



Dream of Travel Writing

Freelance Business Systems: The Surprising Secrets of Servicing Customers as a Freelancer

Today we're continuing our Freelance Business Systems series and talking about customer service. Now, I feel kind of like a broken record. I feel like I say this every week. But I really have found doing the research and putting together the slides for this webinar that I think this is a big missing piece for a lot of freelance writers, particularly in terms of, on the one hand, things that take up a lot of time.

As we go through this Freelance Business Systems series, we've been talking, of course, about systems, and how to create ways for yourself to not spend more time than necessary. And what that means is going to be a little bit different for everyone, of course, but how does not spending more time than necessary, which really could be a very small fraction of the time that you're currently spending depending on what the activity is, on something because you have a system for it, because you have discovered what is the most efficacious way for that thing to be done and you do the same every time, and there's a way for it to be done without not only reinventing the wheel, but emotions coming in, trying to figure out what you're doing every time. All of these things.

So we're really looking with all of these systems, webinars, and how to create a time savings, but also how the systems can grow your business. And I feel like the area of interacting with clients is something that I speak to people a lot about on coaching calls, but it's something that I don't strictly hear people asking overt questions about having issues with. So let me explain. People, typically, when it comes to client interaction issues or customer service, depending what you want to call it, I think people often think of it as more client interaction and customer service.

But when it comes to those types of issues, more frequently, I see people acting as if the things that they run into, they're always telling me this whole situation with all sorts of background and things like this, and people act as if that is a situational thing. But I can tell you, because I've coached people and watched quite a few freelancers go from not having the client, creating the marketing system to get the client, getting the first interaction with the client over email and getting that phone call, signing the deal after back and forth emails and proposals, and then getting that client engagement going. I've seen throughout the whole process what happens at each step of the way. And then when these client interaction issues come up, your clients doing something deleterious to the relationship, not providing something they're supposed to or anything like this, I can see how it traces back to something, a customer service issue, a client interaction issue, whatever you want to call it, that happened earlier on in the relationship that could have been fixed with a system.

So with a lot of people that I coach who are more, if you want to call it further along, or advanced, or experienced, or what have you, with doing their own sort of custom build, they could pitch a client, or maybe they get somebody off a job billboard, and then they build out their relationship pass what was listed as the original job ad. But the people that I work with who are in those sort of settings who do this type of client work, again and again, tend to get



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by somewhere in the range of like the third or fifth client that they've gotten themselves, if not earlier, the sense that they need to have systems for these things.

Because there are aspects of the client relationship that go, whether it's absolutely sour, just a little bit off the tracks, or whatever, further down the line that they see could have been nipped in the bud if some sort of groundwork was laid earlier on. And this is where we get into customer service as a freelancer. So it sounds like a very, not only unsexy, everybody hates customer service, right, or whatever that is, but it sounds like a very unsexy thing, customer service. But it is literally the lifeblood of your business as a freelance writer, particularly because, as we'll see of what really the heart of customer service is.

So today we're going to look at...we just talked now kind of a little bit about what customer service looks like for freelancers kind of just in a conceptual way. But we're going to look at how this idea of a customer service department fits into your bigger picture in terms of what you do as a freelancer.

And we're going to look at kind of I've named it here the missing link between classical customer service. And what I mean by that is what happens in companies, particularly sort of companies that have a built out a customer service department, you know, in particular customer service managers who have things that they look at to ensure and customer service, rather than something haphazard, that just kind of happens as customers have questions. But we're going to look at kind of the missing link between that "classic customer service" and what's typically happening for freelance writers.

And then I usually do this earlier on in these Freelance Business Systems webinar. But I've got a slide kind of looking at some very sort of idealistic, I don't know if I want to say idealistic, but, you know, very conceptual, smoothed over definitions of what customer service is that have some very enlightening things, I believe, to show in terms of the relationship, again, between customer service and what freelancers are currently doing in that perspective. And then I've got quite a couple slides here on some low-hanging fruit to get started with to invigorate this area of your business.

There's always been a lot out there about how to write, you know, how to write about travel.

But how to run a business as a travel writer was something that I didn't see so often. And so in this Freelance Business Systems series, we're really laying the groundwork for what that means. I've jokingly kind of called it an MBA in travel writing. But we're going through department by department of what a "real business" would be set up, I mean, sort of a corporation, and looking at what aspects of that you do need to have in your freelance business, and, particularly, how attending to some of those things in a more sort of classic setting, if you will, can actually answer a lot of the problems that you face with your freelance writing.



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And so as I was mentioning, in one-on-one coaching, I often find myself talking with people about specific situations that they found themselves in and what to do to get themselves out of them. And a lot of them often do have to do with freelance writing, sometimes they have to do with marketing or something like that. But often they do have to do with their freelance writing clients. And it's always interesting because people that I've coached for a long time who not only are sort of used to the way that I would ask them questions or how we would work with a problem, but also are kind of used to working through their own business problems.

Once they asked me about some sticky client situation that they find themselves in, we started talking about it, the answer often becomes really apparent to them. And part of it is because, as I mentioned, in our one-on-one coaching, there's a lot of learning, or not learning, but, you know, learning through doing of solving your business problem so that you can also do it when you're not on the phone with me, of course. Like it doesn't have to only have while I'm there.

But something that I see, particularly with these client situations, like I mentioned earlier, is that there's certain ones that will come up again and again. And there's certain ones that are just entirely new. Sometimes something really, really haywire happens. And we're also talking in this webinar today how to deal with something like that where something is really off the tracks. And it's not something kind of logical where, you know, there's a missing piece of information that's led to the situation.

But what I want to talk through today is how to set yourself up as a freelance writer, whether you work with companies, whether you work with magazines, whether you work with a mix of both, whether you find your clients yourself, whether you respond to ads or call for pitches, whatever that is, I want to talk about how to lay the groundwork to have the best interactions with your clients both in a regular setting, as well as in those sort of over the top, unusual, you know, the shit has hit the fan sort of situations.

So as we go in today's webinar, before we start talking about customer service, specifically, I just want to take a second to look again at this Freelance Business Systems series that we're doing, why we're doing it and sort of position what we're going to talk about today very narrowly within that for a reason.

So when we first started the series, which I was just looking through my own slides, was all the way back in March or April, actually and now we're all the way in August. This is, like I said, me and travel writing, right? We talked about this idea of looking at these different departments that we're talking about, whether it's sales, marketing, human resources, legal, customer service, what have you, and thinking about this idea that whether you intended to or not, when you started being a freelance writing service provider, as in, you create a product, which is your written words, that you then sell to a company or you offer sort of, whether



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you intend to or not, strategy in terms of helping the client figure out what exactly it is that they need to be covering. And then delivering that strategy through written words to the client, you elected to fill a number of roles that you might not have been aware that you signed on the dotted line a job contract for.

And so, in the first webinar in this series, one of the things that we talked about was this idea of as we go through each department, writing down the things that you think that you really need to be doing for each of those things, and sort of creating a job description for yourself of each of these roles that you fill.

And in today's webinar, you'll see this is what we've covered so far in order, we've gone from finance, accounting, purchasing, so really starting with the number side of things, through more of the how things work, operations, quality control, human resources, and legal, and IT, and now we're this communications bed. And I've got customer service at the end of communications, which we've started with sales and we've moved through marketing and PR for a reason, because, really, communicating with customers is something that happens after you have customers, of course, right?

And within that, we have to also look at this idea that as much as this comes sort of at the end of that timeline of getting customers of setting things up, it also feeds back into a number of these other things, right? So you know how well you handle your customers is going to affect your bottom line in terms of retaining the customers, which is going to affect your finance, right, it's going to affect your cash projections. How well you set the stage for your customers to pay their bill on time and is going to affect your accounting, whether you have cash in the bank is going to affect your purchasing, how smoothly things go with your customers is going to affect your operations, how well you have managed to unearth your clients expectations and fulfill them and make it clear that you're fulfilling them is going to affect quality control, and so on and so forth.

And so, throughout this series, while each thing has really built on itself in a lot of ways, customer service is something that really touches these other areas in a very different way than some of the other things that we've been talking about. And I just kind of wanted to start by introducing that today. Because we, in a way, forget customer service kind of feels like something that you do when you're young and you're a clerk, you know, in an ice cream store or something like that. But customer service is really the heart of what you're doing as a freelance writer. I know it feels like the writing is the heart of what you're doing. But if you don't have clients, then it's not, right? And it can often feel like, "Well, then that means marketing must be the heart of what I'm doing."

But there's often other ways to find clients, right? You can find clients incidentally and whatnot. But the way that you service them, I know that's a little inappropriate, but, you know, this is kind of what people say. But the way that you service those clients is what



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allows all of these other parts of your business to happen, okay? So I just want to also point out that if you don't yet have freelance clients, I know a number of people who follow us are looking to transition out of a career doing something else in the freelance writing, or perhaps they're doing a little bit of freelance writing, but mostly doing something else. Maybe you're doing a different type of freelance thing. And so this will also be apropos in that setting.

But if you don't have freelance clients at all, this webinar might feel a bit theoretical compared to some of the other ones we had, where you can kind of imagine these things a bit more because you haven't yet had conversation with your clients, you don't know what sort of issues your clients have that you're answering questions about. So I just want to say, if that is your case, I want to emphasize that there are a number of things that even people who have freelance clients already run into in terms of not really understanding where their clients are coming from, what will make their client happy, what their clients are looking for, what their clients mean when they say something in particular, all sorts of things like that, that you can certainly start thinking about at this point.

And in fact, it's really great for you to start thinking about that at this point because it will help you a lot down the line. However, of course, if you haven't even interacted at all with potential clients that you want to write for magazines, and all you know about how editors think is, I don't know, this webinar or whatever, then this is going to be more difficult.

But it's really useful to lay this groundwork and start out thinking about your dealings with customers this way, because it will, like I said, save you a lot of headaches down the line if you begin like this. I do just want to say, however, I know a lot of you have, I don't want to call it a tendency, but a certain enjoyment from setting up sort of administrative internal, not client-facing projects for yourself, that you need to do before you get clients, whether that's that your website needs to be going, whatever...that's usually the most common one I see.

But whatever it is, okay, that you need to have your portfolio all fancied up, your resume, something like that. So I just want to be really clear that everything I'm talking about today, in terms of systems you can set up for your client interactions, customer service, whatever that is, these are not meant to be things that you must do before you ever have a client. They will be enriched by client interactions, you will learn over time to do the feedback loop.

So do not feel like this is one more thing you have to do before you do your marketing. I also want to say that, all right? So, if we were to distill everything I've looked at for this call tonight, other sort of reading that I've done in the past, I would say that great customer service, according to most people, comes down to two things. And I've also sort of filtered this for the type of customer service or client interaction, whatever you wanna call it, that you guys will be doing.



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On the one hand is training. And again, not what you want to hear more work to put on your plate but we'll talk about this in a second. And this is also stuff, this stuff meaning this training, is the kind of thing that you can do in the background and kind of a small type of work that you do during times when your brain is otherwise sort of non-functional, okay, and all of this training listed here, these are all things that will help you not only in other areas, such as sales and marketing, things like that, but also in your whole life. So it's kind of a good type of thing to be looking into. Okay?

So training, whether it's communication best practices, training about your product. So for instance, you know, this is a kind of thing where I sometimes run into people who want to write an article, maybe have even been assigned an article, maybe I'm thinking of a particular case here, have even been writing a column or some columns or some regular articles for an outlet for quite some time.

And they really do not have a good idea of how to put together an article, or how to approach writing an article, every time they do it, it's as if they're doing it completely from scratch, it's incredibly painful, it takes them dozens of hours tracing for which they get paid a couple hundred dollars, and it's just very, very painful. So training about your product is also being trained in what you are providing, how that is supposed to work, and also what the expectations for client are about that product.

So, for instance, how do editors work with freelancers more generally? What are their expectations in terms of the work that a writer is putting into this? You know, that kind of thing. Conflict resolution, psychology, and behavioral dynamics. These are, again, sort of, you know, mouthful words or phrases in this case, as well. And they sound kind of like big things that you might research if you're doing a master's in international diplomacy or something like that.

But I can tell you and I know I talked about these things in webinars a lot, all these kind of little psychological things are just mind-blowing in terms of tiny tweaks you can learn that will just give you not only a totally different outlook on some interactions that you're having and sort of how to handle them. But also, I find a lot of people come to me with client interaction situations, where they just don't understand why a client is doing something. This is a really interesting sort of case. And if it hasn't happened to you, you might not know exactly what I'm talking about.

But, you know, it's always fascinating to me, when people come to me with a situation, and more than having a solution for whatever is going on, they're more concerned with understanding why this thing has happened. Okay? So if you're that kind of person, if you feel like when you are dealing with client issues, you just get really stuck on what's happening, and you just feel like you can't deal with it until you understand how a client would possibly do such a thing, then this can be really helpful.



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And one book by somebody who I've met who is a good friend of a good friend of mine that's really great about this, called "Captivate." And it's by Vanessa van Edwards. And she just went absolutely over the top with packing everything you would need. I think she's got exercises, she's got takeaways at the end of chapters. It's really well organized, whether you're skimming or you're reading the whole thing. The anecdotes are super enlightening. It's based on tons of studies.

And she is a person who is just obsessed with being fascinating. Of course, the title of her book is "Captivate." But it's really a lot about behavioral dynamics and how to captivate people. And so, that's definitely some reading that I recommend if you want to get started learning more about this. Obviously, there's tons that you can read about any of these topics.

And so the one caveat that I would say here is to make sure that if you're going to go down the rabbit hole learning here or training that you are focusing on that, something that has exercises, something that has takeaways, and preferably something that is quite researched and well regarded so that your time isn't kind of spent in two hours of, you know, first odd pages of Google results that are blog posts that say four things as bullet points and none of them are particularly useful, or anything you didn't know before.

Now, the second thing here is really something that I want you guys to kind of take home, okay? Because a lot of times right up there next to "I don't understand why this person is doing this thing so I can't do anything going forward because I'm just stuck in a spiral here" is this idea of feeling like any complaint or issue, less complaint, but even issue, that a customer has is somehow a reflection on your quality of work overall or your quality of being a human being, okay?

Now, this was something that I read...I've sort of paraphrased it here. But this idea that customer service is not defending a company from complaints, it's helping people with their problems. And the thing that I want you to kind of internalize when, you know, whether your editor is asking for you for something that just seems absolutely impossible and that has something to do with, you know, your piece doesn't this and they want it to this and you know that there's just no way to do that. Rather than look at it as a failing that you didn't do X, Y, Z, that you didn't include it, that you didn't do that research, that you didn't think that was necessary, whatever that is, get to the heart of what the editor needs. Why is the editor asking that? Do they really just need a source? Do they really just need a character?

And the one that they're asking you to elaborate on that's impossible to get ahold of or that's really not that interesting, or that has some crazy problems or really doesn't make sense to focus on that person, is that just one they've picked because it seems interesting? What other character can you develop for them? What other person maybe isn't even included in the piece that you met along the way that you could develop out for them that they don't even



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know is way better than the person that they're asking you to write more about, for instance, okay?

You know, another one on sort of the delivery side, there was somebody that I'm working with currently, but we were talking about how she was working on a guidebook and ran into this thing where... I mean, writing a guidebook from scratch for an entire country, particularly a large country, is an enormous endeavor.

She's been working on this thing for more than a year. And finally, the entire draft, and, you know, all 13, 14, 15 chapters of the book is ready, it's in with her editor, she has a deadline for when the final, final version of the book is supposed to be finished, and she's not received any chapter at it from her editor.

They're obviously going to come but she's now gotten to the point or she had now gotten to the point when we were talking about this, where the number of weeks remaining between her deadline and the time we were discussing this was fewer than the number of chapters that she needed to work on. And she had done one chapter's worth of edits. So she knew approximately how much this was. And it was basically going to need to be the only thing she did for a certain week. And she had trips coming up and she had other work to do.

And so we had to sort of sit there and, you know, create this whole email for this editor, laying out for the editor that, you know, what the editor wants is great copy, right? But she's not going to be able to deliver that if she doesn't start getting version soon. And in this case, it's kind of the reverse, right, where she's actually complaining to her editor that she hasn't gotten the edits yet, right? But the way that we needed to approach it, because obviously the editor is her client, is a way where we are helping the editor with what the editor needs, okay?

So in this case, the editor needs to have the book ready on time, she wants to have the best book possible. So this writer was like, "How can I educate this editor about what I need in order to make that happen for her? How can I make sure the editor knows that I'm prioritizing what she needs, which is this great book, rather than have this just blow up in my face like 10 weeks from now, where I'm just frantically trying to get this book done and I don't have enough time, I can't fulfill my other commitments and it's not what the editor wants, and we all get upset?"

So what I was just describing with this book example is proactive customer service. And this is something I see happen a lot actually, is there's a situation going on with a writer's client and there's going to be a train wreck. It can be seen in the future or it can be seen that there's a place where the tracks branch, and it could go either way, and these proactive steps are not taken. So this is also something that is an integral part of your customer service as a freelance



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writer, is seeing these things that may happen and helping to steer the client around this important fence in the road.

So I know that this is like the kind of webinar that a lot of you don't even want to tune in on because you're like, "Oh, my God, clients stress me up so much, like I don't even want to talk about this." But we can fix that, we can fix that. We can make it easy for you. All right? But it starts with this. First a deep breath and then really thinking.

It often can help if you visualize an individual human, whether you know them or not, you can create a fake individual human as your client, whether this is a magazine editor, somebody who works in-house at a company, whatever that is, you picture them, you picture what their job is, you think of all of the things that are involved in your job.

And then you think about how you overlap with them, how what you do overlaps with their job and what you can do to make that job easier for them in terms of problems that they have, that you can help solve. So this can sometimes be an opportunity to upsell your client. Like, let's say, you see, I use this example a lot, let's say that you're doing blog posts for company and you see that their social media is atrocious, that they're just posting, like, check out the new post on our blog, :URL.

You can say, "Hey, I know that you'd like to get more traffic to this blog post. Could I also, you know, for this extra fee, provide you with some tweets that you can load that will drive people to this post?" Things like that. That is going to get you more money, but it's because it's centered on helping your client with a problem that they really have. Now, there's a lot of problems that your client can really have. And some of them have to do with your deliverable in a way that you don't realize. So I often have people give me something in a file format that I'm not going to use.

And what I mean by that is when I'm online, I have a lot of things that I need to do, they can only be done online. And there's things that I prefer to do offline, particularly editing, or all sorts of things like that. And I have people give me things that are going to require me to really have a deep thing, can preferably have the internet off, to work on, and they give it to me as a Google Doc.

Now, if anybody ever asked me, "How should I submit this to you where a Google Doc?" whatever, I will tell them, "If at all possible, please send it to me in the body of an email," because I can look at it anywhere, anytime, and it'll be done on my phone. But so many people don't ask that. They just assume, they assume that the client works like them. They assume that however they provided to the client, it won't be a problem because the client can figure out. There's so many assumptions that go on.

And I really frequently see, like I mentioned, a lot of client relationships go off the deep end because of this. This can even come down to, for instance, is your client really busy? For



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instance, a magazine editor, but it can also be somebody who does, you know, communications for a company. Is your client so busy that their email is back to, or typically all lowercase and lacking in a final period at the end because they're just trying to get this email out the door?

If you send them an email that's 12 paragraphs long and each paragraph has 12 lines, are you helping your client or you're just creating a new problem for them? So there's a lot of different ways that we can think about this. Now, this slide is super, super small. I'm in WebinarJam myself, I can actually read it. I hope you guys can as well.

Because I gave a couple different examples now, actually more than a couple, of customer service and sort of potential customer service sticking points for freelance writers.

But now I want to take a step back for a second and really drill at the heart of what we want to do with customer service here. So this definition I have here at the top is my favorite. That's why it's at the top, it's also super concise. So this one says customer service is timely, empathetic, help, it keeps the customers' needs at the forefront of every interaction. One sentence, right? You could just write it on the wall.

So that every time you get an email from editor, even if it's a rejection, even if it's, you know, we just ran a piece just like this, you can say, "Okay, well, what is my customer need here?" You know, you can say, if you're empathetic, "Oh, that's so great. I'm so glad to hear you'll be covering this thing," and, you know, that you that you've already got that on the schedule, right? That's empathetic. Because the person has got this thing checked off their list. That's great for them. Something I never see writers seem to say.

And then there's a question you can ask, of course, you know, "Are there other sections that you're looking to fill?" But you can also just say, "Are there other sections that you're looking to fill? Here's another pitch for your blah, blah, blah, section." And scratch both edges. So you're bold.

If the client has something that they're thinking about right now, the magazine editor in this case, that they do need some help with, then they can tell you. But at the same time, if they don't, you're also helping them have more ideas, right? So you're thinking of, what is my client? What is this magazine editor going to need? They're going to need a different story. Obviously, they have other sections to fill. This is done. They've got this.

What have they not got, you know, pardon my language, but you know what I mean there. Customer service is the process of ensuring customer satisfaction with a product or service. Often customer service takes place while performing a transaction for the customer, such as making a sale or returning an item.



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Customer service can take the form of an in-person interaction, a phone call, self-service systems, or by other means. Ideally, customer service should be a one-stop endeavor for the customer. For example, if a customer calls a helpline regarding a problem with a product, the customer service representative should follow through with the customer until the issue is fully resolved. So there's a lot in this particular definition here that I want to unpack.

So customer service can take place and, often does, while performing a transaction for the customer. So for us as writers that can take a long time. If you're working with an editor, or if you're working with a company to produce content for them, the period in which you're performing that transaction is quite long.

And that's why client interaction, customer service, whatever you want to call it, is such a huge and crucial part of our business. Now, it can take the form of an in person interaction, a phone call, self-service systems or by other means. This is a really interesting thing. I don't see too many freelance writers, I don't want to say zero, but I don't see too many freelance writers using self-service systems for that many things that they could. For instance, invoicing.

Now, obviously, some places are going to have requirements for their invoicing, and please follow them if they do. But there are some great systems out there that cannot only invoice your clients, they can do it automatically every month, or every period, or whatever, and also do the follow up for you so that you don't have to worry about that, that you don't have to feel about it.

But also so that you can write a script once for what you want them to say and have the same thing very nicely sent out to the customer every month. Now, this next thing on here in this definition that I really like is this idea that it should be a one-stop endeavor that you should follow through until the issue is fully resolved. This is also a thing where I see people kind of, whether they're feeling like they're dropping the ball or whether it kind of happens incidentally, that there's something that comes up in the editor.

And this is like those ticking time bombs that I've seen, where whether senate or a company or an editor externally, you know, in a magazine, there's this idea that something is happening, right?

So it could be that as you've been researching an article, you've run into something that was in the pitch that is clearly not gonna work out and you're not including, and rather than discuss that with the editor, you kind of submit the piece and wait to see. So that's like a pretty obvious ticking time bomb. But what would be the kind of thing where an editor, particularly of a magazine, can come to you with a problem?

So let's say that an editor has come to you because they need some sort of edit. Let's say they need new photographs for something. Now, you could then go back into your cave, so to say,



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look through all your images again, find some new photographs and submit them. Or you could have a very open communication about what those need to be, send them a sample, say, "Is this more what you're looking for?" before you send them 20. If they don't like that, send them something else.

You know, ask them sort of what exactly is it that they're looking for that's not in the images that you already submitted. Gosh, that's a scary question. What did I do wrong? Like, nobody wants to hear that. But that is keeping the customers' needs at heart. And following up afterwards and making sure to say, rather than just hear more photos, you know, "Did those work out for you?" This kind of thing. All right? Customer service is the provision of service to customers before, during, and after a purchase. The perception of success of such interactions is dependent on employees who can adjust themselves to the personalities of the guest.

From the point of view of an overall sales process engineering effort, customer service plays an important role in an organization's ability to generate income and revenue. From that perspective, customer service should be included as part of an overall approach to systemic improvement. So this is obviously why we're talking about customer service today and why we're talking about it in this vein because it is really crucial to repeat business from your customers, right? All editors on all panels at conferences where writers are listening to editors talk about what they're looking for, the number one most repeated thing and also the thing that editors will always agree on, whereas they don't agree on a lot of other things, is that they just want someone who's easy to work with. Literally, this is the number one thing that editors say.

And it's important to think about this before, during, and after purchase, because there's also some writers who act differently to editors depending on where they are in this cycle. And I don't necessarily mean it in a malicious way. But sometimes it's just kind of like anxiety that can come out, particularly, you know, if you're following up at an invoice. I knew people who are new to the magazine, a magazine that's going to pay on publication, they will sit on their hands and wait for the first check to come. And they will not speak to their editor about anything until that first check comes because they're kind of so suspicious about that. Well, I absolutely get that. And there are magazines out there that can't pay people or that don't pay people rather than they can't pay people. There are some magazines that can't be people. But I'm talking more about the ones that just don't and they should.

There's a lot of other things to do in that situation, rather than go on absolute silence to your editor until the check comes and then be like, "Oh, yes, maybe now I should send this person a new pitch, even though I haven't communicated with them for eight months. And I'm thinking about them because I just got the check but they really have no reason to be thinking about me." Oh, there's a word missing here.



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I think customer support is a range of customer services to assist customers in being cost effective and correct use of a product. It includes assistance in planning, installation, training, troubleshooting, maintenance, upgrading, and disposal of a product. So I really like this definition for a couple of different reasons. Because it talks about this idea of assisting customers and making cost effective and correct use of a product.

So if you, for instance, are working with a company, who doesn't have a great content strategy, or who has somebody not super experienced running things, or who maybe just has like a total wacko way that they manage their content, like the keywords that they're giving you to use, whatever that is, educating them about what content you're going to provide them, how best to use it, how to onboard that, how to communicate the value to other people in the team is part of your customer service.

Customer service is the provision of service to customers before, during, and after the purchase of a product. We said this earlier. Customer service is a series of activities designed to enhance the experience of the customers. The sole purpose of customer service is to meet the expectations of customers, they are satisfied with the outcome.

I love thinking about this in the case of freelance writers. How often are you thinking about really specifically what are my clients' expectations for this particular deliverable right now, right here? And how can I check back with them to make sure I've satisfied this outcome? I was just interviewing a writer the other day and she asked me this very literally.

She said, "What are your success measures for..." And she asked me about something very, very specific. And I have never, ever, ever, when hiring anybody, been asked that question before and quite that way. And it was great. Because then she, you know, was saying how, basically, you know, like how she always wants to know that and to work around that. And that's great. Because that literally is what... I mean, obviously, it's what I teach when we talk about content marketing, figure out what exactly their problem is and what is going to look right for them and make them look great to their boss and to their customers.

But how often do we think about doing that with a magazine editor, right? Saying, "Great. Thank you so much for giving me this assignment. What would make this stand out to you as one of the best submissions you received?" Or something like that. Such a simple, simple question. You know, maybe they think it's weird, maybe they don't respond, who knows, but they could and then you could knock it out of the park because now you know it's important to that editor. Last one here.

Customer service is a more complex department that doesn't only provide support to the customers but also contributes towards the strategic goals of the company. The customer service department, which provides day-to-day guidance to customers, may be part of a



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larger customer service department that makes those activities part of the organization's mission.

The customer service department gets beyond helping the customer solve a particular issue. They exchange ideas and help the user to get more value out of the product or service they purchased. This idea again of getting more value, I can't tell you how often the people who stay with editors and move up, whether that's longer articles or tomorrow work or whatever that is, it's because they look at this, "How can they help the person that they are working for get more value?"

So I have two slides here that I'm just going to go through really quickly that are kind of expanding on kind of what classical customer service people deal with. And I wanted to have this in here. And then we'll talk more again about how this works specifically for freelance writers, not just because in this series, we're kind of looking at how things work in the classical case, and then translating them.

But also because, after everything we've talked about, I want to kind of say these challenges in customer service and these metrics that customer service people are judged on to you and have you kind of think about them in your own space. Anything that lights up for you, great, but I'm just going to kind of go through them. So some common challenges in customer service include customers having to re-explain their issues, for instance, after being passed from one agent to another.

So this is the kind of thing that I hear freelance writers complain about more about, but I can definitely tell you, as a person who hires people that I see on the other side as well, where you might find that the person that you're working with is having to tell you the same thing more than once, but you don't necessarily realize that they're telling it to you more than once maybe because they're saying it two different ways, because whatever they said the previous time you didn't get it.

So this is definitely something to look out for. If somebody that is a client of yours is telling you the same thing more than once, that's a sign that they're getting frustrated, and that it's becoming a customer service issue, and you need to do something about it. Callers asking questions which agents cannot answer. This is another one. I've seen, you know, whether as a test or not, but editors coming back to freelance pitches with quite a lot of questions about the article topic and how it would be executed.

And often people are like, "Oh, my God, I don't know how to answer this." Or they pitched an editor and then...at a trade magazine, for instance, with the letter of introduction rather than a pitch. And then the trade magazine editor says, "Great, can you send me some pitches based on the editorial calendar for my November issue?" And then the writer just goes deer



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in headlights eyes and doesn't know what to do for weeks, and then decides it's too late and gives up.

Customer calls being placed on hold. People generally hate being placed on hold while waiting to connect to an agent. This is this whole hurry up and wait, right? Where, like, obviously we send editors emails, and then we have to wait for, you know, eight months for them to get back to our pitch. And then they write to us and expect a response in five minutes because they're currently thinking about this thing.

Customers require to have spend too much effort in order to resolve an issue. I've seen some things like this where, interestingly, like writers go in Facebook groups and complain about how an editor completely rewrote their piece that they submitted and how they hate the edits, and they're wrong, or they're factually inaccurate, or something like this, and the writer is complaining about it. But the editor is probably not very happy that they had to go rewrite this whole piece as well. And there's probably a reason that they rewrote it. And it usually goes back to what we're talking about on the last slide. What is their success measure? What do they need to see there that you didn't provide?

Agents not accurately understanding customer issues. Customers are not always able to clearly convey the technical details of their issues, leading to repetition, confusion, frustration. So, like, how does this play out with editors? This is something that we talk about really a lot here at Dream of Travel Writing, particularly in terms of journalistic detail.

This is a term that I just absolutely made up because I always see editors asking for the same thing in words that writers totally don't construe in the same way that the editors mean them. So this is another thing. An editor might be asking you for something, particularly if they've sent something back for edits more than once. They're clearly asking for something that they can't convey in the same words that you use. So how can you figure out what it is that they're looking for?

And then their customer service challenges, angry and demanding customers. Pacifying and pleasing angry customers can be particularly challenging. So angry and demanding customers. I see a lot of people construe an editor maybe as being angry or frustrated when they might just be short on time.

But there's also times when they might be angry or demanding for some reason or another. We're going to talk in another slide about how to deal with that. Another challenge is recognizing and understanding customer expectations, right? We just talked about this in the last slide. Service agents need to be highly aware of what customers expect from their purchased products or services, along with what they expect from customer service. So this is an interesting one that I kind of went back to on this idea of somebody sending like a 12-paragraph email in response to somebody who writes 1 sentence with no period emails.



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Expectations can be varied. They might be not just in the quality of the piece that you would submit or the structure, the amount of research provided. It might be in the format of your email or how the attachments are sent or not sent, maybe they need to be uploaded to an FTP site. It might be in terms of how you word your email. There's a lot of different various or nuanced expectations that can go on.

So I just wanted you guys to see, these are the types of things that customer service people are being, for lack of a better word, judged on. This is what their internal goals for themselves are based around. So you'll see a lot of duplicates here between the team level agent, which means like an individual provider, and case, which means one sort of instance, level metrics here.

So you've got average time to first response, average number of interactions for resolution, customers satisfaction score, average call handling time, customer request volume, overall resolution rate. And some of the metrics that are tracked are this customer satisfaction score, something regarding customer happiness, how much effort is required from customers, that's an interesting one, how long it took before customers received initial responses, the percentage of issues resolved within the first contact, the average amount of time taken to resolve a customer issue, and simply the number of issues that are solved, period.

So I think it's really interesting to look at this and kind of think about it for yourself, you know, like, "How often does...? Is there an issue with my editor, whoever I'm writing for, that can be resolved in one email? How can I change what I'm doing so it can be resolved in one email? Or how can I change the amount of time that I am putting into resolving this issue?"

So you can see that the priorities here really kind of focus on this time spent and this like added accuracy, satisfaction, whatever you want to call it, closure situation. So what does that mean for us as freelance writers? How can we pull that into what we're doing? So I want to start kind of talking about how these things play out more specifically for us.

And I have this diagram here. It's kind of an inverted pyramid, which looks at...we talked about the same sort of inverted pyramid things in terms of how marketing flows into sales, and lead generation, all that. But this is kind of what you do in order to generate customer happiness. So some of it is going to be documentation. Some of that can be documentation for yourself, some of it can be documentation that you provide clients. Some of it is going to be how conversations are happening. Some of it is going to be how long it takes you to manage these situations. Some of it is going to be the training side. And some of it is just going to mean how happy are people right now with what we're doing? What else can we do?

So like I said, I've got a huge grab bag of different things you guys can do. And I just want to go through them quickly. Some people are going to be like, "Oh, my gosh, yes. That's the



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thing that I can do. It would take me like 20 minutes. I'm going to do it tomorrow." And some people are gonna be like, "Oh, my gosh, that doesn't compute for me how that works."

So depending on where you are, particularly in terms of having had numerous client interactions or deep in terms of length of time client interactions, whatever that is, these things are going to strike you differently. So I'm just going to go through these suggestions. And then I have some sort of larger, more conceptual points that will work for anybody no matter where you're at, not just in customer interaction or client interaction, customer service.

So we talked earlier about this idea of what does your customer need? You can create an FAQ or frequently asked questions on your website for people to see before engagements, interactions begin. This is also a good thing. If you have a lot of people, perhaps that you see a lot of these, and it would kind of change how my website comes up in search for this, I've just got a lot of people just sending me the super random copywriting, which I didn't do a lot of type jobs, were like, "Can you please write 60 travel guides to Africa where I have no specialties whatsoever? For us, the rate is this. Like this is how it works."

And I've never been somebody who's super happy to work on jobs that have kind of been built out like that, because there's always going to be something missing, whether the rate is lower probably than it should be, because they've already decided what they think is gonna be for, or there's some amount of work that they're expecting the writer to do, which is kind of unreasonable, or whatever that is.

And so, you know, I could have an FAQ and say, like, you know, "If you are interested in reaching out to me with a job, you know, here are some things to keep in mind." And then I can talk about, you know, how I put together a package, what I look at in terms of pricing, how far out, you know, I might be booking new clients. All sorts of different things like this.

And then if somebody sends me that sort of email, I can say...I don't even have to respond. This is like a great tip that I got from Jesse Festa who is a blogger who does really, really lot of work with a very small...she has a couple different assistants for different things. But it's just amazing the amount of stuff that she gets out the door, her own in terms of blogging, doing lots of different deliverables, doing lots of different trips, things like that. And she uses these Google sort of email templates for everything.

So if somebody invites her in a press trip, immediately, like, basically, without her even looking at it, they get an email back with all sorts of great information from her for the person to look at and then email her again, basically. So that's the kind of thing that you can have with this FAQ.

It could be something that when somebody reaches out to you, you're like, "Thanks so much. Have a look at these and see if you still think it makes sense for us to work together." Obviously, that sounds like a kind of first world problem. Freelance writer has a lot of people



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reaching out to them. But it can also be for, if you are getting started, for instance, with pitching custom client work to companies, and somebody writes back to you and they're, like, "Kind of interested. I don't know if I'm quite ready to hop on a phone call. Can you tell me more about how this really works?"

And you can say, "Absolutely. I have this FAQ that goes through all sorts of details here. But I really find that everyone's situation is different. And so I'd love to talk to you more specifically about how this applies to you on a phone call. Here's a link to my calendar, please choose anytime that works for you. And I look forward to speaking soon."

Great automating things to make it easy for them, fewer steps, one-stop shopping, right? Another thing, you can just write all standard emails to close a deal in advance, in templates, and check them for tones and any potential psychological pitfalls. Now this works whether you're talking about content marketing clients or magazine clients, right? So you could have a series of templates. Like, let's say somebody gets back to you on an assignment and it's missing a rate. Let's say somebody gets back to you and it's missing a contract. Let's say someone gets back to you on an assignment and it's missing a due date.

You could have pre-written emails for yourself, again, saved in Google templates, or whatever, if you use that, where you're like, "Thanks so much. I'm so looking forward to working on this assignment with you. You know, here is my standard... I noticed you didn't provide a contract, here is my standard contract. Please let me know if you have any changes. And I look forward to getting this assignment confirmed." Something like that.

You can have these all set up so that whenever these things come in, you don't have to go, "I don't want to respond. Why didn't this person put a contract? Are they going to have problem with my...?" All these things. You just hit template, go, done. Now, something else that we talked about a lot in operations are these different sorts of automation.

There's self-automations, there's template automations, there's workflows. So as you're writing these standard emails, you may have to think about what is your workflow for these things? What about fulfilling and fulfilling on overdue bills? What if a client has asked you the same question 12 times already? How do you handle that? And another thing that you can create standardized customer service for is feedback loops for current customers or for customers you just finished up with.

This can help you get testimonials, this can also help you get more work. This is the kind of thing where, you know, if you do some sort of customer service, where it's going through an app, often the apps these days will automatically send you something... I get these surveys from Delta all the time, for instance, but they'll automatically send you something like, "Please let us know, you know, how our agent, you know, handled your call the other day," or something like that.



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Or you might call and they say, "Please remain on the line after your call for a survey," right? All customer service operations have these built in because that's how they get those customer satisfaction numbers that we were looking at before. And that's going to be really important for you because it's very difficult when you don't have a boss that you actually see, that you can kind of see how they're feeling or, you know, are they talking to less today or something like that, how they feel about your work.

It's very difficult when you work with editors you never see, who you maybe don't work with again, and you're not sure why, to know how you're doing and what you can improve. So this is creating sort of automatic feedback things you just do every time no matter what is a great way to do that. So for instance, let's say you're working with a magazine editor, you know, you could say, "Thank you so much," again, as you're...you know, you've turned in an article.

So like this is the final draft, they say, "Great, send me an invoice." You say, "Thank you so much. It was an absolute pleasure to work with you. I'd love to do so again in the future. Please let me know if you have any feedback that can help me in our next interaction. And here's another pitch for you to consider," for instance.

Here's a good example, by the way, of a standardized kind of template. And this is actually kind of point...not the bottom point here about feedback loops but the workflow. So this is one where I actually see people kind of get into weird things when I'm on coaching calls, where people are kind of like, "Oh, gosh." I've had people say, like, "What should I say when I'm invoicing my client? Oh, gosh, I have to invoice this client every week. And I hate doing it because I don't know what to say to them."

I get this exact same email every Monday from somebody who works for me. It says the exact same thing every time, literally the exact same thing every single time. It's this simple, you just have a big sheet of templates that looks like that. So another thing that you can do in terms of low-hanging customer service fruit is to create communication guidelines for yourself. What timeline do you want to have to get back to customer responses? Does it need to be the second it comes in? Should it be 24 hours? Should it be 12 hours? Does it depend what type of client it is in terms of like if it's a, you know, sort of like a content marketing agency that you're working for that you do a lot of work for versus a magazine editor? What should be included in every message, whether conceptually or in terms of a specific communication best practice?

So this could be, you know, sort of something where in the beginning, maybe you're saying something more human interactive? Or in the beginning, you're saying, "No, thank you so much for that question." Or, like, "I'm really enjoying working with you," or something like that. And what about dealing with conflicts? What is your guideline for yourself to make sure that you are dealing with conflicts with clients, whether large or small, or whatever, in the way that best reflects your values for yourself as a company and as a human?



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I see a lot of times where these, whatever is going on, if there's like a client where it's really kind of like falling off, and this thing needs to close, maybe they haven't been paying you or they haven't been giving you things that you need to get the work done, and now they're saying that you're not delivering and so they don't...whatever.

But think in advance about what your guidelines are for yourself in terms of how you want to deal with the situation when they arise. Because then when they do, you will simply follow the plan that you've laid out for yourself. When you were most saying you weren't feeling a scarcity mindset, you weren't feeling backed into a corner, and you really thought in depth about how do you want to come across in a situation.

In a larger way, you can also create customer service vision and goals for yourself. These can be really simple. Are your goals for the customer service work that you want to do in terms of laying out templates and things to make things less stressful for yourself? Great. To deepen a familiarity with the needs of your customers, maybe to get more feedback, to decrease the time that you spend into the press? What is your goal for your customers service going to be right now?

Maybe you can even meet a training on some different skills. So think about one thing. I said a lot of different things here, there's a lot of derivations thereof as well. But think about one thing that you dread that has to do with client interaction. It could even be on the marketing side, it could be following up on invoices, and a lot of different things. But think about one thing that you dread, and how you can use any of these tools that we talked about to take the emotion out of it.

Now one way that I really, really love that I'm going to share with you is this yes-no-yes formula. So I've done it just a little bit on some of these little mini templates that I gave you over the course of the call. But the idea of the yes-no-yes formula is that anytime you need to say something that might be negative in some way, shape, or form, you soften it with this yes-no-yes.

So what that means is, "Thank you so much for reaching out to me with this, you know, copywriting project of yours right now. I'm currently working through February in terms of being booked for the client projects, so won't be able to accept this for you to complete it in the timeline that you've laid out. I wish you the best of luck in finding another writer for this."

All right, what about something, you know, again, that's like this first world, too much work writer problem. What about an editor asking you for like totally insane edits on something? So let's say you... This is a real situation. Let's say you did photography for an article, and the editor, you know, at some point theoretically knew that you don't live in that place and you travel to do the story. And now the editor wants reshoots on something.



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"Thank you so much for looking over the photos. And, again, I'm so excited to be working on this piece with you. Because I don't live in that location, it won't be possible for me to do reshoots, unless you'd like to approve X amount of dollars for me to travel back out there again. I look forward to working with you to figure out how we can redo the art for this piece in some other method to make sure that it meets your standards." So yes-no-yes is a positive thing, the negative thing, and a positive thing.

So I've queued up some scripts that are used by Michael Hyatt, who also is the guy that produces the productivity program that we have in our Dream Buffet coaching program libraries. And he's the person I learned this from and he really has just a great way of doing this. It's really interesting because the particular ones I'm going to show you today, I find, are like really strong.

And usually I find that when I do yes-no-yes and particularly when I work with people to create a yes-no-yes that we maybe are a little bit softer in like the no. So this might be stronger than you would be doing, but I just want to show them to you regardless. So here's some yes-no-yeses.

"Can I meet with you for coffee or meal?" "Thank you so much for your kind words about my blogger business." "Thanks also for your interest in meeting with me. Unfortunately, will not be possible for the foreseeable future." This is what I mean about a little strong.

"In order to honor my existing commitments, I must decline many worthy invitations like yours. However, this is one of the main reasons that I blog, speak, podcast, whatever. It allows me to connect in some way with people I would not otherwise have the opportunity to meet. Kind regards, name." There's no lack of clarity here.

And this is something that I see a lot of people struggle with when they are looking to sort of say a no to somebody. So a great example is, let's say... There's not a good one here. But actually, this is a good... I'll tweak this for you and kind of show this how this would work. Like, I'll give you two examples here. So this one, can I pick your brain?

This is a great example for somebody who wants to do like free consulting for them. So somebody who's a company and maybe they're interested in having you right, but they really want to like meet with you or something like this and have you basically tell them what they should be doing for free. "So thank you for your interest in meeting with me about blah. I get this request a lot. As a result, I have three options available. The first one is free. My blog, I have numerous articles, blah, blah, blah. Consulting, I do a limited amount of consulting. My minimum is a one-hour consultation, not including travel time for X rate. The why I'm expensive, I do provide a discount on half day and full day rate. So you can learn more about this and book a session on my consulting page."



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Speaking, or you could say training, maybe if somebody wants to know about social media, you can say come into training. "I also speak about this conference. I have a one-hour speech called 'Title of Speech.'" So obviously, this sounds like very first world here. But like, let's say you have a client who wants to meet with you in their office and you're already on a contract, and that is not something that is included in the contract. So here's one that's a good example of this. "So thanks so much in your interest in having me speak at your event. Unfortunately, due to my existing commitments, I'm unable to take on any additional speaking engagements of this time. Best of luck in finding the perfect speaker for your event." So how would we tweak this?

"Thank you so much for offering to meet in person at your office. I really appreciate the opportunity to come in and see you and discuss this. Unfortunately, due to the fact that our contract does not include in person or phone meetings, only the deliverables outlined, I'm unable to come to travel to your location to meet with you due to my existing commitments. I look forward to continuing to produce the rest of deliverables outlined in our contract, and can absolutely answer any other questions that you have over email. Kind regards, you."

So what I really love about these, I'll go back to the slides now, is this idea of the very clear line of no that's created by yes-no-yes. So I recently, during one of my first press trip events, we did a bunch of these together. We kind of talked through some situations that people had. And I gave some examples for some of the ones I had, and then we workshopped how to come up with your own examples.

And it was really interesting how much people struggled with like just saying no, but how this yes-no-yes really made them feel empowered to do it. So if you have clients that are really just scope creeping about different things, I really recommend yes-no-yes. Now here's one other thing that I read, that I wanted to pass on to you guys because I think it's so important in dealing with these kind of sticky client things that we feel not awesome about, like saying no to people.

Yes-no-yes is a great formula, but it works because of this. This is a quote, "Focus on making the customer service department a happy place. Use whatever means at your disposal. Add plants and flowers to the decor. Add fish tanks. Add windows or more natural looking light. Buy better coffee. Buy a better coffee machine. Invest in fun, comfortable furniture. Make the space open and welcoming. Create neutral zones where customer service reps can go to relax for 10 minutes after X amount of calls. In essence, create an environment that makes people happy to be there."

What can you do for yourself to make yourself happy, to have the sort of interactions with your clients? Because I know most of you aren't. And that results in interactions that are not furthering your business. So another couple of things that I read here that I just want to leave



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you with. Make sure your customer service department is an independent body within your company.

If you can't, put it under the tutelage of the marketing department instead of sales. So this means rather than thinking of interacting with your customers, as something that you do as part of your deliverables or part of your work time, you need to think of it as something separate, something that you do in a separate mind space, that you kind of like, you know, look at some flowers, look at some fish, sitting on comfortable furniture, whatever that is, and then you do your customer service.

And if anything, you should do it with your marketing time, with your marketing activities rather than other sales or part of deliverable things. Next thing here, if the support team isn't 100% better than the product you're trying to market, support suffers. So this is an interesting thing. And I talked about it way back in the beginning of the call. If there's things that you feel like you keep supporting clients or interacting with clients, writing emails to clients about, how can you embed solutions to those, better service, better documentation, whatever that is, higher up in the process?

How do the interactions that you're currently having with your customers need to inform the rest of your work? Does this mean that you're having magazine editors, who you're having to do 20 emails back and forth, to solidify with the article ideas? How can you change the emails you send them earlier on? How can you standardize this?

And if they are still not giving the assignment after X emails, does that mean that you just burn it, you just kill it? And you say, you know, "Thank you so much for emailing me this week about this article idea. I was really looking forward to working on this assignment with you. Unfortunately, I can see it's really taking us time to reach a decision about this. I have a number of other clients that I need to service right now. So I wish you best of luck in finding another writer for the survey or for the story. And I look forward to the opportunity to potentially work with you on another article idea down the line."

Done, yes-no-yes email, get them off your plate. So I will leave you with that. And coming up the end of our Freelance Business Systems series, we've got one on admin. I know everyone thinks all of the other things we've been talking about in the last, you know, five months of webinars are admin, but they're not. We'll talk about what the admin really is. And we're going to talk about the fun stuff, and then we're going to talk about strategic direction to cap it all off.

Thank you so much, and I will see you next week.