

Organizational Skills for a Successful Freelance Business

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Overview of topics

- Introduction
- Workspace strategies
- Successful time management
- Effective project management
- Staying on top of finances
- Planning for quality

Why get organized?

- Stuck in clutter
- Never get out of the office on time
- Don't have enough time for the things I enjoy
- Losing money
- Would like to find time for a new hobby
- Would like to feel better



- Decrease stress
- Truly be your own boss
- Do better work

Workspace strategies



Source:
http://beyondclutter.com/wkshp_leader.htm

Strategies for a cleaner work environment

- 10-minute cleanup
- “Prompt action”
- To-do list
- BIG GARBAGE CAN

KEEP THINGS SIMPLE

Filing

- Your system
- Color coding
- File names match the naming system in your computer
- Procrastination means: the system is not right

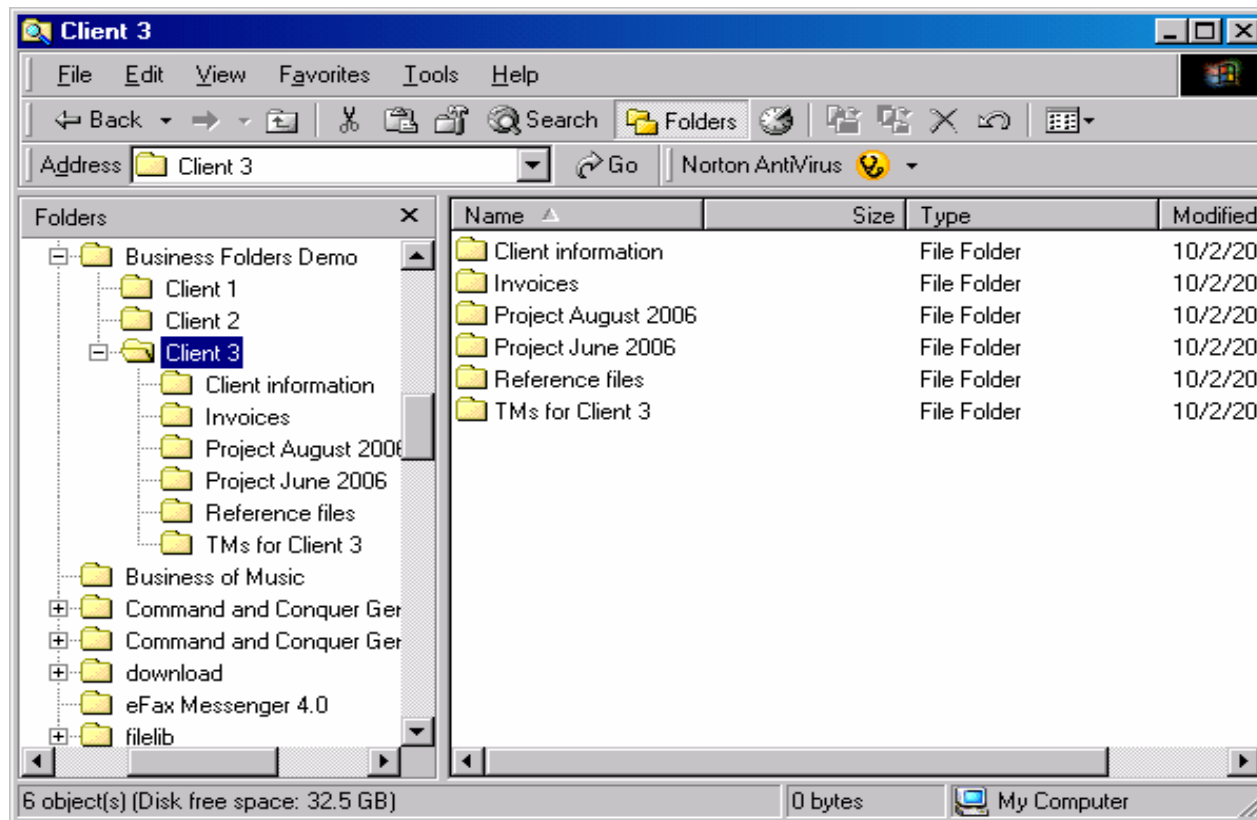
Myth:

Filing systems cost a lot of money

Fact:

You can use what you have on hand

“Desktops” need to be clean, too



Where to start?



Source: I can see the floor

5-minute discussion



- What holds us back?
- Examples of standing in our own way
- RESOLUTION I

Successful time management



Less is more

Early morning optimism...

Pay bills
Clean office
File papers
Call mom
Check for tickets
Edit the XYZTrans assignment
Get laundry done
Iron blouse for tonight
Get kids from school
Do the Miller job
PowerPoint for TransXYZ
Write invoices
Check if any payments are overdue
Get bank balance

Check what's wrong with printer
Enter terminology changes into database
Put glossaries in the folder
Clean up from breakfast
Enter received payments in the computer
Call LinguaXYZ about overdue check
Answer terminology question on a list
Check email
Water office plants
Set up phone message
Clear voicemail

..giving way to mid-afternoon realism...

Edit the XYZTrans assignment

Get kids from school

Do the Miller job

PowerPoint for TransXYZ

Posted by: "nhgtdre" mail@lovetochat.com

Thu Sep 21, 2006 5:26 am (PST)

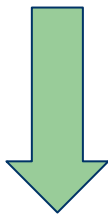
Hi all,

Anyone know exactly what Bokanowskification is? It seems to have something to do with medicine. Psychology?

All the best,

..until evening exhaustion sets in...

Your best intentions

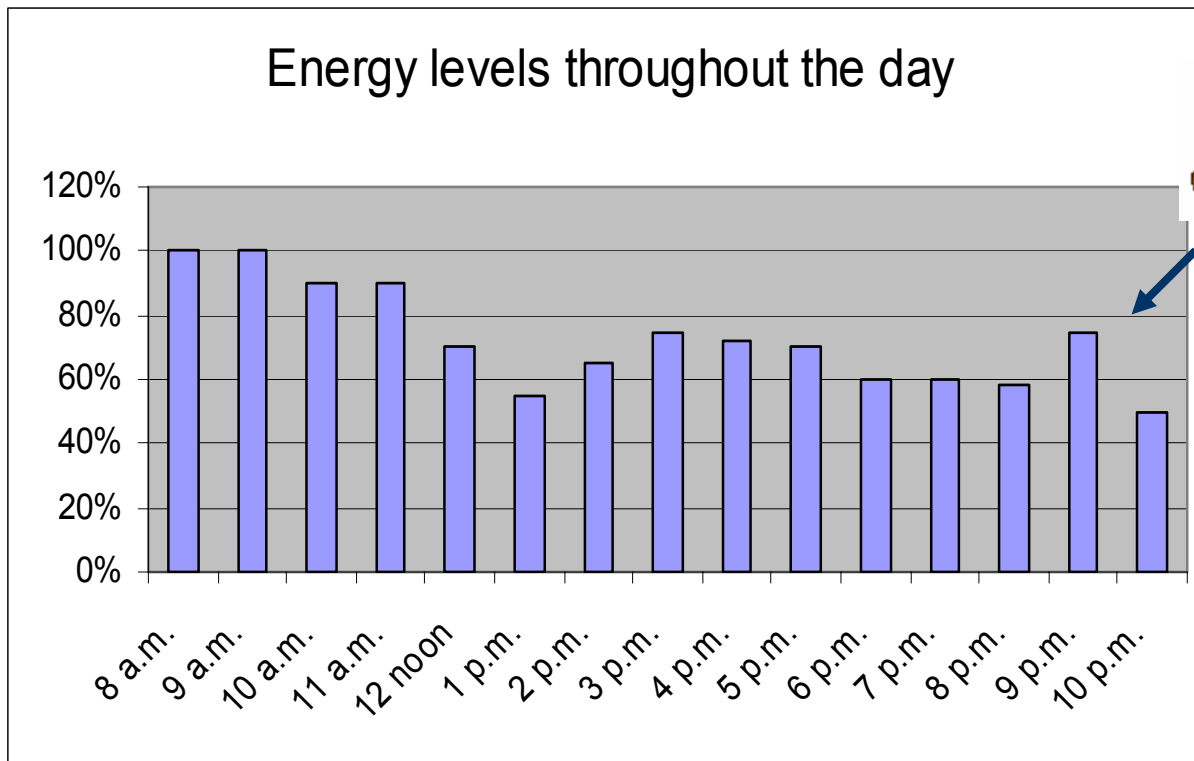


Answer terminology question on a list

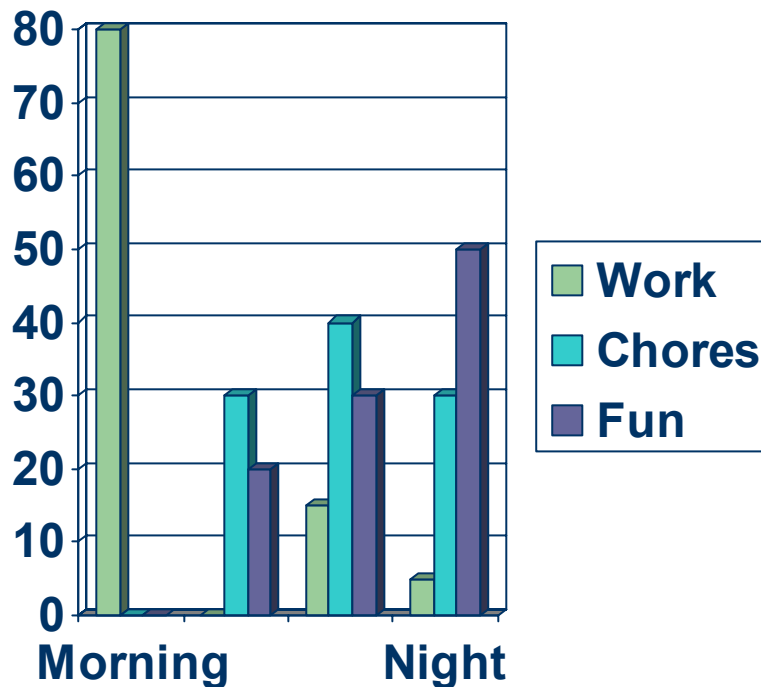
Check email

Chat with translator friend in San Francisco

Prime Time



Planning for productivity



- Plan work hours first
- Plan other chores around your work
- Always dedicate your prime time to work
- Down-time is better for “mindless” tasks

To-do list adjusted for Prime Time

Prime Time

Edit the XYZTrans assignment
Do the Miller job
PowerPoint for TransXYZ

Close to lunch

Check email
File papers
Put glossaries in the folder
Water office plants
Clear voicemail

Later afternoon

Enter terminology changes
into database
Answer terminology question
on a list
Call LinguaXYZ about
overdue check
Enter received payments in
the computer
Write invoices
Get kids from school

Evening

Check what's wrong with
printer
Set up phone message

Make to-do
list for next
day!

Whiteboards...



Source: projectwetusa.org

Dealing with interruptions

Job offers

Telephone

E-Mail

Music

Internet
Listservs

Instant messaging

TV

- Prime Time protection
- Permissible interruptions
- Scheduled interruptions

Group exercise: prioritizing

Strategies to balance all aspects of
a freelance business

- RESOLUTION II

Effective project management



Planning ahead

Try again

7:15 Read e-mail

7:17 Shoot off angry response to European editor

7:18 Spill coffee

7:20 Start translating

8:15 Search Google for terminology

9:20 Accept rush job

The first 15 minutes of the day...

Plan

→ Written agenda in any format

Prioritize

→ Define what HAS to get done

Order

→ Establish order

Rewards

→ Establish small rewards

Project plan for a regular day

	Job 1	Job 2	Job 3
Word count	1,500	600	900
Difficulty	So-so	tough	easy
Problems	Have to find references	Research	All terms in the TM
Resources	References/ glossary	Web/ dictionaries	Previous work for same client
Follow-up	Folder for references	Bookmark website in folder for client	Organize client folder
Notes		Make notes of difficult terminology	
??			

Planning for the unexpected

JOB-RELATED

- Research takes longer than expected
- Rush job comes in
- Client complaint
- Power outage
- Billing issue

PRIVATE

- Family emergency
- Illness
- Sudden visitor
- Long phone call from Aunt Betty
- ...

Organizing your work

Billed?	Client project	Code	Payment	Amount	Currency
*	Client A patient letter	083506	open	1000	Dollar
*	Client B Excel sheet	083606	overdue	1000	Euro
*	Client B Highlights 09-2006	093706	open	1000	Euro
*	Client C editing medical	093906	open	1000	Dollar
*	Client D urgent patient report	094006	open	1000	Dollar
Tuesday	Client E plant information sheet	094406			Euro
Friday	Client A REACH presentation	094906			Euro
*	Client C X-ray report	095006	PAID	1000	Euro



**Lose 30 pounds in a week
and get rid of all your debt
while effortlessly earning a
million dollars!**

- RESOLUTION III

Making realistic changes to work organization

Staying on top of finances



Strategies to get a handle on finances

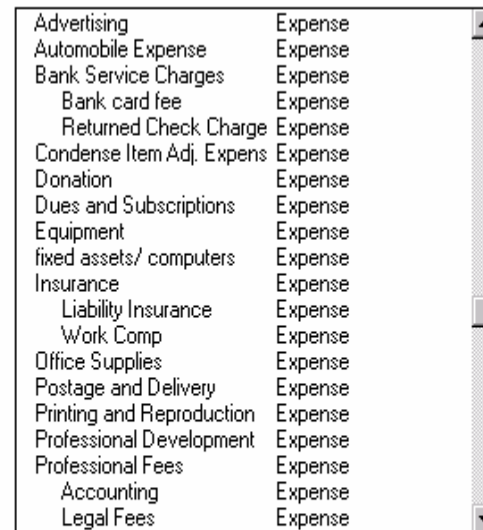
- Invoice immediately
- Keep a record of all invoice data
- Use financial software
- File financial paperwork when it comes in
- Assign categories

**KEEP BUSINESS +
PRIVATE ACCOUNTS SEPARATE**

Financial and business software categories

Expense categories make expenditures comparable

Are usually set up to match IRS reporting requirements



Advertising	Expense
Automobile Expense	Expense
Bank Service Charges	Expense
Bank card fee	Expense
Returned Check Charge	Expense
Condense Item Adj. Expens	Expense
Donation	Expense
Dues and Subscriptions	Expense
Equipment	Expense
fixed assets/ computers	Expense
Insurance	Expense
Liability Insurance	Expense
Work Comp	Expense
Office Supplies	Expense
Postage and Delivery	Expense
Printing and Reproduction	Expense
Professional Development	Expense
Professional Fees	Expense
Accounting	Expense
Legal Fees	Expense

Example from Quickbooks

Schedule C expenses

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Hide

5	Gross profit. Subtract line 4 from line 3.	5		
6	Other income, including Federal and state gasoline or fuel tax credit or refund (see page C-3)	6		
7	Gross income. Add lines 5 and 6	7		
Part II Expenses. Enter expenses for business use of your home only on line 30.				
8	Advertising	8		
9	Car and truck expenses (see page C-3)	9		
10	Commissions and fees	10		
11	Contract labor (see page C-4)	11		
12	Depletion	12		
13	Depreciation and section 179 expense deduction (not included in Part III) (see page C-4)	13		
14	Employee benefit programs (other than on line 19)	14		
15	Insurance (other than health)	15		
16	Interest:			
	a Mortgage (paid to banks, etc.)	16a		
	b Other	16b		
17	Legal and professional services	17		
18	Office expense	18		
19	Pension and profit-sharing plans	19		
20	Rent or lease (see page C-5):			
	a Vehicles, machinery, and equipment	20a		
	b Other business property	20b		
21	Repairs and maintenance	21		
22	Supplies (not included in Part III)	22		
23	Taxes and licenses	23		
24	Travel, meals, and entertainment:			
	a Travel	24a		
	b Deductible meals and entertainment (see page C-5)	24b		
25	Utilities	25		
26	Wages (less employment credits)	26		
27	Other expenses (from line 48 on page 2)	27		
28	Total expenses before expenses for business use of home. Add lines 8 through 27 in columns	28		

Pay yourself

- Designate your accounts receivable
- Retirement
- Planning your annual income

Financial software

Useful characteristics:

- Flexible (adaptable)
- Clearly structured
- Reporting features
- Designed for non-accountants
-?

Conversation: financial strategies

Best financial advice to give to a newcomer?

- RESOLUTION IV

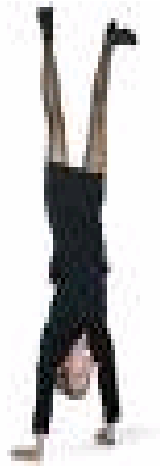
Planning for quality



Truly becoming
your own boss

You as a “Human Resource”

- What do other companies do to keep their “human resources” happy?
- Shouldn't you have all of that, and then some?



Demand “workers’ rights”!

Regular working hours

Breaks

Paid overtime

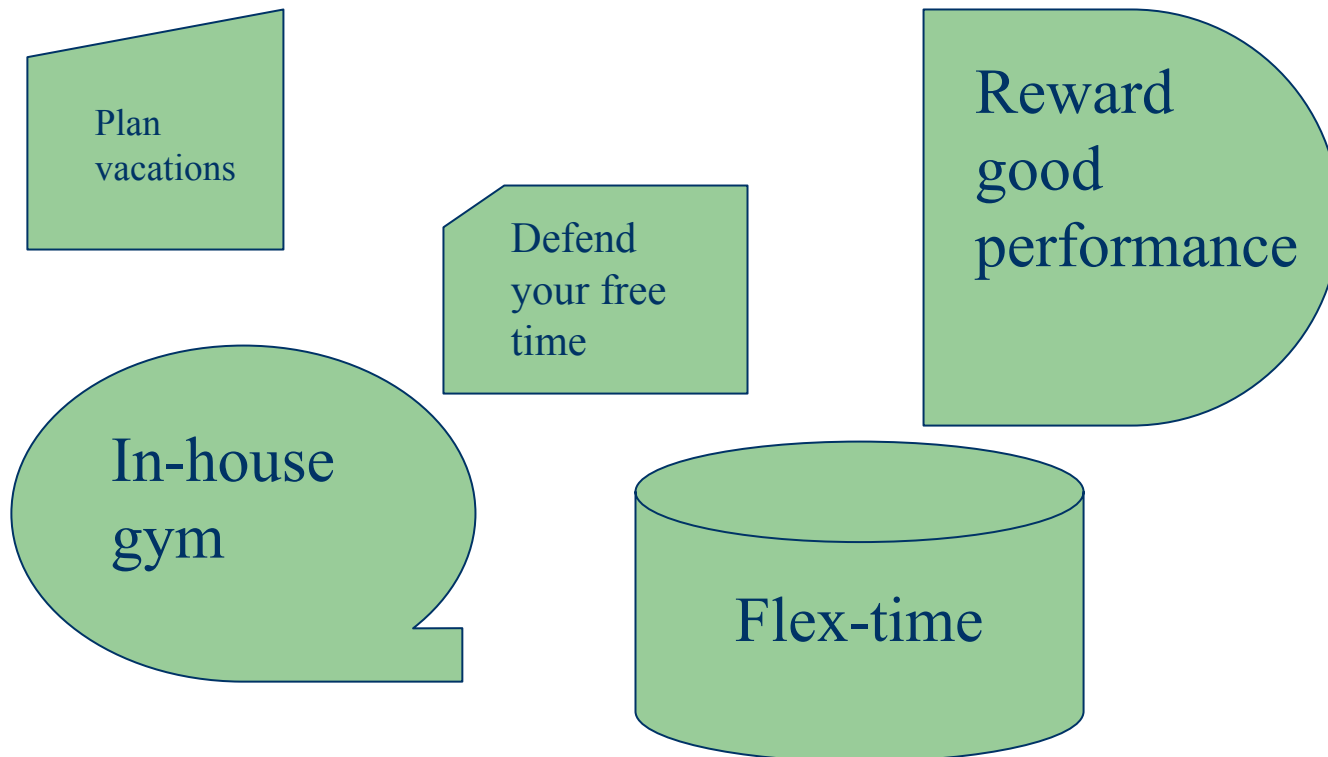
Vacations

“Perks”

Performance-based incentives

Pension plans

Perks for “those at the top”



Simple rules for living better as a freelance business owner

- Don't eat at the computer
- Shut off the computer
- Plan vacations
- Plan quality time
- Say NO
- Set boundaries
- Train customers

Talk to your BOSS

Which improvements would make your workplace better?

- RESOLUTION V

Thank you for your interest.

