

Three Exercises to Identify Ideal Clients You Can Nurture Into Long-Term Relationships

Katherine Molnar-Kimber, PhD¹; Brian Bass, MWC²; Thomas Drake, MA, CMPP³; and Nicole Cooper⁴ / ¹KMK Consulting Services, Kimnar Group LLC, Worcester, PA; ²Bass Global, Inc, Fort Myers, FL; ³Director, Global Outcomes Group, Reston, VA; ⁴Cooper Johnson Communications LLC, Gladstone, NJ

Introduction

Freelance medical writers and editors who have long-term relationships with their ideal clients enjoy many benefits.¹ Among them are increased productivity and efficiency, financial stability, and peace of mind. When the expertise, services, availability, and interests of the freelancer match the needs and goals of a new client, the relationship often clicks and the project proceeds smoothly. In such cases, the characteristics of the freelancer and the client likely match in 4 categories: type and topic of project, required time frame, business agreements, and personal compatibility (Figure 1). Ideally, the expertise and interests of the freelancer should match the needs of the client, and the freelancer has sufficient availability to perform the services within the client's requested time frame. The business agreements and fees are

fair to both parties, and the freelancer and the client have good rapport.

Marketing, including advertising and social media, is a common way to acquire clients that desire and need your services,^{2,3} but “a” client isn’t necessarily an “ideal” client. The trick is to find the clients that will be ideal for you. The following 3 exercises will help you build your business by identifying clients that may be ideal for you. For clarification, the term “suitable clients” refers to clients that match many of your preferred characteristics, whereas “preferred clients” match most of your preferred characteristics and avoid most of the negative attributes. “Ideal clients” match all your preferred characteristics and avoid all the negative attributes. Once you have begun working with them, you can nurture them into long-term relationships by using the suggestions outlined in our article “16 Tips for Nurturing Clients Into Long-Term Relationships.”¹

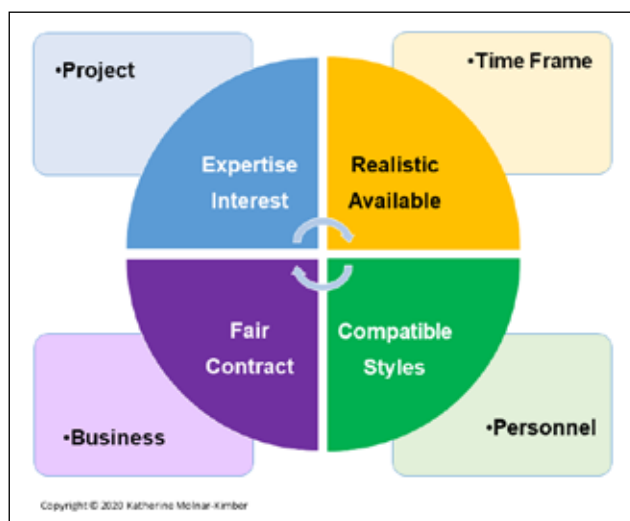


Figure 1. The 4 main aspects of freelancer–client relationships usually align in collaborative, productive business deals, which can be nurtured into long-term freelancer–client relationships.

Exercise 1. Assess Your Strengths, Preferences, and Interests

Exercise 1 focuses on recognizing your strengths and preferences with respect to the types of deliverables, writing styles, subject areas, and project responsibilities. It will also help identify your desired areas for expanding your current range of services. Examples of many deliverables, writing styles, subject areas, and medical writing and project management responsibilities are listed in Table 1. Consider selecting and/or expanding the niches to suit your situation in the Exercise 1 worksheet to consolidate the strengths of your freelance services and goals. Freelancers who know their strengths and preferences have a better chance of getting the work they like and want to do and have a better chance of finding potential clients who need the services they provide.

Table 1. Examples of Medical Writing Deliverables, Writing Styles, Subject Areas, and Project Management Responsibilities

| Areas of Strength and Experience | Examples |
|----------------------------------|---|
| Deliverables | <ul style="list-style-type: none"> • Regulatory documents • Manuscripts for peer-reviewed journals • Abstracts, posters, podium presentations • Grants • Slide decks • Newsletters • Promotional materials (eg, white papers, websites, branded presentations, video scripts) • Educational materials for health care professionals (eg, CME, guidelines) • Needs assessments for CME • Training materials for sales representatives • Educational materials for patients or the general public (eg, lay summaries, narratives, health news) |
| Writing Styles | <ul style="list-style-type: none"> • Prescriptive (eg, regulatory documents) • Scientific (eg, manuscripts, video abstracts, educational materials) • Promotional (eg, websites, branded slide decks) • Plain language (eg, patient/caregiver materials) |
| Subject Areas | <ul style="list-style-type: none"> • Therapeutic areas • Rare diseases • Pharmaceuticals • Devices • Pharmacoeconomics • Managed care • Modalities (eg, biologics, gene therapy) |
| Project Responsibilities | <ul style="list-style-type: none"> • Writing clear concise content • Annotating references • Formatting references and documents • Project management • Tables and figures • Collaboration with scientific graphic designers • Incorporating revisions and compiling feedback from multiple stakeholders |

CME, continuing medical education.

Exercise 1 Worksheet. Assess Your Strengths, Preferences, and Interests to Match to Your Ideal Clients

| Area | Degree of Experience | | | Areas of Interest |
|--------------------------|----------------------|----------|-----|-------------------|
| | High | Moderate | Low | |
| Deliverables | | | | |
| Writing Styles | | | | |
| Subject Areas | | | | |
| Project Responsibilities | | | | |

Use the examples in Table 1, and your own ideas, to list the areas in which you have experience and interest.

Exercise 2. Identify Suitable Client Types and Preferable Characteristics

Table 2 lists many types of clients that hire freelancers. Exercise 2 focuses on identifying the types of clients with whom you want to work: those who complement your strengths, benefit from your expertise, and match your working style and interests. On the Exercise 2A worksheet, identify clients that need your expertise and abilities, whether that is in a particular type of deliverable, writing style, or subject area. In general, go with

what you know because it is more time-consuming and challenging to produce your best work when you also have to learn as you go. This exercise will also help you identify the specific preferred client characteristics. To spur thinking about the characteristics of your ideal client, we have listed several in Table 3. Consider compiling your own list of ideal characteristics, too. Using the Exercise 2B worksheet, compile a list of 10 potential clients that hire freelancers and would belong to the very strong-match category you identified in Exercise 2A.

Table 2. Examples of Types of Clients That Hire Medical Writers

| Types of Clients |
|---|
| <ul style="list-style-type: none"> • Pharmaceutical companies • Biotech companies • Hospitals • Academia • Publishers • Professional societies • Medical communication companies • Medical education companies • Medical advertising agencies • Public relations agencies |

Exercise 2A Worksheet. Identify Suitable Client Types and Preferable Characteristics

| Very Strong Match | Strong Match | Match |
|-------------------|--------------|-------|
| | | |
| | | |
| | | |

Use the examples in Table 2, and your own ideas, to list the types of clients that match your strengths, preferences, and interests

Table 3. Examples of Client Characteristics Preferred by Freelancers

| Preferred Client Characteristics |
|--|
| <ul style="list-style-type: none"> • Recognizing and valuing your expertise • Compensating you accordingly • Paying your invoices on time • Offering projects in your preferred writing style(s), formats, and topics • Providing manageable timelines • Offering contracts that protect both you and the client and allow you to work with your preferred software and hardware on your preferred schedule • Being professional and pleasant |

Exercise 2B Worksheet. Assemble a List of Names of Companies With Appropriate Department(s) That Strongly Match Your Interests, Expertise, and Preferred Working Style

| Very Strong Match | Contact(s) | Comments |
|-------------------|------------|----------|
| | | |
| | | |
| | | |

Compile lists of actual client names that fit the very-strong-match category and identify ways to meet representatives.

Consider ways to meet their representatives, such as through professional organizations or LinkedIn. As one strategy to expand your client base, consider marketing your skills for specific deliverables and therapeutic areas to these identified potential clients with preferred or ideal characteristics. There is nothing better than doing work you love for clients you love.

Exercise 3. Identify the Aspects of Projects and Freelancer–Client Relationships You Prefer to Avoid or to Negotiate

In Exercise 1, you identified your preferred types of deliverables, writing styles, subject areas, and project responsibilities. In Exercise 2, you identified the types of clients with whom you want to work, your specific preferred client characteristics, and 5 to 10 clients that match these attributes. Knowing what you do not like is just as important for helping you find and work with ideal clients: hence, Exercise 3.

Challenges can arise in any freelancer–client relationship, and knowledge about which you prefer to avoid or renegotiate can help relieve stress. Table 4 lists some challenging aspects of projects and freelancer–client relationships many freelancers may want to avoid and potential strategies that may help you address or prevent these issues. Consider creating your own list of client attributes you would like to avoid by combining your own ideas with the attributes in Table 4 on the Exercise 3 worksheet. Knowing the aspects of projects and freelancer–client relationships you prefer to avoid, clarify, or negotiate will give you the time and energy to find and work with ideal clients on the projects you love.

Exercise 3 Worksheet. Identify the Aspects of Projects and Freelancer–Client Relationships You Want to Avoid

| I Want To Avoid or Negotiate . . . |
|------------------------------------|
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |

Use the examples in Table 4, and your own ideas, to list the aspects of projects and freelancer–client relationships you want to avoid or negotiate, so you have more time to find and work with ideal clients.

Summary

Nurturing long-term relationships with ideal clients can help freelancers increase productivity, efficiency, financial stability, and peace of mind. Every prospective client presents an opportunity to explore working relationships and the fit of the freelancer’s services with the expected deliverables. When freelancers are clear about the types of work they like and can do well, their available bandwidth in the requested time frame, and the characteristics of their ideal clients or working relationships, freelancers can more quickly assess whether to proceed with the potentially ideal client. Thus, freelancers can focus their marketing efforts on attracting clients aligned with their expertise and interests. The 3 exercises recommended

Table 4. Examples of Less Desirable Client Characteristics and Potential Strategies to Handle Challenging Situations

| Aspects of Projects and Freelancer–Client Relationships to Consider Whether to Avoid | Strategies to Handle Challenging Situations |
|---|---|
| <ul style="list-style-type: none"> • Chronically tight timelines | <ul style="list-style-type: none"> • Clarify expectation of scientific depth, goals, audience, and length of deliverable. • Offer a realistic timeline. • Turn down the project. |
| <ul style="list-style-type: none"> • Chronic project scope creep without compensation | <ul style="list-style-type: none"> • Write detailed specifications for the project. • For major scope creep, ask for increased compensation. • For repeat clients with this attribute, consider a quote that includes the relevant percentage of scope creep for that client. |
| <ul style="list-style-type: none"> • Lack of boundaries (eg, emails/phone calls at night or on weekends or holidays) | <ul style="list-style-type: none"> • Clarify times when you'll check emails. |
| <ul style="list-style-type: none"> • Lack of consideration (eg, scheduling teleconferences or videoconferences without first asking for your availability) | <ul style="list-style-type: none"> • If unavailable, then state it. Usually, the client will reschedule the call as needed. • If you know about an upcoming meeting to be scheduled, provide available dates and times proactively. • Provide dates for other commitments (meetings and vacation) ahead of time. |
| Potential Contract Issues | Strategies to Handle Challenging Situations |
| <ul style="list-style-type: none"> • Restriction of trade with any and all of company's clients at all their departments and all locations | <ul style="list-style-type: none"> • Request revision of restriction of trade to the departments and locations of agency's clients for which you actually work or interact with under the agency's supervision. Most companies will agree. • Request that knowledge of their clients be sent on a need-to-know basis. |
| <ul style="list-style-type: none"> • Contracts that severely limit your ability to work in broad topics with other clients (ie, restrictive of trade in modality or broad therapeutic area such as oncology) | <ul style="list-style-type: none"> • Negotiate a restriction for a narrower field (eg, PD1 inhibitors in non-small-cell lung cancer). • Offer to accept restriction in exchange for retainer fee. |
| <ul style="list-style-type: none"> • Contract provides many subjective descriptions before payment, but no definitive milestones (eg, submission to journal) | <ul style="list-style-type: none"> • Request 20%-30% deposit before beginning project. • In the transfer of copyright clause in the contract, add the phrase "after payment of all invoices." Most companies will accept the change. |
| <ul style="list-style-type: none"> • No obligation to protect confidentiality of freelancer's confidential information (eg, EIN, bank account information) | <ul style="list-style-type: none"> • Request revision and most companies will agree as they already do it. |
| <ul style="list-style-type: none"> • Project specifications do not yet include the responsible party and the procedure for obtaining published articles behind a paywall (implied freelancer's responsibility) | <ul style="list-style-type: none"> • Ask for clarification, most companies will clarify the responsible party and procedure in their contract or statement of work. |

EIN, Employer Identification Number; PD1, programmed cell death 1.

in this article will enable you to assess your strengths, preferences, and interests; identify suitable client types and their preferable characteristics; and identify the aspects of projects and freelancer–client relationships to avoid or negotiate. By doing so, you will be well on your way toward finding the clients that are right for you.

Author declarations and disclosures: The authors report no commercial associations that may pose a conflict of interest in relation to this article.

Author contact: molnarkimber@KinnarGroupLLC.com

References

1. Molnar-Kimber K, Drake T, Bass B, Cooper N. 16 Tips for nurturing clients into long-term relationships. *AMWA J.* 2020;35(4):186-189.
2. DeMillo L. *The Mighty Marketer: Your Guide to Making More Money as a Freelance Medical Writer.* Booklocker.com, Inc; 2015.
3. Bly RW. *Bob Bly's Guide to Freelance Writing Success: How to Make \$100,000 a Year as a Freelance Writer and Have the Time of Your Life Doing It.* Filbert Publishing; 2016.