

AI Tools for Freelancers — Workbook

This workbook turns the course into a working system you apply to your own freelance business this week, not a stack of notes you forget. Work through it with one real client engagement in mind, current or recent, so every exercise produces something usable: a chosen tool stack, a library of reusable prompts, two working automations, a confidentiality policy, and a repricing decision. Each section maps to one course module, moving from building your stack, through prompting and writing, into research and meetings, and finally into automation and pricing the time you save.

Building Your AI Stack

Decide which AI tools you will actually use, match each to a job, and set the ground rules before writing a single prompt.

Exercise: Run a One-Week Assistant Bake-Off

Pick the single task you do most often and pit ChatGPT, Claude, and Gemini against each other on it using identical inputs. Score each output so you choose a primary assistant on evidence, not vibes, then commit to it for 90 days.

- What is the one task you do most often that AI could draft or accelerate?

- Give all three the exact same prompt and source material; what score (1 to 5) does each earn for accuracy, voice match, and editing effort?

- Which assistant won across three or four real tasks this week, and why?

- Which one will you commit to as your primary for the next 90 days, and which secondary do you keep for the tasks where it clearly wins?

Worksheet: Your One-Page AI Stack

Define the four jobs of a freelance AI stack and name the tool that owns each, with its real cost. If you cannot name a tool for a job, that gap is your next thing to trial. Keep this page as the spine the rest of the course hangs on.

General assistant (drafting and thinking): tool, cost, one example task

Research with citations (e.g. Perplexity): tool, cost, one example task

Meetings (e.g. Otter.ai or Fathom): tool, cost, one example task

Automation (e.g. Zapier or Make): tool, cost, one example task

Document research (e.g. NotebookLM): tool, cost, one example task

Total expected monthly spend, and the billable hours it must save to pay for itself

Checklist: Stack Readiness Check

- I have chosen one primary general assistant and stopped tool-hopping
- Each tool in my stack owns exactly one clear job
- I know the real monthly cost of my stack and what it must save to be worth it
- I have matched the stack to my discipline rather than copying a generic list
- I have written my stack on a single reference page
- I will only add a paid tier after a free tier has earned it

Prompting and AI-Assisted Writing

Build the prompt structure, voice controls, and editing rhythm that turn AI into a reliable first-draft engine in your voice.

Exercise: Rewrite a Weak Prompt Using Role, Context, Task, Format

Take a vague request you might actually type and rebuild it with all four parts. Run both versions and compare the outputs so you feel the difference structure makes.

- Write down a vague one-line prompt you would normally use (e.g. write a follow-up email).

- Rewrite it specifying Role, Context, Task, and Format in full.

- Run both; what specifically improved in the structured version?

- What single piece of follow-up feedback got the draft from good to send-ready?

Worksheet: Client Voice Guide Block

Build a reusable voice block you will paste at the top of every writing prompt for one client or for your own brand. Fill each field with concrete instructions, not adjectives, and include words to ban.

Whose voice is this (your brand, or which client)?

Tone in three to five words (e.g. warm, direct, concrete)

Typical sentence length and rhythm

Words and phrases to use

Words and phrases to ban (e.g. leverage, synergy, game-changer, journey)

Two or three short sample passages that demonstrate the voice

Worksheet: Discovery Call to Proposal Run-Through

Take real or recent discovery-call notes and run the three-step proposal workflow from the course. Capture what AI assembled versus what you decided, so the commercial terms stay yours.

Structured brief: client goals, pain points, scope, constraints, open questions

Outcome-framed deliverables (results, not just tasks)

Two or three package options and the prices YOU set

About-you section framed around the client's specific worry

Next steps and timeline anchored to the client's real deadline

Every claim or statistic fact-checked against a source: yes or no

Checklist: Pre-Delivery Voice and Edit Check

- I supplied Role, Context, Task, and Format in the prompt
- I pasted a voice guide or samples rather than relying on adjectives
- I banned the obvious AI tells before drafting
- I edited the draft and added specific, lived detail only I could add
- I read the final version aloud and removed anything that sounds like a press release
- I never shipped raw, un-edited AI output to the client

Research, Analysis, and Meetings

Use search-connected AI and meeting tools to move fast, then verify every fact before it carries your name.

Exercise: Run a Sourced Research Scan

Use Perplexity or another search-connected tool to research a question relevant to a current client, then verify the answer by opening the sources. Practise treating a fact as unreal until you have clicked the source.

- What specific, sourced question did you ask for a real client or project?

- Which cited sources did you open, and did each actually support the claim?

- Which claims survived verification, and which did you discard as unverifiable or stale?

- How will you record verified facts with their source links for later defence?

Worksheet: Document and Meeting Capture Plan

Plan how you will digest a long client document and capture your next call. Fill in the tools, the grounded questions, and the consent step so capture becomes routine.

Long document to digest, and which tool (e.g. NotebookLM) you will load it into

Three grounded questions to ask of that document

Meeting tool you will use to transcribe and summarise calls (e.g. Otter.ai, Fathom)

How and when you will tell participants they are being recorded and get consent

Where call action items will land in your task manager

Who is responsible for reviewing the transcript for misheard names and numbers

Checklist: Fact-Checking Discipline

- I traced every statistic and number to a primary source and confirmed the date
- I confirmed every quote and attribution is real and in context
- I double-checked names, titles, and facts about people and companies
- I was most skeptical of claims that were suspiciously clean or convenient
- I treated any legal, medical, or financial output as a starting point only
- I ran a two-pass review (truth, then voice) and added the human layer before delivery

Automation and Pricing the Value

Delete recurring busywork with no-code automation, protect client data, and convert saved time into higher-value offers.

Exercise: Build Your First Automation

Choose the single most repetitive task in your week and build one trigger-and-action automation in Zapier or Make. Test it with dummy data before trusting it with a real client, and add a failure notification.

- What is the most repetitive task in your week, and what is the trigger that starts it?

- What one or more actions should fire automatically when that trigger happens?

- How did the automation behave when you tested it with dummy data?

- What notification step did you add so you find out if it ever fails silently?

Worksheet: Your AI Confidentiality and Disclosure Policy

Write the policy you will follow before pasting anything into AI again. Decide your rules calmly now rather than improvising mid-project, and turn it into a trust signal you can share with clients.

What you WILL put into AI tools

What you will NEVER put into AI tools (e.g. NDA material, health or financial records)

How you anonymise client data before pasting

Which data-use or training settings you have turned off, and on which tiers

What your client contracts say about third-party AI use

The one or two sentences you will use to disclose your AI use to clients

Worksheet: Reprice One Service From Hourly to Value

Take one real service and reprice it so AI efficiency becomes your margin, not the client's discount. Work the numbers and choose your move.

Service and its old hourly-based price (hours x rate)

New time the work takes with AI assistance

Outcome value to the client (what it is worth regardless of your speed)

Chosen move: hold price and keep margin, OR hold price and add more value

If adding value, what you will add (e.g. competitor analysis, distribution plan)

New effective hourly rate and how you will state the offer as an outcome

Checklist: Value-Capture Readiness

- I identified which of my deliverables AI accelerates most
- I converted at least one service from hourly to fixed, outcome-based pricing
- I designed one productized offer with a clear scope, price, and turnaround
- I decided how each freed hour is reinvested (more value, more clients, or rest)
- I built and tested at least one automation with a failure notification
- I wrote and can share my AI confidentiality and disclosure policy

Your Action Plan

1. Run a one-week bake-off of ChatGPT, Claude, and Gemini on your most common task and commit to one primary for 90 days.
2. Write your one-page AI stack: a named tool for each of drafting, research, meetings, and automation, with real costs.
3. Build a reusable voice guide block for your brand and your top client, and save it where you can paste it instantly.
4. Create a prompt library: save every Role-Context-Task-Format prompt that works so your standard deliverables get faster.
5. Adopt a sourced research tool and make the rule that no fact is real until you have clicked its source.
6. Set up a meeting tool with a consent step so you stay present on calls and get accurate recaps and action items.
7. Build one no-code automation for your most repetitive weekly task, test it with dummy data, and add a failure alert.
8. Write your AI confidentiality and disclosure policy and decide what you tell clients about your AI use.
9. Reprice at least one service from hourly to outcome-based so AI efficiency becomes your margin, not a discount.
10. Design one productized, AI-accelerated offer with a fixed scope, price, and turnaround, and update your positioning around outcomes.

