

Transcript from the Freelance Friday #EFAchat, October 23, 2015

Topics: Created a to-do list for the final quarter of 2015:

1. Catch up on filing receipts, etc.
2. Select clients who deserve special thanks, such as helpful colleagues and referrers.
3. Purchase thank-you gifts, preferably inexpensive consumables or simply a thoughtful, handwritten thank you card.
4. Reconcile any inconsistencies or pesky issues in accounting software.
5. Create 2016 editorial calendar.
6. Get up-to-date tax info via web search, NYTimes and/or WaPo articles, etc.
7. Get ahead of November–December deadlines to ensure holiday time off.
8. Consider raising rates for 2016, and draft a notification to clients.
9. Give yourself a holiday bonus.
10. Brainstorm ways to optimize business flow and work satisfaction in 2016.

Participants (14): @threepenny (moderator), @WriterRuth, @JenTheEditor, @4ndyman, @KateJermain, @racheledits, @DavidRozansky, @KristenTateSF, @jamesfraleigh, @JenMededit, @JBirdwell, @KyraFreestar, @baileyludlam, @EditorMark

Tweet total: 161

3:00 p.m. ET

@EFAFreelancers

Welcome to the Freelance Friday tweet chat! Use hashtag #EFAchat to be included in today's transcript.

@EFAFreelancers

In this #EFAchat, let's discuss everything we freelancers can do to end the year on a good note: from finances to making down-time happen.

@EFAFreelancers

#EFAchat We'll use Q1, Q2, etc. for questions; please use A1, A2, etc. for your answers to each question.

@EFAFreelancers

Today's #EFAchat is being moderated by Sarah Cypher (@threepenny), a freelance writer and editor from Oakland, CA.

@EFAFreelancers

#EFAchat Let's introduce ourselves. Where are you from, and what do you do?

@WriterRuth

#EFAchat Catch up on filing, resolve to do more and/or better mktg in the new year, aim to beat Nov. & Dec. deadlines for more holiday time.

3:05 p.m. ET

@EFAFreelancers

#EFAchat Q1: What outstanding items do you still have on your 2015 calendar?

@EFAFreelancers

#EFAchat @jamesfraleigh, @editsbyjulia, @harrydavidps, you out there today?

@WriterRuth

#EFAchat Ruth Thaler-Carter; Rochester, NY; a little bit of everything-writing, editing, proofreading, websites, Communication Central conf.

@EFAFreelancers

#EFAchat Welcome, @WriterRuth

@EFAFreelancers

#EFAchat Well, let's hope more join us as we go. Q1: My Quickbooks Online has had 10 months to accrue inconsistencies. Major headache.

@WriterRuth

#EFAchat A1: filing! Got way behind when recovering from a broken leg and not using home office cuz I couldn't sit at my desk with the cast.

@4ndyman

#EFAchat A1: Still focused on finding the gigs -- but, like @WriterRuth, I need to file my tax pmts, too.

@KateJermain

#EFAchat I'm a D.C.-based writer/editor of (mostly) illustrated nonfiction books. I'm working on my marketing and time tracking/management!

@EFAFreelancers

#EFAchat re: your intro, Ruth, it's not complete without "gives amazing responses on the EFA forums" :)

@racheledits

@EFAFreelancers #EFAchat Q1. Creating editorial calendar for 2016. WIP, seems.

@EFAFreelancers

#EFAchat Sorry to hear about the broken leg. Even a cold sets me behind a few days, so I can't imagine. Hope you're better now.

@WriterRuth

#EFAchat This is also the time to think about what, if anything, you want to do & spend in the way of client gifts or thank-you items.

@4ndyman

Seriously not happy that #SciFiChat and #EFAchat are happening simultaneously.

@EFAFreelancers

#EFAchat Welcome, @4ndyman and @KateJermain!

3:10 p.m. ET

@EFAFreelancers

#EFAchat Q2: When do you give client gifts, and how do you show your gratitude without breaking the budget?

@WriterRuth

#EFAchat Much better now, and it's about dang time, too!

@EFAFreelancers

#EFAchat: A1: Also need to collect on a few invoices, thank some referrers, and read about 50 mss queries for contest I held last month.

@WriterRuth

#EFAchat: A2: I usually send (inexpensive) client gifts in January, but might aim for Thanksgiving this year. I set a budget & stick to it.

@KateJermain

#EFAchat I'd love to chat about client gifts: what's appropriate, when to give, etc. I'm new at it.

@JenTheEditor

Hi #EFAchat! joining from sunny California

@WriterRuth

#EFAchat Now is also a good time to look for info about any changes in tax guidelines that would save or cost us \$.

@EFAFreelancers

@4ndyman #EFAchat, ha, understandable. I think SF/F readers make pretty brainy editors, so perhaps we should merge them :)

@JenTheEditor

I think client gift budgets are very personal thing. Total spend on the gifts should be a small fraction of what you made. #EFAchat

@EFAFreelancers

@KateJermain #EFAchat A2: Me, too. I remember @jamesfraleigh saying that he sends chocolates. I might do little olive oils, since I'm in CA.

@DavidRozansky

.@4ndyman Quick! Man the gunnels. Hard to port! We'll blow those scurvy #EFAchat dogs out of these waters. Ahrr. #SciFiChat

3:15 p.m. ET

@EFAFreelancers

#EFAchat Q3: Who needs to be thanked?

@EFAFreelancers

#EFAchat A2: One year I made business-logo notebooks, and clients loved them. I think they were just from CafePress, or similar.

@WriterRuth

#EFAchat No, no - I don't have to file tax payments. Those are done & dusted. I have to file receipts & related info. Piles are taking over!

@jamesfraleigh

Heavy proofing deadline today; sorry I can't be more active! #EFAchat

@JenTheEditor

I have a very small client list so I will be selecting gifts specific to each client rather than giving them the same thing. #EFAchat

@EFAFreelancers

@WriterRuth #EFAchat Staying updated on tax changes is important. Do you use a CPA, or is there a good online resource you recommend?

@WriterRuth

#EFAchat A3: Clients, colleagues who've been helpful or referred me to new projects - all should be thanked. Maybe vendors for some of us.

@EFAFreelancers

@jamesfraleigh #EFAchat That's okay! Thanks for saying hi!

@KristenTateSF

@WriterRuth #EFAchat Anyone have good sources for freelance tax info? I prefer to get my tax info in small steady doses, not deep dive

@WriterRuth

#EFAchat I just watch for tax info in business columns in the NYTimes, Washington Post, etc.

@JenTheEditor

My mom is a realtor, she used to hand deliver poinsettias to her clients. #EFAchat

@KateJermain

#EFAchat A3: I'm getting gifts for managing editors I've worked for this year, plus some writer's I've worked with. Keeping it small.

@EFAFreelancers

#EFAchat A3: I think I should thank the agent who has sent clients my way, plus ppl who gave me word-of-mouth biz.

@EFAFreelancers

#EFAchat A3 follow-up questions: Do you thank the editors who published freelance writing pieces?

3:20 p.m. ET

@EFAFreelancers

#EFAchat Q4: How much time do you plan to take off for the holidays?

@EFAFreelancers

If you're just joining us, welcome to Freelance Friday! Jump in at any time with hashtag #EFAchat.

@4ndyman

@EFAFreelancers #EFAchat A4: Freelancers get to take time off?

@JenTheEditor

@EFAFreelancers @KateJermain @jamesfraleigh I love the olive oil idea. I like to give consumables when I can. #EFAchat

@JenTheEditor

.@4ndyman @EFAFreelancers hahaha! #EFAchat

@EFAFreelancers

@4ndyman #EFAchat I know, shocking! One year, I had a resolution to work three solid weeks (+ weekends) then take one week off. It was ace.

@KateJermain

#EFAchat A3 followup: I find that thank you cards always go over well.

@JenMededit

A4. Every year I dream about taking the last 2 weeks of the year off. Last year managed 2 days off each week (plus weekend) #EFAchat

3:25 p.m. ET

@EFAFreelancers

#EFAchat Q5: How far in advance do you alert your clients of holiday plans?

@EFAFreelancers

@KateJermain #EFAchat Classy, simple--I like it. And it's true, sometimes it's great just to know you are appreciated.

@JenMededit

.@EFAFreelancers @4ndyman I really like @WriterRuth's idea of getting ahead of deadlines now, before holidays are here. #EFAchat

@EFAFreelancers

@JenMededit #EFAchat I know! And "days off" still involve checking e-mails and working on proposals.

@EFAFreelancers

#EFAchat A5: Since I schedule projects far in advance w/ individual authors, I just block off time; usually no need to tell them I'm away.

@JBirdwell

A4: @EFAFreelancers I plan on taking about a week or so off, but it will be hard for me to not check my emails at the airport! #EFAchat

@EFAFreelancers

#EFAchat As a follow on to @WriterRuth's suggestion, does anyone have any killer productivity tips that have been working for you?

@4ndyman

@KateJermain @EFAFreelancers #EFAchat I'm still working on bringing in enough dough to even take time off. :(

@EFAFreelancers

@4ndyman #EFAchat, it will happen! And if you're busy, the end of the year is also a good time to think about raising your 2016 rates.

@WriterRuth

#EFAchat A5: I don't notify people of holiday plans unless they ask. Then again, I don't travel often and rarely take holidays entirely off.

@KyraFreestar

#EFAchat: Best productivity for me is knowing body clock (early!) and prioritizing the actual editing, not business, 1st part of the day.

3:35 p.m. ET

@EFAFreelancers

#EFAchat Q6: Given that all of us seem to work through holidays, how do you recharge? It's important enough to include in Q4 planning.

@JenMededit

When I find my productivity lagging, I get up from my desk, take a break, and then sit back down and set a timer. @EFAFreelancers #EFAchat

@KyraFreestar

#EFAchat: @lepoole emphasizes this in her book on work-life balance, too. Sadly, it only works when I do it, you know? #freelancing

@WriterRuth

#EFAchat A4: Haven't thought about it much yet. Probably Thanksgvg Day, the first day of Chanukah & Xmas Day, but maybe not. I like working!

@EFAFreelancers

Welcome, @KyraFreestar! That's smart. Seems that 1-2 p.m. is the Bermuda Triangle of productivity for me. #EFAchat

@WriterRuth

#EFAchat A5: I work in spurts & take plenty of breaks - walking around apt or bldg, shopping, day trips - so I stay charged up consistently.

@EFAFreelancers

#EFAchat A5: I like working, too. Sometimes I just find myself getting grumpy about it, feeling pressure from other tasks (e.g., laundry...)

@KyraFreestar

@EFAFreelancers @threepenny Thanks! Sorry to barge in. Lunchtime in Seattle here. Bermuda Triangle immediately ahead. #EFAchat

@KateJermain

A5: I take walks. Or do yoga. Or work on my own creative projects. Or bake things I shouldn't eat. #EFAchat

@WriterRuth

#EFAchat A3: Editors who publish my freelance writing pieces are clients, so of course I thank them! When payment arrives & holidays/new yr.

@EFAFreelancers

@KyraFreestar #EFAchat it's great to have you here!

@4ndyman

#EFAchat A5: I do both writing and editing, so part of my "recharging" can involve switching from one to the other.

@4ndyman

#EFAchat A5: I also sit down at the piano and bang something out. Good stress relief.

3:45 p.m. ET

@EFAFreelancers

So far we've got tax check-in, filing, time off, gifts. #EFAchat Q7: What other end-of-year items is it important for us to think about?

@WriterRuth

#EFAchat A5: Oh, and regular infusions of chocolate. :)

@JenMededit

Great post by @sciEditor that will convince you to raise your rates in January.

<http://www.copyediting.com/how-raise-your-rates> ... #EFAchat

<https://twitter.com/efafreelancers/status/657640353701457920> ...

@baileyludlam

Geez, where did the time go! Almost missed #EFAchat Catching up.

@threepenny

@KateJermain #EFAchat Funny how snacking counts as an essential task. It's the same around here, too :)

@EFAFreelancers

@baileyludlam #EFAchat Welcome, Bailey!

@EFAFreelancers

#EFAchat A7: Looks like we can add "consider raising rates" to the list. A vendor of mine does it well, sending out a new PDF rate chart.

@baileyludlam

A5: Change of venue or switch from laptop to tablet (if possible). The smallest changes can make a big difference #EFAchat

@EFAFreelancers

#EFAchat A7: Also, November is NaNoWriMo. I've thought about making a marketing push on Twitter. Anyone have success w/ that?

@EditorMark

A5: Twitter chats, daily walks. About to go on a bike ride. Doing anything physical is great for the mind. #EFAchat

@4ndyman

#EFAchat A7: I've done editing work for vanity publishers. Untested amateur work is not something I want to pile onto my plate.

@EFAFreelancers

@EditorMark #EFAchat Welcome, Mark! Exercise happens pretty much every day around here, too--lets the mind cool off.

@JBirdwell

A5: I go for a walk or watch 30 Rock. It's funny how Tina Fey can restore creativity and energy for a project! #EFAchat

@EFAFreelancers

@4ndyman #EFAchat It's not all hack work. Sometimes the rough stories make for good critique projects, if you address basics, too. (1 of 2)

@EFAFreelancers

@4ndyman #EFAchat (2 of 2) Sometimes it's the newer writers who benefit the most, and are the most grateful. Just set expectations early.

@4ndyman

#EFAchat @EFAFreelancers I realize that was a broad generalization. NaNoWriMo can produce good stuff. I've done it myself. I'm just grumpy.

3:50 p.m. ET

@EFAFreelancers

#EFAchat Q8: What were your successes this year, and how do you plan to thank YOURSELF for your hard work?

@EFAFreelancers

@4ndyman #EFAchat No worries, but I know what you mean. I'm definitely selective when working with newer writers.

@EditorMark

A8: Interesting question. It's been a good year overall, but I never manage to give myself a Christmas bonus. #EFAchat

@WriterRuth

#EFAchat Lots of new work via referrals this yr, which is lovely - no effort, great returns. Reward self w chocolate & Wayne-time every day.

@KateJermain

@EFAFreelancers I work mostly with big publishers who say "our budget is xx, and that's that." Any tips for negotiating re: rates? #EFAchat

@KyraFreestar

.@EFAFreelancers @4ndyman A7: It becomes a new question: What do we do in 2016 to be less grumpy, less often? #freelancing #EFAchat

@EFAFreelancers

#EFAchat Q8: This year was the first year a lit agents has regularly referred clients to me, and rec'ed me to others at her agency.

@threepenny

@KateJermain #EFAchat This is one instance in which the EFA rate chart comes in handy. A raise is often w/in reasonable limits.

@threepenny

@KyraFreestar @4ndyman #EFAchat Scheduling time off, and actually taking it, works wonders for non-grumpiness.

@4ndyman

@KyraFreestar @EFAFreelancers #EFAchat Replace "in 2016" with "today" and you describe part of my morning routine.

@threepenny

@KateJermain #EFAchat Are you a member of the Binders FB group? There are a lot of success stories about negotiation there.

@KateJermain

A8: I worked hard to find and take on projects that excited me this year. I celebrate with wine, hiking, and bookstore time. #EFAchat

@threepenny

@EditorMark #EFAchat Since buying a house, all bonuses tend to go to property taxes. Bleh.

3:55 p.m. ET

@EFAFreelancers

#EFAchat BONUS: Are there any topics you'd like to see addressed in a future chat, or any particular kind of special guest?

@WriterRuth

#EFAchat A8: Might thank myself by doing less work & more play in the new year. I want to go back to some creative/arts pursuits eventually.

@JBirdwell

#EFAchat A8: This is the first year that I can consider myself a true freelance editor. I was dabbling last year. Now to go full time!

@EFAFreelancers

@WriterRuth #EFAchat Sounds like "buy client thank-you gifts" will be high on the Q4 list, then! That's great news.

@KateJermain

@JBirdwell Me too! :) #EFAchat

@EFAFreelancers

@WriterRuth #EFAchat Somehow it all works out. I write in the mornings, 7-10, which doesn't affect the day's work output that much, oddly.

@baileyludlam

A8: Testing the waters this year but plan to do freelance full-time next year. So for now small treats like hiking and new books. #EFAchat

@EFAFreelancers

#EFAchat Looks like we're wrapping up! I plan to put together a to-do list based on this chat. It'll be available in the transcript.

@EFAFreelancers

It's time to end today's #EFAchat. The written transcript will end here. Thanks for a great discussion! See you next time.