Organizational Skills for a Successful Freelance Business

By Dorothee Racette

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Overview of topics

- Introduction
- Workspace strategies
- Successful time management
- Effective project management
- Staying on top of finances
- Planning for quality
Why get organized?

- Stuck in clutter
- Never get out of the office on time
- Don’t have enough time for the things I enjoy
- Losing money
- Would like to find time for a new hobby
- Would like to feel better

- Decrease stress
- Truly be your own boss
- Do better work
Workspace strategies

Source: http://beyondclutter.com/wkshp_leader.htm
Strategies for a cleaner work environment

- 10-minute cleanup
- “Prompt action”
- To-do list
- BIG GARBAGE CAN

KEEP THINGS SIMPLE

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Filing

- **Your** system
- Color coding
- File names match the naming system in your computer
- **Procrastination means:** the system is not right

**Myth:**
Filing systems cost a lot of money

**Fact:**
You can use what you have on hand
“Desktops” need to be clean, too
Where to start?

Source: I can see the floor

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5-minute discussion

- What holds us back?
- Examples of standing in our own way
- RESOLUTION I
Successful time management

Less is more
Early morning optimism…

Pay bills
Clean office
File papers
Call mom
Check for tickets
Edit the XYZTrans assignment
Get laundry done
Iron blouse for tonight
Get kids from school
Do the Miller job
PowerPoint for TransXYZ
Write invoices
Check if any payments are overdue
Get bank balance

Check what's wrong with printer
Enter terminology changes into database
Put glossaries in the folder
Clean up from breakfast
Enter received payments in the computer
Call LinguaXYZ about overdue check
Answer terminology question on a list
Check email
Water office plants
Set up phone message
Clear voicemail
..giving way to mid-afternoon realism…

Edit the XYZTrans assignment
Get kids from school
Do the Miller job
PowerPoint for TransXYZ

Posted by: “nhgtdre" mail@lovetochat.com
Thu Sep 21, 2006 5:26 am (PST)

Hi all,

Anyone know exactly what Bokanowskification is? It seems to have something to do with medicine. Psychology?

All the best,
..until evening exhaustion sets in...

**Your best intentions**

- Answer terminology question on a list
- Check email
- Chat with translator friend in San Francisco

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Prime Time

Energy levels throughout the day

- 8 a.m.
- 9 a.m.
- 10 a.m.
- 11 a.m.
- 12 noon
- 1 p.m.
- 2 p.m.
- 3 p.m.
- 4 p.m.
- 5 p.m.
- 6 p.m.
- 7 p.m.
- 8 p.m.
- 9 p.m.
- 10 p.m.
Planning for productivity

- Plan work hours first
- Plan other chores around your work
- Always dedicate your prime time to work
- Down-time is better for “mindless” tasks

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To-do list adjusted for Prime Time

Prime Time
- Edit the XYZTrans assignment
- Do the Miller job
- PowerPoint for TransXYZ

Close to lunch
- Check email
- File papers
- Put glossaries in the folder
- Water office plants
- Clear voicemail

Later afternoon
- Enter terminology changes into database
- Answer terminology question on a list
- Call LinguaXYZ about overdue check
- Enter received payments in the computer
- Write invoices
- Get kids from school

Evening
- Check what's wrong with printer
- Set up phone message

Make to-do list for next day!
Whiteboards…

Source: projectwetusa.org
Dealing with interruptions

- Prime Time protection
- Permissible interruptions
- Scheduled interruptions
Group exercise: prioritizing

Strategies to balance all aspects of a freelance business

• RESOLUTION II
Effective project management

Planning ahead
Try again

7:15 Read e-mail
7:17 Shoot off angry response to European editor
7:18 Spill coffee
7:20 Start translating
8:15 Search Google for terminology
9:20 Accept rush job
The first 15 minutes of the day...

- **Plan** → Written agenda in any format
- **Prioritize** → Define what HAS to get done
- **Order** → Establish order
- **Rewards** → Establish small rewards
# Project plan for a regular day

<table>
<thead>
<tr>
<th></th>
<th>Job 1</th>
<th>Job 2</th>
<th>Job 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word count</td>
<td>1,500</td>
<td>600</td>
<td>900</td>
</tr>
<tr>
<td>Difficulty</td>
<td>So-so</td>
<td>tough</td>
<td>easy</td>
</tr>
<tr>
<td>Problems</td>
<td>Have to find references</td>
<td>Research</td>
<td>All terms in the TM</td>
</tr>
<tr>
<td>Resources</td>
<td>References/glossary</td>
<td>Web/dictionaries</td>
<td>Previous work for same client</td>
</tr>
<tr>
<td>Follow-up</td>
<td>Folder for references</td>
<td>Bookmark website in folder for client</td>
<td>Organize client folder</td>
</tr>
<tr>
<td>Notes</td>
<td>Make notes of difficult terminology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>??</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Planning for the unexpected

**JOB-RELATED**
- Research takes longer than expected
- Rush job comes in
- Client complaint
- Power outage
- Billing issue

**PRIVATE**
- Family emergency
- Illness
- Sudden visitor
- Long phone call from Aunt Betty
- …
## Organizing your work

<table>
<thead>
<tr>
<th>Billed?</th>
<th>Client project</th>
<th>Code</th>
<th>Payment</th>
<th>Amount</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
<td>Client A patient letter</td>
<td>083506</td>
<td>open</td>
<td>1000</td>
<td>Dollar</td>
</tr>
<tr>
<td>*</td>
<td>Client B Excel sheet</td>
<td>083606</td>
<td>overdue</td>
<td>1000</td>
<td>Euro</td>
</tr>
<tr>
<td>*</td>
<td>Client B Highlights 09-2006</td>
<td>093706</td>
<td>open</td>
<td>1000</td>
<td>Euro</td>
</tr>
<tr>
<td>*</td>
<td>Client C editing medical</td>
<td>093906</td>
<td>open</td>
<td>1000</td>
<td>Dollar</td>
</tr>
<tr>
<td></td>
<td>Client D urgent patient report</td>
<td>094006</td>
<td>open</td>
<td>1000</td>
<td>Dollar</td>
</tr>
<tr>
<td><strong>Tuesday</strong></td>
<td>Client E plant information sheet</td>
<td>094406</td>
<td>open</td>
<td></td>
<td>Euro</td>
</tr>
<tr>
<td><strong>Friday</strong></td>
<td>Client A REACH presentation</td>
<td>094906</td>
<td></td>
<td></td>
<td>Euro</td>
</tr>
<tr>
<td>*</td>
<td>Client C X-ray report</td>
<td>095006</td>
<td>PAID</td>
<td>1000</td>
<td>Euro</td>
</tr>
</tbody>
</table>
Lose 30 pounds in a week and get rid of all your debt while effortlessly earning a million dollars!

- RESOLUTION III

Making realistic changes to work organization

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Staying on top of finances
Strategies to get a handle on finances

- Invoice immediately
- Keep a record of all invoice data
- Use financial software
- File financial paperwork *when it comes in*
- Assign categories

**KEEP BUSINESS + PRIVATE ACCOUNTS SEPARATE**
Financial and business software categories

Expense categories make expenditures comparable

Are usually set up to match IRS reporting requirements

Example from Quickbooks
Schedule C expenses

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not show this message again

<table>
<thead>
<tr>
<th>Part II</th>
<th>Expenses. Enter expenses for business use of your home only on line 30.</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>Advertising</td>
</tr>
<tr>
<td>9</td>
<td>Car and truck expenses (see page C-3)</td>
</tr>
<tr>
<td>10</td>
<td>Commissions and fees</td>
</tr>
<tr>
<td>11</td>
<td>Contract labor (see page C-4)</td>
</tr>
<tr>
<td>12</td>
<td>Depletion</td>
</tr>
<tr>
<td>13</td>
<td>Depreciation and section 179 expense deduction not included in Part II (see page C-4)</td>
</tr>
<tr>
<td>14</td>
<td>Employee benefits programs (other than on line 19)</td>
</tr>
<tr>
<td>15</td>
<td>Insurance (other than health)</td>
</tr>
<tr>
<td>16</td>
<td>Interest</td>
</tr>
<tr>
<td>a</td>
<td>Mortgage (paid to banks, etc.)</td>
</tr>
<tr>
<td>b</td>
<td>Other</td>
</tr>
<tr>
<td>17</td>
<td>Legal and professional services</td>
</tr>
<tr>
<td>20</td>
<td>Rent or lease (see page C-5):</td>
</tr>
<tr>
<td>20a</td>
<td>a Vehicle, machinery, and equipment</td>
</tr>
<tr>
<td>20b</td>
<td>b Other business property</td>
</tr>
<tr>
<td>21</td>
<td>Repairs and maintenance</td>
</tr>
<tr>
<td>22</td>
<td>Supplies (not included in Part III)</td>
</tr>
<tr>
<td>23</td>
<td>Taxes and licenses</td>
</tr>
<tr>
<td>24</td>
<td>Travel, meals, and entertainment</td>
</tr>
<tr>
<td>24a</td>
<td>a Travel</td>
</tr>
<tr>
<td>24b</td>
<td>b Deductible meals and entertainment (see page C-5)</td>
</tr>
<tr>
<td>25</td>
<td>Utilities</td>
</tr>
<tr>
<td>26</td>
<td>Wages (less employment credits)</td>
</tr>
<tr>
<td>27</td>
<td>Other expenses (from line 48 on page 2)</td>
</tr>
</tbody>
</table>

29 Total expenses before expenses for business use of home. Add lines 8 through 27 in columns.
Pay yourself

- Designate your accounts receivable
- Retirement
- Planning your annual income
Financial software

Useful characteristics:
- Flexible (adaptable)
- Clearly structured
- Reporting features
- Designed for non-accountants
- ....?
Conversation: financial strategies

Best financial advice to give to a newcomer?

• RESOLUTION IV
Planning for quality

Truly becoming your own boss
You as a “Human Resource”

- What do other companies do to keep their “human resources” happy?
- Shouldn’t you have all of that, and then some?
Demand “workers’ rights”!

Regular working hours
Breaks
Paid overtime
Vacations
“Perks”
Performance-based incentives
Pension plans

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Perks for “those at the top”

- Plan vacations
- In-house gym
- Reward good performance
- Flex-time
- Defend your free time
Simple rules for living better as a freelance business owner

- Don’t eat at the computer
- Shut off the computer
- Plan vacations
- Plan quality time
- Say NO
- Set boundaries
- Train customers
Talk to your BOSS

Which improvements would make your workplace better?

• RESOLUTION V
Thank you for your interest.