




CHAPTER	TAKE CONTROL OF YOUR FUTURE	
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BE YOUR OWN BOSS
The Independent Worker's
Checklist

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For one, for all

Want to be your own boss but don't know where to start?

If you're thinking of starting out as an Independent Worker - freelancer, contractor, consultant or self-employed, the concept of running all aspects of your business can be quite daunting - especially if you are not familiar with them. It becomes easier once you break it down.

The iPSE-U.S. Independent Worker checklist below is on hand to help. This guide will help you stay on top of your business needs. Take each process step-by-step and you'll soon develop the knowledge you'll need to take your business to the next level.

The Grand Strategy	Time Estimate	Check
Design a simple business plan and strategy.	A day	
Do a financial forecast.	Couple of hours	
Write down a cashflow strategy to mitigate against late payments or income gaps.	Under an hour	

Admin Matters	Time Estimate	Check
Decide whether to set up as a sole proprietor (self-employed), partnership, or limited liability company (see our 'Guide to Independent Work').	Couple of hours	
Source an accountant. Check whether the service includes a basic record keeping and invoicing system.	Big decision (allow a day or so)	
Register with IRS and the states in which you operate. The amount of information you need to provide will depend on your chosen business structure.	Couple of hours	
If your accountant doesn't provide one, source a record keeping and invoicing system.	An hour or less	
Get a bank account set up in your company/ business name.	Couple of hours	
Consider your legal and financial obligations as they relate to your business structure.	An hour or less	

IT & Systems	Time Estimate	Check
Set up a suitable business email address.	Less than an hour	
Get business phone line or mobile phone (if needed).	One week	
Source computer(s), printer, backup system and any other equipment needed. Install relevant software.	A few days	
Set up a professional base to work from.	Half a day	

The Business Drive	Time Estimate	Check
Review business plan and decide which business model, price bracket and marketing tactic to focus on (see our 'Marketing Yourself' guide).	Half a day	
Establish potential business contacts.	A few weeks	
Follow up hot leads.	A few days	
Review results and decide whether to continue or switch tactics. Swap ideas with others at networking events.	Several hours on and off	

Getting ready to deliver	Time Estimate	Check
Understand the project life-cycle from the client's perspective.	Minimum of an hour per client	
Develop a project briefing template to send to clients to help them specify objectives, deliverables and project milestones.	Couple of hours	
The project briefing template will form the foundation for your Statement of Work, or SOW.	Couple of hours	
Understand how you should professionally engage in a business to business relationship.	An hour	
Any projects that might have confidentiality issues, speak with a reputable legal representative to fully understand mutual confidentiality agreements.	A few minutes	

Let iPSE-U.S. make it easier for you to be your own boss

iPSE-U.S., the Association of Independent Workers, is America's only not-for-profit association dedicated to supporting, representing and protecting the independent workforce.

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