

Design Pricing, Clients & Freelancing — Workbook

This workbook turns the course into a running freelance business. Work through each section as you finish the matching module, and by the end you will have a calculated rate floor, a three-tier rate card, a reusable proposal and contract, scripts for discovery, kickoff, and feedback, and a payment and offboarding system. Use the templates to calculate your number, scope projects, and track that you get paid.

Pricing Design Work So You Actually Profit

Build your rate from real costs, choose a pricing model, and package a rate card you can quote with confidence.

Worksheet: Cost of Doing Business Calculator

Fill in each field with honest annual numbers, then total and divide by your realistic billable hours to find your hourly floor. Start with 1,000 billable hours, not 2,080. Use the Rate Calculator template to do the math. Annual business costs (software, hardware, accountant, insurance, subscriptions)

Take-home salary you want to earn

Tax to set aside (estimate 25-30% of income)

Profit margin to add (10-20%)

Realistic billable hours this year (start at 1,000)

Calculated hourly floor (total divided by billable hours)

Day-rate floor (hourly floor times your working hours per day)

Exercise: Choose a Pricing Model per Service

For each service you offer, decide whether to price it hourly, fixed, value-based, or on retainer, and write why. Identify at least one service you currently bill hourly that should become fixed or value-based.

- Which of your services have a clear enough scope to price as a fixed fee?

- For your highest-value service, what business outcome does it drive, and what is that worth to the client?

- Which service are you billing hourly that punishes you for being fast, and how will you reprice it?

- Could any client relationship become a monthly retainer to smooth your cashflow?

Worksheet: Three-Tier Rate Card Builder

Productize your core offer into good, better, and best tiers. Define the deliverables, rounds, and starting price for each, and mark the recommended middle tier.

Service name

Good tier: deliverables, revision rounds, starting price

Better tier (recommended): deliverables, rounds, starting price

Best tier: deliverables, strategy add-ons, rounds, starting price

Day rate and half-day minimum

Monthly retainer scope and price

Checklist: Pricing Readiness Checklist

- I have calculated my hourly and day-rate floor from real costs
- I know my floor and will not quote below it
- I have chosen a pricing model for each service I offer
- I have built a good-better-best rate card with starting prices
- I can state a price out loud and stay silent afterward

Scoping and Contracts That Protect You

Define a tight scope, secure a real contract, and turn inquiries into signed projects with a winning proposal.

Worksheet: Statement of Work Builder

Complete this for your next project so any new request is visibly outside the agreed lines. Be specific and count everything.

Deliverables (exact files, formats, and counts)

Number of initial concepts

Number of revision rounds included

Timeline and milestone dates

Client responsibilities and deadlines (copy, assets, feedback turnaround)

Exclusions (what is not included)

Out-of-scope rate (hourly or per-item)

Checklist: Contract Essentials Checklist

- Scope of work references the Statement of Work
- Payment terms list total, deposit, milestones, and due dates
- A late-payment fee and a work-stop clause are included
- Intellectual property transfers only on full payment
- Revision rounds and the extra-round rate are stated
- A kill fee and cancellation terms are defined
- I have a signing-ready template (AIGA, Contract Killer, Bonsai, or lawyer-reviewed)

Exercise: Draft a Winning Proposal

Write a proposal for a real or likely project using the converting structure. Lead with the client's problem and goal, not your price. Aim to send within 48 hours of a discovery call.

- How will you restate the client's problem and goal in their own words?

- What is your proposed approach in plain language?

- Which three pricing tiers will you offer, and which is recommended?

- What testimonial or past result will you include as social proof, and what is the one-click next step to accept?

Finding, Winning, and Onboarding Clients

Build a pipeline of good clients, qualify them on a discovery call, and onboard so the project starts right.

Worksheet: Client Pipeline and Niche Plan

Define the niche you will lead with and map your channels for finding better clients. Commit to one referral ask you will make this week.

Niche or service to lead with (industry plus discipline)

Top three channels for finding clients (referrals, network, content, curated platforms)

One past client you will ask for a referral

Where your ideal clients gather online or in person

One-line positioning ('I design [what] for [who]')

Exercise: Run a Discovery Call

Use the discovery question set on your next inquiry. Talk less, ask more, and qualify the budget before naming a price. Score the lead against the red-flag list afterward.

- What is the client's problem, and what does success look like in numbers?

- Who approves the work and the budget, and what is the timeline?

- What budget range did they give, and is the project worth pursuing?

- Which red flags (exposure, 'quick and easy', no decision-maker, hard haggling) showed up, and is this a yes or a no?

Worksheet: Onboarding Sequence Plan

Lay out your repeatable onboarding so nothing creative starts until the contract is signed and the deposit is paid. Define how you will communicate.

Deposit amount and structure (50% up front or thirds on milestones)

What the welcome message confirms (steps, timeline, communication)

Intake questionnaire or brief contents (assets, brand inputs, references)

Communication channel and your working hours

Required feedback turnaround to hold the timeline

Kickoff call trigger (deposit cleared and brief returned)

Checklist: Win-and-Onboard Checklist

- I have a niche and at least three client channels beyond open bidding
- I have a discovery question set that covers budget and decision-makers
- I qualify every lead against a red-flag list before quoting
- No creative work starts before a signed contract and paid deposit
- I set communication, feedback, and review expectations in the first week

Managing Money, Feedback, and Creative Direction

Keep projects profitable to the finish: get paid, run feedback in rounds, lead the creative, and offboard for repeat work.

Worksheet: Payment and Cashflow System

Set up the structure that protects your cashflow. Decide your terms, your tools, and your reserves before the next invoice goes out.

Deposit and milestone schedule for your typical project

Net terms (for example, due within 14 days)

Late fee (interest or flat charge) written into the contract

What you withhold until final payment (final files and rights transfer)

Invoicing tool (Wave, FreshBooks, Bonsai, Stripe, QuickBooks)

Percentage of income saved for tax in a separate account

Target cash buffer (months of expenses)

Exercise: Run Feedback in Structured Rounds

Plan how you will present work and gather consolidated feedback so revision rounds stay finite. Prepare how you will translate vague feedback into specifics.

- How will you present the work with context instead of just sending files?

- How will you request all feedback in one batch, from one decision-maker, by a set date?

- Which review tool (Markup.io, Filestage, Figma) will keep comments in one place?

- How will you turn 'make it pop' into specific, answerable questions, and when does the extra-round rate apply?

Checklist: Offboarding and Re-Engagement Checklist

- Final files are delivered organized, labeled, and with a usage note
- The final invoice is paid and rights are transferred
- I asked for a testimonial while the goodwill was fresh
- I asked for a referral as a separate request
- I offered a clear next step (retainer, future phase, or check-in)
- The client is in a light follow-up to re-engage in a few months

Your Action Plan

1. Calculate your Cost of Doing Business and lock your hourly and day-rate floor
2. Choose a pricing model per service and reprice anything you wrongly bill hourly
3. Build a good-better-best rate card with starting prices for your core offer
4. Create a reusable Statement of Work template with exclusions and an out-of-scope rate
5. Adopt a signing-ready contract with deposit, IP-on-payment, revision, and kill-fee clauses
6. Write a proposal that leads with the client's problem and three pricing tiers
7. Pick one niche and ask one past client for a referral this week
8. Run your next inquiry through a structured discovery call and qualify the budget
9. Set up onboarding so no work starts before a signed contract and paid deposit
10. Stand up an invoicing and tax-savings system and offboard every client for referrals

