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Free Advice for Freelancers: Become the Medical Writer Your Client Needs

Jen LiMarzi / Director, Medical Writing, Answers in CME

The modern gig economy, in combination with increased awareness of medical writing as a viable and valuable profession, has allowed medical writing to become a career path for those with a multitude of experiential backgrounds. Whatever a person's work or educational experience may be, when it comes to freelance medical writing, “*fake it till you make it*” may not be best the approach to success.

Fortunately, many of the common missteps made by newer or less-experienced freelancers can be easily remedied by following some best practices to aid in aligning the skills of a freelancer with the needs of their client.

Recognize Why Your Client Needs You

For the most part, clients seek out freelancers in periods of heavy work volume or to handle tasks they cannot accommodate with in-house staffing. This means they are likely already pushed to the limit with workload and are looking for a freelancer to be an extension of the team by producing work that is on time and requires as little in-house modification as possible.

Nothing can start a collective team groan about a freelancer more than a deliverable showing up late, incomplete, or off target. Therefore, when accepting an assignment as a freelancer, it is important to make sure to

- **Agree on a feasible deadline.** If there is any doubt, ask for an extra day or two up front when negotiating the deadline rather than on the day a project is due. Clients usually have internal reviews you may not be privy to, and a delay on your part should not cause an emergency on theirs.
- **Review and clarify all received materials, samples, and direction.** Even if you won't be starting a project for several days, take a quick skim of the materials you receive as soon as you receive them so you have ample time to ask

any questions and can inquire if files are missing, corrupt, or otherwise inaccessible. You want to convey to your client that they are a high priority on your list, not make them panic that you only looked at the project the day before it was due.

- **Set aside time to complete revisions.** Although one hopes one's work is just what the client was looking for, even the best of writers can expect to receive some feedback and requested revisions. To ensure you manage client expectations, when you submit your work, let them know when you are available to complete any revisions and inquire when they expect to provide feedback.
- **Promptly communicate unforeseen delays or issues and propose resolutions.** Emergencies don't just happen to full-time employees; they can happen to freelancers too. However, unless you're dealing with a long-time client with whom you have built up a relationship, they may be less sympathetic to a freelancer's sudden need to be out of the office, as this puts them in a jam to get work done. When situations do arise, communicate them to your client as soon as possible to determine if there is any flexibility with a deadline. Also, if possible, provide a solution to complete the work in your absence. Perhaps offer the services of a fellow medical writer you know who may be able to help, or provide all the background research you may have started to make the project easier. At the very least, offer to provide a financial discount on a future or not-yet-billed project to accommodate the issue.

If You Don't Know, Ask

There are many different types of medical writing, and not all medical writers are adept or familiar with all types. For example, regulatory writing and medical publications follow

very specific rules and formulas, whereas writing for medical communication and education may blend science with storytelling. Beyond the types of projects, each agency or client will have their own specific way of presenting information, even if it isn't the way you would choose to do it. Asking questions up front when accepting an assignment isn't a sign of inexperience: it is likely the best way to align your writing with the client's expectations. Common points to inquire about include

- **Samples.** From needs assessments to slide decks and sales aids, your client will have past samples that they can and should share with you so that you can produce documents with a voice, format, and flow that reflect their particular style. Remember you are not trying to stand out; you are trying to blend in as an extension of their team. Mimicking a client's prior work is the easiest way to do this. If they don't provide samples and guidelines, ask for them. If they do, read them carefully and follow their lead.
- **Content direction.** Although your client will likely be relying upon you for research and writing, if you dive into a project and find it could be approached in several different ways, it is extremely important to touch base with your contact before proceeding. It is better to check in to ensure your research and writing are aligning with their goals than to guess, go down the wrong path, and face lengthy revisions.
- **Templates.** In most cases, clients should be providing you with templates to insert your work into so that the fonts, graphics, referencing, etc. align with how they typically present their information. If you are provided with a template, use it and match up your formatting with what is given to you. If you are not provided with a template, ask if one exists or how the client would like you to complete the work.
- **Invoicing instructions.** Once the project is complete and both parties are satisfied with the work, check in with your client contact about any specific invoicing instructions. Accounts payable, particularly for large organizations, will be processing lots of invoices from many different vendors, and ensuring you have any project or reference numbers on your invoice may be the key to getting your invoice paid in a timely manner.

Remember to Put the Writer in Medical Writer

Although there may be situations in which clients are looking for a rough outline or data dump, unless this is specified

by your client, producing an accurate and readable document is generally what clients are looking for. In my experience, this tends to be the area in which newer medical writers tend to struggle most. Ongoing education, such as that provided by AMWA and university-level courses, can aid in increasing essential medical writing skills. That said, although education can be valuable, continued work-related practice is needed to hone and refine those skills. Some general points to remember:

- **Use recent and primary sources.** Review articles are a great way to quickly get up to speed on a topic and point you in the direction for further research, but rehashing a review article is not what your client is paying you to do. Make sure you are using the latest sources and primary references to make fact-checking easy for your client and ensure all the information you are providing is current.
- **Provide your client with all the details you would want to be provided to you.** Although thoroughly referencing with page numbers may be tedious or looking up that *P* value you forgot to include on your first pass may be annoying, the fact is that that is the job. You are being tasked with providing your client a document that they can run with. If they have to spend hours rewriting or digging for information on their own, they will definitely think twice about using you for a future project.
- **Read your document over before sending it to your client.** Everyone eventually hits a wall with a document and can no longer see the most obvious mistakes. Prior to sending it to your client, set it aside for an hour, take a walk, work on something else, and then give it a full read through. Ensure it makes sense, there are no typos, you've used transitional sentences and phrases where applicable, and there is an appropriate flow to it.

Ensuring you're clear on direction up front, asking questions to make sure you're aligning with client goals, and providing a deliverable that reflects the best of your abilities are key steps bridging gaps between freelancers and clients. Although these practices may seem obvious to some, for those newer to medical writing or freelancing, I hope they provide a framework to improve relationships with clients and build a successful career as a freelance medical writer.

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