The Best Tools for Juggling Multiple Freelance Clients

Get organized with the software and systems you need to scale.

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If your freelance business is growing, that's a good thing – but only if you have the right foundation, systems and processes in place to capture all that data. To be successful with multiple clients, you've got to nail onboarding, project management and scheduling.

Onboarding

If your freelance pitches are landing and you're getting clients, don't use email for managing all of your contracts. It's too easy for things to slip through the cracks or for something to get flagged as spam. No one wants to spend the endless cycle of answering emails just to find their inbox fill up immediately afterward, either.

There are many different programs to get your contracts signed online. You can even store templates to make it simple to lock in another contract on your most popular projects.

Make it simple for clients to send in the information you need to get started on your freelance project. This can include tools like:

- LastPass, where clients can share password details safely with you.

- Invoicing programs like Wave, Invoicely, or Freshbooks.
- Google Forms, where you can populate questions and places for them to upload logos, branding guides or other instructions
- 17Hats or Dubsado, which are paid software options to create customized onboarding (Dubsado and 17Hats also let you send invoices from their platforms, but to get the features you'll need you'll probably have to use their paid versions).

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Project Management

You need one hub or dashboard where you can track everything. If you're working with a client on a big project, they might plug you into their chosen management tool. Even as a solopreneur, however, it's helpful to have one place where you track all the work you're doing for clients.

For simple deadline-tracking, TeuxDeux is great for making sure you get a good visual on your to-do list and that you don't have too much stacked up on one day. If you're on a budget, block out time to work on each project for free inside your Google Calendar and color code each event based on your different clients.

But if you've got a team of subcontractors or need to give clients some access, you'll need something more robust. Other popular project-management tools for freelancers include:

- Asana.
- Basecamp.
- Trello.
- Airtable.

Do your own research to see which platform and system appeals to you most. The important thing is to find the system that

will meet at least 85 percent of what you're looking for in terms of features so that you'll actually use it consistently.

Communication and Scheduling

No more back-and-forth, "Are you available Tuesday at 4?" or missed connections due to time-zone differences. Keep communication seamless by setting up intake, check-in and other phone calls through a tool that connects to your calendar.

Set up common meeting types. (.I like 30 minutes to discuss new projects to keep prospective clients from snagging up too much of your time before there's a paid project and contract in place and 30 minutes for checkpoints/questions calls.)

My favorite tools for scheduling and calendar needs are:

- Calendly (the free version will give you one meeting type and will connect to your calendar).
- Acuity. (An investment worth making if you need to connect multiple calendars.)
- Woven.
- Bella Scena. (Which lets you store notes from your meeting to easily find them again. Bonus!)

Backup Storage

If you're like me, you can process or receive moere than 30 files a week. That makes it hard when a client reaches out three months from now to ask about that website copy or the infographic you created. Use Google Drive or Dropbox to back up all your files so that you don't take up space on your own computer.

Make sure you have a common naming system so that you can do a search to find old work if needed. Something like "ClientName_ProjectTitle_DateTurnedIn_Final" works well!

Related: How to Run a 6-Figure Freelance Business in 20 Hours a Week

When your business is growing and you've got the extra revenue to support it, putting the right tools in place makes your life easier and improves the client's experience, too!

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