

# SALES AND BILLING ADVICE/ETIQUETTE

TECHWRITE STL LUNCHEON

WEDNESDAY, MAY 12, 2026

PRESENTED BY VERONIKA REDMANN, PH.D.

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# LUNCHEON PRESENTATION

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1. My background as a technical writer
2. Discuss advantages and disadvantages of freelance vs. salaried positions (as they relate to sales and billing)
3. Discuss the connection between estimates +sales (uncommitted but possible work) and contracts + billing (active work with legal protections around the process)
4. Learn different sales techniques for freelance technical writers
5. Discuss billing advice/etiquette for freelancers, in order to encourage your clients to pay you on the schedule you prefer
6. Brainstorm with group on sales and billing advice

# Professional Background: Veronika Redmann

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- Technical writer (grant and regulatory writing) since 2018 at [Crane Group](#)
- PhD Scientist by background, 2 post-doctoral fellowships (WashU)
- Run small business that serves academia and industry with preparing federal, state and local grant applications and supporting active grant projects (helped clients prepare 60+ grant applications in 2025)
- Work on a team of 4-12 people, majority sub-contractors
- Teach about alternative science careers, entrepreneurships, grant-writing etc.

# Advantages and disadvantages of freelance vs. salaried technical writing positions

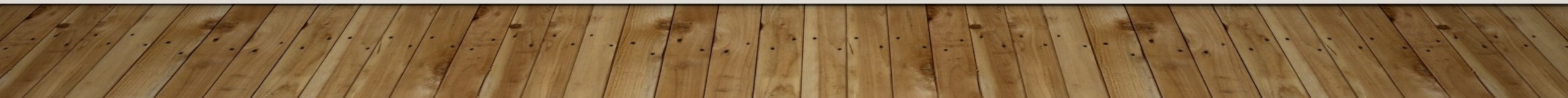
|                                                                                                        | Freelance (Independent Contractor)                                                                                | Salaried (Employee at Company)                         |
|--------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|
| Same income monthly?                                                                                   | Can be with established client base with regular work but usually “feast or famine” at beginning (unpredictable)  | Yes                                                    |
| Benefits like healthcare coverage and/or 401(k) retirement options?                                    | No (would have to set up independently on public marketplace, SEP-IRA)                                            | Maybe, depending on position type and size of company  |
| Choosing which clients to work with?<br>Choosing which projects to work on (ie. schedule flexibility)? | May not be able to be picky when first starting, may have more flexibility as client base and experience built up | Not usually                                            |
| Who does sales and billing?                                                                            | You, independent contractors wear all the hats!                                                                   | Not usually you (unless your position is sales-facing) |

# WORK ESTIMATES AND CONTRACTS/CONSULTING AGREEMENTS

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- The sales process is relevant to freelance or contracted work but not necessarily all technical writers
- May be required to use client's contract or may be able to use your own (always review and ask for terms acceptable and not a liability to you)
- Quote or estimate prepared by technical writer allows client to evaluate scope of work, project timeline and cost prior to contract and initiation of work (part of sales process)
- Execution of a work contract/consulting agreement by two parties:
  - Defines expectations for the work product and timeline
  - Provides legal protection in regards to intellectual property and payment terms as a working relationship begins

*\*I don't have legal education, this presentation is for educational purposes only.*



# Contract Sections: Scope of Work/Services

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- This section may be within the contract or a separate document after contract titled, “Work Order” or “Exhibit A”
- How do you define what jobs will be performed by both parties?
  - management or interaction with personnel
  - estimated hours/timeline/deadline
  - type of work to be performed such as writing, editing, strategy, data analysis (total page count)
- What materials for the project will be covered or provided by the company (ie. software)?
- Are there any expenses to be covered by freelancer/writer?

# Contract Sections: Payment Terms

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- When does the contract start? How can it be terminated?
- How long is the contract good for (what happens if you have different outcomes with the work project? ie. rejection of a manuscript)?
- Does it account for rate changes annually if long-term contract?
- What sections of the contract may survive or continue past termination?
- How will you be paid (ie. project-based vs. hourly/monthly, at milestones or completion only)?  
When (ie. within 30 days after project completion)?

# Example Contract Payment terms:

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## **Terms for Payment of Compensation:**

The Company may invoice up to 50% of project costs at project initiation. Payment will be capped at \$X for work performed for the project. Any additional hours or expansion in scope of the Services must be approved by the Client and Company in writing and in advance of additional hours being spent. Company will be paid within 30 days of completion of work. Should the final work hours be less than the estimated total cap, the amount of the final invoice will be adjusted.

## **Terms for Termination:**

Should Client decide to terminate this Agreement prior to Services being completed (such as delaying for another future grant deadline or because the Funding is no longer available), then Client will owe Company for the time spent on the project at Company's prevailing rates. If Company has agreed to provided Services for a fixed fee, then Company shall be entitled to that part of the fixed fee it would have earned had Services been provided on an hourly basis, but the total charge for Services shall not exceed the amount of the agreed upon flat fee.

## **Invoice and Payment Terms (example University's Contract):**

The invoice must detail the Products provided, Services performed, the dates the Services were completed and must detail expenses apart from the Supplier Fees. Supplier must submit to the University all invoices related to this Contract within ninety (90) days from the date that Products are delivered or services rendered.

Payment will be made within forty-five (45) days after the University's receipt of an invoice from Supplier. The University will make payment through Check.

# Sales techniques for freelancers

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- Develop a **website** that clearly communicates your expertise and services
- Work on a blog, publications, or social media posts (short videos) that show your expertise in your area
- Have ready a good old-fashioned resume, **CV** or Biosketch (ready to be tailored to a certain client or service)
- Spend time personalizing your **LinkedIn profile** (use keywords around your technical writing skills)
- Portfolio (Would need permission of any past clients or shared authors) and References
- **Seek out subcontracting with larger firms** to increase work, experience or better exposure to salaried positions
- LinkedIn (networking, approached by recruiters or larger firms about subcontracting or positions)
- **In person sales** (attending conferences, workshops, job fairs, networking, catching up with colleagues, job referrals)
- Direct job listings on LinkedIn, company websites, Upwork; join a directory like **AMWA Freelance Directory**

# Billing etiquette

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- Do you have an invoice system? (examples Wave, Quickbooks, not all are at cost), review signed contract before issuing invoice
- Do you need a PO issued by the client/customer prior to billing? Do they need extra paperwork like W-9 to start a new vendor account for you? Ask the client customer what needs to be documented on the invoice.....what format does the invoice need to be in?
- State your preferred payment method (direct deposit, payment app, check etc.). Client might only have one preferred payment method 😞
- Payment app may help you be organized book-keeping wise and help the client (ie. Ramp, bill.com)
- Do your invoice amounts match your end of the year total from client on tax form 1099? If not, discuss.

# Billing Trouble-Shooting: How to resolve not getting paid!

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- Check your payment app or bank statement before telling a client a payment is missing
- Refer back to billing instructions and contract from client/customer, check your work on invoice and emails
- Delay in payment might be your fault (missing paperwork or invoice, missed emails, billing being handle by a non-human which can't identify errors), don't default to blaming client first but do communicate you won't do more work until paid
- If client isn't answering about a missed payment: 1) ensure your emails are going through to that individual or company email account, 2) has individual left the company and you can reach out to others?, 3) ask if other writing colleagues have ever had payment issues with that client, 4) look if public info or private info on if company is in financial problems/merge
- Be ready to modify your payment method, in case it improves getting paid more consistently or on time
- Get on the phone with client, work with business attorney if you feel a demand letter might result in getting paid



# Q&A and Story-telling Time: Sales and Billing

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Thank you!