

Freelance Business Launch Plan + Checklist

This launch plan and checklist focus on Groundwork and ongoing Marketing based on strategies: the 3 R's, email marketing, and more “experimental” thought leadership.

Phase I – Groundwork

You're going to put out your shingle, figuratively speaking, and let your existing network know you're available for hire.

- Update the About section of your LinkedIn profile.** As small and inconsequential as this move may seem, more people you already know are likely to see your LinkedIn profile than to visit your website. Communicating that you have a side hustle or that you're going a new direction is a good exercise and a milestone to be proud of in its own right. (For all you overachievers, here's a [checklist for optimizing your LinkedIn profile.](#))

- Write and send 3 emails. This little project consists of 1) creating your initial email list, 2) writing a life update email, 2) writing a professional update email, and 3) writing a “current focus” email.** You're going to send these 3 emails to all the folks who are already in your orbit, including friends, family, colleagues, and past clients. These emails are well received because we like hearing from people we care about and getting more detail and color than we get from the odd social posts we happen to see.

Pro Tip: The easiest way to send these emails is to just copy and paste all the emails from your contact list into the BCC field and send the email to yourself.

You can download an example of the 3 emails below [here](#). They're not perfect, but they'll give you some idea of how the 3 fit together.

- a. **Create your initial email list.** Gmail lets you export a CSV file of all the people you've ever sent an email to. Once you cull out all the irrelevant emails—e.g., your ex-girlfriend or a Craigslist posting you responded to—you'll be left with an up-to-date and fairly concise contact list of 100 to 300 people who won't mind hearing from you.
- b. **Write and send the first email.** This is a general life update. Certain parts of your life you may not want to share. That's fine. What you include is up to you, but your goal is to share some of the recent highlights. At the end of this email, you'll set the expectation for the second one: *“I purposefully did not talk about anything work-related, so I'll send a separate follow-up email to talk about what I'm up to professionally.”*
- c. **Write and send the second email.** Talk about what you've been up to professionally the last 6-12 months: *“You know that I was a consultant. I did a lot*

of strategy work, and that was with startups. I also had a big corporate client for a little while. Again, you're just sharing, not pitching or selling anything.

- i. Be sure to include an invitation at the end: *“Tell me what you've been up to”* or *“Please reply. I'd love to hear what you've been up to.”*
- ii. Then, you can close with something like this: *“I know some of you are eager to help any way you can, so I thought I'd reserve that for a third email. Keep an eye out for that one. I should have it finished in a couple of days.”*

- d. **Write and send the third email.** This is where you share the current focus of your work (namely, your online or freelance business): *“Here is the current focus of my work. Here's what I'm excited about. Here are the specific projects I want. Here's who would make a good client for me. When people would benefit from working with me, here's what they say. And, by all means, if you can think of anyone who has said anything like that recently, I'd love an introduction. If you can think of one person to introduce me to, I'd be grateful”.*

- i. Pro Tip: Some people will reply and offer to make an introduction. Then, they will forget. Add follow-ups to your calendar, planner, or lead tracker / CRM and follow up at least twice before you let it go.

- Start sharing before you're ready to share.** If I've made a consistent mistake in my freelance business, it has been not pulling back the curtain and inviting people into the process. All these years, I could have done a much better job showing what I'm building while I'm building it. It's because I forgot, or I figured, “Why would anybody care?” The better approach is to “work in public.” Share what you're building as you're building it. Share the sawdust. Invite people along for the journey. If you have a share-worthy event, always leverage that for your marketing.

- Don't be afraid to take part in the online community and initiate engagement.** There are tons of benefits to just being a part of the community. I have let fear of how other people would respond or how they would perceive me, fear of coming across as awkward or out of it—the thought that “Clearly, this guy's behind the times”—hold me back. I've been surprised at how cordial LinkedIn, in particular, is. It's a pretty cool place to hang out. It's pretty encouraging most of the time where people are like, “Way to go!”, or “This is exciting!” And I'm like, “Oh, that's nice.” People are genuinely trying to engage with what you say, not poke holes in your argument and dunk on you.

Phase II – Marketing

Strategy #1- The 3 R's

The R's stand for **R**elationships, **R**eferrals, and **R**epeat business. The strategy is simple in concept. You make a regular habit of starting new relations, asking for referrals, and keeping in touch with past clients so that you stay top of mind for new projects.

- New Relationships – I recommend [this Rule of 10s Prospecting Process](#). Assume that you'll need to do this for the foreseeable future. Add the tasks to your daily and weekly workflow and treat them as sacrosanct, non-negotiable.
- Referrals – [Use my referral request email template to make your own](#).
 - For years, my clients, colleagues, and strategic partners said this, after a successful project: “Let me know if there's anything I can do to help you.” And for years my response was pretty weak: “Thanks for offering. Just let me know if you think of anyone who may need my help.” When I started asking for introductions instead, I started getting them—and new clients too. I use two templates to help with this process:
 - [Introduction Request Email](#) – I include a list of the way people I can help describe the problems they have that I can solve.
 - [Example of paragraph someone can use to make the introduction](#) – Once someone thinks of a introduction, I make that introduction very easy for them by writing the email. This serves the dual purpose of giving me better control over how my contact is describing my expertise and value to someone new.
- Repeat Business – I recommend checking in with past clients on a quarterly basis. A [lead tracking GSheet](#) or CRM (e.g., Pipedrive) will help you remember to do that. Also, sending a regular email newsletter helps you stay top of mind. More on that below.

Strategy #2 – Email Marketing

Regular email newsletters help you stay top of mind with past clients, current prospects, and other people in your network and audience. By sharing what you're thinking about, learning, and doing, you demonstrate your expertise and establish yourself as an authority. You make yourself a more desirable hire.

- Tell people that you'll be sending regular newsletters.** Once you send the 3 emails I outlined above, you can start using an email service provider—I love [ConvertKit](#)—and let all those people know you'll be sending out regular newsletters. In the first email, you say something like this: *“By the way, if you just don't want to receive these emails, hit the unsubscribe button below. No feelings hurt, no harm done.”* We all receive plenty of email, and you want to give people an easy out.
- Keep your emails short and readable.** Keep your emails short until you get into a good rhythm. I've kept some of mine really short. I use these three categories: What I'm Thinking About, What I'm Learning, What I'm Doing. I may include only one thing in each

category during a particularly busy week.

- Don't underestimate your small list.** I've made the mistake over the years of underestimating what a very small list could do for my business. You don't have to fully embrace email marketing the way I have, but you cannot build a better asset for your freelance business. Your email list can travel with you from one platform to the next and enable you to own a direct relationship with your audience, a direct line of communication with your audience. Just because your list is small doesn't mean it doesn't have value.
- Leave out the people you don't want to work with.** If there are clients that you don't want to work with again, don't include them in your communications.

Strategy #3 – Thought Leadership

The best freelance clients want to work with experts. However, don't let that psych you out. To be the expert, you only have to be one lesson ahead, not the best-of-the-best-world-class. Your goal with thought leadership is simply to show up online and share what you know—even if that's already been shared a million times before. Chances are, somebody needs your help right now and will benefit if you share right now—and tomorrow, and the day after that, and so on.

- Create and share content.** I don't care which platform you pick: LinkedIn, TikTok, Instagram, YouTube, Facebook, Twitter. Consistency trumps everything in marketing. We must consistently show up, share what we know, and show our authority. That's how we make ourselves easy to find. That's how we become the easy, obvious choice. It's hard to anticipate which post will get a bite from a potential client or which one will get tons of engagement. That post could be #17 or #71. You just don't know. That's why you must treat marketing like any other healthy habit and commit to 6- and 12-month marketing experiments. Here's an example: *"I need to share some of the key stories and core concepts anyway, so I'm going to make short YouTube videos and I'm going to commit to making three videos a week for six months, and just see what happens."*
- Double down on what works.** Creating content, putting it out there, and sharing your ideas will never stop being important. You have an existing network, but you'll likely reach the point where you can't keep plowing the same furrows. You need new relationships, plain and simple. The way to build those relationships online is by showing up, sharing what you know, and showing your authority—that is, working in public.

The mistake I see a lot of freelancers and consultants make early on is getting some traction with their existing relationship and network and then, because it's more *comfortable* for them to just stick with the The 3 R's, they don't do anything else. They become overly dependent on referrals. They put themselves in the position of needing to say yes to suboptimal, unexciting projects because that's all they're getting.

Other Important Notes

- **Have fun.** None of the steps in this launch plan have to be tedious. The more fun you have with your marketing, the more fun your audience will have too. That “Fun First” principle is very simple, yet many freelancers forget it.
- **Keep in touch.** Not keeping in touch with people who already know, like, and trust you already is a missed opportunity. They may not have a project or introduction for you right now, but that could change at any time. One email is all it takes to get in the way of that opportunity. That’s why my email newsletter has produced new projects for me.
- **Ignore people who consider it good sport and their own free entertainment to crap on you.** Some people are only interested in dunking on people who are trying to say something. Their snarky or downright insulting comments aren’t intended to create dialogue. They’re not showing up in your feed looking for meaningful exchange. They’re there to increase their own status by making someone else look foolish. If you’re not careful, you’ll start to think everyone is like this. Most people aren’t. Ignore the trolls, as much as you’re able, and engage with the people who show decency. Remember that it takes more courage to step up to the plate than to shout insults from the stands.