

To The Point

*The Student Guide
To Freelancing*

Justin Barber



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Before You Read

While this guide is structured chronologically, it's also formatted so that you can jump in at any point to read only the sections that seem the most beneficial to you without missing important context. No matter where you are in your freelance career, there's something in here that will apply to you.

Please keep in mind that this guide is written for the sole objective of marketing to clients, which can be different than marketing to other audiences such as employers, friends, or peers. Additionally, the type of clients who you'll most likely be attracting will be individuals looking to launch their startups. Interacting with these clients, particularly in the area of pricing and personal relations, can be different than how you might handle an agency or corporate representative and that's important to keep in mind.

Finally, when I make generalizations like "client's don't..." or "clients always..." please understand what I'm saying is "in my experience, client's typically don't..." or "in my experience, clients usually..." There are no absolutes when it comes to personal interactions.

A Cautionary Word

The big secret to freelancing is that there isn't one. You can start without having a single idea about what you're doing and fake it 'til you make it — though by no choice of my own, that's the path I took. However, it's a lot easier to avoid failure and put yourself in a position to flourish if you're equipped with foresight.

I've done my best to deliver relevant, practical advice based on general truths to kill the ambiguity behind freelancing and point you towards success, but as Illustrator/Designer [Justin Mezzell](#) reminds us:

"You can supply someone with all of the recipes for how to do what you do, but it's then in the hands of the artist to discern appropriate integration. The throwaways and takeaways will differ from person to person. Try not to view how-to's as a holistically prescriptive order...One artist's way of doing things isn't a cure-all for every other one out there."

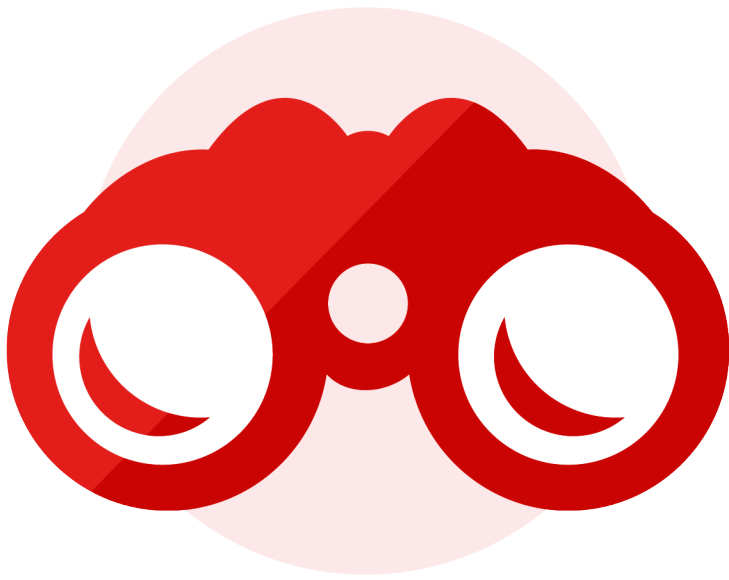
So I humbly put forward the culmination of everything I have learned so far from freelancing and hope it serves as a genuinely helpful resource for you 📍



Marketing: *Work and Self*

Chapter 1

As a student, you don't have experience, a network, or an established reputation. This means the single most important (and essentially only) aspect you have to market yourself with is your work. But because of the internet, this can be an advantage: clients won't care about your lack of experience or exposure if you have quality work. Knowing what to make available and how to position yourself to clients in a way that excludes perceived weaknesses and promotes your strengths is a vital skill needed to succeed in freelancing. But before any of that can happen, clients have to be able to find you.



1.1 Get Discovered: Posting Where Clients Scout

Portfolio hosting sites that also offer curated galleries, like Behance or Dribbble, are incredibly useful to clients because it offers them a centralized starting point of work to scout from as opposed to sorting through vast expanses of google results. For this reason, educated clients typically began their job search through these platforms so it's essential you're on these sites if you want to be noticed.

Behance is arguably the most important portfolio community platform to be on right now, especially since the Adobe acquisition. In addition to being one of the few and first places clients search, Behance is a great choice because it's free to join, allows a limitless number of posts (and full projects), it's conducive to a variety of styles, and it has an active community that is constantly looking for work to feature.

Dribbble is an invite-only service, but I can't stress the importance of getting one enough because it's a hotbed for recruiters and scouts. Paying members are granted a limited number of invitations, and the best way to find available invites is to check on twitter. Because they're a valued commodity, invites can be difficult to obtain since competition is stiff — be prepared to submit

only one piece of design for consideration. There are two major types of design that have a choke hold on Dribbble: app design and anything that looks remotely vintage, but it's still possible to find your design niche within the site's community. Dribbble has been responsible for bringing in at least half, if not more, of my clients so I highly recommend it. Once drafted, the \$20 pro membership that places a "Hire Me" button on your profile is a *great* bargain to take advantage of.

Coroflot is not a service I use so I can't attest to its effectiveness, but it's still a popular site that has a community to tap into that is built around job boards. It features the capability of posting full projects like Behance, though the majority of what gets featured seems to be more in the vein of Industrial Design.

Effective Strategies

Besides browsing the pages of popular projects on these sites, clients also utilize the platform's search feature to discover work they like. This means that aside from getting featured, tagging your projects with relevant search terms is critical to being found. It's ok to tag your projects with a number of descriptions (and their synonyms), but keep the tags relevant. Making proper use of tagging will drastically improve your chances of clients coming across your work.

Another key element of posting on these sites is the cover photo you choose for your project. If clients are browsing through pages of projects, an enticing preview image for your project can be the difference in getting passed over or hooking the client into viewing the project, which interests them in your profile, then your website, and then your contact page. Dedicate time and thought into creating these cover images — you may have the world's best project but no one's going to click on it if it doesn't catch their eye ♡



1.2 Legitimize Yourself: Owning a Custom Domain

Even though clients will typically discover you through portfolio hosting sites and not your own domain, they’ll still want to click through to your website for a few different reasons: to see if you have more work, to find out more about you, or to contact you. Ultimately, the reason to have your own domain is because it validates your existence as a legit entity (since its the standard of professionalism) and confirms you’re reachable.

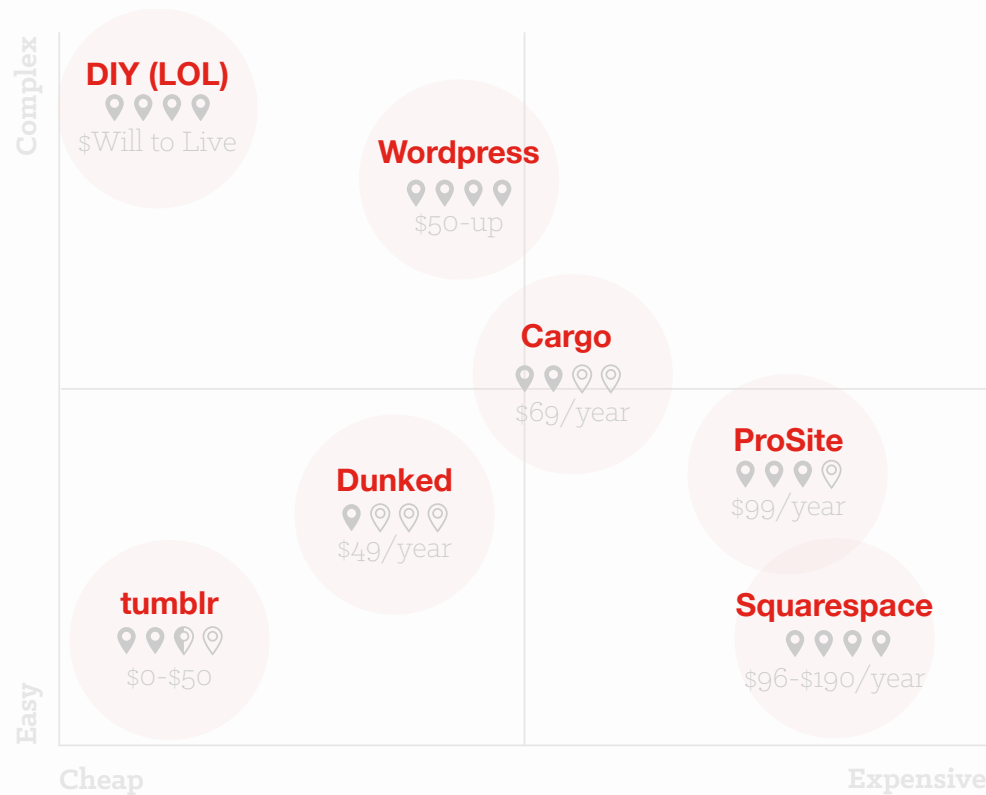
How to Create Your Website

Getting your own site requires a few distinct steps. First, you’ll need to purchase a domain name from a service such as [NameCheap](#) (guess what’s good about them), [Name](#) (extensive domain options) or [Hover](#) (great customer service). If you’re not planning on building your site from scratch, then the next step is finding a service that provides hosting and design. These vary in complexity and pricing (subscription or one time fees), as you can see in the chart below.

Important Design Choices

When you build your website, you’ll face the temptation to make it about yourself — resist this temptation. Your work, not your lovely visage, is what attracts clients. If the first thing visitors see on your site is a big picture of yourself (I’ve done it too) and large letters that say “hello, my name is…” then change it to the most attention getting design piece from your portfolio. Make your work front and center because that’s what clients come to see.

Service Breakdown = Layout Capability & Feature Flexibility



tumblr Free service, third party themes for download or purchase but not natively built for static portfolios

Wordpress Free service, lots of third party themes for purchase, but fairly complicated to set up and manage. Very powerful if you’re willing to learn it.

Dunked Only 2 built-in themes, limited layout options for custom pages but straightforward and easy to use.

Cargo Several built-in themes, popular choice among pros but not very friendly in uploading or managing projects.

Behance ProSite Several built-in themes but fairly limited layout capabilities. Fully integrated with your Behance site, which means you only have to upload work once!

Squarespace Several built-in themes and powerful layout engine, easy as drag and drop. Pricy but popular choice among pros, domain name included in purchase.

DIY If you’re capable, go for it! The less skilled of us will applaud you while your soul weeps for the ensuing battles you’ll face with **Hellish TurMoiL**.

When choosing or customizing your site design, don't worry about using nifty functionality to present your work. Clients want to view as much of your work as quickly and easily as they can — so features like lightboxes and slideshows are very unfriendly ways of presenting your work. Give the power to your clients by letting them scroll, not click. Make sure that when a client is done viewing a project that the rest of the projects are right there waiting to be clicked on. Your website doesn't need any web savvy gimmicks, it just needs to let your work shine and be easily accessible



1.3 Build a Profitable Portfolio: Showing Clients What They Want to See

Deciding what to include and what to leave out of your portfolio is the single most important decision you'll make in building your online presence. The biggest mistakes made in student portfolios fall under two categories: content and presentation. To avoid these pitfalls, you need to manage the content of your portfolio in two ways: by limiting your content, and focusing your content.

Limit Your Content

A lot of students feel they need to fill their portfolio up with everything they've done to compensate for not having a lot to show. As a result, the portfolios become watered down with several projects that students stretch to include mediocre pieces or showing the same item several times in various ways just for the sake of filling out the number of items "required" to be considered a project. This actually has the reverse effect by making the portfolio appear vacant.

Instead, mask the lack of work you've done by showing less, not more. As an alternative to breaking down your portfolio into complete projects, call the portfolio section of your site "selected works" or "condensed portfolio" and include the individual pieces you do have. This gives a unifying way to present the various pieces you have without having to try to fill out your projects and hurting the overall value of your work.

Finally, don't allow mediocre pieces of work into your portfolio just so you'll have more to show. The mystique of showing four to five brilliant pieces or projects is a lot more likely to engage the client than eight to ten average pieces or projects would.

Focus Your Content

The result of students showing too much work is that their portfolios are often too eclectic or broad for clients to be able to process. Keeping the type of work you show cohesive allows the clients to get a feel for whether your style would be appropriate for their project. Showing too many different types of work will confuse clients because they need to label you in terms they can understand — if they're unable to determine the one or two services you could best provide for them, they're likely to move on to someone else.

While your portfolio is about showing off your skill, it has to be in a relevant context for clients to be able to comprehend and ascribe value to it. Irrelevant projects are things like fine art or dead end school assignments. The reason you should avoid including these types of projects is because clients aren't looking for those types of projects to be done in the first place.

If you want to display your fine art skills, find a way to commercialize it by incorporating it into something like package design or greeting cards. The same applies to that poster advertising Baskerville you made for type class. Even though you got a 97 on it and your professor was geeking out about how well you showcased its transitional properties, clients won't be able to interpret value from it — even if they like the design — because the topic of the work doesn't translate. If you can't see a client asking for a similar project as what you've done, the best decision may be to leave it out.

Posting the process of a project is another irrelevant category because it distracts from the final work, which is the area that actually hooks clients. If they're curious, clients will ask to see your process but it's not a big enough selling point to warrant inclusion. If it's not the finished product, don't display it in your portfolio.

Lastly, market yourself for the type of work you want to do. Think twice before you post a type of project that you didn't particularly enjoy doing because clients will come asking for it. But just because you dominate your portfolio with a certain type of work it doesn't mean that you won't get contacted for work outside of that. You'll get the most inquiries for the type of projects you post the most of, but if clients are intrigued by your excellence in one area they will also approach you about doing work in a different area. My portfolio is heavily brand/print oriented, and yet website design is still one of the most popular requests I receive.

Present With Context and Flair

Presenting your work in context makes an incredible difference on the psyche of clients. Because many clients don't have a designer's mind, they don't possess the capability to see beyond what's in front of them so it's up to you to envision this for them and blow them away. If you want to impress, don't just show your exported Illustrator artboards as-is, they bore clients. Instead, mockup the design to look real in a relevant context. In short, always dress up your projects — nothing should be “naked” in your portfolio.

Mockup Resources

There is an enormous amount of free mockup templates available from a variety of sources such as [GraphicBurger](#), [PSDCovers](#), and [Pixeden](#) (which also has premium options). If you're willing to spend some time hunting elsewhere you'll be rewarded with a template that you haven't seen around as much as some others.

[GraphicRiver](#) is another great resource for realistic mockups if you're willing to spend up to around \$10 for complex sets of items, a bargain price for the amount of value it gives to clients. Support the designers who toil to make these high quality mockups instead of ripping the free versions off of torrents.

There's also been a recent upswing of many premium services like the groundbreaking [Live Surface Context](#) and [Boxshot](#) that push the limits of mocking up beyond Photoshop capabilities. While they may be fairly pricey, they are top of the line tools worth investing in.

Or, if you want something unique, make your own in Photoshop. It's not hard to create [an entire campaign into existence](#) using nothing but subtle texture, drop shadows, lighting, and some creative thinking. You can also use [pre-existing photos](#) and [adapt them](#) to your projects, or [find blank objects](#) to place your work on. Creating your own from scratch is more work, but you'll

have total control over how it looks and the results will be more unique than using something premade.

The possibilities are endless and the resources ample, so take the opportunity to inspire clients by mocking up everything in your portfolio. The difference in a client's reaction to seeing something flat to seeing what it would look like in real life is immeasurable.

In Conclusion

All it takes to create an appealing portfolio aimed at clients is administering strict quality control and playing up the potential of your projects. Show relevant design in the appropriate context for clients to experience your work in and you'll reap the benefits.



1.4 Write to Impress: Developing Your Voice

Nothing kills great work faster than poor writing, it's professional suicide. If you can't communicate effectively about what you've done or who you are then don't expect clients to want you to tell their story.

Writing About Yourself

Though you're identified by being a student in many contexts, this label is irrelevant in marketing yourself to clients. Label yourself as who you are professionally.

To clients, you're not a "graphic design student" you're just a "graphic designer." There's no need to hide or lie about the fact that you're a current student if it comes up in conversation with a client, but in the context of the services you're offering you're a professional.

Regardless of what approach you decide to take in writing your bio, don't babble — keep it relevant. You shouldn't be able to summarize your bio, your bio is a summary. Clients are looking for an overview of who you are, not your life story. Here's a real student bio I came across that's an example of what not to do (name and school changed):

"Hello. My name is John Doe and I am currently a senior graphic design student at the Art School University. I have worked on print, web, logo, package, and multimedia designs, using a number of Adobe programs and HTML code. The work on this site shows that I can create material in numerous disciplines of graphic design."

John has picked his diverse skill set as the main point he wants clients to take away from his bio. Unfortunately, he doesn't position that very well. He might as well have written: *"Hello, my name is John Doe. I do a lot of different types of design. My work shows this."*

First of all, clients can see what your work does, you shouldn't have to tell them. Secondly, the experience he lists isn't exactly a selling point — who hasn't worked on the same types of projects he has? Here's an example of how John could have written his bio more effectively:

"Hello, my name is John Doe. I'm a graphic designer who excels in working across a variety of disciplines."

Not only did the bio go from 57 words in four sentences down to 18 words in two sentences and gave him room to include more information, it became more effective

in selling who he is to clients. When you write your bio, focus on what you want to say about yourself and rework it until everything left is essential, then ask yourself, “what’s the point?” Think about what clients will take away from your bio that they couldn’t deduce from your work or find out otherwise.

Forming Project Descriptions

Project descriptions aren’t a major selling point for clients, so leaving them out altogether is certainly acceptable. As always, it’s about what the work looks like and not the how or why behind it. If you feel adding a project description is necessary, determine what you can say that would bring additional value to clients.

The main problem with poorly written project descriptions is that they do just that — they merely describe what the client can already see by looking at the project. Avoid implicit phrases like “the assignment was to...” and boring, obvious, or personal information like “I used Helvetica with a modern color palette...”

When writing a project description, make it read like an advertisement or exciting pitch rather than a mundane explanation of what the project was about (like how your professor explained it on the class handout)

Writing Resumes

For many clients, the determining factor is what your work looks like and not who your work is for. I do have a resume available on my site but it’s not viewed very much in ratio to the number of clients who contact me. If you want to include a resume, consider carefully what you put on it. Clients don’t care about your honor roll streak, your community service work, or your high school art award. Keep your resume to other client projects you’ve worked on or relevant design recognition. If your resume could be viewed as a weakness, don’t make it available.

In Conclusion

Paying attention to the small details of your online representation such as your writing make all the difference in appearing professional. Writing is one of those things that when done well is hardly ever noticed, but when done poorly it can undermine the credibility you’ve worked so hard to establish ♡

Chapter Summary: Marketing

1.1 Get Discovered: Posting Where Clients Scout

- Curating sites are *where* you'll be found
- Tagging and preview shots are *how* you'll be found

1.2 Legitimize Yourself: Owning a Custom Domain

- Use simple functionality to display your work
- Present your work front and center
- Provide easily accessible contact information

1.3 Build A Profitable Portfolio: Showing Clients What They Want to See

- Limit what you show
- Display relevant work
- Market yourself for what you want to do
- Mockup everything realistically

1.4 Write To Impress: Developing Your Voice

- Write only *when* necessary
- Write only *what's* necessary



Business: *Play the Part*

Chapter 2

The best part of freelancing is that unless you inexplicably have some kind of self-imposed dress code, you can do all your work lying in bed without your pants on. The worst part, however, is having to appear like you know what you're doing when you don't. To survive in freelance you need to implement effective systems for protection and workflow, and that begins with pricing.



2.1 Solve the Pricing Puzzle: Knowing What to Charge

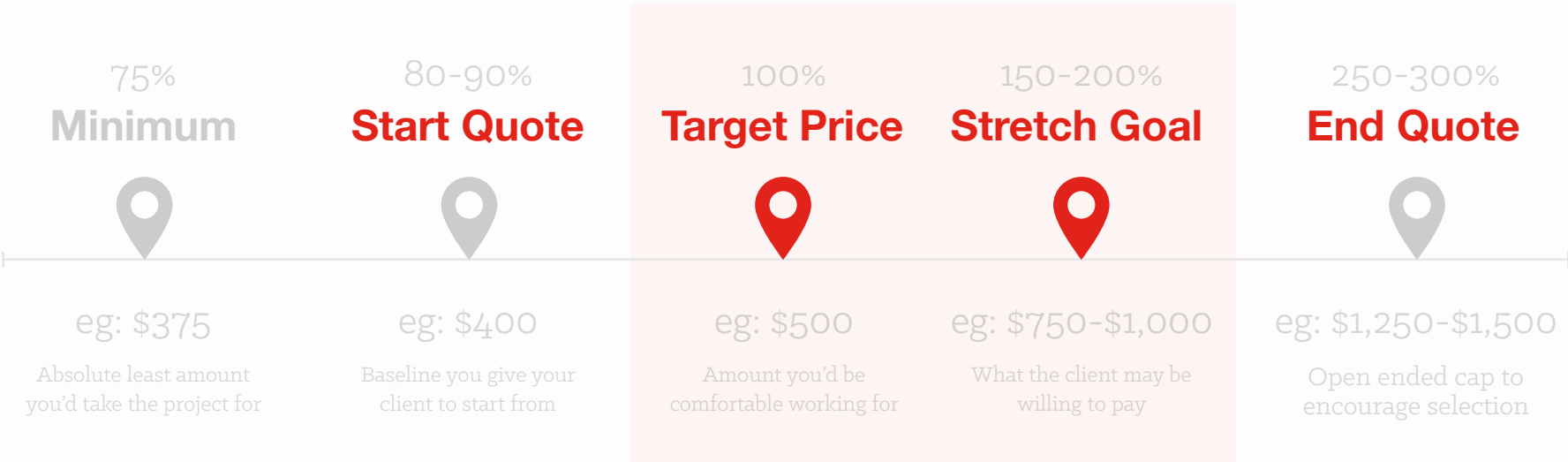
Out of all the aspects of freelancing, knowing what to charge is the most daunting because there simply isn't a point of reference out there to base your pricing off of. It's immensely frustrating not knowing what to quote for projects, and if what you are quoting is fair or insufficient. The hardest truth to accept at the beginning is the fact that there is no determined rate out there for freelancers — there's no magical site or chart that shows you exactly what you should be charging for each different kind of project and client. But the solution to this is surprisingly simple: *let your clients quote the project for you.*

Clients ask you what you charge for a project for one of two reasons: they truly don't know what they should expect to pay, or they're hoping you offer less than what they're expecting to pay. Ninety nine percent of the time clients come into projects with a predetermined figure in mind. If you show your hand first by telling them a number you'll work for, they control the ballgame and you could potentially lose out on a lot of money (and leverage for later on). So when clients ask you for an initial quote, put the ball back in their court by telling them your pricing depends on two factors: the kind or extent of project and their budget.

Almost every time they'll reply with the figure or range they've had in mind, and I've found that these responses are, for the most part, honest — sometimes they'll say something like "I have X amount to spend but I was really hoping to keep it to Y amount".

If they really don't know what to pay for the project, they'll let you know in the next reply. If this is the case, give the client a very broad range to work with, something like "projects like these can range anywhere from \$100 to \$1,000, so it really depends on what you have in mind" or "are you thinking the project will be closer to \$50, \$500, or \$5,000?" If the project needs a more specific range, you can use the formula below to spark your brainstorm. If this still doesn't coax a figure out of them, it be a sign the client isn't worth it.

Quoting Ranges This is not a definitive formula at all since percentages should depend on your target price, but you can use it as a starting point.



Quoting From Experience

As you gain experience, you'll begin to more accurately gauge how much it would take for you to complete a project before quoting a client. If you feel confident in offering a quote it's ok to do so, but it's still important to do what you can to avoid providing a quote before your client does. If you show your hand and the client lowballs you but you decide to take the project on anyway, they'll expect work for the same rate (or less) going forward. By not quoting right away, you might end up with more than you would have asked for.

At the end of the day, sometimes you just have to toss out a number to retain the client even if you're unsure about what you're asking for. Whatever the figure is that you come up with, don't sell yourself short. Never beat yourself up about a client who walks away from a quote you've offered — if they didn't want to invest what you were asking for then they aren't worth it.

Hourly vs. Ad Hoc (Fluid Pricing)

Clients may ask for your hourly rate or request you work by the hour because it is a familiar style of payment to them and it removes a lot of the perceived risk in paying for something subjective — you can't argue with math. You charge X amount per hour so you get paid X amount per hour. The problem with charging hourly is twofold: first of all, clients are paying you to find a solution to a problem they can't solve themselves, and the worth of the solution you provide isn't determined by time, it's determined by how well you can solve it. Whether finding a solution takes five minutes or five weeks, it's the solution (and the skill you have to find it) that has the end value. Getting paid by the hour punishes you for efficiency.

Second of all, each client's needs are different. Two clients may hold your work in equally high regards, but their budgets are different. That's why there isn't a

fixed rate for projects — it's based solely on the client's perceived value of their project and your willingness to work within their investment. Explain to clients inquiring about your hourly rate that you charge by project instead of hour because you fit each project to their needs so that everyone is on the same page moving forward and there aren't any surprise costs.

Of course, you can't escape the fact that time is money. Even though you're not getting paid by the hour, it's good practice to keep track of the hours you work on a project so that you can find the compensation/work ratio and how that resulted: did you feel under paid, properly paid, or generously paid? This will help you build a better feeling for how to price in the future as well as protecting yourself if a project is becoming too drawn out, as it gives you solid evidence to build your case around persuading a client that you need further compensation.

When Clients Take a Pass

Clients won't always reply to you prompting them for a quote, and that's ok. You can always send a follow up email, but sometimes their silence means they aren't interested. Maybe they were asking around and another designer gave them a direct quote they were comfortable with. This is a part of the job, don't let it get to you. Chances are, if they weren't interested in having a real conversation about pricing or walk away after you decline to work for what they asked for, they weren't worth your time in the first place and you've probably avoided a giant headache.

Growing Pains

When you reach a certain point you're going to come to the realization that you should be working for more than what you've been charging. Part of this is a result of natural progression — as your experience and development will manifest itself in your work and

over time you'll gain the type of exposure that nets bigger clients — but part of it will only come from being proactive. When it comes time, you're going to be scared of quoting a number you suspect will be too big for the client. You're in a state of flux: you want to work for more, but you don't want to lose out on the money you have been making. Be confident in quoting what you feel like may be a big number and you'll be surprised a lot of the time by the client's willingness to match. The clients who don't have or want to invest that kind of money will move on. It always hurts to lose out on a potential job, but moving up the ladder is a testament to your progress and worth celebrating.

Keep in mind that just because you're progressing doesn't always mean the types of clients you're attracting will keep up at the same pace. There's no milestone you can surpass that guarantees attracting only big budget clients. The small budgets will always be there, and it's up to you to decide when to take it and when to leave it.

Long Term Changes

As you have built lasting relationships with return clients, you'll face the delicate situation of notifying them that your rates have gone up. This can be very difficult if you've retained some of your very first clients, since they got in at your entry level of charging and are used to the cheaper prices. But if you take time to personally explain your thinking behind the change and how you feel raising your rates is best, many of them will be understanding and stick with you.

It can be awkward to outgrow clients, but sometimes that happens. An exciting part of freelancing with individuals and their startups is they often grow with

you, and can be ready to move up to the next level at the same time as you. This change, of course, doesn't have to happen in the form of a grand announcement. It may be you slightly increasing the price for projects as you progress, and when it reaches an amount the clients are uncomfortable with, they'll ask you for a reason and you can use that opportunity to share with them the ramifications of your growth.

Negotiating Worth

The key to negotiating a quote is appealing to the value clients place in their project to see it succeed. If a client gives you a number that you're disappointed with but are still willing to work for, counter by saying something like "we can do the project for X amount, but it wouldn't allow us as much room for exploration or revision. If you'd be willing to stretch to Y amount that would be great, but if not, I understand. Y amount would really enable us the additional freedom of further exploring possibilities and guarantee your project's success by finding the best solution out there." A lot of clients are willing to pay a little more than what they were initially prepared to if you convince them the additional cost is justified and you genuinely believe it to be the better choice. Other times they'll tell you flat out they don't have any more to work with, but you won't know unless you ask.

If clients ask for less than your proposal it's ok to accept it. But don't slip into the routine of always relenting to their requests. If you conceded to their budget for previous projects, hold fast for the next few and stick to what you're asking for. If you never offer any kind of resistance, they'll realize they can acquire your services for as little as they want to 📍



2.2. Protect Yourself: Composing Clarifying Contracts

Never go into a job without a contract, even if the client is willing to pay the entire fee up front. The main reason for this, aside from ensuring the client is serious about the project, is establishing clarity from the outset so that if things get messy down the road you can come back to the contract as a foundation for claims. Your contract doesn't need to be written in full blown legalese, but there are some important topics you need to include.

Terms to Cover

It's common sense, but be sure to have both you and your clients contact information (name, email, phone, company name) at the beginning, which includes the information on where and how to pay you.

Pricing Structure Include the total amount for the project as well as when the timing of payments needs to be made. For typical projects, 50% due at signing before any work is started and 50% after project completion (but prior to delivery of files) should be acceptable. For larger projects that have several deliverables, it's good to break up that total into more payments. This may be 50/25/25 or 40/20/20/20, but ensure that near the end

of the project the client has already paid at least 50-75% of the agreed upon total. Finally, depending on the method of payment you want your client to use, include a "handling fee" to cover the costs the third party service will charge you for handling the payment. This is often around 3% of the total cost, so make sure clients know up front that they will need to pay an additional 3% of the total cost or be willing to absorb it yourself.

Project Summary List the order of events that will take place, what stages of design there will be, and what the client receives upon project completion.

Property and Rights It's important to make two things clear about the rights of the work you create for the project. The first is if the final payment doesn't go through, you retain all rights to the work you've done and you can reuse them for whatever purpose you'd like. Second, is that you own everything you show the client in the process of the project except for the approved design the client selects as their final solution. When you work with larger corporations, you often will have to sign away your rights to everything you do under the scope of the project (basically anything in the ideation phase belongs to the them, not you) — but in working with individuals it's important to make the distinction about what is and is not theirs. You should also put in a stipulation about being able to display the work you do for them in your portfolio. Sometimes clients will prefer you not for a variety of reasons, but if you find out why it can be easy to either strike this from the contract or convince them to allow you to.

Trust I have a section in my contact titled "trust" that serves to remind the client that they're hiring me as a professional to solve their problem and that they need to let me do what I do best. I tell them I'll be completely honest and expect the same out of them.

Revisions I don't believe in limiting most projects to a certain number of revisions because it's ridiculous to put a cap on it (try defining what a "revision" is) but it's important to mention some type of limit in the contract or else you have no protection if a client runs you ragged through concept after concept (I learned this the painful way). Since you and the client agree to a fixed cost at the beginning of the project, you should reserve the right to charge extra if the client doesn't move forward after you show more than enough revisions. Of course, in cases where revisions happen in very clear stages (like web design or lettering) be explicit in stating a specific number of allowable revisions.

Clients might question you nervously about this aspect, but reassure them keeping it open ended is intentional so that you can both make reasonable judgment calls about it. Out of all the clients I've had, only two or three have gone past a safe number of revisions, so if you're doing your job right it should be a rare occurrence (but there will always be *those* clients). You'll know in your gut when you've reached the number of changes that is covered by what you're being paid, and your client needs boundaries to understand you're not a slave.

Responsibility This section ensures clients take full legal responsibility for the information they provide you to be implemented into the project. Whether that's a company name, a specific graphic, or packaging information, they are responsible that everything they provide you meets legal requirements. If there's a problem with something they provided you for the project, you are not liable for having included it.

Additional Costs Clients need to be aware that they are responsible for covering all project related costs. The biggest of these is fonts (always check to see if they're open to purchasing a font and if so what their budget for it is), but it can also cover shipping, printing, etc.

If there are any of these costs, you need to document it appropriately in an additional bill.

In Conclusion

Even with a contract, you're never guaranteed to be fully compensated. I have a few outstanding balances that will probably never be paid even though the clients are contractually obligated to. But most of all, laying out in detail who gets what when ensures that everyone is on the same page before starting and understands what's going to happen throughout the duration of the project, and that's the primary reason you should always work with a contract.



2.3 Use Proper Management: Finding the Right Systems

It's critical to keep an ongoing record of all your freelance work because without one you'll quickly forget who owes you what. I use a simple spreadsheet in [Google Docs](#) that I update with each project and have a section for "paid," "ongoing," "bill me," and "future." This collection of jobs at various stages keeps me up to date on who I need to keep in contact with as well as what I need to be working on. I have a column for the date of payment, client name, project name, payment amount, method of payment, and a notes section for the project (such as "up front payment of \$X total")

Payment Methods

The easiest and most popular payment method for many is PayPal, so you'll need to create an account and link it to your bank account. PayPal does take a 3% total of each transaction, so it's good to let clients know at the beginning (and in the contract) that you'll be charging an extra 3% on top of whatever the project total is so that you don't lose out on getting paid the full amount. It may not seem like much, but after several projects the net loss of that 3% starts to add up.

The downside of PayPal is that if they detect any kind of "fishy" activity (like if the client's information on PayPal isn't completely filled out), they'll freeze or suspend the funds you just received and there's nothing you can do about it except file a report and wait a month for it to be hopefully resolved in your favor. This has happened twice to me — where the client has filed a request to PayPal for a refund after putting through the final payment (for no reason at all). This is when your contract and email threads come into play as protection, since you'll need to prove to PayPal that the money does indeed belong to you. Both times I have submitted evidence to PayPal, the clients have canceled their request and the money has made it safely to me.

Credit Cards If you're up for something slightly more complicated in setting up, you can also use a service like [Stripe](#) in conjunction with [Spacebox.io](#) to accept credit cards. This will still result in around a 3-4% handling fee, but the money goes directly to your bank account without a third party that can freeze your account at any time. Clients may appreciate the convenience of only having to pull out their credit card instead of having to transfer money over to their PayPal account.

Wire Transfer or Direct Deposit This method is mostly for international clients or larger corporations. Your bank will charge a fee for routing money from a wire transfer into your account, but that charge depends on your bank. To accept a wire transfer, your client will need to know your routing number, SWIFT code, and account number (all of these can be obtained with a quick call to your bank).

Check Only switch to checks if you trust your client and aren't in need of immediate compensation. Obviously checks won't work the majority of the time because they're slow, but if you have return clients that come to you often with a steady stream of projects this can be a good way to go. I had a firm that was outsourcing work to me on a regular basis, but the extra PayPal fee I charged was really adding up as wasted money spent (for both of us) and they asked if I would consider another form of payment. Because I had worked with them for a long time, had a good relationship, and trusted them — I agreed to switching to a monthly billing cycle instead of getting paid per project with front-end deposits. The downside for me is that often monthly checks won't be sent out until two to four weeks later, so I can sometimes go at least a couple months without getting paid for several projects that have been completed for quite some time.

In Conclusion

Keep track of your clients and payments diligently. Sometimes the assumed way of doing things isn't the best, so be sure you and your client have worked out how the payments will be made ♥

Chapter Summary: Business

2.1 Solve The Pricing Puzzle: Knowing What to Charge

- Make clients quote first
- Use ad-hoc pricing (determined on a per-project basis)
- Offer quotes in broad ranges
- Be confident in quoting big
- Be proactive in your climb up the ladder

2.2 Protect Yourself: Composing Clarifying Contracts

- Remember you can't completely protect yourself
- Outline the project requirements
- Clearly state terms (like rights, revisions and deliverables)
- Break down pricing and payments

2.3 Use Proper Management: Finding the Right Systems

- Keep track of clients, projects, and payments in a central place
- Compensate for handling fees from payment providers
- Determine the best form of payment for you and your client



Relationships:

Dating Without Marriage

Chapter 3

Healthy relationships are hard enough to maintain between friends on common ground, but when you add in money and passionate opinions everything becomes infinitely more precarious (kind of like marriage). The height of tension in client relations is at the point of disagreement (kind of like marriage), so knowing when to put up and when to shut up — and doing both in a graceful manner — will go a long way with clients (kind of like ok I'll stop). But unlike marriage, you and your client aren't bound together forever by love, which means there's no safety net preventing a breakup from saying the wrong the things.



3.1. Manage Clients: Treating Cats Like Dogs

Since only one interpersonal metaphor just isn't enough, here's yet another way of thinking that provides the groundwork for client relationships: *clients are like cats but you need to treat them like they're dogs*. The difference is this: dogs enjoy their dependence on you while cats tolerate it. Dealing with clients is about changing that tolerance to, if not enjoyment, at the very least respect.

It's Not Me, It's You

A simple and subtle strategy in building towards enjoyable dependence from clients is by substituting "we" for "you," especially when discussing ideas. This particularly helps during times when you might not be seeing eye to eye with the client, since it's inclusive and pits you on the same side instead of alienating them by making a clear distinction between you and them.

Because you really do have the same objective as the client of producing a successful project, if you refer to how choices effect the *project* with valid evidence instead of making it *personal*, your clients won't feel like your at odds with them and they'll be more likely

to change their opinions and engage in real discussions of how the project can be improved instead of getting frustrated with you when you don't want to do exactly what they want.

So when you feel the client doesn't have the best idea, instead of saying "I'm not sure if the direction you want the project to go is in your best interest," change it to something like "I'm having second thoughts about the direction we decided to take the project, and I wanted to see how you felt about some other options we could pursue like..."

You Were Right, Honey

As Massimo Vignelli famously said, "*The first thing you need to make clear to a client is that you aren't there to answer his wants but to answer his needs.*" But before you decide to stand your ground about what you think the client needs, you need to make an important discernment: does the client need it because you like it better than what they want, or because you've actually found a better solution? The difference here is critical because it effects how, why, and if you should defend your stance.

If you truly believe you see a better solution, an effective means of persuasion is reviewing the project objectives and showing the client a side by side comparison of how well each solution fulfills those objectives. By appealing to reason, and not the emotions and personal opinions that often fill class critiques, the client will be more likely to see your side of things.

But when it's all said and done, the only thing you can do is state your case convincingly as possible. If the client won't budge, even if you're right, it's still your responsibility to give them what they want no matter how painful that is. Their money, their project.

Of course, the refusal to listen or take suggestions is often the sign of a bad client (and designer...) and there is something you can do about that.

The Compatibility Test

Surrounding yourself with good clients will make your life more enjoyable, but it can be difficult to determine what attributes a client will take on before you work with them. If you're able to detect the early warning signs of a potentially bad client in the beginning stages of correspondence, it will either enable you to prepare yourself for what you're getting into or make the decision to pass on the project.

Behavioral Traits Indicative of Bad Clients:

Low Budget *They express skepticism over your quote*

Vague Vision *Their project seems open ended, they don't have a clear objective and encourage you to "do whatever you want." If they don't know what they're looking for it can be hard to convince them what you've made is what they're looking for*

Micromanaging *They express concern about not seeing every step of your process as it happens and don't leave room for you to work*

Entitled *They give you the impression they're doing you a favor by letting you work on their project*

Behavioral Traits Indicative of Good Clients:

Serious Budget *They accept what you quote or ask to hear your reasoning behind the quote*

Clear Vision: *They have an objective they want to achieve with the project and they'll recognize it when they see it in front of them*

Inquisitive *They want to know about how you work so they know what to expect from you*

Respectful *They are impressed by your work and want to solicit your thoughts on their project*

Needing Personal Space

When you set appropriate boundaries, bad clients can transition into good (or at least average) clients. But that's not always the case. Sometimes bad clients are just bad clients. If they're low budget to boot (a not-so-rare combination) then the decision to cut them loose is an easy one. But when a bad client has a bigger budget, the decision becomes much more complicated. Last year my highest paying client was also the biggest pain in the neck to deal with. I weighed the alternatives of making money miserably versus the freedom from the strife the client caused me and went with the money (which was subsequently used to buy pain relief. I kid.). At the time, I was prioritizing generating an income over everything else but I hated almost every second of it. I'm no longer working with the client and I don't regret it at all.

Clients and their projects won't always be fun and games, there will be some tough ones you'll have to slough through. And there's no such thing as a client who isn't difficult, so it's not like you can cut ties with everyone who you've ever had some trouble with because you won't have anyone left to work for. But if you find that your desire and motivation are plummeting because of the duress a certain client is putting you through, it may be time to weigh the pros and cons of retaining or releasing them and the set of problems they bring to the table. It can be worth leaving the money behind to maintain the passion for what you do, but no one will be able to make that judgment call except for you — just remember to value yourself.

Training Clients

One of the hardest things about freelance work is the blurred boundaries between work and personal life. Clients will expect you to be available at the slightest notice, to work through weekends, and make your schedule fit theirs. This is the area I've struggled in

the most — I've often gone too far in prioritizing client needs over my personal life. I've recently learned that it's important to set boundaries from the outset and that it's ok to be unavailable sometimes.

If you're willing to stick with the cat/dog metaphor (just kidding, I'm going with it anyway), setting boundaries is kind of like training. Clients will come to expect what you do as the norm. If you reply to their urgent email at 3am seconds later, then they'll expect immediate replies from you. If you get a big job done in two days, they won't be happy when it takes a week the next time around. If you sit outside in a car at the local library just to get an internet connection to Skype with them on your summer vacation, you've taken things too far.

The key is to draw a line for yourself by dictating what will be considered the norm from the very beginning. This means practicing a little restraint, which won't come to you naturally at the very beginning. If you continually set the bar based on your maximum level of output, you'll never be able to surpass client expectations — you'll be working your butt off just to meet them (and you have yourself to thank for it). If you set the bar at your estimated minimum output by doing things like asking for twice as long as you think you'll need and not responding immediately for general communication, then you'll be surpassing client expectations with your regular pacing — and will really blow them away when you go full throttle. Small things like this can skew the client's general view of you into a favorable one if you're constantly performing above and beyond what they expect while you are able to pace yourself regularly. Everybody wins.

The other aspect of "training" is to let the clients know you won't be pushed around. Whether that's in the area of payments, revisions, or time, if you play hardball you can always relent and make the client's day. If you're

constantly giving in and then decide to toughen up, your relationship is in danger of souring.

Of course, work blending into your personal life is a necessary evil of freelancing and it's up to you to decide when to put your foot down when clients ask for a big sacrifice (maybe by billing them more for it), or if you should suck it up as part of the job you love. Knowing when to draw the line and when to make exceptions for clients is a tough act to balance but the key word is balance.

Rewarding Clients

If you're going to train clients then you've got to reward them too, it's a two way street. One of the easiest ways to reward clients for their business, aside from coming through in the clutch for them, is to do favors. Not all design favors, the small things clients ask you to do, should be done free (see: training) but they can be an excellent opportunity to positively reinforce your relationship. I had a client who was using Moo to print the business cards I designed for him several months prior. He wasn't confident in uploading and placing the files so he asked me to do it and as a good client should, offered to pay me for my time. I used this opportunity to reward him for being my client by doing it for free.

You can also reward your clients by showing your appreciation for them. Sometimes that can be in the small things by including seemingly inconsequential remarks in emails like "thanks for your patience in waiting for this turnaround, I know it's hard to wait" or in a bigger way by crafting an email or gift just to thank them. I selected six of my favorite clients from last year to send a special package to at Christmas as thanks for being such a pleasure to work with. It included a handwritten note detailing why I enjoyed working with them and some custom designed pins just for them. It was a pointless gift that I'm sure has been trashed by

now (seriously, what do you do with pins?), but clients responded back very enthusiastically about how excited they were to receive it and reciprocated the good vibes.

You can't freelance without clients. Let the good ones know you don't take them for granted by using big or small opportunities to show the appropriate amount of appreciation they deserve.



3.2 Discover Truth: Translating Project Briefs

Requiring clients to provide a brief is an important step in the creation process. Along with information about the project, ask clients to include three to ten pieces of design they like even if the pieces aren't related to the project. After you receive the brief, get them on the phone to discuss the project and just listen. Prompting the client to talk about everything that comes to mind can lead down important paths in revealing their expectations and thoughts on the projects you wouldn't have known otherwise. It's important to keep the discussion as open as possible and let the client do most of the talking and conversational steering.

Be weary of clients who lack direction. If they say “we want you to have total creative freedom,” it's not true —

be prepared for them to be unhappy with your solution. Get to the bottom of what they want even if they tell you to let loose to avoid having to design in the dark and hope for the best. It's less dangerous to have a client who is overly detailed about what they want than one who doesn't know what they want at all.

If you're even slightly confused about something — ask — killing ambiguity in the beginning is essential to project success. I've found that for whatever reason many clients only share about 80% of their ideas without additional prompting. That last 20% can be crucial in finding out what clients really want, so always dig a little deeper to unearth the nuggets of information the clients are holding back from discussing to guarantee you're going to go in a direction that the clients want to see with the final results.

Talking About Specifics

Sometimes clients will feel the pressure to tell you exactly what they want designed, even if they don't know what that looks like. They're unsure of the balance to strike between telling you what they want and allowing you to figure it out for them.

A good thing to do is let them know they're only responsible for talking about the conceptual side of things. So instead of talking about the technical aspects like font choice or color, they should talk about the kinds of feelings they want the design to evoke. If they could use adjectives to summarize the project, what words would they choose? This will be a welcome relief to many clients and will keep the door open for you to do what you do best.

Of course, sometimes clients do have specifics in mind, so it's important to find that out. But for the majority of the discussions encourage them to speak in conceptual terms and leave the visual representation up to you.



3.3 Present With Purpose: Persuading Your Clients

One of the biggest mistakes you can make is assuming clients will understand or see things the same way you do. Never let your client build his or her own first impression of your work without guiding them to the opinion you want them to have. Otherwise, clients will draw their own conclusions and that's a big gamble. If you want to maximize the likelihood of client approval and avoid rejection, you need to present your work with explication and drama.

The Art of Presenting

There are many ways to present a major project to a client, but sending attachments with an email message isn't the most effective. If you've been waiting for the latest product from a big tech company, they hold a giant presentation for it that keeps you on the edge of your seat the whole time — they don't email their customers with pictures and a brief explanation. If you don't have the luxury of presenting your work in person, one of the most effective ways I've found of presenting work to clients is creating a video slideshow for them to view.

With a recorded slideshow, you control the pace of the storytelling and decide when the client sees what (unlike an email). Not only this, but it allows clients to easily share your work with their circle of advisors without the mess of having to forward emails with attachments and add in their own thoughts. Clients are always greatly pleased with these presentations and I've had them tell me how impressed they were with the presentation even when the solution I presented wasn't quite what they wanted.

Tools of the Trade

I use Apple's Keynote to build my client presentations because it's easy to use, powerful, and allows recording your presentation as a video with a voiceover. The inconvenience of Keynote is that you have to complete your voiceover in one take, so plan what you're going to say in advance to avoid messing up and having to record everything over again.

Once I finish recording, I export the presentation (with voiceover) to a movie file and use [Vimeo](#) to upload it with password protection so only the client can see it. Make sure the cover image Vimeo selects for the video doesn't give anything away. The free Vimeo account also limits monthly uploads to 500mb (I've found that's around a 20 minute presentation), so keep an eye on how much room you have left.

Telling a Story

You should consolidate everything you and the client talked about from the brief into main points at the beginning of the presentation. Use these main points to identify the problem or challenges of the project, and outline what steps the client felt you should take to find a solution. Giving this summary may seem redundant, but it's good for the client to see the ideas from various conversations and email threads condensed into one place for them to digest.

While process should be left out of your portfolio, it's essential in showing clients before revealing the final solution. If you don't show any of your thought process or exploration before showing them the final design, the client may like what you've done but will inevitably ask to see more. And if you show more options but they still like the first one, they'll feel like they're settling instead of experiencing the excitement of selecting it. By showing your process and leading up to the final solution, they'll understand what went into the work and their thought progression will become aligned with yours which is pivotal when it comes time to unveil the final solution.

Before you reveal the final solution, the client should have a good enough idea of where it's headed but still be surprised (in a good way) when they see the result. Once you show the final solution, backtrack to fill in

the gaps of how the concept went from rough idea to refined solution. This is also a good time to bring the main summary points from the beginning of the project to show specifically how the solution successfully fulfills those ideas.

At the end, transition into showing additional pieces or complementary context of the design. This will leave the clients in a state of excitement about what you've done and view the project in an overall positive light even if they were unsure about some aspects.

In Conclusion

Presenting your work to clients is all about controlling the environment they experience it in the first time and making that experience an informative and exciting one. The way you present your work is half the battle 📍

Chapter Summary: Relationships

3.1 Manage Clients: Treating Cats Like Dogs

- Earn your client's respect by being on the "same team"
- Always state your case objectively, and concede if the client isn't convinced
- Establish boundaries for yourself and the client
- Assess whether clients will be good or bad from the early stages
- Thank clients when appropriate

3.2 Discover Truth: Translating Project Briefs

- Always ask for a project brief with examples of design
- Keep discussions open ended and conceptual
- Find out the specific things they want
- Kill ambiguity by ensuring you've collected all the client's thoughts and ideas

3.3 Present With Purpose: Persuading Your Clients

- Don't let the clients form their own first impressions
- Present your work with explication and drama



Go Forth

“The opportunity cost of waiting to do what you want to do just goes up. The excuses you tell yourself to wait to try what you have in your mind are wrong. In truth, you will have more responsibility tomorrow than you have today—it’s a fact. You can always find a reason why you should wait, and some are very valid...but recognize the fact that the opportunity cost goes up, not down.”

- Scott Belsky, Behance Co-Founder



About the Author

Born and raised in Tokyo, Japan — but currently located in Atlanta, Georgia — Justin Barber is a freelance graphic designer who specializes in branding and identity. His work has been recognized by Apple, Behance, and International Designers Network, among others.

[Website](#) | [Email](#) | [Behance](#) | [Dribbble](#) | [Twitter](#) | [Hustle Co.](#)

A Personal Note

I've poured so much of my time, effort, and love into this project that I wanted it to reach as many people as possible, so I paid to set up a website and offered it as a free download. If you've benefited from reading *To The Point*, would you consider skipping out on your next RedBull to help me cover the costs of the website so that those like yourself can continue to benefit from it too?

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