MODULE #3: KEEPING YOUR FREELANCING LIFE ORGANISED AND ON TRACK

IN THIS MODULE: We'll be taking a look at some great ways to keep everything organized as a freelancer, from tracking the pitches you've sent out to tracking the work that you've done and need to invoice for.

When I first started out freelancing, around a full-time day job, it wasn't too hard to stay organised. I wrote one post per week for both of my clients, and it was easy to track and bill for that.

But as my freelance business grew, keeping track of everything became more time-consuming – and more important. There were a lot of things I could have put in place early on to make life easier!

As a freelancer, you don't want to make things any more complex than they need to be. If you find it helpful to use an app or software tool to plan your work, by all means go for it … but you might also find that a physical planner, a simple spreadsheet, or a notebook works fine.

When it comes to being organized, there are a couple of key things you need to track carefully:

- Your pitches and job applications
- The work you've done (and how much you need to invoice for it!)

Some writers aren't, by nature, especially organised. They like to work when they're inspired, and they're – understandably! – much more interested in doing the writing itself rather than logging details in spreadsheets or apps.

But taking just a few extra minutes to stay on top of your freelancing organisation can save you a lot of headaches … like having to trawl back through a month's worth of emails to figure out what you need to invoice a client for, or worse, forgetting to invoice for a piece of work altogether.

We're going to look at some good ways to stay organised, and I'll share a couple of spreadsheets with you that you can use to help you keep track.

Don't worry if you're struggling with organisation, though: I'll be sharing some tips for pulling together the information you need, even if you've lost the plot a bit. (Trust me, it happens to me too…)

Keep Track of Pitches and Applications

When you've only sent out a couple of pitches to different publications, you can probably easily remember what you've applied to. In fact, you might be obsessively refreshing your inbox to see if that editor has replied yet.

But when you've sent out a dozen pitches, it's difficult to remember what you've already got out there. You don't want to end up pitching the exact same idea to a different market – because you forgot you'd used it already – and you don't want to inundate a busy editor with pitches because you keep forgetting that you've already pitched them.

Keeping track of your pitches and your freelancing job applications means that:

- **You can follow up if you don't hear anything back.** While I don't bother doing this with job applications (busy companies often don't reply), it's worth following up after a few weeks if you don't hear anything from a magazine or website editor who you've pitched with a specific idea. If you've already written for an editor, you can definitely follow up if you don't hear anything from them.
- **You can get a clear idea of how many applications or pitches you typically have to send out before you get to a "yes".** If you know that, on average, you land one in five pitches, then that gives you a clearer idea of what to expect and plan for.
- **You won't make time-consuming mistakes** – like applying for the same gig twice, or having to spend ages digging around in your email to

try to figure out what exactly you applied for when a company finally gets back to you.

One easy way to keep track is using a spreadsheet (or even a large piece of paper, if you prefer) to record basic details like this:

- Name of editor/contact
- Email address of editor/contact
- Date of pitch/application
- Idea(s) pitched (if any)
- Link to the job ad or the "write for us" page – *it can be hard to track down job details later, as job listings often get removed from the main page of job boards. You might also want to keep an offline copy.*
- Any notes about the job – e.g. "says they'll take 6 – 12 weeks to reply to pitches"

You can find the **Freelancing Applications and Pitches** spreadsheet in the Bonuses folder of this course, to help you track these details.

Keep Track of the Work You've Done

If you're a fairly new freelancer, there might not be too much work to keep track of. But it's a great idea to set up solid systems *before* you need them – that way, once you have half a dozen or so clients all wanting different amounts of work that they pay for in different ways, you'll have all the details to hand.

What if Your Client Keeps Track and Pays Automatically?

Very occasionally, I've had a client who pays without being invoiced. They tally up the work done and issue payment at the end of each month.

Even if that's the case for you, it's still worth keeping your own records … if only for your own peace of mind. If there's ever a discrepancy between what you're paid and what you're *expecting* to be paid, you'll be in a good position to query it.

What Details Should You Keep Track Of?

At a bare minimum, you want to track what work you've done and how much you need to bill for it.

Again, this could be done in a spreadsheet, or even in a planner or on a sheet of paper (so long as you don't lose it).

Personally, I use a separate spreadsheet for each client, creating a new sheet within that spreadsheet for each year. I track work by month, invoicing at the very end of each month.

The exact format I use varies slightly depending on the client and type of work, but I always track:

- The title of the piece of work
- The date I completed it
- The type of work it was (unless *all* my work for that client is one type) – e.g. "blog post" vs "outline" or "ghostwritten" vs "my byline"
- How many words it was or how long it took (depending on how I'm being paid)
- The total cost – this might be a flat rate per post/outline, or based on the word count

You should have a copy of the **Freelancing Work Completed** template in your bonuses for the course, which you can use to track these details. (This was also a bonus with Start Freelancing, so you may have the same spreadsheet there, too.)

All my current clients pay for work submitted, rather than work published, so I don't need to keep track of publication dates. If you have a client who only pays once your piece has gone out on their website or in their magazine, then you'll need to track publication dates too.

If there's any room at all for confusion, do indicate in your records when you've invoiced for a piece of work. You don't to be in the embarrassing position of trying to invoice a client for the same piece of work twice … and you also don't want to end up forgetting to invoice for something.

Organizing and Tracking Your Time

One of my biggest challenges for – if I'm honest! – several years of freelancing was that I often found myself spending a lot of time on tasks that I couldn't invoice for.

Things like sending emails, sending out job applications … and simply getting distracted by the internet … didn't improve my income at all.

I also sometimes found myself running up against several deadlines at once – where, with a bit of extra planning, I could have spread things out more.

This is where being organised with your time comes in.

There are lots of different ways to stay on top of how you're using your time. In the past, I used to use RescueTime, which was helpful for telling me how long I spent on different apps and websites – but less helpful for being able to easily add up how much work was on what project.

For much of 2022, I've been using Clockify to track my time more rigorously and consciously. And I don't think it's a coincidence that my income really took off this year after I started keeping track of my work time. *(I also cleared a major life/admin project around that time, but Clockify has definitely made a big difference too.)*

Setting Your Freelancing Hours

In my early years of freelancing, I could start and finish at pretty much any time. While this was great for flexibility and for fitting in lots of work during busy weeks, I think it also made me less efficient with my time.

Since having kids, my freelancing hours have been much more fixed. Back when I had a baby and a toddler, we had childcare most days from 10am – 1.30pm, and those were the hours I worked. These days, my kids are both in school from 9am – 3pm, and about 95% of my freelance work is done between those hours!

You might be in a very different situation. Maybe you need to fit your freelancing around a day job. Or maybe you have all day, every day, to freelance, and it's hard to know when you're "on" and "off" in terms of work.

Whatever your lifestyle looks like, I think it's helpful to give yourself set freelancing or working hours.

That might be 9am – 5pm, but it certainly doesn't have to be. You might want to start earlier or later. You might not want to work a 40 hour week: there's no rule saying you have to. You definitely don't need to work 8 hour days every day: you might like to work long days Monday to Wednesday, then take most of Thursdays and Fridays off.

What matters is that your schedule works for you and that it gives you the opportunity to focus on work during work hours – and do other things (guilt-free!) during your non-work hours.

Staying on Top of Multiple Deadlines

If you're in your fairly early days of freelancing, having lots of deadlines might seem like a nice problem to have!

But if you've been freelancing for months or years, you might well have multiple projects for several different clients on the go.

As I write this, I have six current clients:

- Client A usually wants a blog post every week, but has been on vacation, so I'm waiting for the next post topic to be approved.
- Client B usually wants around 5 - 10 hours of work per week, but this can vary quite a lot. I usually aim for a 24 hour turnaround with their work, as the more quickly I get it done, the more they can assign me.

- Clients C and D each want 2 blog posts most months.
- Client E's project has just gone on hiatus for a few months.
- Client F can have anything from 0 to 8 blog posts per month.

As you can imagine, the amount of work coming in varies quite a bit.

I keep track by using a paper planner (the Full Focus planner) where I record deadlines and which tasks I plan to complete on which days.

At the start of each workday, I also glance through my clients' various spreadsheets/apps where they assign me work – particularly for Client B.

Some other options that you might want to use to stay on top of your deadlines are to:

- **Block out different days for different clients**, especially if work is assigned a week or so in advance.
- **Use different times of day for different types of work.** You might use mornings for big, ongoing projects, for instance, and afternoons for shorter ones.
- **Batch together work for different clients.** For instance, if a client assigns all their work at the very start of the month, you could complete (or at least draft) it all in the first week of the month.
- **Check in with clients if you're expecting more work.** Sometimes, a client will tell me they're going to get the next topic/idea/outline to me within the next week, and I don't hear from them for a while. If that's the case, I follow up. Similarly, some clients will send me 5 – 10 blog post topics at once: when I'm down to the last one or two, that's a good time to prompt them for more.

Being organised isn't particularly exciting – but it can save you from an "oh no!" moment when a client emails you to enquire about that piece you'd promised to get to them three days before.

When Everything is a Mess

Let's say all this advice is coming a little late for you. You're already deep into freelancing, you've muddled along for now, but you're finding it hard to stay on top of everything.

First, please don't beat yourself up, if that's your current situation. It's hard to be totally organised, especially if you've been rushing to meet deadlines, or hustling to get enough work.

Here are some quick fixes you can put in place to – hopefully – make sure that nothing vital slips through the cracks. (And even if you *are* really organised, you may find that some of these are helpful for you, too.)

1. **Write a list of your clients and have it somewhere very easy to find.** (I used to use a Post-It note on my computer monitor, and now have a list in the front of my planner, which is always on my desk.) Once you have the list, check for any tasks/deadlines that are outstanding, and write those down on a Post-It or somewhere really obvious.
2. **Add bookmarks to your web browser for anything you want to check daily or regularly.** I mentioned in the previous section that, at the start of each workday, I glance through the spreadsheets and apps where my clients assign me work. All of these are bookmarked in Chrome.
3. **Overstuffed inbox? Every few days, search your email for your key clients' names.** I'm not always great at spotting emails from my clients (especially if Gmail files them under an unexpected tab), so I'm trying to do better at proactively checking in case I've missed anything.
4. **Do a 5-minute pick up of your desk (/floor/etc).** My desk is currently a little less than tidy. I can live with that, but if stuff starts to pile up, I try to take 5 minutes to quickly sort through it. You don't want to lose those vital meeting notes from a client call underneath a sea of scrap paper and snack wrappers.

The other important thing to do, when things are a mess, is to get some good systems in place moving forward. It doesn't need to be perfect and it certainly doesn't need to be complicated – something as simple as "always write deadlines in my diary as soon as I agree to them" could be a great and reliable system.

How the Assignments Work

For each module, you have an assignment to carry out. Obviously you don't *have* to do it – this isn't school! – but you'll get the most out of the course if you work through the assignments along the way.

Each assignment has a suggested length (e.g. 30 minutes) to give you a rough idea of how long it's likely to take, if you do it in full. Don't worry if you only have a little bit of time to spare: even 10 minutes is well worth doing.

ASSIGNMENT (15 minutes)

Your assignment this week is in three parts:

#1: Set up a spreadsheet to track pitches sent / jobs applied for. Fill in any details that you already have – e.g. if you applied for a job last week.

#2: Set up a spreadsheet for each client you have, to track work done on their project(s). If you prefer, you could use multiple tabs within a single worksheet.

Feel free to use the sample spreadsheets in the Bonuses folder of this course, or go ahead and create your own.

Module #3: Further Reading

All of the further reading is optional, but if you want to find out more about something we've covered, it's highly recommended.

13 Genius Organization Tips Freelance Writers NEED (Double Your Productivity), Elna Cain, ElnaCain.com

These practical tips are well worth looking through: you don't necessarily have to do everything on the list, but you're likely to find at least a few suggestions that will work well for you.

How to Stay Organized as a Freelancer, Matt Rowe, Calendar.com

Again, there are some good solid tips here – I definitely need to better on tip 7, setting aside time for administrative stuff! Some of Matt's advice overlaps with Elna's (above), so you may want to quickly skim both pieces rather than reading each in depth.

Are you a freelancer with ADHD? Here are 8 ways to be successful, Paulette Perhach, inflow

While this piece isn't purely about organization, if you struggle to get organized due to ADHD – or if you're just someone who needs a little extra help and structure around organization – then you'll find this a useful and encouraging read, with a bunch of extra tips.

What's Coming Up Next:

Well done on reaching the end of the third module. Remember, if you have questions at any point, please do pop into the Aliventures Club Facebook group. It's a really friendly place.

facebook.com/groups/aliventuresclub

If it's something you'd prefer to discuss privately, or if you're having a technical issue with the course, the best way to get in touch is to email me at ali@aliventures.com.

Here's what you'll find in Module 4:

MODULE 4:	In the next module, we'll be looking at how you can market yourself as a freelancer – without coming across as excessively pushy, and without making yourself feel uncomfortable (or putting clients off). Many freelancers find it tough to put themselves out there, so we'll be focusing on easy and straightforward ways to do this and also on ways to make time for marketing when you have client deadlines to meet too.

