

FREELANCE FOCUS



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Jam Session for Seasoned Freelancers

Our Freelance Forum contributors—Brian Bass, Sherri Bowen, Cathryn D. Evans, and Phyllis Minick—have provided their own unique insights into topics raised during the open session during the educational session moderated by Cyndy Kryder, MS, MWC — “Jam Session for Seasoned Freelancers.”

The Jam Session for Seasoned Freelancers is always a popular session at the annual AMWA conference. The session gives seasoned professionals an opportunity to share concerns and challenges and to brainstorm and discuss solutions with experienced peers who have had similar experiences. Several topics emerged at this year’s session, including the effect of COVID-19 on businesses, client relationships, subcontracting, and business plans.

EFFECT OF COVID-19

The consensus among seasoned freelancers was that COVID-19 was a boon to their businesses and their bottom lines. Not only did they receive more projects from established clients, but new clients also approached them to assist with a variety of projects, including virtual events such as advisory boards, and these relationships continue as in-person events ramp up again. In the early days of the pandemic, freelancers were viewed as experts in working remotely. Those who were experienced at creating virtual content sometimes had more work than they could handle.

The effect COVID-19 had on me is about the least newsworthy story of all time! The first vaccination required sitting in traffic for 2 hours to reach the injection station at our baseball park. The aftermath was no pain, no symptoms, and [paying] \$50 for the hired driver. The follow-up second vaccine treatment was a phone call from [University of California San Diego] Health to go on campus immediately—private parking lot, 15-minute total injection/follow-up, then no pain, no symptoms, nothing else. Six months later, vaccination at local pharmacy—no pain, no symptoms, nothing else. Finally, 6 months later came the double-dose vaccine—same pharmacy, same lack of aftermath. However, during that time period, I had a bad fall, ripped open 6 inches of leg skin, was hospitalized for 6 days, became infected with [methicillin-resistant Staphylococcus

aureus], underwent 2 sets of daily antibiotic infusions, [and] then [I took a] support antibiotic by mouth that made me nauseous. I tell this unrelated anecdote just so you won’t think I missed all the fun with the effects of COVID-19!

—Phyllis Minick

I think everyone would agree that the whole COVID pandemic time was an amazing, unexpected, and terrible phenomenon that none of us in the whole world could have predicted or were at all prepared to deal with. I would like to think that there were a lot of lessons learned from it. There will be research in so many areas on its impact for years to come, I’m sure. What a very strange time!

For my freelance pharmaceutical regulatory writing business, though, I have to say that I was busier than ever during the main COVID period. I almost felt guilty about having so much work when so many others did not. I donated a lot of money to the local food bank. I have always worked from home, so that was not an impact on me.

I didn’t work on anything directly related to COVID-19, but I had to adapt to (and teach clients about) ever-changing guidances about how to address the COVID impact on clinical trials in clinical study reports. I highly recommend looking at the US Food and Drug Administration guidance on this as well as the Transclerate-suggested clinical study report template wording.

Buckle up if you haven’t already!

—Sherri Bowen

MANAGING CLIENT RELATIONSHIPS

Seasoned freelancers have reached the point in their careers in which they only want to work with clients who treat them well, pay them well (and on time), and supply enjoyable work. When clients fail to meet any of these 3 criteria, most

seasoned freelancers don't hesitate to end the relationship. Doing so politely and professionally requires finesse. Some seasoned freelancers prefer to say, "sorry, I'm busy," when approached about future projects. Others advocate taking a more transparent, honest approach and explain why they are ending the relationship. You should be able to identify which clients will appreciate this candor.

Your mental health is priceless. If you no longer enjoy working with a client, let them go. Reviewing your client list on a quarterly basis can help you identify clients to avoid. "Trust your gut" is a common mantra among seasoned freelancers. If intuition tells you something is not quite right about a client or a project, walk away.

One of my earliest intros to freelancing involved a film maker who wanted to position his video in a forested state park. A business friend made the introductions, and an appointment to meet onsite followed, [that is], the 2 of us alone among the trees. In about 30 seconds came the hustle. I dodged and later complained to the friend who did the intro that I felt compromised. He responded, "if you can't handle it, go back to the kitchen!" He was right! Before undertaking the next such job opportunity, I wrote out samples of opening sentences (a greeting—name, contact info, business card), then invented strategies I had rehearsed aloud, such as script ideas, scenic equipment supplies, examples of texts submitted to journals—anything just to keep talking for the next few sentences. Later, when I was more experienced, I substituted previously successful talking points and soon began such appointments with a contract in hand. Included were samples from previously published manuscripts, scheduling protocol, payment requirements, over-run charges, and always a hold harmless sentence absolving me from any lawsuit regarding, for example, a medical product or equipment function. The latter strategy has served me well through decades of employment as an in-house editor and as a freelancer for medical institutions in 6 countries.

—Phyllis Minick

Client management is full of unknowns! As a freelancer, I would like to think I have more control over choosing clients—but that doesn't mean there will be a bad apple even when everything looked so nice at first. My main recommendation when negotiating with a brand-new client is to ask as many questions as you can about the project up front before signing on. For your long-term existing clients, it's not unusual that companies you're working for may undergo changes—mergers, new management, new approaches to things....make sure you find out what impact

those changes may have on you so you can decide whether to stay or go. I've been let go by clients (for various reasons), and I've also divorced clients myself (but try to do that early on or when a contract is up for renewal). Keep to commitments as much as you can, but it's absolutely always ok to put yourself first.

—Sherri Bowen

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SUBCONTRACTING

Subcontracting takes a lot of time and energy. Not only do you need to find the right person for the project, but you also need to have the right client who will agree to let a subcontractor handle the work. When you subcontract, you are managing rather than doing the work yourself. Consequently, your estimate needs to reflect the added project management time. Never underestimate the time you will need to manage subcontractors and review deliverables. It takes longer than you think.

Subcontracting to other writers, editors, graphic artists, and consultants is an excellent way to increase income because you can mark up the work of others. The mark-up ranges from 20% to as much as 50%-75% (and more) by agencies. However, you can also lose a substantial amount of money by hiring inappropriate people. Even if someone claims to be an experienced writer, editor, artist, designer, video producer, photographer, proofreader, etc.—and provides samples—that person can end up being too slow, unreliable, inexperienced, etc., for you to make money. Sometimes it turns out that you not only *cannot mark up* the subcontractor's time, but *you end up taking a loss because you have to re-do the entire job and cannot possibly charge the client for all that time.*

Hiring subcontractors has been one of the most difficult aspects of my business. Today I hire subcontractors rarely, and then only those I know and trust. Several other consultants and business owners who hire contractors and subcontractors have commiserated with me on this issue—it is a common problem.

So yes, indeed, you can make more money if you have good subcontractors—but do it cautiously and be sure to check references.

—Cathryn D. Evans

I agree. If you think freelancing is tough, just wait until you start subcontracting. So why do it? Because as wonderful as it is to work for yourself, having others work for you is even better—if you do it right. That's the trick.

When you start bringing in other freelance medical writers and/or medical editors, if you're not very careful, you

can end up working harder than you've ever worked before for less money than you've earned in years. Why not just hire the people you need and put them on staff? Because then you have to pay them whether they're busy or not, deal with payroll taxes, health benefits, and vacation pay, and be tempted to force fit projects to the people you have instead of bringing in the best person for the job.

It's true that you have to manage the people to whom you're subcontracting, and that means a lot of extra work if you're lucky. You want to now be juggling more projects at the same time than ever; but with that comes more teleconferences, more estimating, more negotiating, more emails, and more bookkeeping, all of which takes time. And if you want to keep writing yourself instead of just managing, that adds a whole other level of complexity.

How you subcontract is a crucial decision point; one that may provide some relief for you either now or down the road. For example, the people who work with me on a subcontracting basis are among the very best in the business. They're deeply experienced and experts at their craft. They know what needs to be done and are self-motivated to do it. They have the confidence to make decisions and the ability to roll with the punches. For all these reasons and more, I don't have to watch over the people I subcontract to or worry about how they handle clients, timelines, or budgets. They deliver a top-quality product every time, which is why I trust them with my reputation. In contrast, some people prefer to subcontract to medical writers or medical editors who are relatively new to the profession. The advantage is being able to train them in how you want things to be done, so in the future as they gain experience, they'll deliver as you expect.

There's no right or wrong way to subcontract provided you're completely transparent about it with your clients, and the way you structure your business works for you and those you hire. As noted during the Jam Session, your estimate for a project must include the value you bring to the table managing it. That's right, but that's not all! Think of the infrastructure, the unbillable, the rare unthinkable. If all you factor into your estimates is a charge for your management time, you're missing the entire point of subcontracting. You should also be making a profit on the entire project. There are only 8,760 hours in a year, and you can't work all of them. The idea behind subcontracting is either to work less and earn as much as you did before, work as much as you did before and earn more than ever, or work less than ever and earn more than ever.

—**Brian Bass**

BUSINESS PLANS

Some but certainly not all seasoned freelancers have created business plans they review and revise annually.

Businesses evolve over time as your skill set changes, technology changes, and your desires change. Writing a business plan helps some freelance medical writers determine how they want their businesses to evolve and grow as well. You can find templates for business plans online by searching "business plan templates." Through the Service Corps of Retired Executives (SCORE), a nonprofit resource partner of the US Small Business Administration (SBA), you can find a business expert to review your business plan. The SBA has also established Small Business Development Centers throughout the country in which you can get advice about business planning.

Every business must have a plan and it should be in writing. If you choose not to do this, obviously you are not "in business," you are a contract writer, which is okay, but it is not the same as owning/managing a business. Before writing your business plan, think carefully about your product and your market. The business plan describes the nature of the business, its objectives, projected sales and profitability, future growth, etc., over an estimated period of time. It includes a summary as well as a detailed description of the market, marketing strategy, competitors, officers, directors, and other staff, an initial organization chart (and possibly projected future charts), operational strategy, and financial projections (expenses and income) for an estimated period of time (eg, 5 years).

Most businesses require the same specific functions. There is a chief executive officer, president, or proprietor. The functions of marketing director, sales manager, director of finance and accounting, bookkeeper, secretary, public relations officer, purchasing manager, etc., must be included. Regardless of how you structure your business, someone has to perform these duties. Include an organization chart with your written plan. If you perform all duties, insert your name into every box in the organization chart.

Check out the bookstores and the Internet to see examples of such plans. I strongly recommend you take a (free) in-person workshop from SCORE (www.score.org), which is an organization of experienced business people put together by the SBA. They provide everything you need to know when starting out, including detailed information about why and how to create a business plan. Write your business plan your own way, but do it!

—**Cathryn D. Evans**

To address the issue of business plans, I actually referred to a 2001 publication of Selected AMWA Workshops.¹ Of course, the technologies have changed, but the basic elements not so much. Author Marilyn Citron cited some essentials of planning for a freelance career as follows:

attributes [include] independence, autonomy, free choice of working time, opportunity to develop new skills and technologies, [and] broad choice of subjects. Drawbacks [include] necessity to adjust for uneven workload and income, lack of health care insurance or retirement benefits, [and] isolation.

Recommendations for a business plan start with writing a mission statement as well as specifying client profiles, projected income, office and client locations, equipment/furniture costs and space, [and] detailed financial plan for both immediate and foreseeable long-term requirements.

In the 2023 environment of formerly unequaled variety of communication opportunities, I cannot improve on a time-worn practice: “sit down and write a paragraph describing your prospective clients – who will need you and why. Who will be best able to pay you well. Then turn to internet directories and your own contacts to find prospective employers.”¹ Carefully document the advantages of a paycheck from an institutional employer [compared with] the uncertainties yet benefits of a freelance career.

—Phyllis Minick



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