
Overview

When operating as a freelancer, you are your business and your skills are your service. Through successful engagements or contracts and applying your skills you will build your reputation. You need to be able to sell your skills to customers and promote your achievements, while negotiating favourable contracts. Planning is also very important so you are able to manage the busy times and work to improve your business, increase your customer base and manage your administration during quiet periods. You must also be aware of your obligations regarding accounts, tax and insurance responsibilities as well as manage what may be a fluctuating cash flow. As a freelancer you may be required to work for lots of different customers and you need to be both adaptable and flexible. This unit is tailored from Unit F of the Design standards.

You might do this if you are:

1. currently operating as a freelancer; or
2. planning to operate as a freelancer in the future

This unit involves undertaking freelance work:

1. marketing yourself as a freelancer
2. negotiating freelance contracts
3. carrying out freelance work to meet contracts
4. managing your finances, and work administration

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Performance criteria

You must be able to:

- P1 identify and use appropriate strategies to enhance your professional reputation and promote yourself to potential customers
- P2 make, follow up and maintain contacts with potential customers
- P3 make follow up and maintain appropriate networks to support you and your work
- P4 assess the value of work and estimate realistic fee rates
- P5 negotiate fees, timescales, outcomes, and completion criteria that meet your own and the customers requirements
- P6 calculate realistic schedules of work allowing time for contingencies and minor changes
- P7 plan ahead to organise and maintain a workflow that can be done in the time available and gives the income you require
- P8 monitor progress against plans
- P9 set up and use effective systems for managing finances and paperwork
- P10 prepare and keep accurate and up-to-date accounts
- P11 adapt to the way other organisations and people work whilst making sure you maintain your personal work ethic and reputation
- P12 produce outcomes using your own or your employing organisations resources, systems and work practices
- P13 produce outcomes that meet the agreed constraints, quality standards and deadlines
- P14 maintain professional standards of behaviour and work within your specialism, to suit the context

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Knowledge and understanding

You need to know and understand:

Advice and information

- K1 where to find the relevant sources of advice and information on employment, insurance, tax regulations and other small business legislation, and VAT

Marketing and networking

- K2 what the best and most effective promoting tools are to market yourself and your services to potential customers (e.g. CV, advertising, press coverage, exhibitions, website and business cards)
- K3 how to build your reputation and take pride in your work (e.g. by ensuring you send round clear and up-to-date information about your experience, past work, achievements and availability)
- K4 how to make, follow up and maintain contact with potential customers and access work opportunities (e.g. through regular internet trawls, speculative mailings to customers and joining local networks for small businesses)
- K5 how to build personal networks (e.g. of clients, suppliers, support and professional advice)

Planning for yourself

- K6 how to carry out contingency planning, scheduling and future planning so as to maintain available work and cash flow
- K7 how to plan ahead to maintain workflow in terms of required income, time available and outcomes required
- K8 how to estimate time requirements for jobs

Finances

- K9 how to set and manage personal and business budgets
- K10 how to keep simple accounts (e.g. book keeping, income, expenditure and cash flow) and set up systems for purchase orders, invoicing, filing and chasing late payments
- K11 how to budget for resources and overheads (e.g. rent, equipment, electricity, telephone and bank interest)
- K12 how to calculate and allow for business development costs
- K13 how to estimate going fee rates for work and resources (such as accommodation and expenses)

Negotiating contracts

- K14 how to negotiate and agree contracts in line with relevant employer legislation, expected income, time available and established outcomes
- K15 how to make sure contracts are clearly communicated (e.g. contain

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details of deadlines, outcomes, payment terms and time limits for payment)

Working with the customer

K16 how to maintain professional standards of behaviour (e.g. time management, use of resources, co-operating with others and dress).

K17 how to adapt to other organisational cultures and ways of working

K18 the difference between creative decisions and business decisions

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Additional Information

Links to other NOS

1. EE3 Make deals to take your business forward
2. WB1 Check what customers need from your business
3. WB2 Plan how to let your customers know about your products or services
4. WB3 Plan how you will sell your products or services
5. WB9 Bid for work for your business
6. WB12 Deliver a good service to customers
7. MN3 Keep financial records for your business
8. MN5 Get customers to pay on time
9. YS4 Seek advice and help for your business

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