  
PLANNING  
IS A  
MINDSET



I hope the questions and remarks I've shared with you provide the context and insight you need to get down to work building a freelance business that you're proud of.

Action planning is all about momentum. If you have lots of time on your hands, then by all means work through your entire plan in short order; however, for most freelancers the goal here should be to tackle one thing at a time. The size of the action doesn't matter; it's the focus and the accomplishment of the effort that is important here. Whether you simply have a quick moment to tag something (as in, designate a note or task as a priority and change its status), or you have time to write, scheme, or work on a deliverable, it's all part of the planning process. Your goal is to move forward. Period.

Though I probably don't need to say it, I trust that you'll apply some personal judgement and be sure to ignore the components of the planner that aren't relevant to your freelance business. This toolkit was designed to spur you on in the right direction... hopefully it's helped you

get closer to feeling like you can actively plan the creative business that you so passionately envision.

Okay, let's get on with it! With your Business Action Planner imported into your Evernote® service, it's time to prioritize your business issues and start working through the pertinent questions and action items.

From the bottom of my heart, and on behalf of my business partner Eileen Rothe and the entire Taendem team, we wish you great success as you plan your creative freelance business.

Rock on!

**Corwin Hiebert**

[support@businessactionplanner.com](mailto:support@businessactionplanner.com)

# RESOURCES

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## FOR GRAPHIC DESIGNERS



## ***Associations & Foundations***

- [American Institute of Graphic Artists](#)
- [Association of Registered Graphic Designers](#)
- [Canadian Association of Professional Image Creators](#)
- [International Council of Communication Design](#)
- [Society of Graphic Designers of Canada](#)
- [Society of Illustrators, Artists and Designers](#)
- [Society of Publication Designers](#)
- [The Global Association for Professional Communication Designers](#)

## ***Blogs, Books & Publications***

- [100 Ideas That Changed Graphic Design](#)
- [99u \(Website and Book Series\)](#)
- [A List Apart](#)
- [Ads of the World](#)

- [Any Book by Steven Heller](#)
- [Applied Arts](#)
- [Breanna Rose's 'Be Free-Lance'](#)
- [Caffeine for the Creative Mind](#)
- [Cartoon Ink](#)
- [Communication Arts](#)
- [Creatives' Cupboard](#)
- [Design Observer](#)
- [Designers Roundtable](#)
- [Drawsigner](#)
- [Fold Factory](#)
- [Form Fifty Five](#)
- [From Up North](#)
- [Grain Edit](#)
- [Graphic Design & Publishing Center](#)
- [InVision](#)
- [James Victore | Burning Questions](#)
- [Line 25](#)
- [Newfangled Media](#)
- [Print Magazine](#)
- [Smashing Magazine](#)
- [Subtraction](#)
- [The Collative](#)
- [The Best Designs](#)

- [The Marketing Mentor - Toolbox](#)
- [The Web Designer's Idea Book](#)
- [Web Designer Depot](#)

## ***Book Design & Publishing***

- [Art Books Heidelberg](#)
- [Artifact Uprising](#)
- [Blitzprint](#)
- [Blurb](#)
- [Cloverleaf Studio](#)
- [Conveyor Arts](#)
- [Cranky Pressman](#)
- [Edition One Books](#)
- [Hudson Hills Press](#)
- [Magazine Cloner](#)
- [Moleskine](#)
- [Moo](#)
- [MyPublisher](#)
- [Pikto](#)
- [Pinhole Press](#)
- [powerHouse Books](#)
- [Publish Your Photo Book](#)
- [White Wall](#)

## ***Conferences & Events***

- [Creative Mornings](#)
- [Design Thinkers](#)
- [Do Good Lectures](#)
- [Future. Innovation. Technology. Creativity.](#)
- [HOW Design Live](#)
- [HOW Interactive Design Conference](#)
- [Photoshop World](#)
- [PICA](#)
- [South by South West \[sxsw\]](#)

## ***Contests, Competitions, Awards, Grants***

- [AIGA Awards and Competitions](#)
- [Alva Award \(99u\)](#)
- [Applied Arts](#)
- [Communiations Arts](#)
- [How Design Competitions](#)
- [ICOGRADA Awards](#)

## ***Copyright & Licensing***

- [Artists Rights Society](#)
- [Canadian Copyright Law](#)

(from CAPIC)

- [Copyright Alliance](#)
- [Copyright.gov](#)
- [ASMP Copyright Tutorial](#)

- [Shadow House Creations](#)
- [Shutterstock](#)
- [Subtle Patterns](#)
- [The Noun Project](#)
- [You Work for Them](#)

## Credit Card Services

- [Intuit go payment](#)
- [PAYd](#)
- [PayPal](#)
- [Square](#)
- [Stripe](#)

## Downloads - Stock Images, Illustrations, etc.

- [Creative Market](#)
- [Design Cuts](#)
- [Dollar Photo Club](#)
- [Dreamstime](#)
- [Entypo \(icons\)](#)
- [Font Squirrel](#)
- [Google Fonts](#)
- [Graphic Burger](#)
- [iStockphoto](#)
- [My Fonts](#)
- [PhotoXpress](#)
- [Retro Supply Company](#)

## Education

- [Atly](#)
- [Be Free-Lance](#)
- [Braid Creative ECourses](#)
- [Creative Live](#)
- [Code Academy](#)
- [How Design University](#)
- [Lynda](#)
- [Skill Share](#)
- [THNK](#)

## Job Boards & RFPs

- [Design Observer](#)
- [Dribbble](#)
- [Smashing Magazine](#)
- [Society of Graphic Designers of Canada](#)
- [Society of Publication Designers](#)

## **Marketing - Email Campaigns, Directories & Social Media**

- [Agency Access](#)
- [Behance](#)
- [Constant Contact](#)
- [Creative Finder](#)
- [Dribbble](#)
- [Emma](#)
- [iContact](#)
- [InPholio](#)
- [MailChimp](#)
- [Pavly](#)
- [Pinterest](#)
- [Yodelist](#)

## **Marketing - Print Portfolios**

- [Iris Portfolios](#)
- [Lost Luggage](#)
- [Mullenberg Designs](#)

## **More Resource Lists**

- [AIGA Tools & Resources](#)
- [Jessica Hische](#)

- [RGD Video Archive](#)
- [Society of Graphic Designers of Canada - Professional Development](#)
- [Society of Graphic Designers of Canada - Recommended Reading](#)
- [Society of Graphic Designers of Canada - Lists](#)
- [Zoe Rooney](#)
- [The Marketing Mentor Toolbox - Trade Associations & Trade Shows](#)

## **Philanthropy**

- [Big Duck Design NYC](#)
- [Cycle Cause](#)
- [Wheels 4 Water](#)

## **Printing - Business Cards, Fine Art, Large Format, Equipment**

- [Blurb](#)
- [Jukebox](#)
- [Moo](#)
- [Shutterfly](#)

## **Professional Services**

- [ADP](#)
- [APA Insurance Services](#)
- [CG&B Insurance](#)
- [Amy Kerr \(Accountant\)](#)
- [Contractually](#)

## **Software - Business Management**

- [Article - Contract Killer](#)
- [Article - Smashing Magazine Contracts](#)
- [Asana](#)
- [Box](#)
- [Contractually](#)
- [Dropbox](#)
- [Evernote](#)
- [Sign Now](#)
- [Smartsheet](#)
- [TimeFox](#)
- [Toggl](#)

## **Software - Data Backup, File Transfer Data, Digital Asset Management, Online Storage, Delivery & Recovery**

- [Back Blaze](#)
- [Carbonite](#)
- [CalDigit](#)
- [Copy](#)
- [CrashPlan](#)
- [Drivesavers](#)
- [Dropbox](#)
- [HighTail \(formerly YouSendIt\)](#)
- [PhotoRescue](#)
- [SendBigFiles](#)
- [We Transfer](#)

## **Software - Estimating, Bookkeeping & Pricing**

- [Blinkbid](#)
- [Cost of Doing Business Calculator \(free online tool from NPPA\)](#)
- [fotoQuote](#)

- [Freshbooks](#)
- [Mint](#)
- [PayPal](#)
- [Shoe Box](#)
- [Square](#)

## **Software - Mobile Apps**

- [Coffivity](#)
- [Focus @ Will](#)
- [Genius Scan](#)
- [Right Signature](#)

## **Software - Other**

- [Adobe Kuler](#)
- [ColorSchemer](#)
- [Colour Lovers Seamless Pattern Maker](#)
- [Convert Case](#)
- [Google Translate](#)

## **Video Conferencing**

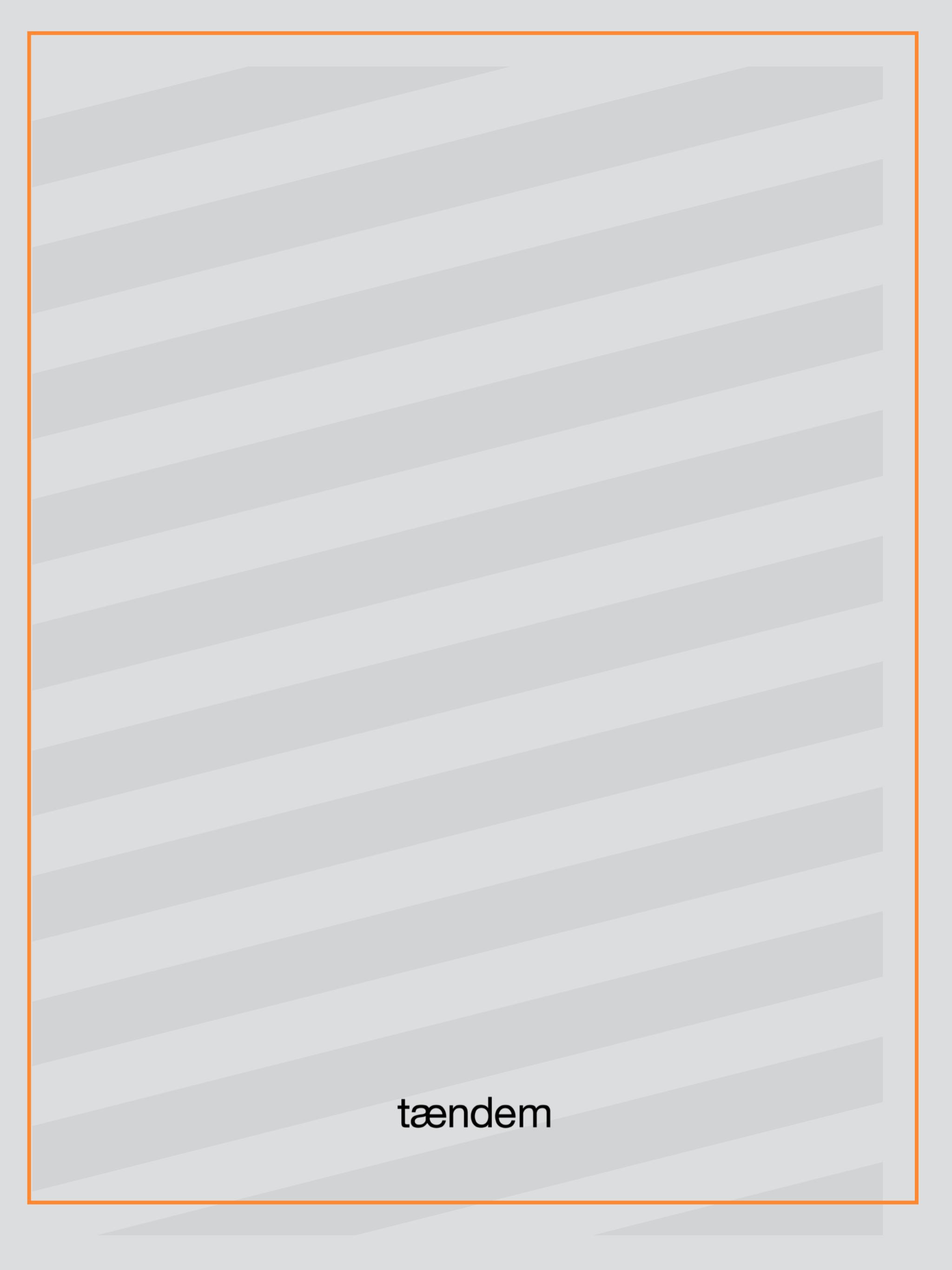
- [Any Meeting](#)
- [Google + Hangouts](#)
- [join.me](#)
- [Skype](#)

## **Website Services**

- [AddThis](#)
- [Cargo Collective](#)
- [Domainsmarty](#)
- [ETWebHosting](#)
- [Go Daddy](#)
- [Google Analytics](#)
- [Gravatar](#)
- [Host Papa](#)
- [Media Temple](#)
- [PhotoDeck](#)
- [PhotoShelter](#)
- [ProSite on Behance](#)
- [Squarespace](#)
- [The Best Designs](#)
- [Theme Forest](#)
- [Wix](#)
- [Wordpress](#)
- [Zenfolio](#)

## **Got a Suggestion?**

*If you feel we're missing an important resource, feel free to email us at [support@businessactionplanner.com](mailto:support@businessactionplanner.com).*



tændem