

# THE FREELANCER'S CHECKLIST TO WORKING (AND THRIVING) FROM HOME

Whether you've just started working from home or have had a home office for years, it's important to make sure you're **thriving, not merely surviving!** This checklist is designed to help you assess your environment and activities to set you up for success while working from home.

## 1. Client Management Strategies

Working from home means clients and freelancers can either think of each other as unavailable or available all the time. It's up to you to create a balance that fosters healthy relationships with your clients in these key areas:

### Communication

- Determine how you will communicate with your clients. Ideally this is a decision you'll make in conjunction with your client based on preference and availability. Choose one or two of these as a primary and emergency communication method:
  - Phone
  - Text
  - Email
  - Video conferencing using tools like [Zoom](#) or [Skype](#)
  - Private messaging through social media
  - Private messaging through project management software

### Scheduling

- When will you communicate with your clients and schedule their tasks and projects? Build a client management calendar for yourself including the following:
  - Client meetings (frequency, duration)
  - Times to check and respond to messages
  - Project/task due dates
  - Check-ins to report on project timelines and progression

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## Boundaries

- When working from home, your clients may worry about whether they'll be able to get a hold of you, or they may assume they can get a hold of you all the time. It's important to establish boundaries around these aspects of virtual work:
  - Client emergencies (how to contact you and what constitutes an emergency)
  - Rush jobs (will there be an extra charge and what type of turnaround is considered a rush job)
  - Scope creep (clear definition of your role and boundaries on what you will and won't do)

## 2. Personal Productivity Strategies

Without the structure of a physical office with co-workers, you may find yourself distracted and unproductive. But you can thrive by planning strategies that keep you focused and balanced:

### Work Routine

- Understand your personality - how much solitude and social time you require. The [16Personalities test](#) provides some valuable insights.
- Organize your schedule using tools like these:
  - [Google Calendar](#): A free online calendar where you can keep track of events or deadlines and set reminders for yourself.
  - [Microsoft To Do](#): A free online app where you can create to-do lists and reminders.
- Begin your day by calming your mind with music or a meditation app like [Calm](#).
- Set a specific time in the morning to get dressed, even if you're planning to stay home all day.

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## Time Management

- Block out chunks of time devoted to certain tasks with certain clients.
- Group similar types of tasks together (e.g. writing, research, admin tasks).
- Create a good work rhythm by tracking your time using tools like these:
  - [Toggl](#)
  - [Tomato Timer](#)

## Work-Life Balance

- Be kind and have boundaries. Let your family and friends know when you'll be working and request that they give you space at certain times of the day. (You can even put a sign on your door that says "Freelancer at Work" so they know not to disturb you.)
- Don't feel guilty about saying no to social activities that will prevent you from getting work done. If you create boundaries, you'll have more of yourself to give to your friends and loved ones when you do take time away from your desk.
- Schedule regular times for a phone call, video call, or visit with a friend or family member. Pinpoint certain times when you can commit to spending time with people.

## 3. Essential Tech Tools

Working from home is made easier by the wide variety of free and low-cost tech tools designed to streamline our tasks. Below are some physical tools and software essential to every thriving home office:

### File Backup

- Use physical backup like an external hard drive to prevent losing important files and data on your computer.
- Use cloud-based services like [Dropbox](#) and [Google Drive](#) to back up files.
- Consider how you will provide extra backup for works in progress (e.g. by popping the file into a Gmail draft).
- Locate an alternate Wi-Fi location you can use and/or figure out how to tether to your cellphone data during an Internet outage.

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## Business Management

- Block out chunks of time devoted to certain tasks with certain clients.
- Group similar types of tasks together (e.g. writing, research, admin tasks).
- Create a good work rhythm by tracking your time using tools like these:
  - Professional forms and contracts
  - E-signatures
  - Invoices
  - Accounting and reporting
- Choose from a variety of tools that streamline these processes for you:
  - [Dubsado](#)
  - [17hats](#)
  - [HoneyBook](#)

## Note-Taking

- In a home office, we need to avoid unnecessary clutter. Sticky notes can be helpful, but to free up extra space, consider using one of these digital tools:
  - [Google Keep](#)
  - [Evernote](#)
  - [OneNote](#)
  - [Pocket](#)
- And if you prefer to write by hand in a physical notebook, [Rocketbook](#) is a great option that allows you to take notes by hand and save them in the cloud.

## Project Management

- Project management tools and apps consolidate communication with clients and team members and allow you to visualize projects and timelines. They also notify you of project deadlines so you can stay on track.
- Choose from a variety of helpful tools:
  - [Asana](#)
  - [Trello](#)
  - [Wrike](#)
  - [Monday.com](#)

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## Scheduling

- Email is one way to schedule meetings and events with current and prospective clients, but online scheduling tools streamline the process.
- Choose from a variety of tools like these:
  - [Calendly](#)
  - [Acuity Scheduling](#)
  - [Doodle](#)
- Simply specify your availability and share a link so people can choose a time and date that works for everyone. The meeting is then added to your choice of calendar.

## 4. Home Office Design

To thrive in your home office, you need to feel comfortable in it. Choose an area of your house that can act as a dedicated work station, free from distraction. Make sure you have enough space to avoid feeling cramped and cluttered, and include these elements:

### High-quality chair

- Choose an office chair that will support your back and avoid aggravating any preexisting conditions or injuries.
- Try sitting in different chairs before you buy one, and take off your shoes if you typically wear only socks at home.

### Desk

- Consider how much space you need and whether you'll be using multiple monitors and a keyboard drawer.
- If you use a laptop, an adjustable fold-up desk allows you to easily work in different areas of your home.
- To allow more range of motion and prevent discomfort from sitting for long periods of time, choose a desk that can be adjusted from a sitting to standing position. The [InMovement Standing Desk](#) is a great option.



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## Lighting

- Place your desk near a source of natural light if possible.
- Include an overhead light and a small desk lamp, making sure the overhead light is not so bright that it overpowers your computer screen.

## Decor

- Include meaningful items that make your space comfortable and enjoyable to work in. Here are some suggestions:
  - Real or artificial plants
  - Inspirational pictures or wall quotes
  - Family photos
  - Calendar
  - Desk toys
  - Relaxing chair or sofa
  - Swag items from clients

## Ambient noise

- Include a source of music or ambient noise to help motivate you and boost your mood.
- Choose from a variety of tools and apps:
  - [Spotify](#)
  - [White Noise](#)
  - [Coffitivity](#)
  - [Noisli](#)

## 5. Self-Care Routines

Out of all the tools in your home office, YOU are the most important one! Ensure you're running at peak efficiency by paying attention to these self-care routines and practices:



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## Exercise

- At regular intervals, stand, stretch, walk or run, even if it's just around your house.
- Consider joining an online fitness class, either on-demand or live. Many are being held on video conference platforms like Zoom right now, allowing for some much-needed social interaction.
- If you have home exercise equipment, select a time and develop a healthy workout routine to invigorate you.

## Decor

- Use the 20-20-20 rule to prevent eye strain. The Canadian Association of Optometrists describes this rule as "Every 20 minutes, take a 20-second break and focus your eyes on something at least 20 feet away."
- Consider using a "night mode" or "night light" setting on your computer or mobile device to reduce the strain on your eyes and help you sleep better.

## Breaks

- Use a stopwatch or a time tracking tool like the ones mentioned above to remind you when to take breaks.
- Get adequate sleep so your mind has a chance to rest. If you're not able to get enough sleep at night, have a nap during the day.
- Develop a nighttime routine to ensure your mind doesn't continue racing when you go to bed.

## Nutrition

- Keep a glass of water by your desk.
- Eat regular meals and snacks to keep your energy up.
- Don't become so engrossed in tasks or projects that you forget to eat and drink.
- Choose healthy foods with the occasional treat. Avoid overindulging in junk food and sweets.

Stay Safe and Healthy!

**[Learn More About Freelance University Here.](#)**

