Freelancer Toolkit

30 prompts for proposals, client communication, project scoping, and business operations. Copy, customize the `[BRACKETS]`, paste into any AI.

Proposals & Pitches (8 prompts)

Prompt 1: Reverse-Engineered Proposal from Job Post

```
Here is a freelance job posting I want to apply to:

[PASTE FULL JOB POSTING — from Upwork, LinkedIn, job board, or client brief]

My relevant background:
- Core skill: [YOUR PRIMARY SKILL — e.g., "full-stack web development"]
- Years of experience: [NUMBER]
- Most relevant past project: [BRIEF DESCRIPTION — what you built, for whom, the result]
- Unique angle or differentiator: [WHAT MAKES YOU DIFFERENT — e.g., "I specialize in
healthcare SaaS," "I've built 40+ Shopify stores"]

Write a proposal (under 250 words) structured as:

1. OPENING (1-2 sentences): Reference a specific detail from their posting that shows I
actually read it. Connect it directly to something I've done. Never start with "Hi, I'm a
[title] with X years of experience."

2. PROOF (2-3 sentences): Describe one relevant project with a concrete result (metric,
outcome, or transformation). Mirror the language and priorities from their job posting.

3. APPROACH (2-3 sentences): Briefly explain how I'd tackle THEIR specific project —
mention 1-2 tools, methods, or first steps that demonstrate I've already started thinking
about the work.

4. CLOSE (1-2 sentences): Propose a specific next step (e.g., a 15-minute call, a quick
audit, a wireframe). No vague "let me know if you're interested."

Constraints:
- Never use: "I'm confident that," "I'd love the opportunity," "I'm the perfect fit," or
"don't hesitate to reach out"
- Tone: Direct, knowledgeable, human — like a peer who can solve their problem, not an
applicant begging for work
```

Example Output: "Your posting mentions migrating from WooCommerce to Shopify while preserving 12,000+ SKUs and custom pricing tiers — I did exactly that for a wholesale auto parts distributor last year, cutting their page load time by 60% and reducing checkout abandonment by 23%. I'd start by auditing your current product data structure and building a migration script that maps your custom fields to Shopify metafields. I could have a test migration of 500 SKUs ready for your review within the first week. Want to do a 15-minute screen share so I can look at your current setup?"

Prompt 2: Cold Pitch to a Dream Client

```
I want to cold-pitch a potential client who hasn't posted a job — I've identified them as a good fit for my services.

About the prospect:
- Company/Person: [NAME]
- What they do: [BRIEF DESCRIPTION — e.g., "DTC skincare brand, ~$2M revenue, sells on Shopify and Amazon"]
- Where I found them: [HOW YOU DISCOVERED THEM — e.g., "LinkedIn, their website, a podcast interview they did"]
- A specific problem or opportunity I've noticed: [WHAT YOU OBSERVED — e.g., "their website loads slowly, their email sequences stop after purchase, their social content is inconsistent"]

About me:
- What I do: [YOUR SERVICE — e.g., "email marketing strategy and Klaviyo implementation"]
- Relevant proof: [ONE RESULT YOU'VE ACHIEVED — e.g., "increased repeat purchase rate by 35% for a similar DTC brand"]

Write a cold outreach message (under 150 words) for [EMAIL / LINKEDIN DM / TWITTER DM — pick one]:

Structure:
1. Lead with the specific observation about THEIR business (not about you)
2. Connect it to a result you've delivered for someone similar (one sentence, one metric)
3. Offer something free and low-commitment — a quick audit, a loom video, a one-page teardown
4. End with a yes/no question, not an open-ended one

Constraints:
- Never use: "I hope this finds you well," "I'd love to connect," "I think we could work together," "just reaching out"
- Write as if you're a peer sharing a useful observation, not a stranger selling services
```

Example Output: "I was browsing your site after hearing your Shopify Masters episode — noticed your post-purchase email sequence ends after the shipping confirmation. For a brand with your repeat-purchase potential, that's leaving serious revenue on the table. I built a 6-email post-purchase flow for [similar brand] that drove a 35% lift in 90-day repeat orders. I made a quick 3-minute Loom walking through what I'd change for your setup specifically — want me to send it over?"

Prompt 3: Upwork Profile Overhaul

```
I need to rewrite my Upwork profile to stand out and win higher-quality clients.

About me:
- Primary service: [WHAT YOU DO — e.g., "WordPress development and custom plugin building"]
- Secondary services (if any): [OTHER THINGS YOU OFFER]
- Target client: [WHO YOU SERVE BEST — e.g., "small business owners who've outgrown their Squarespace site"]
- Years freelancing: [NUMBER]
- Best result I've delivered: [YOUR STRONGEST CASE STUDY — what the project was, what you did, the measurable outcome]
- Second-best result: [ANOTHER STRONG EXAMPLE]
- Tools/tech I use: [LIST — e.g., "WordPress, PHP, Elementor, WooCommerce, ACF, Git"]
- What clients usually say about working with me: [YOUR SOFT STRENGTHS — e.g., "I communicate proactively and hit deadlines"]

Rewrite my Upwork profile with these sections:

1. TITLE (under 70 characters): Lead with the outcome I deliver, not just my job title. Bad: "Experienced Web Developer." Good: "I Build WordPress Sites That Convert Visitors Into Customers."

2. OVERVIEW (300-400 words):
   - First 2 lines must hook a scanning client — these show in the preview before "read more"
   - Lead with the client's problem, not my credentials
   - Include 2 specific case studies with metrics woven in naturally
   - End with a clear call to action and what the client should message me about
   - Write in first person, conversational but professional

3. SPECIALIZATION TAGS: Suggest 15 skill tags, prioritizing ones that match high-paying job postings in my niche

Constraints:
- Never use: "passionate," "dedicated," "detail-oriented," "results-driven," or "seasoned professional"
- Don't list services as bullet points — weave them into success stories
- Tone: Confident and specific, like someone who's already booked and is selective about new projects
```

Example Output: Title: "WordPress Sites That Load Fast, Rank High, and Convert — 200+ Builds" / Overview opening: "Your WordPress site is slow, your plugins conflict every update, and your developer ghosts you when things break. I fix that. Last month I rebuilt a plumbing company's site from a 6-second load time to 1.2 seconds — their organic leads doubled in 60 days..."

Prompt 4: Proposal Follow-Up Sequence

```
I submitted a proposal to a potential client and haven't heard back. I need follow-up
messages that keep me top-of-mind without being pushy.

Context:
- What the project is: [BRIEF PROJECT DESCRIPTION]
- How I initially pitched: [1 SENTENCE SUMMARY OF YOUR PROPOSAL]
- When I submitted: [DATE OR "X days ago"]
- Platform/channel: [UPWORK / EMAIL / LINKEDIN]
- Any additional value I can offer: [SOMETHING NEW — e.g., "I've since found a case study
that's very relevant," "I had an idea for their onboarding flow," "I built a quick
mockup"]

Write 3 follow-up messages, spaced 3-5 days apart:

FOLLOW-UP 1 (sent ~3 days after proposal):
- Lead with additional value, not "just checking in"
- Share one new insight, idea, or resource relevant to their project
- Under 75 words

FOLLOW-UP 2 (sent ~7 days after proposal):
- Reference a specific challenge they likely face with this project
- Briefly mention how you've solved it before
- Under 75 words

FOLLOW-UP 3 (sent ~12 days after proposal — final):
- Acknowledge they're busy and this is your last follow-up
- Leave the door open without pressure
- Under 50 words

Constraints:
- Never use: "just following up," "checking in," "bumping this," "circling back," "any
updates?"
- Each message must provide standalone value — if they only read one, it should still make
them interested
- Tone: Helpful peer, not desperate vendor
```

Example Output: Follow-up 1: "Thought of your project when I came across this — [competitor name] just redesigned their checkout flow with a single-page approach and saw a 19% conversion lift. Given your product catalog size, a similar architecture could work well. I sketched out how the product filter logic would work if you want to see it." Follow-up 2: "One thing I've seen trip up projects like yours — migrating customer reviews without losing the SEO juice from the old URLs..."

Prompt 5: Portfolio Case Study Writer

```
I need to turn a past project into a compelling portfolio case study that sells my
services.

Project details:
- Client (anonymize if needed): [CLIENT NAME OR INDUSTRY — e.g., "a Series A fintech
startup" or "BrightPath Education"]
- What they needed: [THE PROBLEM OR GOAL — e.g., "redesign their onboarding flow to reduce
drop-off"]
- What I delivered: [WHAT YOU BUILT/CREATED — e.g., "new 4-step onboarding with progress
tracking and contextual tooltips"]
- Tools/skills used: [LIST — e.g., "Figma, React, Framer Motion, user testing"]
- Timeline: [HOW LONG IT TOOK]
- Results: [METRICS OR OUTCOMES — e.g., "onboarding completion went from 34% to 71%," or
"client said X"]
- Biggest challenge: [ONE OBSTACLE YOU OVERCAME]

Write a case study (400-500 words) structured as:

1. THE SITUATION (2-3 sentences): What the client's world looked like before — the pain,
the cost of inaction, the stakes
2. THE CHALLENGE (2-3 sentences): The specific, non-obvious difficulty that made this
project harder than it looks on the surface
3. MY APPROACH (4-5 sentences): What I did, step by step — emphasize decisions and
rationale, not just deliverables. Show the thinking behind the work.
4. THE RESULT (2-3 sentences): Hard metrics first, then qualitative outcome. What changed
for the client's business?
5. CLIENT TAKEAWAY (1 sentence): A pull-quote from the client, or a one-line summary of
why this project matters

Also generate:
- A case study headline (under 10 words) that leads with the result
- 3 tags for categorization (e.g., "Web Development," "E-commerce," "SaaS")

Constraints:
- Write in third person for the client, first person for your actions
- Never use: "innovative solution," "cutting-edge," "leveraged," "utilized," "best-in-
class"
- Tone: Factual and confident — let the results speak, don't oversell
```

Example Output: Headline: "Onboarding Completion Doubled in 6 Weeks" / Opening: "BrightPath's onboarding flow was hemorrhaging users. Only 34% of new sign-ups completed setup, and support tickets about 'where do I start?' accounted for 40% of their CS team's weekly volume. The product worked — people just couldn't find their way in..."

Prompt 6: Rate Justification Response

```
A potential client has pushed back on my rate or asked me to lower my price. I need to respond in a way that justifies my pricing without being defensive or arrogant.

Context:
- My quoted rate: [AMOUNT — e.g., "$85/hour" or "$4,500 for the project"]
- What the client said: [THEIR OBJECTION — e.g., "That's above our budget," "We got a quote for half that," "Can you do it for $X instead?"]
- What the project involves: [BRIEF SCOPE]
- My strongest justification: [WHY YOUR RATE IS FAIR — e.g., "the project requires custom API integration that most freelancers can't do," "my past client saw 3x ROI," "I include 30 days of post-launch support"]
- Am I willing to negotiate? [YES — state your floor / NO — state your boundary]

Write a response (under 200 words) that:

1. Acknowledges their concern without apologizing for your rate
2. Reframes the cost as an investment by connecting it to a specific business outcome
3. Explains one concrete thing that's included in your rate that cheaper alternatives typically skip (e.g., testing, revisions, documentation, strategy, post-launch support)
4. If willing to negotiate: offer a scope adjustment, not a rate cut — "I can hit $X by removing Y" (never discount the same scope)
5. If not negotiating: confidently hold the line and suggest what a lower-budget alternative might look like (without being dismissive)

Constraints:
- Never use: "I understand budget is tight," "you get what you pay for," "I'm worth it," "my expertise is valuable"
- Never bash cheaper competitors
- Tone: Calm, assured, collaborative — like an advisor explaining options, not a salesperson defending a price
```

Example Output: "That $4,500 covers the full build plus 30 days of post-launch bug fixes and performance monitoring — most developers hand off the code and move on, which means your first month live is when things break and you're paying someone new to figure out what went wrong. If you need to hit a lower number, I could scope this as a 3-page MVP without the admin dashboard, which would bring it to $3,200. That gets you launched faster and we can add the dashboard as a Phase 2 once you're generating revenue. Want me to re-scope it that way?"

Prompt 7: Discovery Call Prep Sheet

```
I have a discovery call scheduled with a potential client. Generate a prep sheet so I walk in informed and steer the conversation professionally.

What I know about the client:
- Name/Company: [NAME]
- Industry: [INDUSTRY]
- What they need (based on initial message): [WHAT THEY TOLD YOU — e.g., "they need a new website for their restaurant"]
- Their website or social links: [URLS, if available — otherwise write "none found"]
- How they found me: [REFERRAL / UPWORK / COLD OUTREACH / etc.]

My service: [WHAT YOU DO]
My typical project range: [YOUR PRICE RANGE — e.g., "$3,000 - $8,000"]

Generate a Discovery Call Prep Sheet with:

1. PRE-CALL RESEARCH CHECKLIST (5 items): What to look up before the call — their current site, competitors, recent news, social presence, tech stack

2. OPENING QUESTION: One question that shows I've done homework and immediately positions me as a peer (not "so tell me about your project")

3. QUALIFYING QUESTIONS (8 questions): Questions that uncover budget, timeline, decision-making process, past experiences with freelancers, definition of success, and dealbreakers — without sounding like an interrogation. Order them from casual to specific.

4. RED FLAG CHECKLIST (5 items): Warning signs to watch for during the call that indicate a problematic client

5. CLOSE SCRIPT: Exact words to use to end the call with a clear next step and timeline

Constraints:
- Questions should feel conversational, not like a form
- Never include "What's your budget?" as a direct question — embed it more naturally
- Tone: Strategic and practical — this is a working document, not a template
```

Example Output: Opening Question: "I took a look at your current site — it looks like you're getting solid foot traffic based on your Google reviews. What's the main thing the website isn't doing for you right now?" / Red Flag: "They mention they've already been through 2-3 freelancers on this same project without explaining why."

Prompt 8: Niche Authority Pitch for Podcast/Blog/Guest Post

```
I want to pitch myself as a guest expert for a podcast, blog, or newsletter in my niche to build authority and attract inbound leads.

About me:
- My freelance niche: [YOUR SPECIALTY — e.g., "conversion copywriting for SaaS"]
- My unique angle or contrarian take: [SOMETHING YOU BELIEVE THAT MOST PEOPLE IN YOUR FIELD DON'T — e.g., "most SaaS landing pages fail because they talk about features instead of the pain of doing nothing"]
- One specific result I can reference: [A CASE STUDY — e.g., "rewrote a SaaS homepage and increased trial signups by 42%"]
- Target show/blog: [NAME — e.g., "The Copywriter Club podcast"]
- Their audience: [WHO LISTENS/READS — e.g., "freelance copywriters looking to specialize"]

Write a pitch email (under 200 words) with:

1. SUBJECT LINE: Specific and intriguing — reference a contrarian take or surprising result, not "Guest Post Pitch"
2. BODY:
   - Open by referencing a specific episode/post they published and what you found interesting about it
   - State your unique angle in one sentence
   - Propose 2-3 specific topic ideas with working titles that serve THEIR audience (not just promote you)
   - Include one credibility marker (metric, publication, or notable client)
   - Close with a low-friction yes — "want me to send an outline?" not "let's schedule a call"

Constraints:
- Never use: "I'm a huge fan," "I'd love the opportunity," "I think your audience would benefit"
- Pitch topics that teach something actionable, not topics that are just your origin story
- Tone: Peer-to-peer — like one expert emailing another, not a fan asking for a favor
```

Example Output: Subject: "Why the best SaaS homepages never mention the product (+ data)" / Body: "Your episode with Joanna Wiebe on landing page teardowns stuck with me — especially the point about above-the-fold copy doing too much heavy lifting. I've been testing something counterintuitive with my SaaS clients: leading the entire homepage with the cost of NOT switching, with zero feature mentions until below the fold. Last quarter, this approach lifted trial signups 42% for a project management tool. Three topics I could unpack for your audience: 1) 'The Anti-Feature Homepage: Why Pain Copy Converts Better Than Product Copy' 2) 'The 3 Headline Formulas That Outperform Everything Else on SaaS Homepages' 3) 'How to Price Your Landing Page Projects at $5K+ Without Losing Clients.' Want me to send a rough outline for whichever grabs you?"

Client Emails (8 prompts)

Prompt 9: Project Kickoff Email

```
I just signed a new client and need to send a professional kickoff email that sets expectations and makes them feel confident they hired the right person.

Project details:
- Client name: [NAME]
- Project: [WHAT YOU'RE BUILDING/DELIVERING]
- Start date: [DATE]
- Estimated timeline: [DURATION — e.g., "3 weeks"]
- Key milestones: [LIST 2-4 — e.g., "wireframes by Day 5, first draft by Day 12, revisions by Day 18"]
- What I need from them to start: [ASSETS, ACCESS, INFO — e.g., "brand guidelines, login credentials for their CMS, product photos"]
- Preferred communication channel: [EMAIL / SLACK / BASECAMP / etc.]
- Check-in frequency: [e.g., "weekly update every Monday"]

Write a kickoff email that includes:

1. A brief confirmation of what we're doing and the timeline
2. A numbered list of what I need from them (with deadlines for each item)
3. Communication expectations — when they'll hear from me, how, and what to do if something's urgent
4. One line that proactively addresses the most common client anxiety (e.g., "You'll see work-in-progress before anything is finalized")
5. A warm but professional close

Constraints:
- Under 300 words — clients don't read long emails
- Never use: "please don't hesitate to," "looking forward to working together," "excited to get started" (show confidence through structure, not enthusiasm clichés)
- Format: Short paragraphs and bullet points for scannability
- Tone: Organized and reassuring — this email should make them think "okay, this person has done this before"
```

Example Output: "Hi Sarah — We're locked in. Here's how the next 3 weeks look for your new landing page: [timeline]. To keep us on track, I need these from you by Friday the 14th: 1) Brand guidelines PDF, 2) Hero image or product photos (min 1200px wide), 3) Your top 3 competitor URLs for reference. I'll send you a progress update every Monday morning. You'll see the wireframe before I touch any code, so there's plenty of room to steer early. If anything comes up between updates, Slack me — I respond within a few hours during business days."

Prompt 10: Scope Creep Pushback Email

```
My client is requesting work that falls outside the agreed scope. I need to push back professionally while preserving the relationship.

Context:
- What we originally agreed on: [ORIGINAL SCOPE — e.g., "redesign 5 pages of their website"]
- What they're now asking for: [THE ADDITIONAL REQUEST — e.g., "they want me to also set up their email marketing integration and write 3 blog posts"]
- How far along the project is: [e.g., "about 60% complete"]
- Is the request reasonable as a paid add-on? [YES/NO — and estimated cost/time if yes]
- Relationship context: [e.g., "great client, want to keep them long-term" or "first project, still building trust"]

Write an email (under 200 words) that:

1. Acknowledges the request positively — don't make them feel bad for asking
2. Clearly states this falls outside the original scope (reference the agreement without sounding legalistic)
3. Offers a path forward:
   - Option A: Add it as a paid add-on with a specific price and timeline
   - Option B: Complete the current project first, then tackle the new work as Phase 2
4. Reaffirm commitment to the current deliverables and timeline

Constraints:
- Never use: "as per our agreement," "unfortunately," "that wasn't part of the deal," "I'd love to help but"
- Never frame it as a problem — frame it as a decision for them to make
- Tone: Collaborative and solutions-oriented — two professionals figuring out the best path
```

Example Output: "The email integration and blog posts are a great idea — they'd get a lot more mileage out of the new site. Those weren't in our original project scope, so let me give you two options: I can add them to the current project for an additional $1,200 and extend the timeline by one week, or we can wrap up the redesign on schedule and I'll quote a separate Phase 2 for the email and content work. Either way, the 5-page redesign stays on track for delivery by March 20. Which works better for your timeline?"

Prompt 11: Project Update / Progress Report

```
I need to send a progress update to my client that keeps them informed and confident in
the project's direction.

Project details:
- Project: [WHAT YOU'RE WORKING ON]
- Update frequency: [WEEKLY / BI-WEEKLY / MILESTONE-BASED]
- What I completed since last update: [LIST WHAT YOU FINISHED]
- What I'm working on next: [UPCOMING TASKS]
- Any blockers or things I need from the client: [LIST, or "none"]
- Any risks or timeline changes: [ISSUES, or "on track"]
- Anything to show (screenshots, links, demos): [YES — describe / NO]

Write a progress update email structured as:

DONE (since last update):
- Bulleted list, each item in plain language the client understands (no jargon)
- Include links or screenshots where relevant

UP NEXT (this week/period):
- What I'm tackling next, with expected completion

NEEDS FROM YOU:
- Anything I'm waiting on, with a specific deadline and why it matters for the timeline
- If nothing needed, state that clearly so they don't wonder

STATUS: [On Track / Minor Delay — explain / Blocked — explain]

Constraints:
- Under 200 words — updates should be scannable in 30 seconds
- Never bury bad news — if there's a delay, lead with it and include the recovery plan
- Replace all technical terms with client-friendly language (e.g., "the checkout page" not
"the Stripe webhook integration")
- Tone: Calm, competent, transparent
```

Example Output: "Project Update — Week 2 of 3 / DONE: Homepage design approved and coded, About page is live in staging ([link]), contact form connected and tested. / UP NEXT: Building out the Services page and integrating your booking calendar this week. / NEEDS FROM YOU: I need your 3 service descriptions by Wednesday — without them, the Services page will push to next week. / STATUS: On Track."

Prompt 12: Difficult Conversation Email (Delay / Mistake / Bad News)

```
I need to communicate bad news to a client — a delay, a mistake I made, or an unexpected problem.

What happened:
- The issue: [DESCRIBE — e.g., "I'm going to miss the deadline by 4 days," "I accidentally deployed to the wrong environment," "the third-party API we planned to use is being deprecated"]
- Why it happened: [HONEST ROOT CAUSE — don't spin it]
- Impact on the project: [HOW THIS AFFECTS TIMELINE, COST, OR DELIVERABLES]
- My proposed fix: [WHAT YOU'RE DOING ABOUT IT — be specific]
- Revised timeline (if applicable): [NEW DATES]

Write an email (under 200 words) that:

1. States the issue clearly in the first sentence — no burying it under context
2. Takes ownership without excessive apologizing (one apology, max)
3. Explains the cause in 1-2 sentences (enough for transparency, not so much it sounds like excuses)
4. Presents the specific fix and revised plan
5. Offers something that demonstrates accountability (e.g., a discount, expedited delivery, extra deliverable)

Constraints:
- Never use: "unfortunately," "I regret to inform you," "due to unforeseen circumstances," "rest assured"
- Never blame external factors without acknowledging what you could have done differently
- The email should leave the client thinking "okay, they've got a plan" — not "should I be worried?"
- Tone: Direct, honest, solution-focused
```

Example Output: "Hi David — I need to push the delivery date from Friday the 15th to Tuesday the 19th. The payment processing integration is taking longer than I scoped — Stripe's new API requires an additional authentication layer I didn't account for. I should have caught this during the planning phase. Here's where things stand: the storefront and cart are fully built and tested. I'm finishing the payment flow now and will have a working staging link for you by Saturday. To make up for the delay, I'll include the order notification emails that were originally out of scope. I'll send you a progress update Saturday with the staging link."

Prompt 13: Client Offboarding / Project Handoff Email

```
A project is wrapping up and I need to send a professional handoff email that closes
things cleanly and opens the door for future work.

Project details:
- Client name: [NAME]
- What was delivered: [FINAL DELIVERABLES — e.g., "fully built and deployed 5-page
website"]
- Where deliverables live: [LINKS, REPOS, FOLDERS — e.g., "staging site at [URL], source
code in GitHub repo"]
- Access/credentials transferred: [WHAT YOU'RE HANDING OVER — e.g., "hosting login, CMS
admin access, DNS records"]
- Documentation provided: [ANY GUIDES, VIDEOS, OR DOCS — e.g., "a Loom walkthrough of how
to update content"]
- Support period: [POST-PROJECT SUPPORT TERMS — e.g., "14 days of bug fixes included,"
"none — project is complete"]
- Anything the client should know going forward: [MAINTENANCE TIPS, WARNINGS,
RECOMMENDATIONS]

Write a handoff email that includes:

1. A summary of what was delivered (bulleted list)
2. Where everything lives and how to access it
3. Any documentation or guides included
4. Post-project support terms — what's covered and for how long
5. 1-2 recommendations for what they should do next (e.g., "set up automated backups,"
"consider adding a blog for SEO in Q2")
6. A specific, natural door-opener for future work (not a generic "let me know if you need
anything")
7. A request for a testimonial or review (specific and easy to act on)

Constraints:
- Under 350 words
- Never use: "it's been a pleasure," "I hope you're satisfied," "don't hesitate to reach
out"
- Tone: Professional and clean — like a contractor handing over the keys to a finished
house
```

Example Output: "Hi Maria — the website is live and everything is in your hands. Here's what was delivered: [bulleted list]. All source code is in the GitHub repo I transferred to your account. I recorded a 7-minute Loom showing how to add new menu items and update prices in the CMS — link is [here]. Bug fixes are covered for the next 14 days. After that, I offer a monthly maintenance retainer ($200/mo) if you want ongoing updates. One recommendation: set up a Google Business Profile and link it to the new site — it'll help with local search. If the site drives the traffic you're expecting, a Phase 2 with an online ordering integration would be the natural next move — happy to

scope that out whenever you're ready. One last ask: if you're happy with how this turned out, a 2-3 sentence review on [Upwork/Google/LinkedIn] would mean a lot — I can send you a direct link."

Prompt 14: Testimonial Request Email

```
I've completed a project and want to ask the client for a testimonial that I can use on my portfolio, website, or freelance profiles.

Context:
- Client name: [NAME]
- Project completed: [WHAT YOU DID]
- Best result from the project: [THE OUTCOME — e.g., "their site traffic doubled," "they launched on time and under budget"]
- Where I want to use the testimonial: [WEBSITE / UPWORK / LINKEDIN / ALL]
- Relationship warmth: [GREAT / GOOD / NEUTRAL]

Write a testimonial request email (under 150 words) that:

1. References the specific positive outcome of the project (remind them what went well)
2. Makes it absurdly easy — provide 3 optional starter prompts they can use or modify, so they don't face a blank page
3. Specifies where it'll be used
4. Gives them an out — "totally fine if now isn't a good time" (reduces pressure and paradoxically increases response rate)

Starter prompts should focus on:
- The specific result or transformation
- What working with me was like (process, communication)
- Whether they'd hire me again or recommend me

Constraints:
- Never use: "I'd really appreciate it," "it would mean the world," "if it's not too much trouble"
- Tone: Casual and low-pressure — like asking a colleague for a quick favor
```

Example Output: "Hi James — now that the new checkout flow has been live for a few weeks (and those conversion numbers are looking solid), would you be open to writing a quick testimonial I can use on my website? Totally fine if the timing doesn't work. If you're up for it, here are some starters you can use or riff on: 1) 'We hired [name] to fix our checkout flow, and within a month...' 2) 'What stood out about working with [name] was...' 3) 'I'd recommend [name] to anyone who needs...' Even 2-3 sentences is perfect."

Prompt 15: Payment Reminder / Late Invoice Follow-Up

```
A client hasn't paid an invoice that's past due. I need to follow up professionally and firmly.

Context:
- Invoice amount: [AMOUNT]
- What the invoice is for: [DELIVERABLE]
- Original due date: [DATE]
- How overdue: [DAYS/WEEKS]
- Payment method: [HOW THEY PAY — e.g., "Stripe invoice," "bank transfer," "PayPal"]
- Previous reminders sent: [NONE / 1 / 2+]
- Relationship context: [e.g., "good client, probably just forgot" or "history of slow payments"]
- Late fee policy (if any): [e.g., "2% per week after 14 days" or "none"]

Write a follow-up email based on the overdue stage:

If FIRST REMINDER (1-7 days overdue):
- Light, friendly nudge — assume it slipped through the cracks
- Attach or link the invoice again for easy access
- Under 75 words

If SECOND REMINDER (8-21 days overdue):
- Firmer tone, reference the specific due date
- Mention any late fee policy
- Ask if there's an issue with the payment method
- Under 100 words

If FINAL NOTICE (21+ days overdue):
- State the consequences clearly (pause on future work, late fees, collections)
- Set a hard deadline for payment
- Under 100 words

Constraints:
- Never use: "I'm sure this is just an oversight," "I hate to bother you," "as you know"
- Never threaten legal action in the first or second reminder
- Include the invoice number, amount, and a payment link in every version
- Tone: Professional and direct — escalate firmness with each stage, but never hostile
```

Example Output: First reminder: "Quick heads up — Invoice #1047 for $2,400 (website redesign) was due last Friday. Here's the payment link for easy access: [link]. Let me know if you need anything reissued." / Second reminder: "Following up on Invoice #1047 ($2,400), originally due February 3. It's now 12 days past due. Per our agreement, a 2% late fee applies after 14 days. If there's an issue with the payment method, let me know and I'll send an alternative. Payment link: [link]."

Prompt 16: Re-Engagement Email for Past Clients

```
I want to re-engage a past client I haven't worked with in a while, to generate repeat business.

Context:
- Client name: [NAME]
- What I did for them: [PAST PROJECT — e.g., "built their e-commerce site 8 months ago"]
- How long since we last worked together: [TIMEFRAME]
- Something relevant that's changed: [e.g., "I noticed their site isn't mobile-optimized," "they expanded to a new product line," "a Google algorithm update may have affected their rankings," "I've added a new service they could use"]
- My goal: [WHAT I WANT TO PITCH — e.g., "a site audit," "a new feature build," "ongoing retainer"]

Write a re-engagement email (under 150 words) that:

1. Opens with something specific to them — not a generic "hope you're well"
2. References our past work and a positive outcome
3. Identifies one specific opportunity or issue they might not be aware of
4. Proposes a concrete, low-commitment next step (an audit, a call, a quick review)
5. Doesn't feel like a sales email — feels like a useful heads-up from someone who knows their business

Constraints:
- Never use: "it's been a while," "I hope business is going well," "I wanted to reconnect," "I have availability"
- Tone: Helpful and specific — like a former contractor noticing something and flagging it
```

Example Output: "Hi Tom — I was looking at the outdoor gear site we built last spring and noticed the category pages aren't passing Google's Core Web Vitals anymore (looks like the image gallery plugin pushed load times past the threshold). That could be dragging down your search rankings, especially with the algorithm update Google rolled out last month. I can run a quick performance audit and flag what needs fixing — usually takes me about an hour. Want me to send over a report?"

Project Scoping (7 prompts)

Prompt 17: Project Scope Document Generator

```
I need to create a clear, professional scope document for a new client project that protects both of us and prevents misunderstandings.

Project details:
- Client: [NAME/COMPANY]
- Project type: [e.g., "website redesign," "mobile app MVP," "brand identity package"]
- What the client wants (in their words): [PASTE THEIR BRIEF OR SUMMARIZE THEIR REQUEST]
- What I've agreed to deliver: [YOUR UNDERSTANDING — e.g., "5-page responsive website with contact form, blog, and CMS"]
- What is explicitly NOT included: [THINGS THEY MIGHT ASSUME — e.g., "copywriting, stock photography, SEO optimization, ongoing maintenance"]
- Timeline: [ESTIMATED DURATION]
- Key milestones: [2-4 CHECKPOINTS — e.g., "wireframes, design mockup, development, launch"]
- Number of revision rounds: [e.g., "2 rounds of revisions per milestone"]
- Tech stack / tools: [WHAT YOU'LL USE]
- Deliverables format: [HOW THEY'LL RECEIVE THE WORK — e.g., "deployed to their hosting, source files in GitHub, Figma file"]

Generate a scope document with these sections:

1. PROJECT OVERVIEW (2-3 sentences summarizing the engagement)
2. DELIVERABLES (numbered list — specific and measurable)
3. OUT OF SCOPE (bulleted list — be explicit about what's NOT included)
4. TIMELINE & MILESTONES (table: milestone, deliverable, target date, client approval needed?)
5. REVISION POLICY (how many rounds, what counts as a revision vs. a new request)
6. CLIENT RESPONSIBILITIES (what they need to provide and when — assets, content, feedback, approvals)
7. ASSUMPTIONS (conditions under which this scope is valid — e.g., "assumes content is provided by client by X date")

Constraints:
- Use clear, non-legal language — this is a working document, not a contract
- Every deliverable must be specific enough that both parties can objectively agree whether it was delivered
- Tone: Professional, clear, and protective of both sides
```

Example Output: "PROJECT OVERVIEW: [Company] has engaged [Your Name] to redesign and develop a 5-page responsive website, replacing the current WordPress site with a modern, mobile-

first build on Webflow. The project includes design, development, content migration (client-provided), and deployment. / DELIVERABLES: 1. Homepage with hero section, 3 service cards, testimonial carousel, and CTA. 2. About page with team bios (content provided by client)..." / OUT OF SCOPE: "Copywriting and content creation, stock photography licensing, SEO audit or optimization, email marketing integration, ongoing maintenance after launch."

Prompt 18: Requirements Extraction from Vague Client Brief

```
A client has given me a vague or incomplete project brief. I need to extract clear requirements and identify what's missing before I start working.

Client's brief (paste exactly what they sent):
[PASTE THE CLIENT'S BRIEF, EMAIL, OR MESSAGE — however vague or rambling]

My service area: [WHAT YOU DO — e.g., "web design and development"]

Analyze this brief and generate:

1. WHAT I UNDERSTAND (bulleted list): Translate their brief into clear, specific requirements. Restate what they're asking for in concrete terms.

2. WHAT'S AMBIGUOUS (bulleted list): Things they mentioned but weren't specific enough about — with 2-3 clarifying question options for each ambiguity.

3. WHAT'S MISSING (bulleted list): Critical decisions they haven't addressed that I need answered before starting. For each, explain why it matters and suggest a default if they don't have a preference.

4. HIDDEN ASSUMPTIONS (bulleted list): Things the client probably assumes are included but hasn't explicitly stated — flag each one so I can confirm or set boundaries.

5. RECOMMENDED REPLY: A professional message I can send back to the client that acknowledges their brief, confirms what I understand, and asks the essential clarifying questions (limit to 5-7 questions max — don't overwhelm them).

Constraints:
- Don't assume — flag every ambiguity, even small ones
- Prioritize the questions: must-answer-before-starting vs. can-decide-later
- Tone: Thorough but not pedantic — the goal is to show competence and save everyone time
```

Example Output: "WHAT I UNDERSTAND: 1) You need a new website for your bakery — replacing the current single-page site. 2) You want customers to be able to place orders online. 3) You need it done 'soon' (timeline TBD). / WHAT'S AMBIGUOUS: 'Place orders online' — does this mean a full e-

commerce checkout with payment processing, or a simple order form that sends you an email? / WHAT'S MISSING: Budget range — this determines whether we build custom or use a template..."

Prompt 19: Time & Cost Estimator

```
I need to estimate how long a project will take and what to charge, based on the scope.

Project details:
- What I'm building/delivering: [DESCRIBE THE PROJECT — be as detailed as possible]
- My hourly rate: [YOUR RATE — e.g., "$75/hour"]
- My experience with this type of project: [FIRST TIME / DONE A FEW / VERY EXPERIENCED]
- Client type: [STARTUP / SMALL BUSINESS / AGENCY / ENTERPRISE]
- Complexity factors: [LIST — e.g., "third-party API integration, custom animations,
multilingual support"]
- Am I providing content/copy, or is the client? [ME / CLIENT / SPLIT]

Break down the project into individual tasks and estimate each one:

FORMAT:
| Task | Estimated Hours (Low) | Estimated Hours (High) | Notes |
|------|----------------------|----------------------|-------|

Include these categories:
- Discovery & planning
- Design / architecture
- Core build / development
- Integration & testing
- Revisions (assume 2 rounds)
- Client communication & project management (typically 10-15% of total)
- Buffer for unknowns (15-25% depending on experience level)

Then calculate:
- TOTAL HOURS: Low estimate and High estimate
- PROJECT PRICE (hourly): Low hours x rate, High hours x rate
- RECOMMENDED FIXED PRICE: High estimate x rate x 1.1 (10% margin for fixed-price risk)
- RECOMMENDED QUOTE TO CLIENT: A sentence framing the price with the timeline

Also flag:
- Which tasks are most likely to run over estimate and why
- Whether hourly or fixed-price is better for this specific project, and why
```

Example Output: "Task breakdown: Discovery & planning (3-4 hrs), Wireframes (4-6 hrs), Homepage design (6-8 hrs), Inner page designs x4 (8-12 hrs), Development (16-24 hrs), CMS setup (3-4 hrs), Testing & QA (4-6 hrs), Revisions (6-8 hrs), Communication (5-7 hrs), Buffer (6-10 hrs). TOTAL: 61-89 hours. At $75/hr: $4,575-$6,675. Recommended fixed price: $7,350. Tasks most likely

to overrun: Development (scope creep in responsive behavior) and Revisions (client feedback cycles often expand)."

Prompt 20: Feature Priority Matrix (MoSCoW)

```
I need to help a client prioritize features for their project when they want everything but the budget or timeline can't support it all.

Project: [WHAT YOU'RE BUILDING]
Client's full wish list:
[LIST EVERY FEATURE/REQUEST THE CLIENT HAS MENTIONED — numbered]

Budget: [TOTAL BUDGET or "flexible" or "tight"]
Timeline: [DEADLINE or TIMEFRAME]
Primary goal for the project: [WHAT SUCCESS LOOKS LIKE — e.g., "launch an MVP to validate demand," "replace their outdated website before a trade show"]

Categorize every feature into the MoSCoW framework:

MUST HAVE — The project fails without these. Core functionality required for launch.
SHOULD HAVE — Important but the project can launch without them. Strong candidates for Phase 2.
COULD HAVE — Nice to have. Include only if time and budget allow.
WON'T HAVE (this time) — Out of scope for this phase. Explicitly deferred.

For each feature, provide:
- The category (Must/Should/Could/Won't)
- Estimated effort (Low/Medium/High)
- Reasoning (one sentence — why it's in this category)

Then generate:
1. A PHASE 1 SCOPE (Must Haves only) with estimated timeline
2. A PHASE 2 RECOMMENDATION (Should Haves) with estimated cost
3. A client-facing summary paragraph I can paste into an email explaining the prioritization

Constraints:
- Be ruthless with Must Haves — most freelancers put too many features here. If the project can technically launch without it, it's not a Must Have.
- Tie every categorization to the client's stated primary goal
- Tone: Strategic and decisive — the client is hiring you partly for this judgment
```

Example Output: "MUST HAVE: 1) Homepage with hero + CTA (Low effort — core conversion page), 2) Contact form with email notification (Low — can't capture leads without it), 3) Mobile responsiveness (Medium — 60%+ of their traffic is mobile). SHOULD HAVE: 4) Blog section

(Medium — important for SEO but not needed for launch), 5) Testimonial carousel (Low — social proof helps but static quotes work for now). WON'T HAVE: 8) Client portal with login (High — this is a Phase 3 feature, not an MVP requirement)."

Prompt 21: Technical Approach Document

```
A client has asked how I'd technically approach their project. I need to explain my plan in a way that builds confidence without drowning them in jargon.

Project: [WHAT YOU'RE BUILDING]
Client's technical level: [NON-TECHNICAL / SOMEWHAT TECHNICAL / TECHNICAL]
Key decisions to explain:
- Tech stack / tools: [WHAT YOU'LL USE AND WHY]
- Hosting / infrastructure: [WHERE IT'LL LIVE]
- Any third-party services: [APIs, PLUGINS, PLATFORMS — e.g., "Stripe for payments, Cloudinary for images"]

Write a Technical Approach document (300-500 words) that:

1. APPROACH SUMMARY (2-3 sentences): Plain-language overview of how I'll build this and why this approach is right for their project specifically (not generically)

2. TECHNOLOGY CHOICES (bulleted list): Each tool/technology with a one-sentence justification framed around the client's benefit (speed, cost, reliability, ease of maintenance — not "it's the latest framework")

3. HOW IT ALL CONNECTS (1 paragraph or simple diagram description): How the pieces work together — explained at the client's technical level

4. WHAT THIS MEANS FOR YOU (bulleted list): Translate technical decisions into business outcomes:
   - How it affects their ongoing costs
   - How easy it'll be for them (or a future developer) to maintain
   - How it handles growth / traffic / scale
   - Any trade-offs I'm making and why

5. ALTERNATIVES I CONSIDERED (2-3 items): Other approaches I evaluated and why I didn't choose them — shows due diligence

Constraints:
- Adjust jargon to client's technical level — if non-technical, use zero unexplained terms
- Never justify a choice with "it's industry standard" or "it's what I'm most comfortable with" (even if true)
- Tone: Trusted advisor explaining their reasoning — confident, transparent, no fluff
```

Example Output: "APPROACH SUMMARY: I'll build your booking site on Next.js with a headless CMS (Sanity), which means you'll be able to update services, pricing, and photos yourself without touching any code. Payments go through Stripe — they handle all the security and compliance so we don't have to build it from scratch. / WHAT THIS MEANS FOR YOU: Your monthly costs will be ~$0 for hosting (Vercel free tier handles your traffic level) plus Stripe's 2.9% per transaction. If you hire a different developer later, they'll have no trouble picking up a standard Next.js project."

Prompt 22: Risk Register for Client Projects

```
I want to proactively identify risks for an upcoming project and have mitigation plans
ready before problems occur.

Project: [WHAT YOU'RE BUILDING]
Timeline: [DURATION]
Client type: [e.g., "startup with changing requirements," "established business with slow
approval cycles," "agency subcontracting to me"]
Known concerns: [ANY RISKS YOU ALREADY SEE — e.g., "client has never worked with a
freelancer before," "tight deadline with no buffer," "depends on a third-party API I
haven't used"]

Generate a Risk Register with 8-10 risks, covering these categories:
- Scope risks (requirements changes, feature creep, unclear specs)
- Timeline risks (delays, dependencies, approval bottlenecks)
- Technical risks (integration failures, platform limitations, performance issues)
- Client risks (slow feedback, changing stakeholders, payment issues)
- External risks (API changes, vendor issues, market changes)

For each risk:
| Risk | Category | Likelihood (Low/Med/High) | Impact (Low/Med/High) | Early Warning Sign
| Mitigation Plan |

Then generate:
1. TOP 3 RISKS I should discuss with the client upfront
2. A "risk conversation" script — 3-4 sentences I can use to bring up the most important
risk without scaring the client

Constraints:
- Risks should be specific to THIS project, not generic boilerplate
- Mitigation plans should be concrete actions, not vague ("have a backup plan")
- Tone: Pragmatic and solution-oriented — identifying risks shows professionalism, not
pessimism
```

Example Output: "Risk: Client feedback takes more than 5 business days per review cycle | Category: Client | Likelihood: Medium | Impact: High | Early Warning: First milestone review takes more than 3 days | Mitigation: Set explicit feedback deadlines in the scope document; if exceeded,

timeline shifts day-for-day automatically. / Risk Conversation Script: 'One thing I like to align on early — the timeline assumes 3-business-day turnarounds on feedback at each milestone. In my experience, that's where most project delays come from, not the build itself. If reviews take longer, the delivery date shifts proportionally. Does that process work on your end?'"

Prompt 23: Project Retrospective & Lessons Learned

```
A project just wrapped up and I want to do a quick retrospective to improve my process for future projects.

Project details:
- What I built/delivered: [DELIVERABLE]
- Original timeline vs actual: [e.g., "estimated 3 weeks, took 4.5 weeks"]
- Original price vs actual time spent: [e.g., "quoted $5,000 fixed, spent 72 hours at $75/hr = $5,400 effective"]
- What went well: [LIST 3-5 THINGS]
- What went wrong or was harder than expected: [LIST 3-5 THINGS]
- Client communication quality: [GREAT / OK / DIFFICULT — briefly explain]
- Would I work with this client again? [YES / MAYBE / NO — and why]

Generate a structured retrospective:

1. PROJECT SCORECARD:
   - Timeline accuracy: [on time / X days over / X days under]
   - Budget accuracy: [on budget / over by $X / under by $X]
   - Effective hourly rate: [total payment / total hours worked]
   - Client satisfaction (your estimate): [1-10]
   - Your satisfaction: [1-10]

2. WHAT WORKED (keep doing):
   - 3 specific practices or decisions that paid off, with why they mattered

3. WHAT DIDN'T WORK (change next time):
   - 3 specific issues, each with a concrete process change for the future (not vague resolutions)

4. PRICING INSIGHT:
   - Was this project priced correctly?
   - What should I charge for an identical project next time?
   - Any scope items I should price separately going forward?

5. TEMPLATE UPDATES:
   - Specific changes to make to my scope template, proposal template, or process based on this project

Constraints:
- Be honest and specific — vague retrospectives ("communicate better") are useless
- Every "change next time" must be a concrete, implementable action
- Tone: Analytical and forward-looking — this is for your own improvement
```

Example Output: "SCORECARD: Timeline: 10 days over (estimated 15 working days, took 25). Budget: Over by $1,125 (effective rate dropped to $54/hr vs. my target $75/hr). / WHAT DIDN'T

WORK: 1) I didn't cap revision rounds — client sent 4 rounds of homepage feedback when I scoped for 2. Fix: Add to scope template: 'Includes 2 rounds of revisions per milestone. Additional rounds billed at $75/hr.' 2) I estimated the Stripe integration at 4 hours — it took 11 because of their new SCA requirements. Fix: Add 150% buffer to any third-party integration estimate."

Contracts & Invoicing (7 prompts)

Prompt 24: Freelance Contract Generator

```
I need a clear, professional freelance contract for a new project. This should protect both parties without requiring a lawyer for a standard engagement.

Project details:
- My name/business name: [YOUR NAME OR BUSINESS]
- Client name/business: [CLIENT NAME OR BUSINESS]
- Project description: [WHAT YOU'RE DELIVERING — keep it specific]
- Deliverables: [NUMBERED LIST OF SPECIFIC DELIVERABLES]
- Total price: [AMOUNT]
- Payment structure: [e.g., "50% upfront, 50% on completion" or "monthly milestones"]
- Payment due within: [e.g., "14 days of invoice"]
- Late payment fee: [e.g., "2% per week" or "none"]
- Timeline: [START DATE to END DATE]
- Revision rounds included: [NUMBER]
- Who owns the final work: [CLIENT AFTER FULL PAYMENT / SHARED / YOU RETAIN RIGHTS]
- Kill fee / cancellation terms: [e.g., "client may cancel with 7 days notice; all completed work is billed"]
- Confidentiality needed: [YES — describe / NO]

Generate a freelance contract with these sections:

1. PARTIES — Who's involved
2. SCOPE OF WORK — What's being delivered (reference the scope document if one exists)
3. TIMELINE — Start date, milestones, end date
4. PAYMENT TERMS — Amount, schedule, accepted methods, late fees
5. REVISIONS — What's included, how additional revisions are billed
6. INTELLECTUAL PROPERTY — Who owns what, and when ownership transfers
7. CONFIDENTIALITY — If applicable
8. CANCELLATION & KILL FEE — How either party can exit, and what's owed
9. LIABILITY — Standard limitation of liability clause
10. CHANGES TO SCOPE — How scope changes are handled (written agreement + cost estimate before work begins)
11. SIGNATURES — Signature blocks for both parties with date lines

Constraints:
- Write in plain English, not legalese — both parties should understand every clause without a lawyer
- This is a starting framework, not a substitute for legal advice on complex engagements
- Include a note at the top: "This agreement is a professional working contract between independent parties. For engagements exceeding $[10,000], consider having it reviewed by a
```

```
legal professional."
- Tone: Clear, balanced, and fair to both sides
```

Example Output: "FREELANCE SERVICE AGREEMENT / Between [Your Name] ('Contractor') and [Client Name] ('Client') / Effective Date: [Date] / SCOPE OF WORK: Contractor will design and develop a 5-page responsive website for Client, consisting of: 1) Homepage with hero section, service overview, and contact CTA, 2) About page, 3) Services page with pricing table, 4) Portfolio/gallery page, 5) Contact page with form. / PAYMENT: Total project fee: $4,500. Payment schedule: $2,250 due upon signing this agreement (before work begins); $2,250 due upon delivery of final approved deliverables..."

Prompt 25: Invoice Template with Professional Line Items

```
I need to create a professional invoice for a client.

Invoice details:
- My business name: [YOUR NAME / BUSINESS NAME]
- My address: [YOUR ADDRESS or "remote — no physical address"]
- My email: [EMAIL]
- My payment details: [PAYMENT METHOD — e.g., "PayPal: email@example.com" or "Bank
transfer: details below"]
- Client name: [CLIENT NAME / BUSINESS]
- Client address: [CLIENT ADDRESS, if known]
- Invoice number: [NUMBER — e.g., "INV-2024-017"]
- Invoice date: [DATE]
- Due date: [DATE]
- Project/engagement name: [PROJECT NAME]
- Line items: [LIST EACH DELIVERABLE WITH COST — e.g., "Homepage design: $800, Inner page
design x4: $1,200, Development: $2,000, CMS setup: $500"]
- Tax (if applicable): [TAX RATE AND AMOUNT or "N/A"]
- Discount (if applicable): [DISCOUNT AND REASON or "N/A"]
- Late fee policy: [e.g., "2% per week after due date" or "none"]
- Notes to client: [ANY ADDITIONAL NOTES — e.g., "Phase 2 will be invoiced separately"]

Generate a clean, professional invoice with:
1. Header with my business info and the word "INVOICE" prominently
2. Client info block
3. Invoice number, date, and due date
4. Itemized line items in a table: Description | Quantity | Rate | Amount
5. Subtotal, tax (if applicable), discount (if applicable), and TOTAL DUE (bold/prominent)
6. Payment instructions — exactly how to pay, with any relevant links or account details
7. Late payment terms (if applicable)
8. A professional footer with a thank-you note

Format the output as clean text that can be pasted into a Google Doc, Notion page, or
invoicing tool. Mark where formatting (bold, larger text) should be applied.

Constraints:
- Line item descriptions should be specific enough that the client knows exactly what
they're paying for — no vague "consulting services"
- The TOTAL DUE amount should be impossible to miss
- Tone: Professional and clean — this is a financial document
```

Example Output: "[INVOICE] / From: Apex Digital Co. / To: Sunrise Bakery LLC / Invoice #INV-2024-017 | Date: March 15, 2024 | Due: March 29, 2024 / Line Items: Homepage Design & Development — 1 — $800.00 / Inner Page Design (x4) — 4 — $300.00 each — $1,200.00 / CMS Setup & Training — 1 — $500.00 / Subtotal: $2,500.00 / Tax: $0.00 / TOTAL DUE: $2,500.00 / Payment: PayPal to invoices@apexdigital.co or bank transfer to [details]."

Prompt 26: Payment Terms & Policies Document

```
I need a standard Payment Terms document I can send to all clients or include as part of my onboarding package.

My details:
- Accepted payment methods: [LIST — e.g., "bank transfer, PayPal, Stripe invoice"]
- Standard payment terms: [e.g., "Net 14 — payment due within 14 days of invoice"]
- Deposit required: [YES — amount/percentage / NO]
- Milestone payment structure (for larger projects): [e.g., "33% upfront, 33% at midpoint, 34% on delivery"]
- Late payment fee: [e.g., "5% of invoice total added after 14 days overdue, plus 1.5% per additional week"]
- When work pauses for non-payment: [e.g., "after 21 days overdue"]
- Rush fee (if applicable): [e.g., "25% surcharge for projects with less than 5 business days turnaround"]
- Refund policy: [e.g., "deposits are non-refundable; work completed to date is billed if project is cancelled"]
- Currency: [e.g., "USD"]

Generate a Payment Terms document with these sections:

1. PAYMENT METHODS — How clients can pay, with any relevant details
2. STANDARD TERMS — When payment is due, what triggers an invoice
3. PROJECT DEPOSITS — When deposits apply, amounts, refundability
4. MILESTONE PAYMENTS — How larger projects are billed across milestones
5. LATE PAYMENTS — Fee structure, when work pauses, escalation process
6. RUSH PROJECTS — Additional fees for expedited timelines
7. CANCELLATION & REFUNDS — What happens if the client cancels mid-project
8. EXPENSES — How out-of-pocket expenses (stock photos, plugins, hosting) are handled

Constraints:
- Write in plain English — no legalese
- Be specific with numbers — vague terms cause disputes
- This should be firm but fair — protect yourself without sounding adversarial
- Tone: Professional and matter-of-fact — like terms you'd see from an established agency
```

Example Output: "PAYMENT TERMS / Standard Terms: All invoices are due within 14 calendar days of issue. Invoices are sent via email with a payment link. / Deposits: Projects over $1,000 require a 50% deposit before work begins. Deposits are non-refundable and are credited against the final invoice. / Late Payments: Invoices unpaid after 14 days incur a 5% flat late fee. An additional 1.5% is added per week thereafter. All active work is paused after 21 days of non-payment until the balance is cleared..."

Prompt 27: Subcontractor Agreement Generator

```
I'm hiring a subcontractor to help with part of a client project. I need a clear agreement that protects me, the sub, and my client's interests.

Details:
- My name/business: [YOUR NAME/BUSINESS]
- Subcontractor name: [THEIR NAME]
- Client project this relates to: [DESCRIBE — the sub doesn't need to know the client's name necessarily]
- What the subcontractor will do: [THEIR SPECIFIC DELIVERABLES]
- What I'm handling: [YOUR PART OF THE PROJECT]
- Payment to subcontractor: [AMOUNT AND STRUCTURE — e.g., "$1,500 flat, paid on delivery" or "$50/hr, invoiced weekly"]
- Timeline: [WHEN THEIR WORK IS DUE]
- Who communicates with the client: [YOU ONLY / BOTH / SUB DIRECTLY]
- Confidentiality needed: [YES — they'll see client data / NO]
- IP ownership: [WORK BELONGS TO YOU/YOUR CLIENT ON PAYMENT]

Generate a subcontractor agreement with:

1. PARTIES — You as hiring party, them as independent contractor (not employee)
2. SCOPE OF WORK — What they're delivering, with specific deliverables
3. TIMELINE — Due dates and milestones
4. PAYMENT — Amount, when it's paid, payment method
5. INTELLECTUAL PROPERTY — All work product belongs to you/your client upon payment
6. CONFIDENTIALITY — If applicable, they can't disclose client info or that they're subcontracting
7. NON-SOLICITATION — They won't contact your client directly for related work
8. QUALITY STANDARDS — Work must meet your review before delivery to client; revision expectations
9. INDEPENDENT CONTRACTOR STATUS — Clarify they're not an employee (tax implications)
10. TERMINATION — How either party can end the arrangement

Constraints:
- Plain English — the subcontractor should understand every clause
- Balanced — protect yourself but don't make it exploitative; good subs won't sign one-sided agreements
- Tone: Professional and straightforward
```

Example Output: "SUBCONTRACTOR AGREEMENT / Between [Your Business] ('Contractor') and [Sub Name] ('Subcontractor') / SCOPE: Subcontractor will develop the front-end of a 5-page website based on approved Figma designs provided by Contractor. Deliverables: clean, responsive HTML/CSS/JS files for Homepage, About, Services, Portfolio, and Contact pages. / PAYMENT: $1,500 flat fee, paid within 7 days of Contractor's approval of final deliverables. / IP: All work product becomes the property of Contractor upon payment..."

Prompt 28: End-of-Year Income Summary for Tax Prep

```
I need to organize my freelance income and expenses for tax preparation.

Financial details:
- Tax year: [YEAR]
- Total gross income: [AMOUNT or "I'll calculate from the list below"]
- Income sources: [LIST EACH CLIENT AND AMOUNT — e.g., "Client A: $12,000, Client B: $8,500, Upwork: $15,200"]
- Business expenses:
  - Software/subscriptions: [LIST WITH COSTS — e.g., "Figma $144, Adobe CC $660, Slack $84"]
  - Hardware: [LIST WITH COSTS — e.g., "MacBook Pro $2,499, monitor $450"]
  - Home office: [DETAILS — e.g., "200 sq ft office in 1,500 sq ft home, annual rent $18,000"]
  - Education/courses: [LIST WITH COSTS]
  - Professional services: [e.g., "accountant $500, legal $300"]
  - Marketing: [e.g., "website hosting $120, domain $15"]
  - Travel (business-related): [LIST WITH COSTS]
  - Other: [ANY OTHER DEDUCTIBLE EXPENSES]
- Estimated quarterly taxes paid: [AMOUNTS AND DATES]
- Retirement contributions: [e.g., "SEP IRA: $5,000"]
- Health insurance premiums (self-paid): [AMOUNT]
- Country/state: [FOR TAX CONTEXT]

Generate:

1. INCOME SUMMARY TABLE:
   | Source | Gross Income | Platform Fees | Net Income |

2. EXPENSE SUMMARY TABLE:
   | Category | Item | Amount | Tax Deductible? | Notes |

3. KEY NUMBERS FOR YOUR TAX PREPARER:
   - Total gross income
   - Total deductible expenses
   - Net self-employment income
   - Estimated quarterly taxes already paid
   - Retirement contributions (deductible)
   - Health insurance premiums (deductible)
   - Home office deduction estimate (simplified vs. actual method comparison)

4. DOCUMENTS CHECKLIST: List of documents/forms your accountant will need

5. TAX-SAVING NOTES: 2-3 specific, actionable suggestions based on the numbers (e.g., "you're under the SEP IRA max contribution — you could reduce taxable income by an additional $X")
```

```
Constraints:
- This is a summary document for a tax preparer, not tax advice
- Include a disclaimer: "This summary is for organizational purposes. Consult a qualified tax professional for filing decisions."
- Flag any items that might need receipts or documentation
- Tone: Clean, organized, and easy for an accountant to work from
```

Example Output: "INCOME SUMMARY: Client A — $12,000 gross, $0 fees, $12,000 net. Upwork — $15,200 gross, $1,520 fees (10%), $13,680 net. Total Net: $34,180. / EXPENSE SUMMARY: Software — $888, Hardware — $2,949 (may need to depreciate MacBook over 3-5 years), Home Office — $2,400 (simplified method: $5/sq ft x 200 sq ft, capped at $1,500) or $2,400 (actual method: 13.3% of rent). / TAX-SAVING NOTE: Your SEP IRA contribution of $5,000 is well below the max 25% of net self-employment income ($8,545). Contributing the additional $3,545 would reduce your taxable income accordingly."

Prompt 29: Retainer Agreement Template

```
A client wants to put me on retainer for ongoing work. I need a retainer agreement that clearly defines what they get, how hours work, and what happens with unused time.

Retainer details:
- Client: [NAME/COMPANY]
- My service: [WHAT I'LL DO ON RETAINER — e.g., "ongoing web development and maintenance"]
- Monthly hours included: [NUMBER — e.g., "10 hours/month"]
- Monthly retainer fee: [AMOUNT — e.g., "$750/month"]
- Effective hourly rate: [CALCULATED — e.g., "$75/hr"]
- Overage rate: [RATE FOR HOURS BEYOND THE RETAINER — e.g., "$85/hr"]
- Do unused hours roll over? [YES — up to X hours / NO — use it or lose it]
- Retainer period: [e.g., "3-month minimum, then month-to-month"]
- Billing day: [e.g., "1st of each month, due within 7 days"]
- Response time guarantee: [e.g., "within 4 business hours during business days"]
- What's included: [TYPES OF WORK COVERED — e.g., "bug fixes, content updates, minor feature additions"]
- What's NOT included: [WORK THAT'S BILLED SEPARATELY — e.g., "full redesigns, new feature builds requiring more than 5 hours"]
- Cancellation terms: [e.g., "30 days written notice"]

Generate a retainer agreement with:

1. RETAINER OVERVIEW — What this arrangement covers, in plain terms
2. MONTHLY HOURS & FEES — Hours included, rate, when payment is due
3. OVERAGE POLICY — What happens when hours exceed the retainer
4. ROLLOVER POLICY — How unused hours are handled
5. SCOPE OF RETAINER WORK — What types of tasks are covered vs. billed separately
6. RESPONSE TIME — Guaranteed response time for retainer clients
7. HOUR TRACKING & REPORTING — How I'll track and report hours (e.g., monthly summary)
8. MINIMUM COMMITMENT — Minimum retainer period before either party can cancel
9. CANCELLATION — How to end the retainer, notice required, final billing
10. PRIORITY ACCESS — Any priority the retainer client gets over project-based clients

Constraints:
- Be crystal clear about what "10 hours" means — does a 5-minute email reply count? Define the minimum billing increment.
- Address the most common retainer disputes: "I didn't use my hours" and "that task should have taken less time"
- Tone: Fair and transparent — retainers only work when both sides feel the arrangement is equitable
```

Example Output: "MONTHLY RETAINER AGREEMENT / RETAINER OVERVIEW: [Client] retains [Your Name] for up to 10 hours per month of web development and maintenance services. This guarantees priority access and a response time of 4 business hours during weekdays. / HOURS & FEES: 10 hours included at $750/month (effective rate: $75/hr), billed on the 1st of each month. Hours beyond

10 are billed at $85/hr. / ROLLOVER: Unused hours do not roll over. / MINIMUM BILLING: Time is tracked in 15-minute increments. Tasks under 5 minutes (e.g., a quick email reply) are not billed against retainer hours. / REPORTING: A time log with task descriptions is sent to Client on the last business day of each month..."

Prompt 30: Client Red Flag Assessment

```
I'm considering taking on a new client but something feels off. I need to objectively assess whether this is a viable engagement or a project I should walk away from.

What I know about the client/project:
- How they found me: [REFERRAL / UPWORK / COLD EMAIL / etc.]
- Their initial message or behavior: [DESCRIBE — e.g., "very detailed brief" or "vague requirements and wants a call ASAP" or "immediately asked about discounts"]
- Project description: [WHAT THEY WANT]
- Budget signals: [WHAT THEY'VE SAID ABOUT MONEY — e.g., "wants a full e-commerce site for $500," "said budget is flexible," "hasn't mentioned budget"]
- Timeline signals: [e.g., "needs it yesterday," "reasonable timeline," "keeps changing the deadline"]
- Communication style so far: [e.g., "professional emails," "11pm text messages," "takes a week to reply then sends 15 messages in an hour"]
- Red flags I've noticed: [LIST ANYTHING THAT CONCERNS YOU]
- My gut feeling: [WHAT YOUR INSTINCT IS TELLING YOU]

Analyze this potential client across these dimensions:

1. COMMUNICATION RED FLAGS (score 1-10, where 10 = major concern):
   - Response patterns, professionalism, boundaries, urgency vs. actual timeline

2. BUDGET RED FLAGS (score 1-10):
   - Realistic expectations, willingness to pay fair rates, payment terms resistance

3. SCOPE RED FLAGS (score 1-10):
   - Clarity of requirements, likelihood of scope creep, "it should be easy" language

4. RELATIONSHIP RED FLAGS (score 1-10):
   - Power dynamics, respect for your expertise, signs of micromanagement or distrust

5. OVERALL RISK SCORE: Average of all four scores
   - 1-3: Low risk — proceed normally
   - 4-6: Moderate risk — proceed with extra protections (larger deposit, stricter scope, milestone payments)
   - 7-8: High risk — proceed only if you really need the work, with maximum protections
   - 9-10: Walk away — the project will likely cost you more than you earn

For each dimension, list specific observations and what they typically predict based on common freelance patterns.

6. IF PROCEEDING — PROTECTION PLAN: Specific contract terms, payment structures, and communication boundaries to put in place

7. DECLINE SCRIPT: A professional, brief message to decline the project if I decide to pass
```

```
Constraints:
- Be honest and direct — don't sugarcoat red flags
- Distinguish between real red flags and normal client behavior (not every non-technical client is a red flag)
- Tone: Objective and analytical — help me make a clear-eyed decision, not an emotional one
```

Example Output: "COMMUNICATION: 7/10 — Sending messages at 11pm and expecting immediate responses suggests boundary issues. In my experience, clients who don't respect communication hours during the sales process only get worse during the project. / BUDGET: 8/10 — Wanting a full e-commerce site with custom features for $500 signals either a fundamental misunderstanding of development costs or a pattern of undervaluing freelance work. Neither is fixable by you. / OVERALL RISK: 7.5/10 — High Risk. If you proceed, require 75% upfront with strict milestone gates. / DECLINE SCRIPT: 'Thanks for thinking of me for this project. Based on the scope and my current availability, I don't think I'm the right fit for what you need at this budget level. I'd recommend checking [Upwork/Fiverr] for developers who specialize in working at this price point. Best of luck with the build.'"
