

Checklist for Being a Writing Professional

Business Setup

- ❑ **Legal structure and name** – Set up business structure, e.g., sole proprietor, LLC, S-corp, with or without DBA.
- ❑ **Bank accounts** – Set up separate bank accounts for business and personal.
- ❑ **Resale certificate** – If you sell books, you may want to obtain a resale certificate so you can buy wholesale (not paying sales tax) and sell retail (collect and remit sales tax).

Basic Business Presence

- ❑ **Basic visual branding** – At minimum, pick 2–3 fonts and 2–3 coordinating colors to use consistently in your client-facing materials; step it up with a branding identity that includes a professionally designed logo.
- ❑ **Website** – Choose a domain name that reflects you or your business. Tip: Keep it short, intuitive, and easy to type. On the website, include what you do (services), who you do it for (target audience), who you are (bio), portfolio, testimonials, how to contact you, and a blog (optional but good for SEO).
- ❑ **LinkedIn profile** – Until you have a website, at minimum make sure your LinkedIn profile is up to date.
- ❑ **Social media** – Depending on your focus, social media platforms may be appropriate, but remember you don't own the real estate, so a website is highly recommended.
- ❑ **Email address** – Ideally you have an email address at your website domain (e.g., karin@clearsightbooks.com) rather than a free email (e.g., kswiberg@yahoo.com).
- ❑ **Business card** – May be less important than in the past, but is useful as an enclosure with cards/gifts and sends the message you are a pro.

Financial Management

- ❑ **Bookkeeping system** – How will you track revenue and expenses? Systems include QuickBooks, Xero, FreshBooks; at minimum, you could use Excel.
- ❑ **Accounting method** – Will you use cash or accrual accounting? Hint: Ask your CPA.
- ❑ **Recordkeeping** – How will you manage receipts, invoices, bank statements, etc. that feed your bookkeeping? Paper folder, scan to keep online?
- ❑ **Invoicing** – How will you invoice clients? Some bookkeeping systems manage this; you can also use payment services like PayPal or create your own invoices in Word or Excel.

- **Accepting payments** – What methods of payment will you accept, e.g., check, credit card, Venmo, PayPal, Zelle, EFT, wire?
- **Budgeting** – Consider an annual budget.
 - What business expenses do you need to cover on a monthly or yearly basis?
 - How much do you want to make?
 - Does your current pricing and business model support your financial targets?
 - Are you spending enough (e.g., on getting help, business marketing/growth, professional development)?
- **Taxes** – Define how taxes will be managed:
 - Payroll or estimated taxes (monthly or quarterly)
 - Sales tax – If you sell products, collection and remittance of sales tax (monthly or quarterly)
 - Annual income taxes (e.g., 1040, Schedule C)
- **Financial reporting** – Assess your finances on a monthly basis:
 - Enter expenses.
 - Enter sales or invoices; send invoices to clients.
 - Reconcile bank accounts.
 - Run Balance Sheet (BS) and Profit and Loss Statement (P&L).
 - Check Accounts Payable (A/P, what you owe) and Accounts Receivable (A/R, what people owe you).
 - Are you on track financially? What changes are needed?

Pricing

- **Pricing strategy** – Are you comfortable in your pricing, i.e., making enough without feeling petrified to state your price?
 - Have you determined how you will price, e.g., hourly, flat rate, project-based? (You could use multiple strategies depending on types of work.)
 - How will you handle travel and materials?
 - How often will you reassess/raise prices?
- **Payment arrangements** – Will you invoice/be paid:
 - Monthly for hours incurred?
 - On a retainer basis (e.g., monthly)?
 - At project milestones?
 - Half up front, half at end?
 - Something else?

Time Management

- **Time budgeting**
 - How many hours can you work per week? (It may be fewer than you think once you account for business development, administration, etc.)
 - How do you predict client time and availability for new clients?
- **Time tracking** – How do you track time on a daily/weekly basis, e.g., spreadsheet, time tracking apps, paper calendar?
- **Time analysis** – Periodically assess your time, e.g.:
 - If you charge time & materials, are you invoicing accurately?
 - If you charge a flat/project rate, is your price appropriate for the amount of work?
 - Is your time spent well, e.g., enough writing and not too much admin?
 - Are you working enough hours? Too many hours?

Client Experience

- **Client set-up checklist and tracking sheet** – Streamline and create a consistent client experience. See sample.
- **Client contracts**
 - Develop a standard approach, e.g., one contract, master agreement and statement of work, letter of agreement. It can be simple and straightforward as long as it's clear.
 - What signing method will you use, e.g., paper, sign/scan/email, Adobe Sign?
- **Client scheduling** – How do clients schedule time with you? Email to set something up? A tool like Calendly or Acuity? (Tip: These kinds of tools can save time and help you look more professional.)
- **Availability to clients** – When/how are you available? What is your response time?
- **Client niceties** – Are there things you want to provide as part of the client experience? Possibilities: Handwritten welcome/thank-you notes on branded notecards, books you think they will enjoy, gifts to celebrate milestones.

Getting Support

What support do you need so that you can 1) not worry about something critical being done incorrectly, and 2) focus on your best and highest use? Consider:

- Bookkeeper/CPA
- Admin support/virtual assistant
- Attorney
- Mastermind group
- Tech support/website help
- Coach/mentor

My Favorite “Professionalism” Tips

Tip 1: Identify your best and highest use.

What are the things only you can do? Writing your novel, providing editorial services to clients—those are the things only you can do. Scheduling meetings, bookkeeping, and posting on social media might not be the best use of your precious skills and time. Focus on your strengths, and streamline or outsource other tasks as soon as it becomes feasible.

Tip 2: Get help.

To the extent possible, hire help for areas that you don’t have expertise in (e.g., filing taxes) or that underutilize your strengths (e.g., administrative work, bookkeeping). But don’t forget you can get help from colleagues, writing groups, free online classes, and so on as well.

Tip 3: Use checklists and templates.

Make your work as efficient as possible by standardizing. Checklists and templates let you perform repetitive tasks without having to think too hard about them, so you can save your energy for writing. Possibilities:

- Welcome email for new clients
- Client tracking sheet (see sample)
- Invoice template and accompanying email
- Spreadsheet of prospective clients
- Month-end financial processes (see sample)
- Travel or meeting facilitation checklist

Tip 4: Automate what you can.

To the extent you can automate processes, you will save time, but you may also find that automation levels up your professional appearance. Consider:

- Contract e-signing tools like Adobe Sign – No more printing and mailing or printing and scanning to email back!
- Scheduling tools like Calendly and Acuity – Bonus: You can add your branding to the scheduling page.
- Payment tools like PayPal, Square, Stripe – Many tools will integrate with your bookkeeping and scheduling systems.

Tip 5: Raise your rates.

Writers are notorious for racing to the bottom on price. Don't do it! Professionals charge a sustainable rate. Here are some ways you can raise rates:

- Every 6 or 12 months raise your rates 10%. (Or 5% or 20%—you get the idea.)
- After a set number of clients at your current rates, raise your rates 10%. (After 20 clients pay you \$50/hour, raise your rates to \$55/hour. After another 20 pay that rate, go to \$60.)
- Double your rates. Yup. You can do that. You can find the right client for your price if you give them the right experience.

Tip 6: Remember that practice makes it easier.

When implementing a new approach, you may feel uncomfortable, nervous, or afraid of making a mistake. The first few times you do a new business process, it may feel like it takes forever. Remember that discomfort won't physically hurt you; repetition brings familiarity, ease, and speed.

Tip 7: Take one step at a time.

Trying to do too much at once will overwhelm you. Prioritize what you and your business need and implement one thing at a time.

Client Information & Checklist

Name: _____ Date prepared: _____

Home Address: _____

Work Address: _____

Business Phone: _____ Home Phone: _____

Cell Phone: _____ Other Phone: _____

Email Address: _____

Alternate Email Address: _____

Best time/method of contact: _____

Package/program: _____

Set-up:

- Create a file to document activities
- Add to email list
- Set up bookkeeping
- Set up Dropbox/Google Drive
- Send contract
- Send initial invoice
- Send welcome package/note
- Receive signed contract
- Receive payment
- Review documents, ground rules, agreement in person

Close-out:

- Final payment
- Hold debrief
- Hand off all final files and documentation
- Request testimonial
- Ask for referrals
- Send thank-you/congrats note
- Give W-9 form if over \$600

Books Sent

Gifts/Special Items and Reason

Additional Notes

Time Tracking

Date	Time (Start/End)	Billable Hours	Nonbillable Hours	Notes

Month-End Checklist

Monthly Financial Items

- Enter all bills
 - Check folder for receipts
 - Enter recurring transactions, e.g., internet service bill, phone bill
 - Do reimbursement for any items paid personally
- Enter all sales and customer invoices
 - Email invoices to clients
- Run Merchant Services deposit
- Reconcile bank accounts
- Review Balance Sheet
- Review P&L
- Verify Accounts Payable balance (future checks)
- Verify Accounts Receivable balance (open invoices)
- Make adjustments and corrections
- Review and print adjusted/corrected financial statements
- Enter close date on month
- Calculate self-employment tax and set \$ aside
 - Federal 15.3%
 - State 5.25%
- Make retirement plan contribution

Monthly Nonfinancial Items

- Check on client/prospect list – anyone to touch base with?
- Update website
 - “Now booking clients for MONTH”
 - Events
 - Check 401 redirects
- Update LinkedIn profile
 - “Now booking clients for MONTH”
 - Make sure recent articles have been posted

Quarterly Items

- File self-employment/estimated taxes
 - Federal
 - January 15 (for Sep-Oct-Nov-Dec)
 - April 15 (for Jan-Feb-Mar)
 - June 15 (for Apr-May)
 - September 15 (for Jun-Jul-Aug)
 - State
 - January 15 (for Sep-Oct-Nov-Dec)
 - April 15 (for Jan-Feb-Mar)
 - June 15 (for Apr-May)
 - September 15 (for Jun-Jul-Aug)
- File NC sales and use tax
 - January 31 (for Oct-Nov-Dec)
 - April 30 (for Jan-Feb-Mar)
 - July 31 (for Apr-May-Jun)
 - October 31 (for Jul-Aug-Sep)

Annual Items

- Obtain W-9 forms for anyone I paid \$600+ (November/December)
- Send W-9 to anyone who paid me \$600+ (November/December)
- File and send out 1099 forms (before January 31)
- Make final contributions to retirement plan (by December 31 or April tax date)
- Do LLC annual filing (April 15)
- Do taxes (April 15)