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IT'S FREE!

2024

The \$200 Idea How To Make Upwork Pay Your Bills

*Insider tips and advice from a Top 1%, Expert Upwork Finance Freelancer
Who Routinely Bills His Time at \$200/Hour+...*



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Clint Lovell

ThatUpworkGuy.com

5/21/2024

The Secrets to My Upwork Success That I Share In this Booklet...

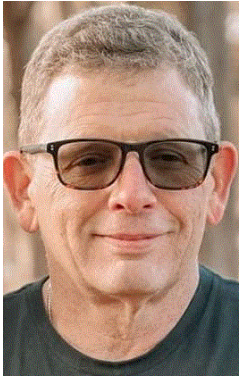
1. How to make hourly jobs turn into jobs that can pay as much as 3 or 4 times your hourly rate.
2. How to differentiate yourself from the pack.
3. How to avoid some of the common scams that cost money.
4. How to be efficient in the application process.
5. How to set up your interview for success.
6. How to create package deals that make you even more money.
7. How to write effective application letters that get attention.
8. How to get featured attention on your job applications.
9. How to create a winning profile on Upwork.
10. How to create a catalogue project that helps you sell more services.
11. How to create a portfolio project that helps you sell more services.
12. How to deal with the common application questions quickly and efficiently.
13. How to deal with problem clients and prevent them from making your Upwork profile a mess.
14. How to provide freemiums that don't cost you an arm and a leg.
15. How to create a project template you can use again and again, thus increasing your effective hourly rate.

And there is more...

I'm giving you my best stuff here and you get it all for free. It's time for you to enter the tall cotton with a sharp knife and start making some serious money off of Upwork freelancing, my friend.

Go hard gettin' busy with it!

The \$200 Idea – How To Make Upwork Pay Your Bills...



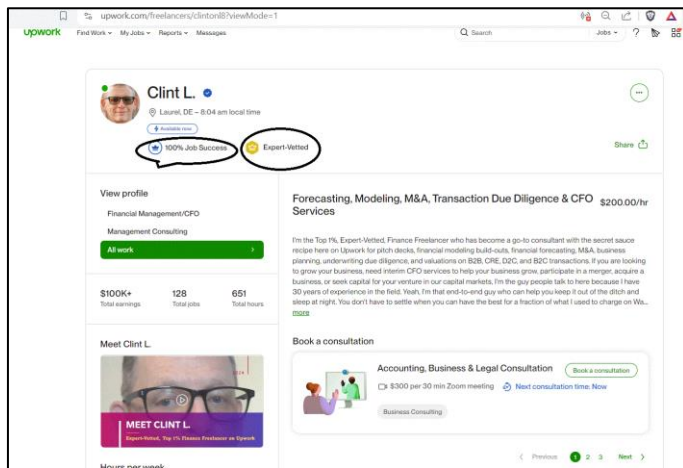
Welcome

Hello. I'm Clint Lovell and I'm a real guy who is a freelancer you can find on Upwork ([click here](#) to see my live profile on Upwork). You are reading this because you think you may not be quite ready to launch your freelancer career on Upwork or you would like to do so and minimize the propensity for those uh-oh moments that result in loads of wasted time and money. I will show you what I know about it.

This program works best if you are seeking to get organized BEFORE you have set-up your Upwork freelancer account but if you already have done that, don't worry. We have some catch up to do!

Quick Background on Me...

I'm a Top 1% Freelancer on Upwork. I think there are over 8,000,000 freelancers on that platform from around the world (at the time I wrote this guide), so being designated a Top 1% Freelancer – in the field of finance, no less – is no easy thing to do, I would think.



I'm also an Expert-Vetted Freelancer (note circled badge in screenshot at left) – which I think is a subset of the Top 1% Freelancers on Upwork (note black circled badge at left in my account screenshot). There are only a few hundred of us in that designation worldwide, I believe. This designation means that I am supposedly the cream of the crop in my field of consulting and a featured consultant on Upwork with a 100% Job Success Rating¹ by my

clients on over 125 completed consulting assignments (note black call-out). I think this makes me someone who could probably teach you a thing or two about business, servicing clients, and Upwork. If you don't agree with the aforementioned statement, please stop reading this and go on to something else.

I charge \$200 per hour (or more) for my time, and I have made more than \$100,000 off the Upwork platform, yet my Upwork billings are only a fraction of my total revenue picture as a consultant. The math works out to an average (currently) of around \$344 per hour for my Upwork client work, I think.

I do business management, M&A, business negotiations, and other financial stuff people associate with "Wall Street", so I know you are going to say, "I can't do that, so this is no help, and I am wasting my time, right?"

¹ I know that sounds great, but my experience has been one where my Job Success Score has fluctuated between 97% and 100% on an ongoing basis. No matter how you slice it, I think you would have to agree I am doing a better than average job of managing clients.

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No Worries – Keep Your Shorts On...

Not to worry. Everything is scaled in life, right? If you are making \$25 an hour now, I'm going to show you how to get that up to around \$40, \$50, or even more on Upwork (and you can do this if you keep at it – no "magic" or payment to me required – I lay it all out in these pages). *What you used to make in this world may not matter as much as assessing what the market may be willing to pay you – so don't sell yourself short.* The approach I use isn't some secret formula b.s. that you see on social media or any of that which has some kind of pay-to-play scam attached to it. It's a systemic approach I developed the hard way – **through trial and painful error** – to make the platform work for me as best I could. As it turned out, it worked better for me than perhaps 99% of all the freelancers on Upwork. There's valuable information being potentially provided here, and I normally make people pay for the "secret sauce" -and pay handsomely at that.

Yet I am going to give it all to you for free.

Now why would I do that, you ask? There's no such thing as a free lunch. What's the catch?

There's no catch. I have a potentially bigger play by which I make money – a blog and other services that are intended to support people who need help beyond this detailed, "how to" manual.

Some people will read this guide and be able to hit the ground running and never think about me again (I hope you are one of them and you make an absolute smash success of it!). Some will need some help, and some would like to receive monthly updates on things I have learned or things I do so they can make even more money. Some would like to participate in ongoing classes, have their questions answered, receive dedicated coaching time, and maybe work out issues and problems with someone who does just that for a living. I make money on those things, okay? You don't have to buy them to get the benefits of what I have learned. Would I like you to buy them all? Sure. But if you can get there without spending anything more, then God bless you and maybe I have done something to pay it forward and you will, too.

All that being said, let's dive in and see what we have to unpack on this beast.

A Simple Plan...

The idea is simple, and I made it easy to remember by using the reference to \$200. I'm going to help you get started being a freelance consultant on Upwork (also known as a "gig worker", "gigger", or "freelancer") by which you will augment your family income and then (hopefully) replace it entirely and have the life of a freelancer. I am suggesting you use the phased approach I outline in this guide so that you (hopefully) don't make the mistakes I made when I started that wasted six months of earnings time and a whole lot of money. You need to do a quick assessment of whether this is for you or not, okay? So, let's cover that stuff – briefly.

UPWORK POWER PLAYER RULE

REMEMBER:

WHAT YOU USED TO MAKE OR THINK YOU CAN MAKE MAY HAVE NOTHING TO DO WITH WHAT YOU CAN MAKE VIA YOUR ASSOCIATION WITH UPWORK.

DON'T BE IN A HURRY TO SELL YOURSELF SHORT. YOU ARE CONSULTANT, NOT A PROSTITUTE.

What are the benefits of being a freelancer?

I'm sure there are many, but I have found the top three (3) to be:

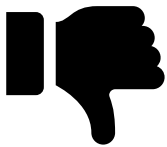
- You have a very flexible work schedule – this is very attractive to young parents as well as anyone else. I have worked for myself all my life, so I am always available to help support whatever the family needs are, church needs, or that of my friends and neighbors. I like that about this lifestyle.
 - You can work from any place on the planet that has an Internet connection. Your spouse can drive, and you can work on your computer doing client stuff while you head out for the day. I do it all the time. I've also found that I can take big amounts of time off to do and go places (all tax deductible as well, now), so that helps with the lifestyle as well.
 - You can work on the types of jobs and assignments that you really like as opposed to working because you simply need to work and have more money. I am almost certain one of the reasons I am still alive is that I am able to work on the types of things I find to be engaging, challenging, and interesting to me.



What are the impediments to this lifestyle?

I'm hoping there are not a lot of reasons why you wouldn't want to do freelancing work, but the big three (3) reasons that occur to me are:

- Money and jobs are not constant. You have high tides, and you have low tides, as well as having flood tides and extreme low tides that can dry up the landscape of all living things (an opportunity to thin that huge herd of competitors!). Plan your resources with care and you will probably be okay. If you need a steady paycheck, you need to go to work for someone, take what you are given, and hope when you end your day, each and every workday, that you still at least have a job.
- You have to be able to work unsupervised and do it as if the boss was standing right over your shoulder. Nobody is going to hold your hand or tell you to get it done. You are the boss, and you have to set the standards! If you can't be disciplined, this is not going to be an easy time for you.
- Any given day can turn into a workday whether you like it or not – sometimes you have to go to war, people. Nothing is sacred anymore. We make hay when the sun is shining. Get used to that thought.



Takeaway...

Bottom line: freelancing on Upwork should give you the opportunity to earn at least \$45,000 per year working around 30 hours a week. Furthermore, it will open the doors for you to take in work outside of Upwork and that can be quite a bit as well. For example, in 2022 my consulting practice grossed a little over \$300,000, of which, Upwork accounted for about 20% - or around \$60,000. I used Upwork to leverage that other work in a very creative way! Yeah, I think you can do this. You have to be smart; you have to work hard; you have to be dedicated; and you have to not complain when you get a curveball instead of that fastball you routinely hit out of the park.

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What can you earn on Upwork?

The answer is governed by the Upwork marketplace, the nature of what you intend to do for a living, and your relative level of creativity. Generally speaking, Upwork trades labor for money at a discount to the market. If you are looking to get hired at an hourly rate, the hourly rate will typically be one-third to one-half of what the rate would be from a corporate consulting firm that does the same work.

We'll use my field of endeavor as an example...

I do securities offerings underwriting due diligence. It's extraordinarily complicated stuff and the going rate for this kind of work on Wall Street is anywhere from \$400 per hour to \$1,500 per hour. In my old firm the firm billed me out at \$600 to \$900 per hour to do this work. On Upwork, the stated hourly rate is \$200 to \$250 per hour that I currently ask people to pay me for my time – *and I get it!*

Moral of the story? If you seek to compete on an hourly basis, you are going to get hammered and potentially be unhappy with your freelancer lifestyle choice. In my case, there are people overseas who say they can do the work for \$45 an hour. I have doubts about their abilities on a head-to-head comparison basis, but people (meaning the prospective clients, here) make bad choices out of greed, so I imagine they have no want for work as they are the current lowest bidder (and far beyond the reach of our federal court system).

How do we fix this problem?

We fix it by embracing it. You will never be the lowest cost provider. There will always be someone living in a cave who will do the work for a couple of dollars and a bag of rice. Get over it. We make the money by developing a flat fee approach or package deal approach that makes it hard (or downright impossible) for the client to compare and gives them price protection while you up your average hourly rate as a result.

Does it work?

On some projects my hourly rate exceeds \$500 per hour. Nice when you have a couple of hours to get it done or so, right?

To make this work, you need a plan. Plans come from the exchange and testing of ideas, so let's test out my ideas that are based on my actual experience – including hard-won lumps and wounds suffered on Upwork that I am hoping you will not have to bear.

UPWORK POWER PLAYER RULE

REMEMBER:

FEAR CAN MEAN “FORGET EVERYTHING AND RUN” OR IT CAN MEAN “FACE EVERYTHING AND REIGN”! WE FACE THE CHALLENGE WITH LOGIC AND PLANNING TO TURN A PROBLEM INTO A MONEY MAKING OPPORTUNITY.

WE HAVE DEFINED PLANS & STRATEGIES TO DEAL WITH THE PROBLEMS, HERE.

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The Plan Rolls Out in Phases

Note the graphic below in reference to the continuing discussion.

We can't try to do everything at once in life. Things drop between the cracks and those things will cost you a lot of money sometimes – especially on Upwork. So, before you get your subscription filled out with Upwork and pay for your first month (hopefully) we have some things to do to get ready, so you hit the ground with full force and are ready to jump into the Upwork trenches and do some business!

Once you have mastered the very basics, we then build on top of that to take you to the next level, and so on after that. The exhibit below shows you what the tasking key elements are in this phased approach to getting your consulting business launched and optimized as quickly as possible.

Phased Requirements for Implementing the \$200 Idea			
Tier I Tasking	Tier II Tasking	Tier III Tasking	Tier IV Tasking
\$200 Per Month Program	\$200 Per Week Program	\$200 Per Day Program	\$200 Per Hour Program
Vocation Specific Tools	All Tier I Items	All Tier I & Tier II Items	All Tier I, Tier II & Tier III Items
Basic Profile Listing	3 Profiles Complete	Create & Optimize Website	Green Screen Studio Area
Separate Work Email Address & Google Phone Number	3 Project Listings Complete	Develop Linked-In & Social Media	Whiteboard Live Demos
Library Account (Calameo)	3 Catalogue Items Complete	Focus on Intermediate & Expert Listings	No Apps for Jobs that are not <5 Apps
Personal Video	Customize Job Searches	Develop Package Deal Key Items	Develop Long-Term Client Program
Banking Approvals	Set-Up Library Entries	Create "Deliverables" Library Links	
Form Letters		Independent Zoom Account	
Answers to Questions		Independent MS Teams Account	
Studio Setting & Set-Up			
First Project			
Personal Resume			

The idea is to increase the intensity of work effort as the circumstances, responses and earning opportunities start to scale up for you.

Set-Up Time Requirements

The first question I always get deals with how long it takes to get the set-up done for each of these four (4) phases (or “tiers”). The answers are (as long as it takes, of course) a bit fluid for a number of reasons I want you to be thinking about, including:

- I'm in a rather complicated field, so more time is needed to ensure everything is vetted and correct. Your field may require more or less time, so consider that closely in trying to determine a production schedule for completing a given phase or all of it.
- I'm rather fast and efficient. I work really fast, create fast, type fast, and talk really fast. I get things done typically in half the time it takes other people to do them, so consider that in your determination process as well, please.
- Once you have things already up and running on Upwork (i.e., Phase I is done and you are taking jobs, hopefully) you can do the other phases as quickly as time allows you to do so.
- What do you already have of these things we are going to discuss in-hand?

With those thoughts in mind, please note the following:

- 1) **Phase I Requirements: at least 18 hours** – over the course of two days or so.
 - a) Vocation Specific Tools – unknown to me. You have to figure this out as far as what specific software programs, tools, etc. are required in your line of work.
 - b) Basic Profile Listing – 2 hours.
 - c) Separate Work Email Address & Google Phone Number – 15 minutes.
 - d) Library Account (Calameo) – 30 minutes.
 - e) Personal Video – 3 hours.
 - f) Banking Approvals – 2 days. This you do with Upwork but you have to have a bank account set-up to be on Upwork so you can have money sent to it that you earn.
 - g) Form Letters – 4 hours.
 - h) Answers to Questions – 30 minutes.
 - i) Studio Setting & Set-Up – 1 hour.
 - j) First Project – 4 hours.
 - k) Personal Resume – 2 hours.
- 2) **Phase II Requirements: at least 24 hours** – over the course of time once you are spun up.
 - a) All Tier I Items
 - b) 3 Profiles Complete – 1 hour.
 - c) 3 Project Listings Complete – 10 hours.
 - d) 3 Catalogue Items Complete – 10 hours.
 - e) Customize Job Searches – 1 hour.
 - f) Set-Up Library Entries – 2 hours.
- 3) **Phase III Requirements: at least 70 hours** – over the course of time you decide.
 - a) All Tier I & Tier II Items
 - b) Create & Optimize Website – 40 hours.
 - c) Develop Linked-In & Social Media – 20 hours.
 - d) Focus on Intermediate & Expert Listings – no hours.

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- e) Develop Package Deal Key Items – 6 hours.
 - f) Create "Deliverables" Library Links – 4 hours.
 - g) Independent Zoom Account – 15 minutes.
 - h) Independent MS Teams Account – 15 minutes.
- 4) **Phase IV Requirements: at least 34 hours** – over the course of time you decide.
- a) All Tier I, Tier II & Tier III Items
 - b) Green Screen Studio Area – 4 hours.
 - c) Whiteboard Live Demos – 20 hours.
 - d) No Apps for Jobs that are not <5 Apps² – no cost of hours.
 - e) Develop Long-Term Client Program – 10 hours.

Program Purpose, Scope & Basis of Operations

Now we get to the fun part – explaining the moving parts, the reasoning so you start feeling it bubble through the old noggin, and how I have operated the Plan to work for me. I have made minor changes to my means and methods here so that (hopefully!) *The \$200 Idea* is workable for almost anyone who wants to implement it and become financially independent as a freelancer.

Recap Presentation of Relevant Background Information

Upwork operates an Internet-based Platform as a Service ("PaaS") and Software as a Service ("SaaS") program that you run on your desktop, laptop, tablet, or phone. The Upwork business model focuses on attracting both companies seeking temporary/contract workers and temporary workers who are seeking contract, temporary or full-time employment opportunities. Upwork charges the companies money for creating this "marketplace" and also charges the freelancer for creating this marketplace. Theoretically,

Upwork has no favorites in this operation and acts as the referee to keep it all sane.

The reality is a little bit different.

In the end, Upwork will not really support the freelancer – you are on your own... Upwork charges the freelancer for providing these so-called "legitimate opportunities" even though many are scams, and many of the scams result in freelancers expending connects (i.e., spending money – kind of fraudulent, isn't it?) answering these ads that never result in any freelancer getting any compensation. Upwork management has designed the platform to help Upwork make money whether anyone else makes money or not.

Upwork's business model requires it to engage as many freelancers

UPWORK POWER PLAYER RULE

REMEMBER:

I DEFINE SUCCESS ON UPWORK FOR YOU AS THE OPPORTUNITY FOR YOU TO REALIZE ABOVE MARKET COMPENSATION FOR YOUR SERVICES.

WE SEEK TO MAKE A MULTIPLE OF MARKET RATES FOR YOUR COMPENSATION.

² The statement "<5 Apps" refers to the status of the posted job relative to applications filed for it by Freelancers in the Upwork system. The "<5 Apps" designation means less than 5 people have applied for the given assignment as of the moment you hit the button to see that job posting. Having said, quite often I find that it can go up considerably by the time I file an application myself, so you have to be fast and efficient in applying for jobs! Don't worry, I teach this here and in my packaged services courses.

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as possible, thus creating (unintentionally, I think) a “race to the bottom” of ever lower bids and contract awards to freelancers, thus price pointing has become a real problem for most freelancers who DO NOT live in a third world country.

The process for creating a freelancer account can be laborious and Upwork makes money off of you in the process, so the pain never ends.

Upwork is open to almost every potential category of services and consulting that can be provided via online portals. If you can deliver your work via the Internet (or over the phone) you can bet, you will find prospective customers for it on Upwork.

The Scope of Challenges We Have to Face Using Upwork – The Truths...

Taking the recap into account, certain “truths” must be understood as being clear challenges we are to face (and overcome!) if we are going to have a shot at success (as we defined the term success on the previous page) on Upwork.

Inalienable Truths About Upwork Freelancing

There are Five Inalienable Truths about Upwork that apply to what we are seeking to do and make money:

- A. We must have a systemic approach that allows us to not have to compete on the basis of an hourly price to get jobs, otherwise the risk of loss is too high.
- B. We must have a carefully choreographed package of presentation materials to make up our profile so that people want to hire us. Our approach on this point must be as flawless as possible in all aspects of its execution.
- C. Our presentation materials must focus on creating a strong approach to marketing – the 3-Prong Controls Approach³ being the core of what we do to bolster client confidence and make the client more apt to select us for the job.
- D. We must develop a business model of our own freelancing that allows us to create differentiating products that save time and money for customers but allow us to profit from them at a rate that is well above our target hourly rate stated in our profile.
- E. We cannot afford to take a hit on our stats due to a customer being unhappy with the work, not wanting to pay, or otherwise being recalcitrant (i.e., a jerk wanting something for nothing). My policy is to give the customer the work, no bill to be paid, end the relationship as quickly as possible, and leave the job open forever so it can't hurt you as much. We have to be strategic players on this problem so we can get the chance to make more money than the other consultants who are doing what we do for a lot less.

³ Modern business management theory holds that you cannot control your business outcomes, but you can reduce the propensity for unwanted outcomes by controlling the price, delivery schedule, and deliverables requirements with any vendor. Accordingly, I developed the 3-Prong Controls Approach that I market to clients of giving them control by offering a guaranteed delivery price, pay when I deliver, and a defined scope of work that shows what the deliverables should be.

Basis of Operations for Marketing Yourself on Upwork

Your marketing of your services on Upwork is based on the defined scope of operating activities you are going to adopt. In turn, this defined scope of activities will give you specific things to do (as listed in the Tier Phase Key Tasking, above) that fit into this systemic approach to the future operations of your freelancing empire. All of it is designed to maximize the odds of a successful outcome with a prospective client.

So, who is your prospective client?

I will define the one you want for you because I have tried going after almost all of them and found success only in a narrow channel of endeavor:

1. Your client is the one who wants the highest quality outcome. They want experts to do their work.
2. Your client is willing to pay for experts to do their work. Your client is not the one who is looking for the lowest cost. The lowest cost clients are never satisfied, they don't pay up, and they suck up your time. Avoid those people at all costs.
3. Your client is a small business – not a medium-sized business or big commercial entity. Forget those guys. They have the people they need on staff in most cases.
4. Your client needs this work completed within 72 hours.
5. Your client wants to know there is support beyond the current deal requirements.

The entire goal of The \$200 Idea is to give you the chance to capture job opportunities that meet every one of these five (5) tests, above. Why? That's where I found the big money was and continues to be made as a freelancer on Upwork. Now that we have the why, let's get to the how...

Let's Reverse Engineer the Outcome to Determine How to do This...

To capture this client deal, we have to reverse-engineer the process by which the client is captured to determine what is going to be required to support that outcome on a routine basis.

- 1) For the client to hire you, they have to agree upon the terms and conditions of your services. Those terms and conditions need to be defined in a formal Scope of Work (or "SOW"). Upwork does not provide this to the client, so this is how you: (i) stand out from the crowd; and (ii) help prevent a misunderstanding or dispute over billing later – all at the same time. Warning: a clever and deceitful client prospect will use your SOW as a shopping list to go get someone to try and do it cheaper, so beware; and
- 2) For the SOW to be produced you have to be interviewed by the client and the client agree to review a SOW on this job which you will prepare; and
- 3) For the client to agree to receiving an SOW you have to be able to offer the client what is known as "the alternate of choice" closing presentation and close on the deal with them; and
- 4) For you to give the alternative of choice presentation you must have an interview with the client; and
- 5) For you to have an interview with the client, the client has to respond to your application or send you an invite, after which they decide to go ahead and contact you to discuss their deal based on how you answered their advertisement; and

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- 6) For you to receive an invitation you must have a complete and attractive profile that businesses will be able to find and routinely consider; and
- 7) For you to respond to the job application, you have to have an idea of what to put in the response, what to attach, and what it will cost you; and
- 8) For you to create the response you have to decide which postings are the ones you want to apply for; and
- 9) To apply for the jobs, you have to pay the fees and costs, and complete the application process that Upwork requires.

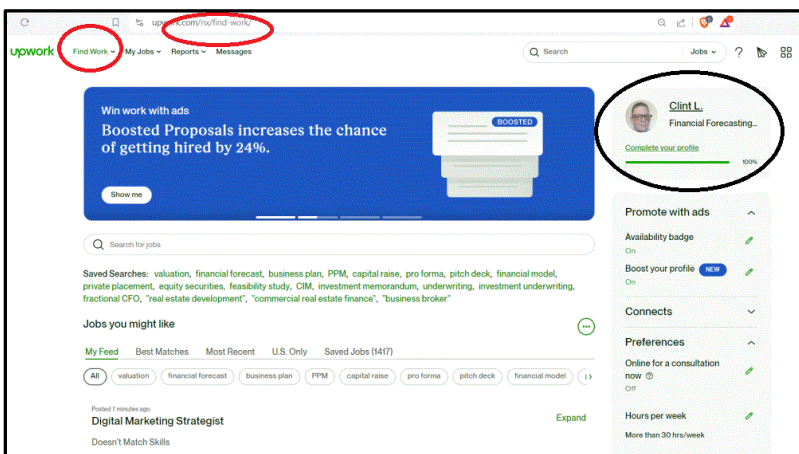
Now that we have the basic steps of the process down, we will go in reverse order to determine what will need to be done. The discussion under the following sub-headings explains what is needed (and why it is needed) so you can understand the importance of these items and how to prioritize your time in getting them done.

To help you do this, the Appendix Section contains a workbook (I know, another workbook? Ugh!). This one is slightly different – just a place to organize and put all the relevant bits and pieces of information that you are going to want to collate and drop into your profile. I am only asking you do to this for Phase I. The rest of it will look after itself, but if I can't get you through Phase I launch, those won't matter much, anyway.

Upwork Account Application Process

The process starts by you paying money to Upwork to become a freelancer and completing their account application. To complete the account application, you will need the following:

- 1) I.D. you can transmit to them – photo driver's license, plus birth certificate, passport, or similar document proving citizenship.
- 2) Verifiable Bank Account that is in your name. This takes a day or two for them to get done I found. If you do not have a bank account, then you have to get one set up before you start this process, okay? You will need the bank name, name on the account, account number and ABA routing number of the bank. This is non-negotiable.
- 3) Professional Licenses – if you have some sort of professional license, you need to be able to transmit a copy of the license to Upwork.



The Upwork system tracks your progress in completing your profile. Your progress is shown on the Find Work page (red circles in screenshot at left) of your account once it goes active (note the black circle in the screenshot at left). You can click on it at any time, and it will tell you what is still pending and what is not even started. The goal (really, a requirement!) is to be 100% complete as soon as possible.

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Why?

Your profile is based on search-engine optimized tags and keywords that are used by the Upwork system to determine who to show clients when they log into the Upwork PaaS and decide to look for people for a job. You want to be on that list, and you want to be on the first page of returns, and you want to be first place on that first page. Getting your profile completed properly has a lot to do with where you get invitations from and how people perceive you – and those people are the source of your future income, so we have to make them want to talk to you or you will not make a dime doing this. Furthermore, you have to decide what level of expertise you have (i.e., Entry, Intermediate or Expert) so the Upwork system can better match you to posted engagements that correspond to your level of professed skills. Unless you are 18 years old and have never done anything in your life other than live in Mom & Dad's basement, you are starting out at Intermediate or Expert, okay?

Time Commitment: figure you will spend somewhere around a half hour getting this information together for that all-important initial step. Put the items all in one envelope so they are in one place where you can find them when you are ready to do the Upwork application.

Applying for a Job on Upwork – The Process Dissected Step-By-Step

Applying for a job posting means you have to see them first. To do that you have to have your Find Work tab open and then you have to winnow down the huge flow of job opportunities to those that are (generally) of some level of interest to you. My experience showed me that for every job I liked that I would consider making an application for would require me to weed through at least 20 other ones that – even though they were GENERALLY considered to be in my field – were of no interest whatsoever. So, some things have to be set up.

When you look at the job postings in the Find Work Tab, you will see this type of representation on your screen:

Follow along on the key notes below in reference to the screenshot on the following page:

1. Black Circle – shows I have selected the “Find Work” tab – note the URL in the URL line is “upwork.com/nx/fine-work/”.
2. Red Rectangle – this is where the action is going to be as there are categories of “My Feed”, “Best Matches”, “Most Recent”, “U.S. Only – my country, okay? and “Saved Jobs”.
3. Purple Arrows – these are my customized searches that I saved that Upwork uses to provide me with access to filtered results that more closely match keywords in job posts that pertain to what I do as a freelancer – my skills, if you will. You will note there are two (2) arrows – what is shown in green above is also shown as buttons below that I can just click on and go to that specific category.

Along the righthand side are promotion opportunities. I don't know what to tell you about these promotional items – Upwork charges you more money to give you “promoted” status and “Available Now” badges on your profile to try to induce clients to hire you. I have not gotten a good response on this front. My poor response may be due to factors that do not potentially apply to your situation. You can try these out and see if they work for you. If so, great. If not, stop doing them and move on. Upwork claims they increase your hire rate, but they have a conflict of interest here, so without giving us the data to back up

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the claim, it becomes a bit like the pitcher in a baseball game calling his own pitches. I don't know if I believe the pitcher on every call and I don't believe Upwork on every call, either. You decide knowing what the issues are as I have pointed out here.

You will need to set up your search criteria right off the bat when you go to set up your account as part of Phase I work. To do this, please see the handout in the Appendix on Upwork Job Post Searches (see page 28).

Stand out and win more work
Ads are a proven way to help you get hired at any stage of your career.

Show me how

Search for jobs

Saved Searches: valuation, financial forecast, business plan, PPM, capital raise, pro forma, pitch deck, financial model, private placement, equity securities, feasibility study, CIM, investment memorandum, underwriting, investment underwriting, fractional CFO, "real estate development", "commercial real estate finance", "business broker"

Jobs you might like

My Feed Best Matches Most Recent U.S. Only Saved Jobs (1421)

All valuation financial forecast business plan PPM capital raise pro forma pitch deck financial model

Promote with e
Availability badge On
Boost your profile On
Connects
Preferences
Online for a consu now Off



Stay Away from Jobs You Don't Want or Need...

UPWORK POWER PLAYER RULE

REMEMBER:

NOT ALL JOBS ARE WORTH APPLYING FOR ON UPWORK AND NOT ALL CLIENTS REACHING OUT TO YOU ARE FOR REAL – UPWORK DOESN'T VET ANYONE OR ANYTHING FOR YOU.

BE ALERT FOR SCAMS AND PEOPLE WHO WANT SOMETHING FOR NOTHING.

The most important thing to learn about the overall process is how to recognize potential dog deals that you don't want to be any part of because:

1. They are scams intended to ensnare you and fleece you out of what little money you have; or
2. They are postings from the "something for nothing crowd" who want a "bread crumb trail" or "how to" class on how to get whatever it is they need without paying for it and you answering their needs via the application process fits the bill exactly for this kind of parasite; or

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3. The client wants to pay practically nothing for the work and see if there is someone stupid enough to go for it – testing the market and setting a new low-end barrier; or
4. The job posting demonstrates the client is a huge risk for payment or performance by: (i) having been on the board more than two months and never verified payment; or (ii) has posted multiple jobs but never hired anyone; and/or (iii) has less than 4.8 rating by freelancers⁴; or
5. The application process is extremely detailed with requests for references (which can get you into trouble really quick), long with samples, and complete packages to review – these all constitute posts where – again – the client is typically never going to hire anyone but takes a bit from each application to form the picture of what they need and then get it for nothing. Meanwhile, Upwork keeps on making money on the Connect fees even though the job is never going to be awarded, much less paid to anyone.
6. The job is going to be banged with over 50 applications in a few minutes, so yours is going to get lost in the wash.



There are a lot of scam posts put up on Upwork on a routine basis. After a few months of being on the platform, most people can quickly recognize the ones that are a scam or a potential problem. To help you in your start-up process (meaning, not get burned by a scam, hopefully), I am giving you some general guidelines here on what you should be on the lookout for:

- You receive an invitation for work you don't typically do – red flag.
- A prospective client asks you to pay other people for them – big-time red flag.
- The client has invited you to the job along with more than 10 other people – don't bother.
- The posted rate is ridiculously low –you do not need to prostitute yourself to do this.
- The client posts a rate and then interviews you stating they are not going to pay the posted rate, only something less. Move on because, chances are, the client isn't going to pay anyone any amount of money.
- The client posts a job and says they will give you a good review – avoid these like the plague. They are going to work you to death for nothing. I have a better way of making this happen.
- The client post says the job is "perfect for Upwork newbies or beginners!" – don't do it.



The Questions That Come on Posted Applications

Upwork allows clients to post questions to be answered as part of the application process that

UPWORK POWER PLAYER RULE

REMEMBER:

YOU CANNOT AFFORD TO WASTE TIME ANSWERING POSTED QUESTIONS THAT ARE THE STOCK QUESTIONS THAT COME UP AGAIN AND AGAIN.

HAVE ANSWERS IN A DOCUMENT FILE READY TO COPY FOR THE STOCK QUESTIONS.

⁴ This is a bigger deal than you might think. My experience has been that – as a group - freelancers tend to not leave anything other than 5-star feedback unless the client is really a problem. In MOST cases they may leave no feedback – and that is a sure sign the client is going to be a huge problem and not worth whatever it is they are offering to pay you.

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goes with posting a job opportunity. There are stock ones that Upwork has on file the client can utilize or the client can post their own questions. In cases where the client posts using the Upwork questions, we want to have stock answers ready to go that answer this requirement, so you don't waste time on the application process (and potentially violate the 5 Minute Application Rule).

The five (5) most common questions posted on the system are:

1. Describe your recent experience with similar projects.
2. How do you assess problems?
3. Describe your proficiency with _____.
4. How do you communicate changes or suggest improvements?
5. Please list any certifications related to this project.

We don't want to spend more than 30 seconds – literally – answering these questions. Time is the enemy and if you have all five of these to answer, you could easily eat up 5 minutes just putting out answers to these questions, much less assessing what needs to be in the response letter. By then, half the world could already be in on the application, and you get lost in the noise of the thundering herd.

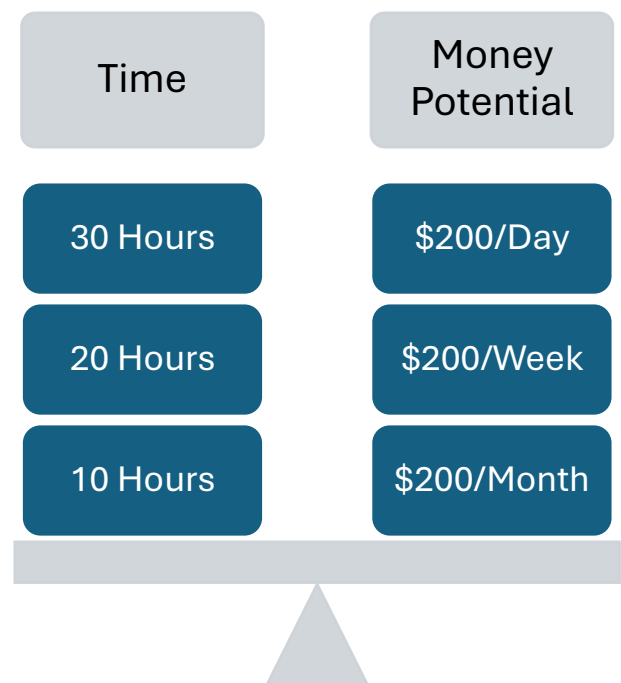
To fix this we create a WORD document and put draft answers in it for the questions as they pertain to a given job profile (or simply use the free workbook in the Appendix – [click here](#)). Let me show you, using my own experience...

The job type is financial modeler, and they are asking about my experience.

"My financial modeling experience is indeed deep and characterized by more than 500 modeling assignment completions for clients over the past 30 years. I'm old school all the way, with all of the key inputs baked into the model along with a linked reporting feature for clients who need management reports that tell the story all by themselves. My direct experience includes more than \$15 billion in transactions in CRE, SaaS, B2B, B2C, and D2C verticals across the globe. Here on Upwork I have cone more than a dozen of these assignments for Upwork clients and maintained a 100% client job satisfaction rating while doing so."

Now, we have changed to the job type being M&A consultant and they are asking about my experience.

"My M&A experience is indeed deep and characterized by buy-side and sell-side assignment completions for clients over the past 30 years on billions of dollars of deals. I'm old school all the way, with a baked-in strategy designed to put an end to fire sale outcomes for clients seeking to sell their businesses in a way that is guaranteed to work for the client. My direct experience includes transactions in CRE, SaaS, B2B, B2C, and D2C verticals in the range of \$5 million to over \$500 million."



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You will notice the two entries are remarkably similar. What is different is the language is adapted for the specific job profile type I will be going after (financial modeling on the first one and M&A advisory services on the second one). Each month took me approximately 45 seconds to type out and correct. Once these are done, it takes less than 15 seconds to copy and paste it into the application. That is the difference that can be the difference between you getting jobs and you getting nothing. More information on this topic (including step by step guidance and help) is available in the Appendix section. IN the meantime, let's stay focused and discuss the next big step – interviews and getting hired. The best part of the whole deal!

Excuse Me – There Are Some Ground Rules to Remember Here...

Maximizing the odds of success with the \$200 Idea on Upwork requires us to think about the following ground rules:

- 1) **Time Commitment Rule.** Nothing happens snappy-doodle quick in this life and making money on Upwork takes a bit of time and you will have to make a commitment. If your goal is:
 - a) To make \$200 per hour worked on Upwork, you will likely be working more than 40 hours a week on Upwork related stuff.
 - b) To make \$200 per day worked on Upwork, you will likely be working more than 30 hours per week on Upwork related stuff.
 - c) To make \$200 per week worked on Upwork, you will likely be working more than 20 hours per week on Upwork related stuff.
 - d) To make \$200 per month worked on Upwork, you will likely be working more than 10 hours per week on Upwork related stuff.

- 2) **Early Bird Board Update Rule.** The posting board on Upwork (under the "Find Work" tab selection) offers you the choices of "My Feed", "Best Matches", and "Most Recent" among other options. These boards need to be checked no later than every 20 minutes as a rule. I have found that when I am looking to make big scores on Upwork, I have to be first in or darn near close to it. Once you get to more than 5 people applying for the given post, the odds of you getting selected go right into the dumpster. Bottom line: comb those listings constantly and be ready to pounce without delay.

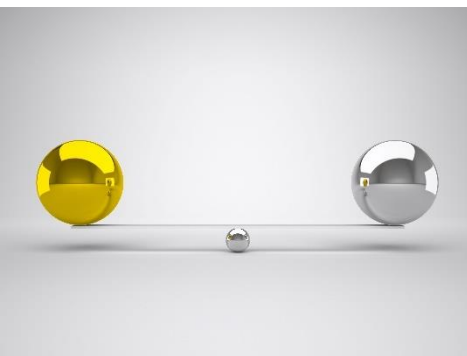


- 3) **Application Limits Rule.**

Applications made on job postings are limited to no more than five minutes (that's 300 seconds!) to get done and you do not want the application letter to exceed 250 words. If there are questions to answer you are to use the stock answers (see "The Questions on Applications", further below in this guide). It's like



- 4) **Hourly Jobs Balance Rule.** You do not want to be the guy or gal who works solely on an hourly rate basis on your jobs on Upwork. You won't get many jobs and you won't make money. You must



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constantly seek to balance your book of business such that hourly rate deals are not more than 50% of your total deals you have underway at any one time. Why? In the end, once you structure things correctly, the flat fee work or package deal work allows you to be more efficient – doing it in an assembly line fashion in a fraction of the time. That's where the money is going to be made. Example: you do a package deal for \$100 for a client, yet the work only takes you a half hour of your time. That converts to a \$200 per hour outcome! That's where you need to be headed.

- 5) **Offshore Contracts Rule.** Do not take a contract offshore (outside your country or zone) without some payment up front if the deal is a flat fee deal. Almost every time I would take a contract from a client in the Middle East I got stiffed. My policy now is that I need to cover the basics. Give me 50% or get lost. Some people will go to great lengths to set you up on Upwork and get the work product for free by simply ignoring the fact they have an obligation to you. In the end, Upwork cannot and will not make them pay. You have to eat it and move on, so limit the amount of work you have to eat by enforcing this rule from Day One.



- 6) **Free Samples Rule.** If the client ad states, they want previous samples of your work – and giving such samples would be the same as giving away the work for free because it provides a “how to” do the work – don't respond to the ad. Pass it and move on – you aren't a hardware store or bakery. There are a lot of scammers on Upwork trying to scam you into providing them with free work. Don't be a fool. They will never hire you and you paid Upwork to apply and be scammed. Now that hurts.



- 7) **Same Day Interview Rule.** Always – and in all ways – seek to have an interview the same day the client prospect reaches out and first contacts you. “What' wrong with 10 minutes from now? I'm just finishing something up and can do this meeting in 10 minutes. How's that for a response?” **THE NUMBER ONE RULE FOR GETTING BUSINESS ON UPWORK IS TO GET THE DEAL OFF THE STREET.** You can only do that by pitching the deal and seeing if you can close it before someone else undercuts you one way or another. Time is really money on Upwork. Never deviate from this rule. You will always pay the price.



- 8) **Zoom Preference Rule.** Whenever possible, you want to be set up to do the client interviews via Zoom with your camera on and you are just sitting there in your working attire. Dress like a professional for these meetings because you are one and you get paid more than the slob. Once you put together your script for how you are going to do these meetings, you get better and better at them. As a result, you must record all of them and save them on your local computer drive so you can have your performance critiqued and as a record in case there is a dispute later about what was said, what was offered, etc.



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- 9) **Manual Time Rule.** If you do accept an hourly rate-based assignment from a client I recommend you require the client to allow you to log Manual Time hours. Be advised, Upwork states their policy is that



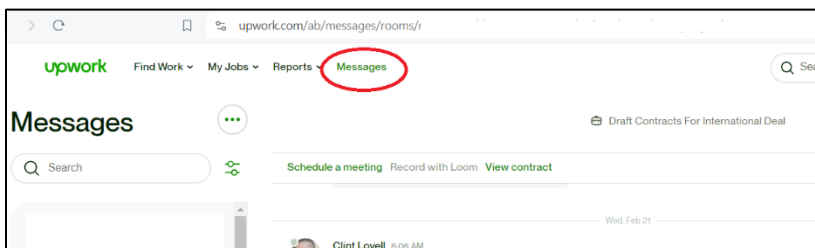
if a client disputes manual time hours billings Upwork cannot guarantee you will be paid. Upwork says they guarantee you will be paid only for logged system hours – meaning hours when your computer is being monitored directly by Upwork and screenshots are taken of your screens while you work. The reality here is that if the client disputes the charge on their card with their bank, Upwork will hit you for the refunded money – not eat it themselves (as would be the case if it were in fact guaranteed payment by Upwork). So, I'm getting nothing from the logged hours. Furthermore, when I am whiteboarding

client work in my office, when I am talking to the client on the phone, when I am working on the client matter in my head at the gym (or anywhere else), I can't recover that time because it isn't "logged time" in their system. I can only recover it if I have manual hours allowed. Furthermore, if my computer is somehow hacked as a result of Upwork monitoring my computer, client files could be compromised for which I have signed non-disclosure agreements and that could be even bigger trouble. You make your own decisions. Mine was made a long time ago – I only accept assignments where manual time is allowed to be logged. If the client screws me on the bill that is a cost of doing business and I just move on.

- 10) **Application Goal Rule.** Don't get all caught up in slick applications that become their own thing. Your goal is simple: to put in the information that induces the client to want to interview you. Without an interview you cannot make money on Upwork so getting interviewed is EVERYTHING. You are not trying to be William Shakespeare. You need to be brief and focused on the singular goal of inducing the prospective client to want to interview you, so no hyperbole, baloney or extraneous language. Get to the point and do it right.

Requests For Interviews, Interviews, Offers & Getting Hired

The job application process is intended to result in an interview request communicated by the client to you via the Upwork Messaging system (the "Messages" tab on the platform – note circled item in graphic screenshot below).



You get a tone notification and an alert on your Messages tab letting you know a client has contacted you.

Personally, this phase of the process is the entire ballgame. You must stand out from the crowd via your Profile credentials, your application letter, and your application offer to get a client to be willing to talk to you. Remember: just because they talk to you doesn't mean they have any intention of hiring you.

In my opinion, this is the true "cutthroat" market that is Upwork. Some clients have no intention of ever paying for your work – it's a cost of doing business and you will accept it because – once you get good at

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this game – the costs associated with having Upwork handle marketing and client G&A baloney is competitive.

We know this so we have to be a bit ruthless ourselves. We have to be prepared for communications and to focus on OUR SINGULAR GOAL – **get the deal off the street** (i.e., make the sale on the first call). I focus on the prize, and I end up converting more than 20% of all interviews into some kind of contract for me. You must be organized for this process to work. Your organizational skills have to extend to a strategy for getting the prospective client to talk to you in a Zoom meeting or on the phone – **NOW!**

I have decades of experience in consulting sales and still make routine mistakes because I'm just as human as everyone else. I get the deals because I focus on some simple key elements to help realize my hiring opportunity conversion goals. The goal is to convert those qualified opportunities into deals – period, the end. Nothing else matters.

Converting Interviews into Paying Deals

This is the best part – everything else feeds this or feeds off of this in my practice. I have to be ready for the client and you do as well. To do that, there are certain things that have to be set in place – like a dinner table for our client guest, if you will – so we can have the potential for a perfect outcome. We know they can get up from the table anytime they want and leave *without paying!* We have to keep that in mind. Rules are required so we remember to do the important things. Rules are hard to remember without some kind of name branding attached to them. I call these rules the Four Key Pre-Interview Rules:

- First, I made mental notes about the client's job posting. If there is time, I will read it again and I may have been given enough information to find it on the Internet. If so, I visit their website and take in the scope of what they are doing, who is running things, and any other potentially useful items given the context of the job opportunity posting.
- Second, I thought about a potential freebie I may toss out there to the prospective client as proof of my good intentions and bona fides regarding the work. Again, I have to take into account the nature of the job posting and what is potentially at stake. I don't want to give away something worth hundreds of dollars in exchange for a potential job that is advertising a \$50 fee.
- Third, I thought about which package deal I might be able to put in front of this guy to make him want to barter with me on an exclusive basis, if not give me the business out right.
- Fourth, I try to remind myself to not interrupt, not talk over people, not talk too much tech, slow down my talking speed, and not change the subject. *I have problems with these things,*

UPWORK POWER PLAYER RULE

REMEMBER:

THE FOUR KEY RULES OF UPWORK CLIENT PROSPECT INTERVIEWS:

- 1. FIND OUT ABOUT THE CLIENT COMPANY IF YOU CAN;**
- 2. BE DRESSED AND READY FOR SUCCESS;**
- 3. THINK ABOUT THE PREMIUM YOU MAY BE ABLE TO OFFER; AND**
- 4. THE PACKAGE DEAL YOU WANT TO SELL.**

FOCUS ON BEING READY AND HAVING A PLAN BEFORE YOU DO THAT MEETING.

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so I need to remind myself about them. You may need to be reminded to put on business attire or something else.

Now I'm ready for the interview, so we need to understand that process.



Our singular goal is to get the client to agree to hire us immediately (this is called, "getting the deal off the street..."). There are many cases where the sales interview process may have to play out over several days, but the reality is in my business that, if I don't get them while I have them in the meeting, chances drop from 25% to almost zero. Listen to me, the proverbial "be back bus" only comes back once in a Blue Moon. Understanding this means we have to be efficient in getting to that stated outcome. We need to understand some basics...



Do you want to be hired by these people?

You must find out if the person interviewing you (and their company) represents a legitimate hiring opportunity for you in terms of pay, duration, requirements, and goals. This is a big question you need an answer to before going further. You will find out some clients on Upwork are going to scam you and there's nothing you can do about it other than to qualify your client prospects up front as good as you can. Some do not know what they want, and you have a special duty to make sure they are not unduly taken advantage of.

In one form or another, certain questions must be asked and answered by someone. Some of the questions you need answers for you will get without asking – the client will volunteer the information you need or provide you with other "body language" clues that suggest to you an answer. These issues are my big ones:

Is the work something I know I can do?



Do I feel like this is the kind of work I can really hit out of the ballpark for the client? If you are not excited about doing the work the client will know and not hire you. By the same token, if you don't do the work they are talking about, then that's grounds to get out of the meeting as quickly as possible as you could be wasting time doing something else.

Is the required delivery period realistic?



Can I beat it and thereby use my delivery date as an inducement (i.e., "I would be willing to commit beating your delivery date if you go ahead and assign this one to me now, sir.") to get things nailed down.

Can I work with this person?



Let's face it, the world is loaded with unreasonable – and sometimes downright crazy – people who demand things we cannot provide. One of the things I am looking for is assurance this person (or the person I will be potentially working with) is on the level and is being realistic and at least genuine enough to complete the required tasking. My "radar" is set on high to detect any kind of nuance of bad joss. I have been burned so many times on Upwork that I now have the policy that if I get a bad vibe off the client, I am looking for a way out of this deal. It's just not worth it to me or my self-esteem and I don't want any more of them living in my head rent-free than I

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already have. You have to make your own mind up, but we are here to make money for ourselves and not run up psychiatry bills because these people drive us nuts.

Prepare & Run Your Play

Now that we know what we are looking for in terms of pre-qualification of the prospective client for hiring us, we now must organize, prepare, and run our play during the interview.

1. Preparation. I command the top-end of the rate card in terms of an hourly rate, so I try to look professional for the initial encounter by wearing a button-down shirt, tie, and/or sports coat when I am going to be on camera. Sometimes I have my set-up such that I have a whiteboard that I work with as I find that demonstrating my points on the whiteboard for the client accomplishes some really important psychological goals: (i) it sets me apart from everyone else, therefore, I must know something they do not; and (ii) I can reinforce points that I discover as being hot button issues for the client; and (iii) I can describe a "package deal" in terms of their job requirements and added value items that get me hired more often than not. You decide. It's your money and time. It cost me less than \$100 to have a 12' whiteboard up on a wall, green background to shoot me from, and then a stool I could sit on while I'm being shot. I have a pro level camera I use for these interviews but the cameras they have on cell phones these days can be just as good in most cases. I also put the money into lights and mikes, so I am the ultimate professional. Some get it, some don't. Don't worry about it. Keep your eyes on the prize like I do and let the chips fall where they may. You will get more than your share just by doing these simple things to prepare before you start the meeting. Note: *I go into this entire process as a key freelancer objective in my newsletter and the program of support services as none of this is to be taken lightly.*
2. You Run the Interview. My style isn't for everyone – I seek to take control and show that I am a high-energy guy who gets stuff done for clients. I focus on taking passive control from the beginning. I introduce myself and ask them how they are doing. Did you notice that? I introduce myself and ask a question that demands an answer. As soon as they answer I move towards my next control objective – framing the interview. Running your interview is about creating the right framework for success. Here's how it goes:
 - a. **Get them focused on the job.** I do that by asking an open-ended question that is simple and to the point – "Well Mr. Zabazaba⁵, what brings us together today?" or "Whatchya' got going on here, Mr. Zabazaba?" Either one works and either one requires them to answer something other than yes or no. This gives them the chance to talk and the illusion of

UPWORK POWER PLAYER RULE

REMEMBER:

DO YOUR SET-UP RIGHT AND THEY WILL PRACTICALLY LAY DOWN FOR YOU AND BUY! YOU WANT TO BE HIRED? THEN GET BUSY WITH BEING THE ULTIMATE PROFESSIONAL IN A WAY THAT MAKES SENSE.

RUN THE INTERVIEW OR BE RUN OVER IN THE INTERVIEW.

⁵ Mr. Zabazaba and Mrs. Zabazaba – as the case may be – are my fictitious client prospects I am pitching. They are old friends and hope they become yours too as I use them to illustrate dialog between clients and me during the sales process.

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control, but they are still responding to you, and you are running the interview without them realizing it.

- b. **Get to their hot points.** Once they answer the previous question, they are likely to ask you about your experience and how it may address their needs – something to that effect. If not, you have to make a logical and smooth transition to that phase. Let's look at it both ways so you have a plan of attack no matter which way the client goes:
 - i. **Client Asks.** Answer the client's question about your experience in terms of the number of years you have been doing it (hopefully- if not your commitment to it and why you are doing it) and your recent experience in terms of what they stated their goals were for the assignment such that someone listening in or watching would say your experience matches exactly with their desired goals and outcome requirements, then transition. The transition is designed to get all their hot points out there. *"Mr. Zabazaba, are there any other key goals for this job that were not posted?"*
 - ii. **Client Doesn't Ask.** If the client responds to the previous question without turning back to you with a question regarding your abilities or experience, then you have to transition to it. Here's what I typically say, *"...Mr. Zabazaba, I got really excited when I read this particular job posting because the stated goals and requirements of your post matched up so nicely with my work experience and what I focus on for clients."* From here, go into why that's a true statement by briefly describing your work experience and client service experiences in terms of how those jobs satisfied the goals this client has for the current job. Don't run on and on. Get it in in less than 2 minutes, then transition as stated above.
- c. **Trial Conversion Play.** If the goals and requirements for this job posting can be done in a package deal, then now is the time to convert this into a package deal that offers them a flat fee they pay on completion (in most instances), a guaranteed delivery date, and a schedule of deliverables in writing that we agree upon. This is where you can turn a \$25 an hour job into a \$50 or \$75 an hour job! I do this by creating a "set-up" as follows:

UPWORK POWER PLAYER RULE

REMEMBER:

IF THE CLIENT ASKS FOR A DISCOUNT ON YOUR RATE BEFORE YOU HAVE DISCUSSED THE JOB REQUIREMENTS, YOU ARE LIKELY WASTING YOUR TIME WITH SOMEONE WHO IS JUST SHOPPING.

IF THEY WANT THE LOWEST BIDDER IT WILL NOT LIKELY BE YOU.

- i. I confirm their understanding of what the deliverables entail – *in their mind!* Getting them to commit to a defined set of goals gives me more information about what I need in my "package deal" and it tells me if I can put some add-ons into the deal to: (1) make me the unique competitor in this round-up who can solve their problems; and (2) allow me to create a pricing matrix that is hard to shop. In both cases I am setting things up to get the deal now as a result of the client believing I am the only realistic solution to their problem on an IMMEDIATE BASIS. The key here is making a commitment to them to getting it done immediately – whatever immediate time frame is required but that it starts with getting on it TODAY.

- ii. I seek to use my add-ons to provide extended benefits the client may need and by which I can tack on some additional charges to make the job pay at a higher rate. This

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"upsell" is the key to unlocking higher earnings so get comfortable with it!

- iii. Type out in their message box the parameters of the new deal for them to approve. This will give you more firepower if there is a problem with the client later and Upwork help desk is called in to try and referee (remember, they aren't referees, they are players who are there to make money and if you make money that's okay, but definitely isn't a requirement for Upwork). Get the client to acknowledge the new scope of work is the scope of work you will do.
 - iv. **If there is agreement, have the client cancel the job and you offer a new one for a flat fee that they sign off on.** They do this by either: (1) cancelling the current job and awarding you the job directly when they create the new job, or by you initiating a job proposal with them and they accept it.
 - v. If these opportunities are not available to me, I move on to the next phase.
- d. **Premium Play.** Clients will almost always seek to get you to lower the fee – whether it is the hourly rate or the cost of the entire job. In the past, this was a "hard gulp" moment when I would be suddenly bummed out that I would have to dicker with this person even though I am charging a lot less than my firm used to charge for my time. I knew I would be bargaining with myself if I did this, and I thought there was no choice. In almost every case where the client awarded me the job, I had problems with the client that required proactive client management. None of this noise matters. None of it. Superman had to face kryptonite and so did these people. I'm going to show you how to turn this into a potential advantage with some sales Jui-Jitsu moves. I assess the situation and decide on what to do via one of the following pathways:



i. If the client goes to demanding a discount at the onset – or pretty close in – then you are not likely to have a qualified prospect and they are only shopping. Time to get out. Trust me on this, the ones I played with and took almost always ended up being problem children. **Discount clients aren't going to help your business grow – they are going to eat away at your bottom line and sanity like a cancer.**

ii. When they do ask (appropriately) for a reduction in rate, I state the following, *"...I can appreciate the concerns that come with spending money from your budget, so let's put a pin in this issue and I will come back to it when you have decided you want to hire me and it's time to get the final details worked out, okay?"* Now notice how I ended that statement – with an interrogatory (a question). I want to goad a response out of the client – and no matter what the client says, I'm more in control than ever at this point. If the client is not ready to hire me, then I'm going to force the client to tell me what the open issues are so I can pitch and close on those issues. If the client says

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they are ready to hire me, I need to close on that (remember, **getting the deal off the street is our number one priority!**) by saying, "...Okay, since the parties are determined to do this engagement together, then we need to agree on the terms and conditions". I am going to utilize some strategy here to keep this one in our pocket. First, we need to reduce this to a dollar and cents number. I ask, "...How far off am I on the total budget?" If it is more than 20%, the likelihood of you being hired is very small, so the answer would be to simply state, "my clients select me not because I'm the cheapest, but because I provided that added-value they can't get anywhere else, I see no reason to deviate from that approach and if you elect to go forward with me, my 100% client job satisfaction rating suggest you will in fact be more than satisfied with the value I will add to your deal." If that doesn't satisfy the client, then they are not a qualified interview, **and you need to get out of the interview**. If the discount is 20% or less, I state, "...assuming we get started today, I could potentially present a scenario where prepayment would essentially work out to us splitting the difference. Will that work, Mr. Zabazaba?" If they agree you need to set up a new package deal in Upwork. If the original job posting was for an hourly rate, then we need to propose a new job where it is a flat fee (because they bankroll the fee upfront with Upwork, for all flat fee contracts).

1. It pays to bear in mind that we are looking at using your package deal (whether it is in your product catalog or your Projects Showcase or not, doesn't matter) because the mark-up should be almost 100% or more on the services cost. Giving away 10% to get the deal still puts you at a great outcome opportunity (e.g. You do the math – you are a business manager who offers a plan or program document that requires 2 hours to set-up and complete (from a template in your templates library that is first-class all the way and free of A.I.-generated content. Best of all, the template took you 6 hours to create, edit, and perfect). **This is a deliverable the client would**

reasonably believe to require 6 to 8 hours of your time to go from start to finish, but your package is already sitting there waiting for you to simply customize for meeting this particular client's objectives – *a process which you determined will likely not take more than TWO HOURS*. You normally charge \$25 an hour for your services in this regard, but the client still reasonably believes the bill should be \$150 to \$200, thus creating a huge opportunity for an upsell for you. Your baseline advertised hourly rate remains at \$25.00 per hour, your previous template time "investment" has set up the opportunity for you to capture that \$150 to \$200 fee. If you agreed upon a price of \$200 and the resulting work took you exactly two (2) hours to complete, you just became a superstar – you jumped from billing out your time at the starting rate of \$25 per hour to the superstar earnings of \$100 per hour. You feeling me on this, now? If you discounted it 10%, then the ten percent discount

UPWORK POWER PLAYER RULE

REMEMBER:

IF THE CLIENT ISN'T READY TO MAKE A HIRING DECISION, THEN OFFERING THEM A DISCOUNT IS RATHER POINTLESS BECAUSE THEY ARE NOT A BUYER – JUST A LOOKER.

NO COMMITMENT TO BE A BUYER MEANS YOU DO NOT OFFER DISCOUNTS UNTIL THEY MAKE THAT COMMITMENT.

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means the client bought it at \$180 – you still have only two (2) hours in it, and that means you are still a superstar at \$90 per hour while your competitors are trying to underbid each other at a measly \$25 an hour or less!

There are some basic steps and processes I use to accomplish the primary objectives of: (i) ending the price negotiations; and (ii) getting the deal now; and (iii) increasing the profitability tremendously in my deal with the client:

2. First, I qualify what I am going to do. I need to know if they are shopping or if they are ready to hire me. I have to ask the question of, “*are you ready to make a hiring decision now, Mr. Zabazaba?*”, in some form or another. This is a “yes or no” answer question. If they say no, then you are wasting your time with a shopper who is not likely to come back. Find a way to politely get out of the call and move on (they might come back – 1 in 20 do for me, so I stay polite). If they say yes, move to the next phase – finding out how much we need to discount to close the deal.
3. Ten Percent or Less. Next, I seek to provide a premium as a condition of getting the deal today. I state it by saying, “*I understand, Mr. Zabazaba, and I appreciate the fact you are seeking to get the most value for every dollar your business spends. This is about value, and I am about providing added-value consulting. While I can’t change the rate due to my own business model issues, I can add value here and I think by providing you with this additional deliverable (name what the premium is and why it is worth more than the discounted amount), we have the makings of taking it to another level on this one. If you are willing to make the commitment to go with me today, this deliverable is yours as part of the deal.*” If they bite, we are good to go. If they don’t, odds are they are just shopping you and you should find the polite way of getting out of this (unless you want to undertake advanced negotiations tactics such as those I cover in the newsletter and the premium package). To get started, you need to be able to quickly probe the prospect and see if there is real interest or stop wasting time trying to find out. As with the previous section, if they bite, they need to cancel the job and you can propose a new job with a flat fee that they accept and fund.

UPWORK POWER PLAYER RULE

REMEMBER:

NEVER, EVER, EVER OFFER TO DO ANYTHING MORE THAN SPLIT THE DIFFERENCE IN A PRICING DISPUTE. ONCE YOU OFFER TO TAKE THE WHOLE DISCOUNT YOU ARE GOING TO HAVE TO GIVE EVEN MORE.

ALWAYS OFFER TO SPLIT THE DIFFERENCE AS THE BEST POSSIBLE OUTCOME YOU CAN OFFER.

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Now Get in the Game...

Okay, I have given you my best shot and a primer on how to go after it all and get started on Upwork and (hopefully) have a decent shot at making real money (both on *and off of* Upwork). In closing, I want to remind you that:

- The Appendix Section (starting on the next page!) has a lot of good stuff to help you out. If it wasn't important to the entire Upwork play I wouldn't have taken the time to put it in there. Please read and use it!
- Upwork is not my total income – and it should not be yours, either. If you are totally dependent upon Upwork (or any other single platform) for your revenue, you are in trouble. You need to diversify as quickly as possible by: (i) set up a website and start SEO marketing organically with it; and (ii) use a blog to drive traffic to that website; and (iii) network out to FaceBook and Linked-In, using static ads strategically!
- I want to encourage you to sign up to take my free newsletter. Generally, the newsletter comes out every couple of weeks (with the exception of important, breaking news events that I believe may immediately impact our chances of getting hired or how to make even more money on Upwork). I send the newsletter out as an email with a video link where I discuss the events, so it isn't long, and it isn't complicated. It gets to the core of what we are doing. I don't sell your information, so don't sweat it. [Click here](#) and sign-up for it, please.
- If you are one of those people who needs a helping hand, coaching, a review, or you want to take the advanced course on how you may have the chance to squeeze even bigger profits out of Upwork using my exclusive system, consider signing up for one of my courses. [Click here](#) to learn about these special offers that just might be too good for you to refuse!
- If you want to reach out with a question, thought, pick, or pan, tag me via email at my work account: bizconsultant@gmx.us.

Appendix

All the cool extras to help you get going are catalogued right here for you.

The Phase I Workbook

Hello – welcome to the Phase I Workbook. I created this to give you a central place to drop all of your Phase I Key Task stuff. When you create your account on Upwork, just about everything you need (I think) to get fired up and rolling can be put in one place.

These are the things we have on our to-do list:

1. Basic Profile Listing
2. Personal Video
3. Form Letters
4. Questions to Answer
5. First Project
6. Personal Resume

Basic Profile Listing

There is a process for creating your main profile. To do that you need to do a sober assessment of where you are going with your career and do it fast. Then we are going to create the profile itself.

We will start the process by assessing what kind of work you may be interested in doing in your new career.

What Kind of Work Do You Want to Do?

Time for the toughest part – deciding what you are going to be doing on a freelance basis to make money on Upwork. It is the toughest part because everything else builds on this step, so if you don't do it right (or have to change it, as I did) you are going to have to do a lot of work all over again. Let's avoid that by using some basic business management strategies and tactics to help determine what may be the best fit for you.

In determining where you want to focus your energies in making big scores as a freelance consultant, the idea is to focus on the issues of market, your passions, and what can be converted into production line deliverables. More specifically, consider the following three (3) general guiding principles:

- **Principle of Passion:** focus on those deliverables which you are passionate about doing and really enjoy doing. If it is fun to do, and you have to work longer at it on some assignments, you won't mind the extra time as much. This helps prevent burnout.
- **Principle of Market Scarcity:** consider market forces – is there some aspect of what you do that is potentially a

KEY TAKEAWAY

Freelance work is made to pay for the freelancer when the freelancer becomes very good at that work. When you are a beginner (or fresh out of school) your income expectations have to be at the "training salary" level because you have no proof that you can do the work that anyone will likely believe. Accordingly, The \$200 Idea is meant to be implemented on work that you are doing in which you would be independently considered to be an expert in undertaking.

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relatively scarce commodity (or service) in the market now that could be in fact monetized in a different way.

- **Principle of Production Complexity:** consider whether or not the deliverable can be systemically assembled or created in a way that lend itself to production line completion approaches for standard uses/orders and allow you to NEGOTIATE add-ons or provide concessions to get the deal due to the add-ons. This is the most important consideration – this is where you can make the deal happen when all else fails. Generally speaking, the hardest production requirements are generally created in the deliverable as standard features and the easiest production requirements are generally created in the deliverable as add-ons. Read that twice so you get this point – *if I have to give away something, let it be something that doesn't cost me anything – right?*

I try to apply this approach to all of my marketing pitches that I make. I combine the Three Guiding principles with the 3-Pronged Control Approach to help me create the presentation for each specific interview and each specific application. You feeling me on this?

Perhaps one more level of explanation.

In sales, we have to tell people who are prospective customers information. We have to repeat it, so the customer understands the true meaning of the value proposition we end up making and thus maximize the opportunity for a successful sales interview outcome the first time. Simply put, this amounts to: (1) telling them what you are going to tell them; then (2) tell them what you are telling them; then (3) tell them what you told them.

Our process here is to start with the application (telling them what we are going to tell them); then going to the interview (telling them what we tell them), and following it up with the SOW (telling them what we told them in writing) so we stay consistent on what is important to the client.

Along the way we seek to lower their resistance barriers by using the controls to tell them they are not going to get hurt by us because:

- We are doing this for a flat fee.
- They pay the fee when the work is done.
- The work will be as described in the SOW, or the payment will not be made.

Everybody has a chance to win.

Get it now? A little clearer, at least?

Reliance Upon Search Criteria

The Profile and search criteria for jobs are interdependent and interwoven by both the keywords you select for your profile, as well as any keywords you use in your profile title and main body. In turn, these will be selected by the Upwork software system in search algorithms to show you relevant job listings you may wish to apply for – what happens after that is where the money really gets made. To start though, we need to be able to understand that the process is indeed reliant upon keywords and your industry has keywords like any other.

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Start by asking how I would find you on the Internet if I didn't know your name and only knew what you do for a living or the kind of company you worked for. What words would I use to search for relevant information about you and what you do for a living? That's the key here. Focus on how other people might be finding people like you (instead of you as much at this point) and you will be well-served.

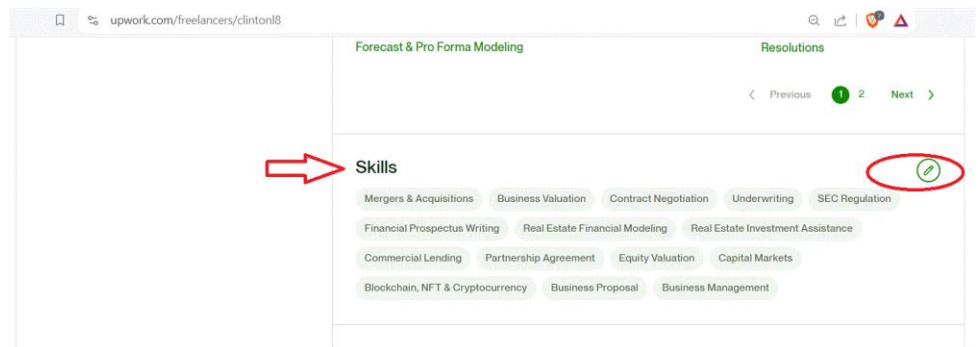
Now Create Your Main Account Profile

We need to get started on the Main Profile. I am going to give you the parameters that I believe are relevant as of the time of the writing of this guide⁶. The key elements of the Profile are:

1. Selecting your field or work and industry.
2. Selecting the geography you will cover (most go worldwide but you can focus on certain areas so go over all of the selection boxes).
3. Creating an hourly rate for this specific Profile the public will see. The additional two (2) allowed secondary profiles can each have their own hourly rate elections as well.
4. Create Skills. Skills are created based on keywords pertaining to your vocational skills that



generally apply to the kind of work you do. The keywords you select for Skills are more towards the bottom of the Profile page. They have a box that looks like the green icon at left here (and in the red circle in the image below of the Skills section of the Profile page) – that's an "Edit Button" image. You click on it and the section below it can be edited by you. Start by typing words associated with your work skills that may pertain to job requirements a client



might be seeking as qualifications to hire you in the main box. As you can see from the image of my account, I have approximately 15 Skills selected (the maximum the system allows – you want to fill this up!). The Skills have many uses in the Upwork system you need to come to grips with:

- a. These are the current search criteria modifiers the Upwork system appears to be using to match jobs to you when you click on the Find Work button and go to the Find Work page – your "Best Matches", "Most Recents", and geographic specific searches, along with "My Feed" are keyed on these words that match up to words found in prospective client job posts.
- b. The system also checks the Title Line of your Profile for keywords we believe as we have found higher visibility by focusing on putting Skill keywords in the Profile or putting Job Posting Titles in the Title. I am focusing on the words the client is using in the job title as my primary means at the moment (in the past it has also been focused on the skillset

⁶ If you want the latest and greatest, I encourage you to consider joining my newsletter – it comes out on a biweekly basis (and in cases of really pressing matters, as news develops) – and it is free, so what's not to like?). You will learn to earn and/or save quite a bit more, so [click here](#) if you would like to join the newsletter.

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keywords). I am seeking clients to find me for M&A work, financial forecasting, temporary CFO work, and due diligence stuff on investments for corporate clients. This cuts two ways and I have no definitive information (one way or another) as to which set of priorities may apply here, so run it one way for a month, then run it the other way for a month. Compare your results.

5. Create Title. The Title line has to get the message you think is most important in the marketing of your services to the client. Hyperbole won't work here, okay? Avoid using descriptive words that could mean anything to anyone (e.g., best, greatest, hottest, etc.) as this can lead to potential problems later on due to a misunderstanding, so don't create one to begin with. You have to do the title line in 75 characters or less. Write them out in the Workbook section – just [click here](#) to do that as important information is also placed there on procedures.
6. Create the Profile Overview. This is the most important part – the message about you and what you bring to the table the world (meaning prospective Upwork clients posting jobs) will get to see and read on a routine basis. You can change the copy you put in the Profile Overview any time you like, but the platform uses a search algorithm that incorporates this information, so I recommend you do not change it more often than once a month. Go to the Workbook Section on the [Profile Overview](#) –and read the instructions on key items you don't want to miss out on.

Creating Search Criteria for Upwork Job Postings

There is more to creating search criteria than merely trying to pick words and this means the entire subject of search criteria is important enough to have its own tutorial on a stand-alone basis.

Background

Before you start thinking about putting up your profile and going live on Upwork, and before you even start picking key words to be the search criteria filters for the job postings you will routinely see on Upwork, there lies before you the selection of freelancing skills and services you plan on providing to clients on a routine basis.

Oh yeah, that again. Right?

We come back to one of the central issues – an Upwork Truth; do what you are passionate about that can help you differentiate yourself from the rest of the pack in a competitive atmosphere. Here's what you have to remember, okay?

- a) If you are not “in” before there are more than 5 applications already filed on the job posting, your chances start going down real fast for having your proposal even viewed. I get in on the front end – usually within 10 minutes of when a job is originally posted. I am almost always the most expensive proposal in the deal, yet I still get viewed more than half of the time. Almost 15% of the time my proposals result in interviews, and I typically close no less than 20% of all interviews. When the economy was going strong, I really hit it with a raw closing average of more than 10% - meaning more than 10% of my proposals made resulted in a hiring on Upwork. What is the difference about me? One of the things is that I am in on the ground floor of the posting of the job application because I want that interview. If the client interviews me, when we are done they will

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either hire me or they may never do an interview again in their life because I may put them through the wringer and hit repeat a few times. You will too.

- b) You must be able to quickly generate a cover letter to respond to the job posting with and that means you have to have a specific idea of the types of jobs or job titles that you will be doing before you get started. Those job titles will come with keywords associated with their skillsets and application that need to be in your search criteria.
- c) The search criteria is also applied to your profile page and what you put in your profile Title, Body, and keyword selections there as these will be used to help narrow the search criteria for you by Upwork and will be used to put you in front of prospective clients as those clients go thru the job posting process and are considering which Upwork Freelancers they may wish to invite to apply (and you want to be on that list!).
- d) The most important part of the search approach has to be you thinking through what packages and flat fee pricing items you can provide on a routine basis that will set you apart and change the deal from an hourly deal to a flat fee deal so you can make more money than the rest of the dummies who just post and pray for fair treatment on hourly jobs (and then accepting discounts because they are desperate and they are stupid to give the discounts to customers – never give a discount on your hourly rate).

These four (4) factors (“truths”) mean you have a bit of thinking to do before you set up everything so that you get the chance to maximize your opportunity for immediate success.

UPWORK POWER PLAYER RULE

REMEMBER:

**PACKAGE DEALS ARE HOW I
TURN THE AVERAGE CLIENT
ENGAGEMENT INTO A
SUPERSTAR EARNER AND YOU
CAN'T NOT HAVE THEM.**

**DON'T LEAVE MONEY ON THE
TABLE – PUT TOGETHER YOUR
PACKAGE DEALS.**

Create the Package First

The “Package” is the deal the customer is going to get for taking an “off-the-shelf” type of service item that you can do for a flat fee. This will be an item you list in your “Project Catalogue” that is advertised by Upwork (along with essentially similar packages from other consultants – don't forget that!).

Here's an example of that from my own experience...

“I do financial work and many Upwork clients have come to me and asked for a financial forecast for their business. Almost none of them understand the legal implications of not doing a thorough job, but all want that thorough job done – and done at a discount. My

solution was to create the financial forecast for them as a template in my system. I had an engine that did actual computations in Excel and a report specimen that was linked to the engine to take the output on the fly. It took me about 60 hours of billable time to set that system up for one type of business, alone. My bill rate is \$200 per hour, but I know the clients on Upwork will not typically pay \$12,000 for a financial forecast. They might pay \$1,800 to \$3,500 for something loaded with bells and whistles, but not \$12,000. The opportunity is created in the form of time saved. When a customer orders one of those forecasts, it takes me less than 45 minutes to prepare it and have it ready for final proof review – a report of up to 125 pages, in color, with intense graphics and a link to separate document of about 50 pages that has the

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means and methods I used to prepare the forecast. A very slick package to be sure that most consultants cannot or will not do. So, I complete these now and charge what I can get. If all I get is \$1,800, then it works out to no less than \$1,800 per hour for me. Furthermore, I take the proof copy of one and create a Project in my Upwork Profile folder so people can see the kind of work I do. Now I'm really starting to be efficient."

You need to undertake the same kind of assessment by following this Catalogue Project Package Creation Process:

- 1) Create a "master" list of deliverables you can provide clients. A deliverable may be a graphic representation, picture, report, or specific software solution – all representing the most common elements you can think of that clients may like to obtain from consultants like you via Upwork.
- 2) Go through the list and identify a sub-list of deliverables that you can make unique in terms of their benefits, for the client, so the client gets an added-value outcome as a result of paying for the standard item (think about, "...I gave them their cake and let them eat it, too..." types of approaches to bundling here). The object is to give them something more than they would otherwise get, in the same time (or less) and at the same price as everyone else or less.
- 3) Test the list of "bundled" Project Packages now.:
 - a. How many hours will it take you to create the given deliverable on a routine basis?
 - b. Being realistic, what do you want to earn an hour?
 - c. Multiply the hours it will take to create by the earnings per hour expectation. Compare the result to the market price you believe you will routinely see from your competitors (do some market analysis homework on this if you are smart). If it looks like it will cost more for you to make these on a routine basis than the market price, then it is not a good idea for this process. If the cost of providing the deliverable is in fact less than the market price – you have a winner that can be focused upon.
 - d. Make a note of all the bundled Packages that you have available as a result. Rank them according to market demand and profitability. Why? Because you also must create these as "samples" that can be shown in your Projects section of your Profile Page and you are going to provide links to them in your online library for clients to view (but not download, save or print).
- 4) You must now create at least one (1) Project package from your list that will be ready to go in your Project page section of your Profile page when you set-up your account. This is a Phase I key task (see page 6 for that list again).

Now Create the Keyword List

Now that you know what Catalogue Project Packages you have in the future by which you can make a lot more money (hopefully!) rather than making money by begging for wages, you have to create a keyword list associated with those packages so you can find jobs where you can make applications and offer these packages of benefits (you following the logic here, Pilgrim?) that clients will bite on (hopefully!) and increase your client base and cash flow from Upwork in a way that is good for you.

You will:

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1. Create a list of keywords that correspond to each Project Package you have created that people would use to search for these services (or deals) on the Internet.
2. Seek to have at least five (5) keywords per Package that uniquely describe the Project Package.
3. Create a description of the Project Package that is less than 250 words in length – you will be using it in the catalogue entry/set-up process later.
4. Keep the list where you can find it as we will put this “into the mix” when we create your Profile Page entries, and it will help us in the crafting of our form letters we will use as a basis for job applications when you go live on the platform.

Workbook Answers for Phase I Set-Up

Here we have everything organized for the launch of your profile. You keep the profile in this workbook on an ongoing basis as you make changes to your profile so you know what you have done before and what impact the change may have going forward. Here below are the sections (just add space as needed).

Skills Keywords Selection

There are no more than fifteen (15) Skills you can pick to put in your profile. Each time you change them put the new list here with the date as shown:

1. Date: _____

- a. Skill 1:
- b. Skill 2:
- c. Skill 3:
- d. Skill 4:
- e. Skill 5:
- f. Skill 6:
- g. Skill 7:
- h. Skill 8:
- i. Skill 9:
- j. Skill 10:
- k. Skill 11:
- l. Skill 12:
- m. Skill 13:
- n. Skill 14:
- o. Skill 15:

2. Date: _____

- a. Skill 1:
- b. Skill 2:
- c. Skill 3:
- d. Skill 4:
- e. Skill 5:
- f. Skill 6:

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- g. Skill 7:
- h. Skill 8:
- i. Skill 9:
- j. Skill 10:
- k. Skill 11:
- l. Skill 12:
- m. Skill 13:
- n. Skill 14:
- o. Skill 15:

Main Profile Title Line Drafts

Remember: the Title line can be no more than 75 characters (letters plus all spaces and punctuation marks you put on that line – spelling counts!).

Make at least three (3) drafts of the proposed Title and then pick and enter the one you intend to use:

1. Date: _____
 - a. Proposed Draft Title #1:
 - b. Proposed Draft Title #2:
 - c. Proposed Draft Title #3:
 - d. Selected Title:
2. Date: _____
 - a. Proposed Draft Title #1:
 - b. Proposed Draft Title #2:
 - c. Proposed Draft Title #3:
 - d. Selected Title:

The rules for Titles (again) are:

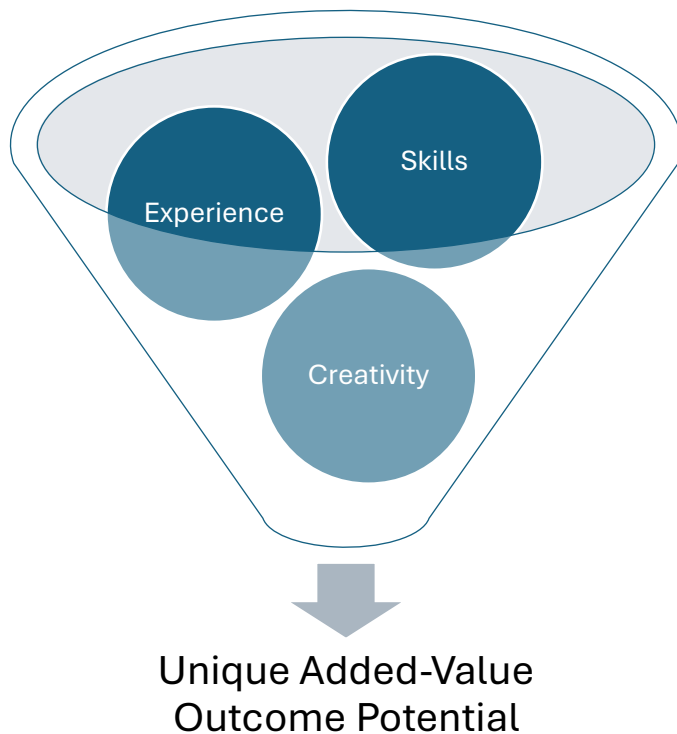
1. No more than 75 characters.
2. Focus on either promoting the skillsets or matching up with the job titles you expect your key client prospects to be posting.
3. Change it not more often than monthly – you have to get enough data to see if changing it is doing anything or not for you.
4. Remember that the keywords you put in the Title are going to be reflected in the Main Body of your Profile (called the, "Profile Overview" – the briefing on you and what you do). I believe this maximizes your opportunities to show up in job searches clients may do so you can get more job invitations (which cost you nothing) and also more job opportunities in the feed (which costs you real money).
5. Check the grammar and check the spelling.

Create the Profile Overview

The Profile Overview is the brief introduction you want every prospective client to see such that they may be induced to:

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- Hire you directly for a private job. This is the best possible outcome as it costs you nothing, there's no competition, and the client is highly motivated, so most times it could be very good – just be careful.
- Invite you to submit an application on a job they are posting. This means you don't pay connect fees to be able to apply for the job and they will likely be giving your application priority treatment. Good outcome. Again, be mindful of potential scams.
- Contact you directly to discuss consulting work via the Messaging system on Upwork. This is great as well because it develops a relationship potential with the client prospect that may turn into a private job. You will end up getting a lot of people who are just fishing for free advice, but that's the cost of doing business so don't let it live in your head rent-free for more than five minutes.
- Consider hiring you based on the totality of information presented in your application letter to the client and the information posted in your Profile – including the all-important Profile Overview.



Don't Forget the Funnel...

We must also consider the optimal outcome of "funneling" the client into a pre-packaged deliverable by which we may double or triple (or more) the hourly rate we would otherwise receive for doing work on the more competitive hourly rate basis (which you want to avoid if you take my advice). This means we have to also be thinking about our first Project and Catalogue items, to wit:

- The first Project showcases the proposed first Catalogue item and is based upon a combination of more than one (1) of your primary job skills. Why? If you are only using one

skill to do a given job, you can be paid by the hour – nothing special about that, right? **When we are using MULTIPLE skills to complete a task (or set of linked tasks called a "business activity chain" or "business process management"), we are incorporating the added-value combination of skills, experience, and creativity to solve the client's problem in a unique way.** Focus on that last sentence, please.

- Where there is a combination of different elements required (by you at least) to solve the client's problem (current and unanticipated future outcome you can reasonably assume is coming), it becomes very difficult to have an apples-to-apples comparison (and if there is no comparison, it

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gets doggone hard for a customer to shop around and beat your deal). This is the basis for converting hourly deals into flat fee deals. It is imperative that you create a continuing series of flat fee deliverables that allow you to have ample market opportunities to sell them (gotta' be something they want on a regular basis, right?) and the unique basis for delivering them that gives you a shot at being interviewed by that prospective client as the key solution source they may wish to engage for the project. (Note: I offer a course on this topic to help folks out and that is one of the ways I earn money, okay? I'm pretty good at business management consulting, so getting you a "tune up" at a discounted rate, plus some additional help in other common problem areas that make it a potentially excellent value – is part of what I do. You decide if you need that help as there is a package deal on it that I think you may find very attractive – [click here](#) to learn about that!).

The bottom line here is that your Profile Overview should include a mention of related verbiage to "set the stage" for clients to get pounded with the "added-value" message.

Important Rules About Your Profile Overview

There are rules for setting up your Profile Overview that conform to what is considered to be Search-Engine Optimization ("SEO") for being pulled into a pool of job prospects. The current information as of the date of publishing this report suggests we want:

1. No more than 250 words in the Profile Overview – less than 200 if we can do real damage with that amount of words. My current Profile Overview has 230 words in it.
2. To load up the keywords pertaining to the Skills and Title in the first 150 words – closer to the beginning, the better.
3. Be sure to add "luxury" words into the text of your profile that do not "stretch" the truth beyond what is believable. Examples would be:
 - a. "I've been working in this industry for x years now. Clients (inside and outside of Upwork) appreciate an added-value consulting approach that takes into account what is needed now and how it is expertly woven into what comes next. This is where I excel and can offer special discounts on packaged deals that provide price, delivery, and quality protections not commonly offered by other consultants." Notice that I put in, "added-value", "expertly", "special", and "protections". All of these luxury words may connote value to the client (at 65 words it is intended to create impact within 30 seconds – the time it takes to read it) and be the difference between being interviewed and not even getting a look.
 - b. "The essence of quality service is exemplified in my approach to this industry – one that is hallmarked by added-value creativity, package deals that support good business practices, and a firm hand on the wheel of integrity to keep everything and everyone headed on the client's goal pathway. This is part of the approach I bring to freelancing and why client enjoy working with me so much." Luxury terms used were, "essence", "quality", "exemplified", "hallmarked", "good", "integrity", and "goal". This one came out to 66 words, yet it has potential impact that can be shoehorned into the Profile Overview.
4. No potentially fraudulent claims, misspelled words, or poorly constructed sentences. If you can't write professionally get some help from someone who does to get you headed in the right direction. (Note: remember that I offer a course on this topic to help folks out if they really need it,

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okay? I'm pretty good at the writing stuff – I write 20,000 to 40,000 words a month when I am busy, and I think you may find this service to be very attractive – [click here](#) to learn more).

5. Bang the Drum. First, make sure you get in the fact that you are skilled, have experience (number of years is important if you have years of it!), and understand what their needs are likely to be – empathy is important, so it needs to be in there every bit as much as the Skills keywords and Title keywords.
6. Maximum impact. I need you to focus on what is going to make the client want to “buy you” – so to speak. What makes them want to buy you? My experience has shown that adding value beyond the proposed scope of work is what moves the needle sometimes and gets me hired. By being the “end-to-end” solution guy for my niche, I make myself more attractive because I have a good idea of what is supposed to happen next and clients like to know that information sometimes. In addition, when you “bake in” a little extra of some kind that doesn't cost you a ton of time or money, but really helps boost the outcome value to the client, then you have something that you should be highlighting in your Profile Overview. I need you to focus on what you can do in your work that adds value beyond their expectation. You are not going to tell them exactly what it is you are going to be doing that adds value, okay? You are going to state you provide added-value consulting in whatever field or industry you intend to serve. Then, if you get the deal, you do that and remind the client of it, and get great feedback for having done it. Big win here in the making that can accelerate your earnings, your profile, and your overall satisfaction with being a freelancer, so focus on this, please. (Note: again, part of the course package deal is coaching on this all-important matter if you feel the need).

Again, this is the current information as of the publishing of this report. If you want the updated intelligence that I have on an ongoing basis, please subscribe to “*The Upwork Insider*” newsletter (costs you nothing for the first six months, for goodness sakes – [click here](#) to request your subscription). Having said, even without it I am getting you in position so that you can quickly exceed the Phase I goals of *The \$200 Idea*.

The Draft Copies of the Profile Overview

Here we put together the draft for the Profile Overview. As was the case with the Title, you should enter the date you changed it and what you changed it to now read:

1. Date: _____
 - a. Copy 1:
 - b. Copy 2:
 - c. Copy 3:
 - d. Selected Entry:
2. Date: _____
 - a. Copy 1:
 - b. Copy 2:
 - c. Copy 3:
 - d. Selected Entry:

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Again, add numbering and spaces in your own workbook as you need them so you can continue tracking what is going on for your account.

Your Welcome Video

The next part of the Profile page requires you to create a video. Upwork doesn't require a video, but you would be stupid to not put one together. People don't want to read and – for the most part – they consider everything that is video to be some kind of potential entertainment. Some will actually look at your video and make a decision based on that video, alone. I have personally received at least three (3) engagements that I can immediately remember due to the fact the client saw my video (either on Upwork or on YouTube). I spent most of the morning doing that video (and some supporting ones) from my desk. When I think about those three (3) engagements, I think the total billings on them together was a bit over \$2,800 or so, so those clients paid for 14 hours of studio time at my posted rate of \$200 per hour. Yeah, I will take that every day and twice on Sunday. Maybe you'll do the video, huh?

General Rules on Welcome Video

Here are the general rules:

1. **It can't be long** – Upwork won't let you post up a feature length film, people. Don't bore your audience to death with some long-winded (and likely terrible) video about you. You want this to go about 2 to 3 minutes max, but not less than a minute.
2. **If there are topics you can immediately cover that relate to what you do**, then create sub-topic videos and post them on YouTube as well. They will find them if you put links in the videos to them. This may be good stuff over the long run, so think it thru and see if you need something to support your video welcome mat.
3. **Put a cover on the video**. I used PowerPoint to do mine. I'm color blind so colors and graphics aren't my thing and I'm terrible at it – but I let everyone know it so they don't make too big a fuss about it. You? You better put something on the cover that is pleasing. Wording is everything – you need some sort of challenge that makes them potentially want to see the video. My cover says, "The Secret Sauce Recipe..." I hope it entices people to watch the latest one.
4. **Change the video every quarter if you can remember**. Use a new approach and see if it gets you anywhere. By new approach, I mean to say that you either change the video or you change the cover. Do not change both at the same time or you will have no idea whether the new cover or the new video caused more engagement with prospective clients.
5. **Make sure you create the video with a full SEO-compliant description** and tag it so it can be found by people searching for this kind of information who are NOT on Upwork. After all, you will take work whether it comes to you thru Upwork or if it comes to you thru your email, right? Freelancing is freelancing, baby!
6. **Make sure you mention a premium, freemium, or discount you will be providing if they mention they saw the video to you in an interview**. This may get you more traffic, then again, your business may be different from mine. You will have to try it and see, right?
7. **Make your first video plain and easy and quick so that Upwork approves it quickly** (yeah, they have approval rights). After that, I found they don't seem to pay as much attention, so you can add

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subscription links and cards to videos and repost them down the line. This is important insider intelligence you need to be thinking about.

Resume – Employment History Section

The Employment History section is a reflection of what is on your resume or CV. This is the time when you need to tune up your resume or CV, as many clients will ask for an updated resume or CV, and you have to turn that over to them. You want it to be fabulous looking and picture perfect in its execution.

Here are my pointers for completing the Employment History section:

1. If a past job is not relevant to what you are doing, then don't post any information about it if you can help it. You should only be posting about the past jobs which directly relate to your current/proposed services so that clients can assess whether you have the skills and experience their job posting requires.
2. What's in the Employment History Section better be in your resume – as in almost word for word.
3. Mention your resume being available in this disclosure section.
4. Make sure your resume does NOT list any compensation expectations or past earnings - that's not any of their business.
5. If you have a list of completed jobs or projects, make sure you update your projects list so they can see you have done quite a bit of related work. If you have quite a bit, consider moving it down into the "Other Experiences" Section.
6. Have someone review your work (even if you have expert level grammar skills). There is no room for error here – no points on style. The resume has to be spot on, crisp, and businesslike. Stay focused on that, please.

Other Experiences Section

This is a great section that allows you to extend beyond your resume and add information that may be considered by the client as well. I have quite a bit on some of the related things I have done and how they fit into what I do today. This may be worth taking some time on if your resume is light, so stick with the following rules:

1. Focus on items that support your core value proposition to the client. If you are the added-value provider, describe the work, experience, education, or gift (whichever it is) that allows you to provide this added-value service approach.
2. Focus on the bigger picture. If you can, demonstrate how this other work enabled clients to realize their goals while you were "charting uncharted waters" on their behalf and taking a risk.
3. Keep it to no more than five (5) key items if possible.

Certifications

If you have formal certifications that are current, you have to go through the Upwork approval process of getting them incorporated into your Profile. I'm thinking these are not as quite important as this may seem, as I have no real certifications to speak of and have no problem attracting work. Maybe your field of endeavor is different, but on this one I cannot offer any advice other than to follow the process.

Testimonials

You can use third-party testimonials if you think that helps. I thought it was a bit over the top and never bothered with it. In a perfect world I would but you need to decide it for yourself. Since I don't do it, I don't have anything to offer to you on this subject.

First Portfolio Project

The Portfolio Project is the linchpin in your launch strategy. It details the deliverable the client would receive (with the client being able to read the first three pages but not download or copy it, Upwork says). You can highlight the value in this process.

The creation of Portfolio Projects comes with an intuitive editor to walk you through the process, so follow the steps, but be ready by adhering to the following principles:

1. Have a description of the Project ready. Has to be less than 250 words, ideally less than 150 words.
2. The graphics must be uncluttered and easy to read without a lot of copy on them to read. Upwork has repeatedly rejected Projects I have submitted because of having graphics they didn't like, so be advised there seems to be a subjective process being used there that nobody seems to really understand. Keep at it until it is approved.
3. You will have keywords that you can select to amplify the Project in searches. Use them!
4. You will be able to pick industries that you serve – do so!
5. Do not put contact information in the Projects. That's a "no-no" with Upwork and grounds for automatic rejection.
6. Make a template of the project execution elements if you can that is as easy to follow as a baking recipe. You want to be able to replicate this work as quickly and efficiently as you can so that you can maximize your earnings potential for boosting your hourly pay rate.
7. Create a separate handout on the Project (I created mine in PowerPoint) that you can attach to project applications for clients to see. The hallmarks of my handouts are:
 - a. Flat fee pricing – I state that I offer the service for a flat fee starting at _____. Be sure to leave that wiggle room in just in case there are changes to the scope of work later on!
 - b. Delivery time – I state what the range will be for delivery on the standard package.
 - c. Deliverable – I state they will get two (2) rounds of revisions and approval of draft before I release the final.
 - d. The final version of the deliverable is not released until payment is made. In the meantime, leave your copyright and the "DRAFT" watermark on the document and/or deliverable.
 - e. I have links in the document to my other deliverables packages. Never can tell, right?
 - f. Check to make sure the Profile Overview and Portfolio Project are in sync. You want this to be completely orchestrated and as perfect as possible.

You want this done and be ready to turn it into a Catalogue Project.

First Catalogue Project Entry

The Project Catalogue utilizes the same intuitive editor approach to create catalogue entries and the same rules kind of apply:

1. Upwork will have the right to pre-approve it, so it won't be live until they approve it. In the past this has taken a day or two or less.
2. Have high quality photo pieces and dramatic stuff, but limit the text in the images (again, Upwork will likely reject an entry that has a bunch of text in the image).
3. You have to define the package as either a stand-alone deal or one that comes with two (2) additional levels of detail and pricing.
4. You have to know what the customer is going to be required to provide to you for you to do the work. This section must be fully documented, or it won't be approved by Upwork.
5. You have to decide how long it will take to deliver the Project. Upwork will collect the money from the client (supposedly) and you will have the client sign off on acceptance (when you post the work in their message box you request payment approval), but you have to disclose upfront how long it will take to deliver to the customer.
6. You have to provide clear descriptions regarding the nature of the deliverable. Again, be thinking SEO on this as you want the keywords that describe it to jive with your Skills, Title, and Profile Overview verbiage to the greatest extent possible.

Form Letters

Applying for a Job Posting on Upwork requires you to provide an introduction letter to the client prospect. These can be up to something like 5,000 characters in length, but my experience has shown the clients generally do not read long letters. They don't have the time. I seek to keep the response to less than 300 words as a rule, while seeking to be less than 200 words in practice. Why? The average person should be able to read 200 words within 2 minutes – that's about as long as they will spend on your application. You must "set the hook" within the first 30 seconds in order for them to potentially push the button to ask you to attend an interview meeting via Zoom or on the phone.

What's this mean to you?

You must have a form letter ready to go that can be quickly and efficiently customized a bit to match up with the information put in the job posting so the client can clearly see your response wasn't written by A.I., ChatGPT, or is in fact a robo-response. These tend to all be rejections.

And all of that means you need a form response for each type of job you are intending to apply for on an ongoing basis. If we look at my profile, you see that I do valuations, I provide M&A advisory services, I do pitch decks for capital raises, I provide CRE feasibility studies, etc., etc. Each one of these services requires a slightly different form letter that can be readily adapted to each specific instance of use in replying to job postings.

To get you started, I have some general rules, some tips, and if you are really stuck on this point of how to get started, I offer a package deal to provide help on these as well as the other key aspects of your Profile

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for the purposes of maximizing your opportunity for success and to move to the next level – [click here](#) to learn more on that!

General Rules on Job Application Form Letters

Before you run off into the wild blue yonder and start writing long and impressive introductory letters, I want you to be able to use the hard-won intelligence that comes from my own experience that is translated in this section into some general rules to follow:

1. The goal of this process is to get them to contact you – nothing else matters. Got that? You want them to contact you and that means you want to be granted an interview with them as soon as possible. Every now and then a client just flat out makes a job offer to me without an interview (and sometimes without a job posting). These are exceptions to the rule. You want to get that interview and nothing else matters. No interview, no money-making opportunity for you. Got it?
2. Do not make the letter longer than 300 words.
3. Do not put a ton of hyperbole in the letter. If you say you are the best consultant for the job you have to tell them why you are the best consultant for the job, otherwise, you look unprofessional and risk immediate rejection.
4. You must get the message across in a professional way that covers the following issues (in a way that is enticing to the client):
 - a. Your experience *that is relevant to the job posting in terms of the client's service goals*.
 - b. Your understanding of the job requirements.
 - c. Your commitment to complete the work in a defined period (you have to state when you will start and when you expect it to be done).
 - d. What the total cost appears to be based on the posting.
 - e. A call-out directing them to view your profile on Upwork. You want to "funnel them in" to the work you did setting up your profile so that you can have the chance to convert the deal from an hourly contract to a flat fee deal by which you are more efficient.
5. You must "set the hook" within three (3) sentences. "Setting the hook" means you provide an inducement so strong the client is motivated to ask you to interview or flat out awards you the job because you hit a nerve with them that suggests you are the only consultant for this particular job they want to interview (the exact set of circumstances I ALWAYS try to achieve). See my notes below in the "How to Set the Hook Tutorial" section.
6. Do not bother putting your phone number or email address in the letter. The Upwork system will scrub it out and it may result in you being downgraded in the stack of applications – don't do it!
7. Focus always on a Call To Action (or "CTA") seeking to have a meeting with them as soon as possible.
8. Consider offering a freemium – something that costs you nothing, but they may find it of value if they agree to interview you. Freemiums I offer to clients may include:
 - a. My "How To..." guide on their subject that offers some general tips and tricks (as well as a link to my work online that has contact information as well so they can reach out any way they choose).

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- b. Industry statistics or regulatory information. These are great items in my field as most people have no idea what the rules and regulations are and what is required of them, so giving out the regs is a great one for me. Is there something similar you can do for your clients?
- c. Offer a recorded interview where you answer all questions and give them a pathway forward to achieve their goal whether they hire you or not. Don't worry, you are going to have the shot to get the deal and that's all you want.

Pro Tips

Here are some additional tips and tricks:

1. If the job really looks tasty, be proactive and investigate their history on jobs they have hired on previously. See how they were rated or what information you can get. Sometimes Freelancers will provide the client's first name in their comments – use it in your letter.
2. If the job posting names the company, look up the company on the web and see what you can find out on their website about their business and then mention that you looked them up and found them to be similar in size to another client you served and how that turned out. You following me on this?
3. Develop a services package handout that provides broad references to the services you provide and what the costs START AT. You may wish to attach them to your application to make you stand out a bit further.
4. If the client posting says you must apply via their website, pass on the deal. This is a violation of the Upwork Terms Of Use Agreement ("TOU") and is likely a scam.
5. If the client has registered only recently, be sure to say something in your letter about it. I always go with, "Good morning/afternoon/evening, folks and welcome to Upwork. I'm Clint Lovell..."

Now let's see the rules and tips in action. Review some examples before you start putting yours together.

Examples

Let's see some examples from what I currently use.

Example 1: Generic Opportunity Form Letter

"Good ____, folks. I'm Clint Lovell - a capital finance, business management, and compliance expert who has end-to-end experience with companies that need _____ support. I have more than 30 years of practice experience and have supported more than 100 Upwork clients so far (see my Upwork profile, please). I'm Expert-Vetted on Upwork and I'm the Top 1% Finance Freelancer Upwork clients have obviously come to rely on for financial matters.

My clients say it all - I've maintained a rock-solid 95%+ Client Satisfaction Rating on more than 100 engagements in the last two years and more than 94% of my past clients would recommend me to other Upwork users just like you. You don't have to settle for anything as I'm more efficient than most teams, so the money works out the same as if you hired the lesser man.

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*Looking forward to the opportunity to add you to my growing list of satisfied Upwork clients, I remain
Cordially,*

Clint Lovell"

You will notice this one is 161 words. I put blanks in that are completed on each individual application. You will likely see similar ones in the additional examples.

Example 2: Interim CFO Letter

Here's my draft of the letter I start with to do applications when a posting comes along for someone to provide interim CFO services:

"Good ____, folks. I'm Clint Lovell - a capital finance, business management, and compliance expert who has end-to-end experience with growth-oriented companies seeking interim CFO services. I have more than 30 years of practice experience and have supported more than 100 Upwork clients so far (see my Upwork profile, please). I'm Expert-Vetted on Upwork and I'm the Top 1% Finance Freelancer Upwork clients have obviously come to rely on for financial matters.

My clients say it all – I've maintained a rock-solid 95%+ Client Satisfaction Rating on more than 100 engagements in the last two years and more than 94% of my past clients would recommend me to other Upwork users just like you. You don't have to settle for anything as I'm more efficient than most teams, so the money works out the same as if you hired the lesser man.

*Looking forward to the opportunity to add you to my growing list of satisfied Upwork clients, I remain
Cordially,*

Clint Lovell"

You will note this one is 167 words in length – straight to the point and short. Again, you can see the blanks that provide a reminder to not only complete the letter, but to CUSTOMIZE the letter based on the information disclosed in the application by the client (and in the invitation if you got an invitation to the job).

Example 3: Generic Opportunity – Take II

This one is another generic opportunity letter that requires me to provide significant customization when used. Look at it and see how I put it together in only 165 words.

"Good _____, folks. I'm Clint Lovell - a _____ and _____ consultant who focuses on helping Upwork clients navigate these seemingly treacherous business waters because I have end-to-end experience to support you. My 30+ years of experience has repeatedly demonstrated the value of ----- being incorporated into the successful engagement outcome. Luckily, I'm a subject matter expert in this area and can get this one knocked out in as little as 5 to 7 days with as few as ___ billable hours being required (about \$_____). No need to settle for anything less than the top professional – you have it all right here.

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I'm the Expert-Vetted, Top 1% Finance Freelancer on this platform, so this is not idle boasting – it's more like the kind of added value consulting you have probably been hoping for but not found – until now. I'm ready, so let's talk before EOB today about getting you ____ as soon as the end of _____.

Thanks for the look!

Cordially,

Clint Lovell"

Notice the blanks require me to put more information in, so the final letter may end up being almost 200 words, but not by much it would seem. You need to take the same approach to maximize the impact as I do.

Your Workbook Entries

Now you are (hopefully) ready to start drafting your own versions of the Job Application Form Letter. Use separate files to create multiple drafts for each type of letter you think you will require on an ongoing basis (remember, you can modify this and add more as you find out what your needs are on Upwork, so don't sweat it for completeness at this point).

Now that you have that done, the next thing to be aware of is the fact that some clients post a job opportunity and they post questions for you to answer in order to be considered for the job. The Upwork system will not let you proceed without providing some response (no blanks!). So, let's move on to the common application questions we typically see and get ready for answering them on a routine and efficient basis.

Common Application Questions

In this section of the workbook, I want you to work up your standard answer for these questions for each type of job you are going to be going for where the answers would in fact be different, okay? We cannot afford to have you wasting time doing these from scratch most times unless you are really fast and really good at creative writing (like me). Follow along in the sub-headings discussion and completion requirements below.

Describe your recent experience with similar projects.

This question comes up quite a bit and has different answers potentially for different tasking assignments, right? The key is for you to recognize the general types you will be answering this for and developing a stock answer for each one, so it is ready to copy and paste when called for – *and then customizing it to the application a bit if required.*

I try to get an answer to them on this that is less than 100 words (as a general rule) but keyed on the exact type of work being quoted.

Example:

Experience with valuations.

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I have completed probably a dozen or so valuations for Upwork clients on businesses valued in excess of \$200 million (in the aggregate), while rigidly maintaining both my stated 14-day delivery guarantee and my 100% client job satisfaction rating as to the quality of the work. I would welcome adding you to this list.

Done in 54 words. You may have multiple ones for multiple skill-driven assignments, right? Get them ready so you are not wasting time on your applications.

Example:

Experience with business planning.

I have completed a couple dozen business planning assignments for Upwork clients in a variety of business/industry groups that include CRE, B2B, d2CC, and B2C verticals. I completed these assignments on time (you can check my stats on this) and maintained a 100% Client Job Satisfaction Rating while I did so. This approach is what helped make me a Top 1% Finance Freelancer here on Upwork. I can do the same for you I would expect.

Done in 76 words.

The key is to have a version that you open every day in a WORD document that is "ready to go" almost as is for the range of job descriptions and skills you will be seeking to promote of your own in answering job postings. This approach made me much more efficient, and I think it will increase your chances of having your proposal viewed, an interview undertaken, and a job assignment awarded to you.

How do you assess problems?

This is the winner of the Stupid Question Award. This is subjective beyond belief so the only way I know how to deal with it is to provide a stock answer. I suggest you answer this question in less than 50 words if it all possible.

Here's an example:

Whenever we find the work activities – as presently planned – seem likely to result in the current work not being sufficient for the client to realize success (as the client defined success before hiring), we pause the work, inform the client and hold off from any further activity until we get written direction.

I did it in 52 words. You get the point, I hope.

Describe your proficiency with ____.

The client is asking a direct question here regarding your skills. Answer the question directly and do it in less than 50 words.

Example:

I usually get asked this question regarding my use of MS-EXCEL.

I've been using EXCEL since its introduction some 30 plus years ago. I have expert level skills but am old-school, so we do it from scratch and we document what we are doing so it can be audited and my clients seem to love that!

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Done in 45 words.

How do you communicate changes or suggest improvements?

Next to the “assess problems” question, I think this is the dumbest question someone could have. It is entirely subjective and the outcome product of it is likely to only be confusion. I flat out hate this question and get worried every single time I have to answer it.

My advice on this one is to keep it brief. You want this answer to be less than 100 words. Don't go into some long-winded song and dance about what a great problem-solving problem-solver you happen to be. So what? Let them know you have a process and be done with it.

Here's mine as an example:

I tend to follow business management best practices of following up meetings with requests for information and then providing the client with a proposed solution set of options to choose from based on their expected financial impact, only. The client is the only person in power to decide changes.

Less than 50 words.

Please list any certifications related to this project.

Have a brief description for each item in a list. Don't eat up a lot of lines describing what the certification or award is.

Here's an example of mine:

Upwork Top 1% Finance Freelancer

Upwork Expert-Vetted Finance Freelancer

Upwork Top Rated Plus Freelancer

Former FINRA Compliance Vendor

When I was in the Navy I received a Naval Enlisted Code (or “NEC”) designation for my certification on the Mark 86 Gun Fire Control System (an advanced weapons system on warships). Do I put it in here? No? Why? It's not relevant to business management.

Use your common sense and keep this brief and easy to copy.

NDA

You will likely be routinely asked to sign a Non-Disclosure Agreement (commonly called an “NDA”). These are agreements designed solely to protect the client's interests and not yours. Basically, shut your mouth and do the work is what it all means.

You need to have your own to offer to the client. Why? It will save you time sometimes from having to read their version which may contain clauses that are intended to take unfair advantage of you. An example would be the client asking you to agree upfront that all copyrights are theirs and theirs alone – nope. Not doing it. They get the copyright transferred when you have received all payments due and not

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before. I recommend you get one drafted by an attorney. I have a standardized one I have used for years and years and years. Covers most of the issues. NDAs are like locks on gym lockers – they keep honest people, honest. If someone is going to hose you, they are not going to worry one bit about what's in an NDA most times.

Note: my package deal review includes a draft specimen copy of my NDA (as to form, for the purposes of convenience only and not as legal advice) that you may wish to offer to your attorney to review and mark-up before you go forward and offer it to anyone on Upwork. Mine reflects the laws of Texas I believe, so your state will have slightly different language. See your attorney.

END OF GUIDE

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Get Expert Support, Inspiration & Take Off!

Okay, detailed instructions are not for everyone and not everyone gets moving at the same pace, yet we all want to start learning and earning better money almost immediately. Some of us even want to accelerate the process so we can put groceries on the table next week. *We have all been there!*

Time to get some help? Okay, I'm in it to win it with you!

Free Basic Support

If you have a question, feel free to send me an email at bizconsultant@gmx.us. It may take a day or two (or more on weekends) for me to respond, but I respond to all of them and answer questions at no charge. All I ask is that you don't abuse the privilege (I will simply put you into Spam if you do abuse it – life is too short, right?).

Upwork Initial Set-Up Support Package

For folks who would like to have me review your profile set-up, provide editing suggestions, and check your work to see if you are ready, I offer a streamlined package for only \$99 to help you get there. Here's what you get:

1. I review your profile page and make comments.
2. I review each section of the profile for completeness and make comments and suggestions on what you might want to change.
3. I provide sample language to help you get pointed in the right direction.
4. I review your draft Application Letter(s), provide comments, and suggestions on changes.
5. I review your Project Catalogue and Project Portfolio submissions.
6. I put you on the email list for *The Upwork Insider* and you get it for free for the first six months (after that I think I will charge like \$2 a month for it, so what's not to like?).

My basic rules for delivery of services for the Initial Set-Up Support Package are:

1. Your materials have to all be written in the English language.
2. Your materials and intentions will have to conform to the Upwork TOU.

PACKAGE

redistribution. For only \$99 you get the pro tips on:

- Your Profile Page (up to three profile entries reviewed)
- Your Skills Selections
- Your Previous Work & Employment History
- Your Proposed First Portfolio Project
- Your Proposed First Catalogue Entry
- Your Proposed Application Letter (up to 3 of them!)
- Your Job Questions Draft Answers (per the Workbook)

Fast Turnaround

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3. I cannot guarantee success of any kind – that's your department (but I have another package that will help you increase your odds of success and possibly help you bring your game up to my level, if you like).
4. You pay via Zelle. Tag me at the link below (or just [click here](#)) and I will know you want the Initial Set-Up Support Package and I will get the payment stuff worked out for you. Be sure to put your Zelle information (for contact and payment request) in the email along with your contact information and I will get right back to you as soon as practically possible.
5. If your materials are not complete, then the review will not be able to help you with the open and incomplete items (i.e., I'm not going to do the review and editing twice unless you pay twice).
6. Turnaround time here is typically a day or two from when you give me the completed submission package after payment. The submission package is just a few questions I will need you to answer so I know what industry you are going to be working in and what the key issues may be.

DEAL CLOSERS COACHING PROGRAM INITIAL SET-UP SUPPORT

The Deal Closers Coaching Program focus on a more intense personal touch. For only \$199 you get the opportunity to take it all in a whole new direction.

A 1-hour group coaching session with up to four (4) other clients where we cover:

- My 13-Step Systemic Sales Strategy that is designed to maximize your opportunity to be a double-digit closer on Upwork.
- The strategies, steps, and tactics I use that you can use as well to make effective sales presentations and get hired more often on Upwork.

A follow-up 1-hour group coaching session with up to four (4) other clients where we discuss your actual results, the ways you can refine your presentation, better your odds of success, and prime the pump for more hires from Upwork!

Sessions are recorded and you get a link to get your own copy for your own use and not for

Go ahead and order it: [click here](#).

Deal Closers Coaching Program

If you are anxious about doing client interviews on Upwork (or have suffered from repeated instances where the interviews resulted in you not getting hired), then **we must** do something about that, don't we? Never fear, we have a more personalized solution for helping you get started on your pathway to becoming a double-digit closer on Upwork!

I have done extensive coaching and presentations for a living over the past 30+ years and I am getting pretty good at it (the numbers are what they are, right?). For only \$199, I offer you a defined program for helping you get going on a different path that includes:

You get my systemic Upwork New Client Sales Presentation Program that I teach in two (2) 1-hour Zoom sessions you attend with up to four (4) of my other clients. This seminar series follows the classic pathway of "Learn It, Do It, Refine It" sales coaching.

In the first session you learn the basic

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strategies, steps, and tactics I routinely deploy, along with my 13-Step sales process used for Upwork and other sales encounters to maximize my opportunities for a successful outcome. As I stated before, my earnings and stats on Upwork suggest this to be an incredible deal as the average salesperson out there

Learn It

Use What You Learn

Fine Tune It & Go!

is considered a superstar if they can become a “double-digit closer” (i.e., close 10% of their sales interviews on a routine basis) while my results have been consistently above 20% (for Upwork) on an ongoing basis.

You attend this conference with up to four (4) other clients, so there is a lot of time to answer direct questions and learn additional business intelligence from other Upwork freelancers who are experiencing similar problems and challenges.

The second 1-hour session is intended to provide you with the opportunity to fine-tune your presentations based on the challenges and issues you actually experienced after having actually put into play the strategies, steps, and tactics I teach in the first session. I have found this approach creates the best foundation for better potential outcomes and higher output rates for clients.

You can book the second session as soon as a week following the first session but no later than 6 weeks following the first session. Don't worry, I will send you reminders so you can be in a group.

Note on groups: if someone doesn't show for their designated/booked group, they forfeit their right to the session (with no refund) and the remaining persons in the group get even more personalized attention!

Order it now – [click here!](#)

**BE A DOUBLE-DIGIT CLOSER AND
YOU WILL HAVE THE KEY TOOL
YOU NEED TO MAKE IT ON
UPWORK.
Clint Lovell**

END OF DOCUMENT

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