



Welcome to your VA & Freelancer Quick Start Guide!

Congratulations!

We're so excited to have you. You're here because you've finally decided that **yes**, you can create a freelance or VA business that brings you BOTH financial and lifestyle freedom. Both of us have worked hard to help our own businesses grow, and we'd love to give you all our shortcuts so you're not spending months in the bowels of Google with tons of conflicting information. Sound good?

Okay, just make us one promise...that you'll implement these strategies. That's the only way this business dream of yours is going to work. We promise, we'll be with you every step of the way.





xx Madelaine and Julie

INTRODUCTION

Working from home used to be something specifically for a very small section of the population, but it's not true anymore. With telecommuting on the rise, and more and more companies using the Internet as a way to create a global team, virtual work is fastly becoming **mainstream**.

The following resource will give you the EXACT steps you need to create a thriving business. There are lots of links and resources in this guide, and if you have any questions, please don't hesitate to drop us a note at support@createyourlaptoplife.com.

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PLANNING

Your plan should include 4 key things, and believe us when we say, your plan will change over time. So iron out these four details and then keep on moving towards that first client!

Your ideal client

Who you are going to help? Get really specific about their ideas, problems, preferences, etc. This doesn't mean you ONLY work with these people, but it helps you craft offers and messaging that are more powerful, then if you tried to talk to anyone and everyone.

Your ideal work environment

How much you want to work, what hours you want to keep, and what sort of office you need. These are small



but crucial details that will help you set boundaries, both in your work/life balance, and with your clients.

Your ideal financial goals

How much do you want to make each month, and therefore how much you need to sell in order to meet those goals? This can feel scary, but without goals, you statistically lower your chances of success.

Your offers

What skills will you offer to your clients and how much will they cost. For many people just starting out, an hourly retainer is a great way to arrange your services.

SETUP

It's easy to get completely overwhelmed and distracted by all the shiny objects out there that you can buy and use. This guide is going to give you the steps to creating the MINIMUM of what you should have as a business owner.

A Facebook Business Page

Creating a website can take a while, so we recommend you start with a Facebook business page and fill out all



the about and services sections so people can find information about you there.

A LinkedIn Profile

Another necessity is a profile on LinkedIn. Create a title for yourself {see below for our titles table) and then fill out all your work history, even if it's not directly related to what you're going to be doing.

A Website

We recommend WordPress*. You can get a hosting and domain for about \$110 a year and then create a website using a free theme. There are tons! If you have some money to spend, we recommend looking at the Genesis Framework.

Before we continue, let's just iron out what your TITLE will be. It can change, but for now...let's try to think of something more than just VA, since you'll find an income cap quickly hits you when you don't have a more descriptive title.

SOCIAL MEDIA 1. Social Media Manager 2. Facebook Ads Manager 3. Instagram Campaign Manager 4. Pinterest Campaign Manager	EVERYTHING WEBSITE 19. Website Designer 20. Website Developer 21. SEO Specialist VIDEO & AUDIO 22. Video Editor	ONLINE COURSES 34. Online Course Developer 35. Virtual Learning Expert 36. Educational Tech Specialist
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<p>5. Social Media Strategist</p> <p>ADMIN</p> <p>6. Virtual Executive Assistant</p> <p>7. Virtual Administrative Assistant</p> <p>8. Virtual Personal Assistant</p> <p>9. Virtual Receptionist</p> <p>10. Customer Service Specialist</p> <p>11. Transcriptionist</p> <p>TECH</p> <p>12. Online Tech Strategist</p> <p>13. Virtual technology manager</p> <p>14. Infusionsoft Specialist</p> <p>15. Leadpages Specialist</p> <p>16. Tech Support Specialist</p> <p>BRANDING AND DESIGN</p> <p>17. Brand Strategist</p> <p>18. Graphic Designer</p>	<p>23. Video Marketing Specialist</p> <p>24. Voice Over Specialist</p> <p>PROJECT MANAGEMENT</p> <p>25. Virtual Office Manager</p> <p>26. Online Business Manager (OBM)</p> <p>27. Project Manager</p> <p>28. Operations Manager</p> <p>PROFESSIONAL ROLES</p> <p>29. Legal Administration</p> <p>30. Virtual Paralegal</p> <p>31. Virtual Bookkeeper</p> <p>32. Virtual CPA</p> <p>33. Legal Consultant</p>	<p>MARKETING</p> <p>37. Launch Strategist</p> <p>38. Sales Funnel Specialist</p> <p>39. Online Marketing Specialist</p> <p>40. Marketing Consultant</p> <p>41. Digital Strategist</p> <p>COPYWRITING</p> <p>42. Freelance Writer</p> <p>43. Freelance Editor</p> <p>44. Copywriter</p> <p>45. Ghost Writer</p> <p>46. Conversion Copy Specialist</p> <p>HUMAN RESOURCES</p> <p>47. HR Assistant</p> <p>48. Human Resources Consultant</p> <p>49. On-boarding Specialist</p> <p>50. Virtual Team Expansion Consultant</p>
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MARKETING

There are lots of ways to get clients, but here are our top 3:



Facebook Groups

We recommend joining these [20 Facebook groups](#) and then responding to requests for hire.

Subcontracting & Networks of Freelancers

When you start to network with other freelancers, you quickly start to see JUST HOW MUCH work is out there. You can build relationships with other freelancers in your industry, and offer to subcontract when they have overflow. [Create Your Laptop Life](#) has two networks – our paid community, and our [free public Facebook group](#). We'd love to have you!

RFPs through IVAA.org

We recommend [you get a trial subscription](#), and then you can respond to clients RFPs, which are requests for proposals. Other sites like Upwork and Elance are similar, but we don't see the quality of jobs there that we do on IVAA.



CLIENT WORK

The most important things you need for onboarding clients:

A way to create quick and easy proposals

We LOVE **17hats**. It makes creating proposals, contracts, and invoices a cinch. Not only that, but it has time tracking built right in, plus workflows, email templates, and all kinds of other goodies. If you can swing it, do not pass go. Just **GRAB** it. If you don't have a budget for something paid, we recommend using a Google doc to create a nice template, and then sending that. When they've approved it, you can use Paypal invoices to collect partial payments over time or in one chunk.

A set of documents for welcoming them and setting expectations

A *How I Work* document will give your clients clear expectations about what to expect in terms of payment, communications, and hours. Outline everything from your average email response time, give them a general idea of how long certain tasks take, and how they can best reach out.



Feedback to get great testimonials

A successful business THRIVES on testimonials. Even before you have your first client, we recommend that you have a feedback form (like Google forms) ...again 17hats can do this as well... that asks them questions that create automatically beautiful testimonials!

Project Management Software

No matter how many clients you have, keeping track of tasks is easier with a PM software. You can start with a free Asana or Basecamp account, and you'll be sure NEVER to lose track of any details.

TOOLS

Below we've outlined tool packages for freelancers with a FREE only budget or MODEST INVESTMENT budget.

FREE

- **Planning**
Google Docs, Google Calendar, Google Sheets
- **Setup**
Facebook Business Page, LinkedIn Profile



- **Marketing**

Facebook Groups, Free Website at en.wordpress.com

- **Work**

Paypal Invoices, Google Docs, Free Basecamp account

MODEST

- **Planning**

Google Docs, Google Calendar, Google Sheets.

- **Setup**

Facebook Business Page, LinkedIn Profile, [Hosting with WebHosting Hub](#) {ask us how you can get a free year!}, Genesis Framework on WordPress {ask about our Design & WordPress classes}.

- **Marketing**

Facebook Groups, IVAA.org, [Acuity](#) calendar for discovery call bookings.

- **Work**

[17hats](#) connected with Paypal or Stripe, Basecamp.

SKILLS



Some of you might be saying, but how do I get the skills I need? I can do admin work, but I need more tech skills. If this is the case, here's our down and dirty advice.

#1 Offer to help someone for free (like a fellow freelancer) and learn on the go. It's one of the fastest ways!

#2 Take one of our skills classes and learn ONE thing first, and then move on to something a bit harder.

#3 Sign up for free trials of programs you want to learn. Study, study, study, and watch all the tutorials and use your trial to get as much experience as you can.

#4 Go into Facebook groups and write down a list of all the software platforms you hear mentioned. We can give you a few right off the bat to tackle...

- WordPress - website design and blogging
- Clickfunnels - sales funnels, webinars, and landing pages
- Mailchimp - email marketing
- ConvertKit - email marketing and content upgrades
- Web Design with Genesis - WordPress Design



- Facebook Ads
- LeadPages - Landing Pages and Sales Pages
- Active Campaign - Email Marketing
- Ontraport - Customer Relationship Manager and Email Marketing
- Infusionsoft - Customer Relationship Manager and Email Marketing
- Canva - Design and PDF's
- Photoshop - Design
- Trello - Project Management
- Asana - Project Management
- Basecamp - Project Management
- Microsoft Suite - Spreadsheets, Docs, and Presentations
- Google Drive - Spreadsheets, Docs, and Presentations
- Dropbox - Storage
- Facebook, Twitter, Instagram, Pinterest - Social Media
- Edgar, Hootsuite - Social Media
- Direct-Response Copywriting - Sales Pages, Facebook Ads, Landing Pages
- Web Copy - For About pages, bios, services, taglines, and blog posts



MINDSET

95% of a successful business happens between the ears. Some of the best ways to get in the mindset of a successful freelancer is to do the following...

BOOKS

Read books that have to do with online marketing, design, start ups, and freelancing. Here's a few recommendations that we love...

- **Rework**
by Jason Fried and David Heinemeier Hansson
- **The 4-hour Workweek**
by Timothy Ferriss
- **Lean In**
by Sheryl Sandberg
- **#Girlboss**
by Sophia Amoruso
- **The \$100 Startup**
by Chris Guillebeau
- **The 7 Day Startup**
by Dan Norris
- **Virtual Freedom**
by Chris Ducker
- **Remote**
by Jason Fried and David Heinemeier Hansson



- **Dot Com Secrets**
by Russell Brunson

MENTORS

Get a mentor! There's no other way to fast track your success, than to hang in the company of people who are doing what you want to be doing in the next few years. That is the whole mission and vision behind **Create Your Laptop Life** and we'd love to have you join us!

COMMUNITY

There's something powerful that happens when you start to hang around people who are doing what you want to be doing. Who are meeting their goals and going further than they thought they could. This kind of community is one of the key predictors of longterm success, so we invite you into ours. The transformation is something you have to experience to believe.

Now let's get 'er done!

- Step One: Buy Domain
- Step Two: Purchase Hosting
- Step Three: Fill Out the Freelance Business Planning Workbook
- Step Four: Setup WordPress



- ❑ Step Five: Install and Customize Your Theme
- ❑ Step Six: Add Your Content
- ❑ Step Seven: Setup a Facebook Biz Page & LinkedIn Page
- ❑ Step Eight: Join our top 20 Facebook Groups
- ❑ Step Nine: Get a Mentor
- ❑ Step Ten: Take a Skills Course
- ❑ Step Eleven: Use our Proposal Bundle to Craft Your Offers
- ❑ Step Twelve: Setup Your Payment Gateway and Onboarding Process
- ❑ Step Thirteen: Start Prospecting in Groups!