

Freelancing 101 — Workbook

This workbook turns the course into your own 30-day path to a first paid client. Each section maps to a course module: you build a concrete offer, calculate a rate you can defend, run real outreach, and set up the contract, project rhythm, and invoicing that get you paid. Use real names, real numbers, and real dates instead of placeholders, and the included spreadsheets handle the rate and pipeline arithmetic so you can focus on decisions and outreach. The whole point is action, so send the messages and book the calls, do not just read.

Build an Offer People Will Pay For

Turn a broad skill into one specific service for one specific client, packaged and proven so a buyer understands it in seconds.

Worksheet: Define My One-Line Offer

Fill every field with something specific and reachable. If a stranger could not repeat your offer after reading it once, rewrite it tighter. Confirm real demand by finding at least three open jobs or reviewed freelancers doing this exact service on Upwork or Contra.

The concrete service I deliver (a named deliverable, not I do marketing)

The specific client who buys it (a group I can actually reach and that has money)

The outcome they care about (more bookings, fewer support tickets, a finished brand)

My one-line offer: I help [client] get [outcome] by [service]

Three places online where people already pay for this exact service

What is NOT included in my offer, so I can pre-empt scope creep

Worksheet: Design My Three-Tier Package

Build a good-better-best set of three tiers. Make the middle tier your target sale and price the other two to support it. Quote in round, confident numbers and always include a revision limit in each tier.

Starter tier name, deliverables, revision rounds, turnaround, price

Growth tier (my target sale) name, deliverables, revision rounds, turnaround, price

Scale tier name, deliverables, revision rounds, turnaround, price

The exclusions that apply to every tier (what is never included)

Why a buyer would step up from Starter to Growth

Exercise: Build Proof With No Clients Yet

Create credible evidence of skill before anyone has paid you. Make two or three before-and-after spec pieces or steeply discounted projects, then write each up as a tiny case study.

- Which real local business or public asset can I redesign or rewrite as a before-and-after sample?
 - Who in my network would let me do one free or discounted project in exchange for a testimonial?
 - For each piece: what was the problem, what did I do, and what was the result or my reasoning?
 - What one or two sentence testimonial could each person give that names a specific result?
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Checklist: Profile and Mini-Portfolio Ready to Show

- My profile opens with my one-line offer, not my job history
- I have a real, friendly headshot uploaded
- I show three to five strong, relevant pieces, not everything I have ever made
- Each piece has a one-paragraph case study (problem, action, result)
- I have at least one testimonial, even from unpaid work
- Every page ends with one clear next step (such as message me your project)

Set Rates You Can Defend

Replace borrowed numbers with a rate built from your own target income, costs, and realistic billable hours, then convert it into project quotes and a calm money conversation.

Worksheet: Calculate My Floor Hourly Rate

Work through the target-income formula honestly. The included spreadsheet does the arithmetic; here, write the inputs and the result. Remember a full-time freelancer realistically bills only about 20 to 25 hours a week, not 40.

Target annual take-home income

Yearly business costs (software, equipment, platform fees)

Tax buffer percentage to add (often 25 to 35 percent)

Savings for unpaid time off (vacation and sick days)

My realistic billable hours per year (weekly billable hours x working weeks)

My floor hourly rate (total needed gross divided by billable hours)

Exercise: Turn a Real Project Into a Fixed Quote

Take one realistic project for your service and price it from the bottom up. Add a buffer because parts always take longer than expected, then sanity-check against the value to the client.

- What are the concrete tasks (research, drafting, revisions, calls, handoff) and the hours for each?

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- What is my base hour estimate, and what is it after adding a 20 to 30 percent buffer?
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- What is the cost-based price (buffered hours x floor rate)?
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- What is this outcome worth to the client, and what is a fair value-based price above the floor?
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Worksheet: Scripts for the Money Conversation

Write your own words for each line so they sound natural out loud. Practice saying your rate as a calm fact, then staying silent. If you lower a price, always remove something in return.

My one-sentence way of stating the price, framed around the outcome

My response to that is more than I expected

My response to can you do it cheaper (offer a smaller package, not a discount)

My response to I can get this cheaper elsewhere

What I will take out if I ever agree to a lower price (revisions, timeline, deliverables)

Checklist: Rate Readiness Check

- I calculated my floor rate from my own numbers, not a forum post
- I can say my rate out loud without flinching or over-explaining
- Every fixed price I quote is tied to a written scope and a revision limit
- I never quote large projects on the spot; I send a proposal instead
- I will trade scope for any discount, never give the same work for less

Find Clients and Win the Work

Run a repeatable pipeline from warm leads and the right platforms, through outreach and discovery calls, to a sent proposal that closes.

Worksheet: Map My First 30 Leads

List 30 to 50 warm contacts before touching a job board: former coworkers, classmates, community members, and friends at small businesses. Then choose the two cold channels you will work consistently.

Ten former coworkers or classmates I can tell about my new service

Ten people in communities or groups I belong to who fit my client

Friends or family who run or work at a small business that fits my offer

My two chosen channels beyond my network (such as Upwork plus a niche community)

My warm-intro line: I am taking on freelance [service] clients, do you know anyone who needs [outcome]?

Exercise: Write Outreach That Gets a Reply

Draft a cold message and a platform proposal that lead with the client's problem, not your name. Keep cold messages under about 120 words and tailor at least the first line every time.

- What specific observation about this prospect's business can I open with?

- What outcome do I provide, stated in one plain sentence, and which single sample proves it?

- What is my one small, easy ask (such as a 15-minute call this week)?

- For platforms: what detail from the job post will I reference in the first sentence?

Worksheet: Discovery Call and Proposal Builder

Use this before and after each discovery call. The call is for listening; ask budget directly but gently. Send the proposal within 24 hours while the conversation is fresh.

What prompted them to look for help now (the real urgency)

What success looks like to them in three months (the outcome to promise)

Their timeline and any hard deadlines

Their budget range (ask: do you have a budget range in mind?)

Recommended package, deliverables, timeline, and price for the proposal

The clear next step I will end the proposal with

Checklist: Pipeline Discipline

- I track every lead and its stage in one simple sheet
- I tailor at least the first line of every message; no identical sends
- I lead with the client's problem and put credentials second
- On discovery calls I ask questions and listen more than I pitch
- I send every proposal within 24 hours and follow up once after a few days
- I walk away from work priced below my floor unless I cut the scope to match

Deliver, Get Paid, and Keep Clients Coming Back

Protect the project with a contract and deposit, run it to finish on time and within scope, invoice so you get paid, and turn one project into reviews, referrals, and repeat work.

Worksheet: My Agreement and Deposit Terms

Define the terms you will require before any work begins. Use a freelancer contract template from a tool like Bonsai or HelloSign. Always collect a deposit; a client who refuses any deposit is showing you future payment problems.

Scope: exactly what I will deliver, written so a stranger could check it

Total price, deposit amount and percentage, and the payment schedule

Timeline: start date, milestones, and what happens if the client causes delays

Revisions included and the rate for extra rounds

Ownership of the final work and any kill fee if the client cancels partway

Exercise: Run a Clean Kickoff and Control Scope

Plan the kickoff that prevents most mid-project friction, and prepare your warm reframe for out-of-scope requests so extra work always becomes paid work.

- What exactly do I need from the client, and by when (logins, brand files, copy)?
 - What communication rhythm will I set (for example, a short update every Friday)?
 - How will the client send feedback so it arrives in one consolidated batch per round?
 - What is my exact sentence for an out-of-scope request (that sits outside our scope; I can add it for X, want me to)?
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Worksheet: Invoice and Get-Paid Plan

Set up how you will bill so clients have no reason to delay. Use a real tool such as Wave (free), FreshBooks, PayPal, or Stripe, and state explicit terms. Plan your reminder steps in advance so chasing a late payer is a calm process, not a panic.

The invoicing tool I will use and the payment methods I will accept

My payment terms (such as net 14) and what each invoice must list

When I send invoices (on delivery or at each milestone)

My reminder steps for a late invoice (friendly on due date, firmer a few days later, late fee if contracted)

My ask at handoff: the testimonial wording, the referral question, and the next project I will propose

Checklist: Delivery and Repeat-Work Check

- No work began until the agreement was signed and the deposit was paid
- I confirmed scope, deliverables, and what I needed from the client at kickoff
- I sent proactive updates so the client never had to chase me
- Every out-of-scope request became a warmly-framed paid add-on
- I sent a clear invoice promptly with explicit terms and an easy way to pay
- At handoff I asked for a testimonial, a referral, and the next project

Your Action Plan

1. Day 1 to 2: Draft your one-line offer (service, client, outcome) and confirm demand with three real paying examples on Upwork or Contra.
2. Day 3 to 4: Build your three-tier package with clear deliverables, revision limits, and round prices, making the middle tier your target sale.
3. Day 5 to 7: Create two or three before-and-after spec pieces or discounted projects and write each up as a short case study with a testimonial.

4. Day 8: Calculate your floor hourly rate from target income, costs, tax buffer, and realistic billable hours using the rate calculator.
5. Day 9: Convert your package into fixed-price quotes with a 20 to 30 percent buffer and rehearse stating your rate out loud until it sounds calm.
6. Day 10 to 12: List 30 to 50 warm leads, send your service announcement, and ask each for a referral to anyone who needs your outcome.
7. Day 13 to 16: Pick two channels, complete your profile, and send at least 20 tailored cold messages or platform proposals that lead with the client's problem.
8. Day 17 to 20: Book and run discovery calls, listening for urgency, outcome, timeline, and budget, then send a one-page proposal within 24 hours of each call.
9. Day 21 to 23: On your first yes, send the signed agreement and collect the deposit before any work begins, then run a kickoff to lock scope and inputs.
10. Day 24 to 30: Deliver on or ahead of schedule with proactive updates, send a clear invoice with net 14 terms, and at handoff ask for a testimonial, a referral, and the next project.

