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How to take vacation as a freelancer without losing out on new business

Adrian Granzella Larssen
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When you work for yourself, you get to set your own PTO. Oliver Rossi/Stone/Getty

Freelancing comes with many perks that you won't get in an office — setting your own schedule and picking your own projects — but taking time off is often hard to think about.

With no company-sanctioned vacation time, many freelancers are afraid that they'll lose business or miss out on new clients if they take a break.

Seasoned freelancers shared tips with Business Insider on why taking vacations is so important for your business in the long run, and how to properly set aside time for relaxation.

Plan trips well in advance, letting your clients know way ahead of time, and adjust your rates to make up for the hours you won't be working. Also set reasonable expectations as to how often you'll be able to respond to urgent requests.

You can set up automatic replies for any incoming business opportunities, but avoid taking on new clients when you're off.

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Transitioning from the corporate world to freelance life comes with many changes, not the least of which is: How exactly does taking vacation work when you don't have company-sanctioned PTO?

For many, the answer is not taking it at all, for fear of letting clients down or missing out on new business.

"For the first five years, I was scared to go on vacation for fear all my hard work would unravel," said Paige Arnof-Fenn, founder and CEO of global marketing and branding firm Mavens & Moguls, which works with clients like Microsoft, Virgin, The New York Times Company, and Colgate.

Paige Arnof-Fenn. Courtesy of Paige Arnof-Fenn

Since then, after losing several close family members, she changed her approach — taking more time for herself, resisting the urge to overschedule, and planning long-overdue vacations.

"And guess what?" she said. "My business did not suffer. In fact, it became stronger. Downtime and vacations are not optional — you need to take breaks to be productive, creative, and energized."

But it takes some strategy to take time off effectively. Business Insider spoke to seasoned freelancers who've built vacations into their work lives over the past few years (including during a

pandemic!), as well as those who hire them.

Here are their tips on what works and what doesn't.

Bake vacation into your hourly rates and yearly calendar

Shirley Yang, VP of community at Braintrust, a marketplace that connects companies with highly skilled freelance tech talent, first recommended thinking far in advance about how many days you want to take off each year and making sure your hourly rates account for the days you'll not be working.

"If you're trying to hit a certain salary goal, the more days you plan on taking off, the higher your hourly or project rates will need to be to compensate for the non-billable hours," she said.

Shirley Yang. Shirley Yang

Vip Sitaraman, a freelancer with more than five years of experience consulting for Fortune/Inc. 500 companies and high-growth startups, takes this one step further, using a customer relationship management (CRM) tool to

track his time and understand how much he needs to make.

"My freelance CRM tells me not only how much I've earned and how many dollars should be closed any given day, but also how those dollars translate to my time (e.g., my estimated hourly rate)," he said. "Having these metrics readily available allows me to schedule vacations without compromising on monthly goals or growth plans."

(For those who're interested, his CRM is a custom platform he built using time tracker Toggl, Toggl's public API, and a bit of scripting into a Google Sheet.)

He noted that often, he'll be more aggressive about sales and marketing and take on more than his usual workload for the months prior to vacation to further ease the load.

Kris Travis, a freelance art director at Firesign Design and brand manager for A.wordsmith with over a decade of freelance art direction and graphic design experience, said she simply saves a percentage of every check that comes in, earmarking a certain amount for a vacation fund. "Some years we use more of it than others, but we do prioritize having a budget around time off and travel," she said.

In a typical year, she aims to take three to four weeks of time off, though this year she's planning fewer, shorter, and more local vacations. "I'm not very comfortable flying anywhere until things stabilize, and as many people are, I'm keeping an eye on the budget," she said.

Prep your clients way in advance

Once you've budgeted for the vacation, what about the clients you're leaving behind?

Travis said that her approach is communicating early and often. "I give my clients notice that I'll be out up to a month in advance, then I remind them in our communications as the dates approach," she said.

She also adds the dates she'll be off to any client project management software calendars and sets auto-replies on all channels, including email and Slack.

"Never assume clients remember when you'll be out just because you've communicated it with them previously," Yang added. She

recommended sending a calendar reminder to the client for the days you'll be out of office.

Kris Travis. Kris Travis

Arnof-Fenn said she gives her clients months to prepare for her absence, especially for longer trips (like the month-long vacations to Italy she took for her 40th and 50th birthdays). "I told them about my plans, reiterated the dates as we discussed timelines for projects, and put it in emails, proposals, and invoices," she said. "No one was surprised when I left because I gave everyone ample opportunity to discuss back-up plans and raise questions or get input."

She added that a surprising benefit of being out of town was that it created a sense of urgency for clients.

"Many projects that had been waiting for decisions to be made on were actually kicked off so they could launch before I left town," she said. "Not a bad way to accelerate the sales cycle by creating a sense of urgency every now and then."

Set expectations as to how available you'll be

Yang recommended setting expectations for clients ahead of time —

and communicating those clearly. "Will you be checking email?" she said. "Should clients only contact you for absolute emergencies? Set up agreed-upon guidelines for how existing clients can contact you and under what circumstances while you are out."

While many freelancers think that they must check email or be reachable, that's not necessarily the case.

During one trip, Arnof-Fenn stayed in a 17th century farmhouse overseas that wasn't wired for internet access and didn't have cell reception. "I decided not to fight it and looked at this opportunity as a sign and a gift to myself," she said.

On a later trip, her accommodations had computer access, but she noted that she didn't want to waste time getting bogged down online. "I do marketing, not brain surgery, after all," she said. Now, she advises other freelancers to leave their laptops at home, too.

When Travis is planning to be mostly off the grid, she secures backup support for her clients so that they have someone that they can reach out to should needs arise. "I've built a small network of designers I trust to address urgent issues that may come up while I'm gone," she said.

Avoid taking on new clients right before or

during a trip

Sitaraman cautioned against onboarding new clients on vacation. "Turning down work is always difficult when you're a freelancer, but trying to coordinate a new client while on vacation is assured to go badly and leave a sour first impression," he said.

He knows from experience. When he traveled to India to visit extended family a couple of years ago, a second-degree connection reached out with what sounded like a simple UI/UX project. "I closed the project in just 15 minutes on a video call from my aunt's noisy balcony in Chennai and thought I could wrap it up with just a few hours a week," he said. "Ultimately, the project completely fell apart."

Vip Sitaraman. Vip Sitaraman

As it turned out, collaborating with team members was difficult due to poor internet connection, and as he entered a mostly-offline jungle region of India the client struggled to reach him.

"Because of the hurried meetings and lack of communication, the

scope of work started to deviate from the evolving goals of the client and the final product ended up being less useful," he said. While he was able to finish the project once he returned, "It was a negative experience for both parties that could have been easily avoided," he said.

If you absolutely must take on new clients, Yang emphasized being clear and upfront about your plans. "Let the client know before a contract is signed so that there are no surprises," she said.

Expect the unexpected if you're planning to work while away

Speaking of surprises, don't assume your vacation destination will have everything you need to work.

"There have been times I assumed I'd have WiFi access in case I needed it, but then didn't ... and really needed it," Travis said. "I distinctly remember urgently uploading final print-ready files from my car in a grocery store parking lot because that was the nearest and most immediate WiFi I could get."

Other than truly off-the-grid trips (which she notes are important now and then), Travis travels with her laptop. "[It's] been a lifesaver in situations where my Sunday flight home has been delayed and

that Monday deadline is not going to wait."

She also said that being able to get online now and then while she's away has been helpful. "No matter how airtight the plan seems, clients are unpredictable and nothing's perfect," she said. "Accepting this and giving myself grace around a few minutes of attention to an email or file upload during a quiet moment of the vacation has helped reduce my stress."

Set up auto-replies to keep business coming in

Even if you don't bring your computer, there's no reason not to line up new leads for when you return, Yang said. She recommended using an auto-responder on your email and an automated calendar booking service like Calendly so that prospects can book a time to speak with you when you're back.

Sitaraman uses a similar approach. "There's almost inevitably a couple prospects or repeat clients who show up in my inbox with new opportunities right as I land at my vacation destination," he said. "For these, I have prepared a couple simple email templates (I don't like to waste vacation time agonizing over email phrasing) to turn down new projects while explaining the circumstances and when my availability will return to normal."

No matter what, take time off

Travis sympathizes with freelancers who find it hard to take time off. "It's so easy *not* to take time off as a freelancer — we are capable of working independently, from nearly anywhere, oftentimes with intense perfectionism and focus," she said. But, she added, time off is crucial to maintaining creativity and reducing the risk of burnout.

She also noted that taking vacation has illuminated for her who her best clients are. "I have built a roster of clients who respect my time off — even encourage it — and who are flexible in coordinating with me before and after I'm out," she said. "When I have a client step up to help protect my time off, to insist all will be well while I'm away … that feels really good."

"As much work as it requires beforehand and afterward, I've never regretted carving out the time, especially once I've got my feet up, vacation cocktail in hand," she added.