

# Price Your Design Work Without Apology

FREE CHECKLIST

## Your Checklist

### CHAPTER 1

#### Before you build the Rate Card: the Loaded Hour Cost calculation that sets your floor

- ☐ Open your bank and credit card statements in a spreadsheet (Google Sheets or Excel) and pull exactly 3 months of transactions — label each row 'Business' or 'Personal' before calculating anything
- ☐ Total the Business column for each month, average the three months, then repeat for the Personal column — keep the two averages separate so you can update either one independently at your 90-Day Rate Review
- ☐ Divide combined monthly costs by 80 (20 billable hours × 4 weeks) to get your Loaded Hour Cost — enter the result in a new cell labeled 'Loaded Hour Cost' and lock it from editing
- ☐ Round the Loaded Hour Cost up to the nearest \$5 increment and label that figure 'Personal Rate Floor' — this is the number that enters the Rate Card, not the raw Loaded Hour Cost
- ☐ Create your Rate Card as a private document in Notion, a locked Google Sheet, or a password-protected Numbers file — add four columns: Personal Rate Floor (USD), Date Set, Next 90-Day Rate Review Date, and Notes
- ☐ Enter your Personal Rate Floor in the Rate Card's first row, set 'Date Set' to today, and set 'Next 90-Day Rate Review' exactly 90 days out — add a recurring calendar reminder in Google Calendar or Apple Calendar so the review date doesn't slip

### CHAPTER 2

#### Rate Card quick-start checklist: everything to complete before sending your first Quote Document

- ☐ Calculate your Loaded Hour Cost: open 3 months of statements, sum all costs, divide by 240 hours, and enter the result in your Rate Card with today's date
- ☐ Record your Personal Rate Floor in the Rate Card, then add the next 90-Day Rate Review date as a recurring calendar block in Google Calendar or Notion reminders
- ☐ Set both Complexity Multipliers in the Rate Card: Complex = 1.4× the base estimate, Rush = 1.6× — confirm the Rush multiplier overrides Complex when both apply
- ☐ Complete all five Quote Document sections before saving the template: Scope Block, Deliverables List, Revision Limit clause (2 included rounds), Payment Schedule section (50% deposit), and Expiry Clause (14 days)

## CHAPTER 3

### Assigning a Project Tag during the scoping call — and what changes when you get it wrong

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- ☐ Open your Rate Card at the start of every scoping call — not after — so the Project Tag field is the first thing you fill in before any other note-taking
- ☐ Ask the client two questions in this order: 'What is your hard deadline?' then 'Who else needs to sign off on the work?' — the answers assign the tag without further analysis
- ☐ If the deadline compresses delivery below your standard turnaround, assign Rush and apply the 1.6× Complexity Multiplier; do not check whether the work is also technically difficult — the Rush tag takes precedence
- ☐ If the client names more than one approver, identifies a deliverable type outside your standard workflow, or mentions a research phase, assign Complex and apply the 1.4× Complexity Multiplier before calculating the quoted total
- ☐ Record the Project Tag in the Rate Card row for that project immediately after the call ends — before you open the Quote Document template — so the multiplier is applied to the base estimate, not retrofitted to a number you already typed
- ☐ When a project meets both Complex and Rush conditions, write 'Rush (precedence)' in the Rate Card note field so the decision is documented and you have a clear record if the client later asks why the Rush multiplier was used

## CHAPTER 4

### The Quote Document's 5 sections and what each one is actually protecting

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- ☐ Open your Quote Document template and add a dedicated Scope Block section; write the four default exclusions as a bulleted list — stock photography, third-party font licenses, print production, and file formats not named in the Deliverables List — so they appear before any project-specific inclusions
- ☐ Build the Deliverables List by naming every file type, colour mode, and size variant explicitly — for a logo project, this means listing SVG, PNG (transparent background), and any required size variants individually rather than writing 'logo files'
- ☐ Set the Revision Limit clause to state '2 included revision rounds' and write the per-round fee for Billable rounds as a fixed dollar amount on the same line — do not leave it as 'billed at my hourly rate' because that requires a second calculation the client cannot verify upfront
- ☐ Check that your Revision Limit clause language matches The Mpls Egotist's documented risk: if it does not state the number of included rounds explicitly, clients assume revisions are unlimited and you have no grounds to enforce a limit [16]
- ☐ Write the Payment Schedule section as two trigger events, not two dates — '50% deposit due before work begins; balance due upon delivery of final files' — so the payment event is tied to a project milestone, not a calendar date that can slip
- ☐ Add the Expiry Clause as its own labelled clause, not a footnote: state 'This quote is valid for 14 days from the date sent; after this date a new Quote Document will be issued at current rates'
- ☐ Cross-check every item in your Deliverables List against the Scope Block's exclusion list to confirm there is no overlap — if print-ready PDFs are in the Deliverables List, remove print production from the exclusion list for that project specifically
- ☐ Store your Quote Document as a template in a tool like Notion, Google Docs, or HoneyBook so you can duplicate it per project rather than rebuilding from scratch — this also ensures the 5-section structure is never accidentally dropped

- ☐ Before sending, run the 48-Hour Quote Rule check: confirm the Quote Document will leave your outbox within 48 hours of the scoping call; beyond that window, client decision momentum drops and the structured quote loses its timing advantage
- ☐ After sending, move the client's status from Prospect to Quoted in your tracking sheet and set a calendar reminder for day 13 — one day before the Expiry Clause lapses — so you can follow up before the window closes rather than after

## CHAPTER 5

### **Sending the Quote Document inside the 48-Hour Quote Rule — what the delay actually costs**

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- ☐ Open Notion or Google Docs and build a master Quote Document template with five locked sections: Scope Block, Deliverables List, Revision Limit clause, Payment Schedule section, and Expiry Clause — leave only the fee, Project Tag, and deliverable names as editable fields
- ☐ Write the Scope Block default exclusions into the template now: stock photography, third-party font licenses, print production, and file formats beyond the Deliverables List — these appear on every quote without editing
- ☐ Set the Revision Limit clause to 2 included rounds in the template, with a per-round fee line you fill in at quoting time, and mark Revision Round Status as Included when the Quote Document goes out
- ☐ Set the Payment Schedule section to 50% deposit due before work begins and 50% balance due on final file delivery — hard-code these percentages so they cannot be accidentally changed in a rush
- ☐ Add the Expiry Clause as a calculated field: quote date plus 14 days — in Notion, use a date property with a formula; in Google Docs, write the expiry date manually the day you send
- ☐ The moment you send the Quote Document, open your Rate Card and change that client's status from Prospect to Quoted, and log the expiry date — this keeps your pipeline accurate and tells you exactly when to follow up

## CHAPTER 6

### **Revision creep: how Included rounds become Billable — and the exact language that enforces the switch**

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- ☐ Before any project starts, open your Quote Document template and confirm the Revision Limit clause names exactly 2 included rounds and states the per-round fee for anything beyond that — edit the fee field if your Rate Card has been updated since you last used the template
- ☐ At the scoping call, read the Scope Block exclusions aloud to the client — stock photography, third-party font licenses, print production, and file formats not in the Deliverables List are excluded by default — and get verbal confirmation before sending the Quote Document
- ☐ When a revision request arrives, open the Deliverables List in the signed Quote Document and compare the request against what is listed — if the request names a deliverable, style direction, or file format not in that list, tag it as out-of-scope before replying
- ☐ Send the written Billable round message (see the template in this section) within the same business day the out-of-scope request arrives — do not reply verbally first, do not say you will 'look into it,' send the written note and wait for written approval before touching the file
- ☐ Update Revision Round Status in your Rate Card immediately after each round closes: mark the round Included, Billable, or Exhausted — never let a project reach final delivery without checking that the status reflects what actually happened

- ☐ If a client approves a Billable round fee verbally, follow up with a one-line written confirmation over email before starting the work — 'Confirming we've agreed to one additional revision round at \$[fee] — I'll begin once you reply to confirm' — this keeps the paper trail intact if the invoice is questioned later

## CHAPTER 7

### When a client pushes back on the price: the Pushback Script

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- ☐ Write your Pushback Script before your next scoping call — draft both parts (acknowledgement sentence and scope-redirect question) in a Google Doc or Notion page you can open during a call
- ☐ Open your Quote Document and confirm the Deliverables List names every file, format, and size — if it is vague, a client can argue that 'removing a deliverable' changes nothing
- ☐ Identify one or two deliverables in your current Scope Block that could be deferred or removed without breaking the project — know these before the pushback arrives
- ☐ Check that your Revision Limit clause states the per-round fee for rounds beyond the 2 included; this gives you a second redirect point if the client objects to revision costs rather than project cost
- ☐ Set a calendar reminder for the 14-day Expiry Clause on every Quote Document you send — when a client goes quiet after a pushback, a brief follow-up on day 13 referencing the expiry date often restarts the conversation
- ☐ After any project where you discounted outside this process, open your Rate Card and verify that the final effective hourly rate still cleared your Personal Rate Floor — if it did not, flag it for your next 90-Day Rate Review

## CHAPTER 8

### Retainer pricing: why a monthly cap without a rate-adjustment clause locks you into last year's floor

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- ☐ Open your Rate Card and confirm the Personal Rate Floor is current before drafting any Retainer Agreement — if the last 90-Day Rate Review was more than 90 days ago, run the review first
- ☐ Set the monthly hour cap in the Retainer Agreement as a specific number (e.g., 20 hours) and write the above-cap rate as the Rate Card hourly equivalent for the assigned Project Tag
- ☐ Add the rate-adjustment clause in plain language: state that the monthly fee is reviewed at each 90-Day Rate Review and that any change takes effect with 30 days' written notice to the client
- ☐ Record the client's status as Retainer in your project tracking tool (Notion, Airtable, or a spreadsheet) — distinct from Active — and note the monthly cap hours and the current rate so the Rate Card entry stays accurate
- ☐ Schedule the 90-Day Rate Review as a recurring calendar event in Google Calendar or Notion, and add a linked reminder 30 days before each review date so the client notice lands on time if a rate change is coming
- ☐ Before sending the Retainer Agreement, verify the recurring deposit amount equals half of the monthly fee and confirm the agreement explicitly states that work for each cycle begins only after that deposit clears

## CHAPTER 9

### The 90-Day Rate Review: a one-page routine that keeps the Rate Card current

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- ☐ Open your last 3 months of bank and invoice records and recalculate your Loaded Hour Cost using 20 billable hours per week before touching anything else
- ☐ Update the Personal Rate Floor in your Rate Card the moment the new Loaded Hour Cost is confirmed — do not quote again until this is done
- ☐ Check each active Retainer Agreement against the revised Rate Card; if the rate has changed, start the 3-Touch Rate Raise Method with 30 days' notice before the next billing cycle
- ☐ Set next review date in Google Calendar or Fantastical immediately — repeat every 90 days, block 60 minutes, mark it non-negotiable

## CHAPTER 10

### Raising rates with existing clients: the 3-Touch Rate Raise Method without losing the relationship

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- ☐ Open your Rate Card and confirm the new Personal Rate Floor figure before drafting any client communication — the number you send must clear your floor, not just feel like a raise
- ☐ Draft Contact 1 (first notice) in your email client as a plain-text message: state the new rate, the effective date (30 days out), and one sentence tying the increase to your 90-Day Rate Review schedule — no apology, no lengthy justification
- ☐ Set a calendar reminder 7 days before the effective date to send Contact 2 (confirmation): restate the rate, restate the date, and attach or reference the updated Retainer Agreement with the new rate-adjustment clause reflected
- ☐ Update the Retainer Agreement in your contract tool (Bonsai, HoneyBook, or a PDF you version-control in Notion) before sending Contact 2 — the document the client sees must already show the new figure
- ☐ On the first billing date at the new rate, send Contact 3 as the invoice itself — the invoice amount is the only new information; the covering note is one line confirming this is the first invoice at the agreed updated rate
- ☐ After all three contacts are sent, open your Rate Card and update the current retainer rate field so your internal record matches what the client is now paying — this prevents a mismatch at the next 90-Day Rate Review

## CHAPTER 11

### Quoting through freelance marketplaces: where the Scope Block and Expiry Clause break down

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- ☐ Open your Upwork or Fiverr listing editor and set the platform's built-in revision counter to exactly 2, matching your Revision Limit clause — find this in the package details section of the listing builder
- ☐ Paste your Scope Block exclusions (stock photography, third-party font licenses, print production, file formats beyond the Deliverables List) as the first block of text in every fixed-package description, above the feature bullets
- ☐ Add a 14-day response window statement to every marketplace proposal cover message, worded as a scheduling note — 'This proposal reflects my current availability and rate; please reconfirm if responding after 14 days' — to approximate the Expiry Clause

- ☐ Before entering a package price, open your Rate Card, find your Personal Rate Floor, and calculate the gross price using the formula:  $\text{target payout} \div (1 - \text{fee rate})$  — check the current fee rate in your platform's earnings or fee settings page before each proposal
- ☐ After each marketplace project closes and the balance clears, record the actual payout and the hours logged, then check whether the effective hourly equivalent stayed above your Personal Rate Floor — flag any project where it did not and adjust the next listing's price accordingly
- ☐ At every 90-Day Rate Review, update your saved marketplace listing packages to reflect the revised Personal Rate Floor — do not leave old package prices live after a Rate Card update, as returning clients may accept a stale price before you notice