

**FREELANCE FOCUS**



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## Jam Session for Seasoned Freelancers—Part 2

**Brian Bass, with commentary from Cathryn D. Evans, Phyllis Minick, and Sherrri Bowen**

Last month in the *AMWA Journal*, you may have read the first installment of the review of the popular annual conference session, the Jam Session for Seasoned Freelancers. Here we summarize and discuss the experiences, ideas, concerns, and challenges faced by seasoned freelancers that there wasn't space for in last month's issue. If you missed last month's article, we reviewed managing stress; email, travel, and security issues; and sculpting your business. Here, we discuss doing business with friends, referring clients, legal battles, and one of the costs of doing business.

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### THE FRIEND ZONE

When a seasoned freelancer finds themselves working with a friend and an issue or a concern arises, the best thing to do is leverage the friendship to be honest and transparent—something you might not be able to do if the person were not a friend. Explain what isn't working and why and ask for help to make it work better. Be proactive and act quickly so the issue doesn't fester. Problems are much easier to resolve when they're small.

### Tips From Seasoned Freelancers

It is my view that, when working with one of your personal friends, the reporting structure should be *quite clear*. [In fact, whether working with a friend or colleague—freelance or as an employee—the reporting structure always should be crystal clear. There is no such thing as a “lateral hierarchy.”] When I hire a friend, I expect them to follow my direction; if they have opinions that differ, I definitely wish to hear them and often have changed something based on input from others who work with/for me. But my vote is the final vote if the person has been hired by me. If a person is truly a close personal friend (outside of any business relationship), then I expect that we would be able to speak together honestly and try to compromise. However, if actual

*friction* occurs and it seems impossible to resolve, then decide whether you want to keep the friend or the project/client—and eliminate one of them.

—Cathryn D. Evans

At an AMWA national conference in San Diego several years ago, I encountered a young woman who had been in a workshop with me, and we chatted about issues raised by the speakers. Of course, the matter of “getting started” as a medical writer arose. Numerous workshop attendees had complained about related difficulties and obstacles. Engaging with the 50 or so eager faces surrounding me, I felt obliged to say, “In this room, I see and hear individuals who are educated, energetic, and eager. I can't help but say, have faith in yourself! Never stop trying. Back away from any failed attempts. Focus on your eagerness for new opportunities. Seek new options.”

Subsequently, that young woman took a new job. The pay was terrible, and the working conditions were worse. But she has kept in touch with me and has recalibrated to a different job. She is still a “work in progress,” but she continues to correspond with me and actually has improved her working life. Each of us has gained a new friend!

—Phyllis Minick

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### MATCHMAKING

Some seasoned freelancers manage their workloads by referring clients when they're either not the right person for the job or already committed to another assignment. When you're ready to make an introduction, first contact each person involved to make sure they're aware and on board. Then, send an email to both the client and the person you're referring to them. Introduce them to each other and say something relevant and complimentary about each of them. End the introduction by wishing them both well and

reminding the client that you look forward to working with them when the next opportunity arises. Some seasoned freelancers make so many referrals that they keep a spreadsheet of who they refer and to whom.

### Tips From a Seasoned Freelancer

If I am unable to take on a particular project for a prospective new client because of my schedule, I will give the person the name and contact information (email and telephone number) of a qualified colleague who might be able to fit the project into their schedule. I will recommend the person based on my personal experience working with them. If this exchange is by telephone, I will follow up with an email to the person I recommended with the name and email of the new client. If a long-term good client needs something and it is nearly impossible to fit it into my schedule, I will try to *make it possible* to fit it in, even if it means working nights, etc. I have referred a number of such new clients to other writers but have not followed up to see if the connection worked out; some writers do email and thank me.

—Cathryn D. Evans

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### LINGERING LEGAL BATTLES

It has been a few years since California enacted AB5 and threatened the livelihoods of freelancers everywhere. Since then, the COVID-19 pandemic has taken center stage, but seasoned freelancers know they need to remain vigilant and vocal and do everything possible to show that their freelance business is a real business. This includes establishing your freelance business as a recognized business entity, such as an LLC or S-Corp, and describing your freelance business as a vendor rather than as a contractor.

### Tips From a Seasoned Freelancer

Years ago, a member of this Freelance Contributors Group advised all of us to insert in each of our work contracts a “hold harmless” clause. She cited a coworker who had written medication instructions for a pharmaceutical company’s package insert. A patient sued that company, and the writer was also sued. I later included a similar hold harmless clause in my contract as a freelance writer with a major pharm company. The company agreed to my contract without question. Anyone accepting this suggestion should have an attorney write that clause for their personal situation.

—Phyllis Minick

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### THE COST OF DOING BUSINESS

Seasoned freelancers have noticed an increasing number of clients requiring their vendors to participate in standard operating procedure (SOP) training, sensitivity training, and other similar programs. Should you charge for your time? You bet! Employees of the company are required to go through the same training and their salaries are not docked for the time, so freelancers should not be financially penalized either. When a client asks you to participate in an internal training program, simply ask them how they want you to invoice for it. If they balk about compensating you for your time, consider it a red flag.

### Tips From Seasoned Freelancers

Of course the freelance writer/editor should charge for any time required to study a new client’s SOPs and other training material! It should not even be a question. But if you are not sure, just tell the client, “Okay, I will charge this time at my normal hourly rate of \$XXX and invoice you once I complete the training.” Especially if the project you are about to undertake is based on a *fixed-fee bid*, you should communicate that all extra activities not associated with the specific project, as outlined in your contract, will be charged hourly—just to be certain that the client does not think your training is part of the project bid.

—Cathryn D. Evans

Absolutely, you should charge for this kind of training time! In fact, all your time spent on behalf of a client’s business—whether it be training or even time with the IT staff to fix issues with your client-issued laptop computer—should be billed at your regular hourly rate. I have never had a client balk about compensating me for training time, especially since it’s their requirement that I complete such training. I have also never asked ahead of time how they want training time to appear on an invoice. I just include a line item for training (and a separate one for “IT issues,” when necessary) on my invoices. I do recommend printing or saving a copy of any type of confirmation of your completed trainings. Some companies record your training module compliance automatically in their internal system, but it’s a good idea to keep a copy for yourself, just in case of any future disputes.

—Sherri Bowen