

PROPOSALpreneur's Playbook

Items to consider when launching your freelance proposal business

TECHNOLOGY RESOURCES

- Computer and monitors
- Production software (InDesign)
- Meetings: In-person at executive suite or Virtual: Zoom, Microsoft Teams, Webex
- Time tracking software (Clockify, Harvest, Excel)
- Invoicing (Quickbooks, Excel, Harvest)
- Virus protection software
- Document collaboration (Adobe, Bluebeam)
- Email marketing platforms (MailChimp, Constant Contact)
- Website updates, Research if taking payments via the site (GoDaddy, WordPress)
- Social media account(s) (Instagram, LinkedIn, Facebook, TikTok)

NOTE: There are free or trial versions of many software programs. Check them out before investing long term.

OUTSOURCE OPTIONS

- Legal (Business formation)
- Accounting/Bookkeeping
- Technical support contracts (Geek Squad, Nerds on Call)
- Social media/Email campaigns
- Tax preparation
- Business cards (Canva, Shutterfly, Vista Print)
- Other tasks that freak you out.

NOTE: Other people offer the services you lack the time or skills to handle. Ask for help or delegate.

FINANCIAL DECISIONS

- Emergency fund/Savings of 4-6 months
- Billing rate to charge for services offered
- Separate bank account for business
- Separate bank account to save tax payment
- Business insurance
- Business formation cost
- Website and/or business email address

NOTE: If you run your business from your home, there are minimal costs. Additional expenses may include reserving a cowork space or increasing home internet speeds.

COMMUNITY CONNECTION

- Professional organizations (SMPS, APMP)
- AI software for brainstorming
- Small/Micro business networks on social media
- Local Chambers of Commerce
- Mentors/Friends

NOTE: Being a solopreneur can be isolating. Make a point to connect with your community weekly. It's important to surround yourself with resources to ask questions and share experiences.

CLIENT ENGAGEMENT

- Adopt a belief in abundance (There is enough work for all of us.)
- Spread the word you have a business on social media (posts or paid ads)/attend networking events
- Business Coach Christy Wright's expression: "Do it Scared". Put yourself in motion, even if you are not sure how it will turn out.
- Moonlight while keeping current job to build experience and referrals

NOTE: Believe in your talents, persevere, and succeed.