

Your Freelancers kit

Proposals for every inquiry, your hours logged and invoiced, and LinkedIn posts in your voice, all drafted for your OK.



SALES &
2 doing
1 blocked

TIME
10 minutes

FOR
Freelancers, consultants,
coaches and trainers (zzp)

VERSION
v1.0

Your Freelancers kit

01 Your kit team

These three join Michael and the Basics team when you click **Add 3 team members** on the **Services team** card in **Settings → General**.

02 What this kit does

Every item below is a draft, a proposal or a report. You read it, change what you like and send or post it yourself.

03 Connect first

04 Your first week

Day 1 is the same for every kit: fill in your business profile with Michael. Then, one request a day.

05 Good to know

■ BEFORE YOU START

- ☐ Locally set up with the Basics team (guide 01)
- ☐ Support mailbox connected (guide 03)

Your kit team

These three join Michael and the Basics team when you click **Add 3 team members** on the **Services team** card in **Settings → General**.



Noor CLIENT DESK

Turns inquiries into tailored proposal drafts, follows up, runs each engagement from yes to closing and writes session recaps.



Tess HOURS AND BILLING

Keeps your hour log, checks it every Friday, counts the urencriterium (NL) and prepares monthly invoice drafts per client.



Ruben THOUGHT LEADERSHIP

Two LinkedIn posts a week in your voice, case studies and testimonial requests, with client permission.

reasons, unanswered questions in your chats, and save and win-back drafts for members who leave. Jade makes members feel at home: welcome DMs, a first-week path, a weekly calendar of prompts, events and wins threads, and reply drafts for member questions. Rio grows the community: affiliate program and swipe copy, honest launches and promos, and Content Rewards (clipping) briefs with the budget math. They only read Whop and Discord; every post, DM, email, promo code and campaign is a draft you check and post yourself. Works together with the Business basics team that comes with every kit.

- ☒ **Kai** — Member pulse & retention: daily numbers, Monday churn report, unanswered questions, save and win-back drafts
- ☒ **Jade** — Member experience: welcome DMs, first-week path, weekly engagement calendar and reply drafts for member questions
- ☒ **Rio** — Community growth: affiliate program and swipe copy, honest launches and promos, Content Rewards clipping briefs

Team folder (shared files, plans and drafts): ~/Documents/Locally [Change](#)

- Needs Whop (optional) — strongly recommended: read members, cancellations and reasons, payments, reviews, affiliates and Whop chats/forums
- Needs your Discord server (optional) — if your community is on Discord: find unanswered questions and quiet channels (read-only, the bot never p
- Needs your mailbox (optional) — to read member emails and leave reply and win-back drafts [Connect](#)
- Needs Kit (optional) — so onboarding and win-back emails can wait in Kit as draft broadcasts [Connect](#)
- Needs Klaviyo (optional) — so onboarding and win-back emails can wait in Klaviyo as draft campaigns [Connect](#)

[Add 3 team members](#)

READY-MADE TEAM Trading & picks community team

Three AI colleagues for the busywork of a paid trading-education or sports-picks community. Owen checks your posts and sales pages for risky claims and turns your own trade/pick log into honest stats (every loss included). Clara writes pre-market or slate recaps from public sources and builds your lesson library and glossary. Felix drafts answers to member questions, plans AMAs and challenges, and tells you every Monday who left and why. They never write signals, picks or trade calls, and nothing is posted without you — Whop and Discord are read-only. Works together with the Basics team that comes with every kit.

- ☒ **Owen** — Compliance & honest numbers: checks posts and sales pages for risky claims, and turns your own trade/pick log into honest stats
- ☒ **Clara** — Education writer: pre-market or slate recaps from public sources, the weekly recap, and your lesson library and glossary
- ☒ **Felix** — Community manager: welcomes new members, drafts answers to member questions, keeps the FAQ, plans AMAs and challenges, and reports every Monday who left and why

Team folder (shared files, plans and drafts): ~/Documents/Locally [Change](#)

- Needs Whop (optional) — so Felix can read memberships, cancellations, reasons and member questions on Whop for support rounds and the churn

Settings → General: your kit card. Untick anyone you do not need yet, then Add 3 team members.

What this kit does

Every item below is a draft, a proposal or a report. You read it, change what you like and send or post it yourself.

- A tailored proposal draft for every new inquiry: scope, deliverables, out of scope, your price from the profile, and terms. Left as a reply draft in your mailbox, twice a day.
- Follow-up drafts for proposals that got no answer (at most two, then closed) and a pipeline file so you see where every inquiry stands.
- A client file on every yes, a written confirmation draft, session prep and a closing evaluation.
- Session recaps from your notes: summary, action items and a recap mail draft. Sensitive coaching details stay out.
- Your hour log in `services/hours.csv`. Tell Tess what you worked on and she logs it in one line.
- A Friday hours check: the week's hours, empty days and rows that look wrong. Once a month the urencriterium count, for Dutch owners.
- In the first days of each month, an overview of uninvoiced hours per client and the invoices you pick as drafts in Moneybird, Stripe or as a file.
- Two LinkedIn posts a week in your own voice, case studies for clients who gave permission, and personal testimonial requests, at most three a week.

IMPORTANT Everything is a draft. The kit never sends a proposal, invoice or mail, never posts on LinkedIn and never changes a price. Rates come only from your profile or the client file. If one is missing, Tess and Noor ask you.

Connect first

APP	WHY	GUIDE
Support mailbox	Noor reads new inquiries and client mail and leaves proposals and recaps as drafts	03
Moneybird (optional, NL)	Noor adds the quote as a draft, Tess prepares monthly invoices as drafts	03

APP	WHY	GUIDE
Stripe (optional)	Tess prepares monthly invoices as drafts outside the Netherlands	03
Calendly (optional)	Read-only, so Noor can prep your sessions	03

NOTE

Nothing connects to LinkedIn. Paste two or three of your own posts once, so Ruben can learn your voice. You post his drafts yourself.

04

Your first week

Day 1 is the same for every kit: fill in your business profile with Michael. Then, one request a day.

1

Day 1, the profile

Click **Get to know my business and fill in the profile** in Michael's panel and answer his questions. Mention your services, your hourly or fixed rates, your country (this decides VAT and invoice rules) and the clients you have right now. Then type: "Tess, start my hours log. These are this week's hours: ..." and list them. She confirms client, date and hours and logs them in `services/hours.csv`.

2

Day 2

Type: "Noor, turn this inquiry into a proposal draft: [paste mail]." The proposal lands as a reply draft in your mailbox's **Drafts** folder, and in **Documents → Locally → services → proposals**. With your mailbox connected, Noor does this twice a day on her own, morning and early afternoon.

3

Day 3

Paste two or three of your own LinkedIn posts, then type: "Ruben, write two LinkedIn posts in my voice about a recent project." The drafts land in **services → linkedin**. Pick one, edit it, post it. From now on Ruben drafts two posts every week.

4

Day 4

Type: "Noor, draft follow-ups for proposals that haven't had a reply." She checks

`services/proposals/pipeline.md`, drafts a friendly follow-up for each open proposal and closes the ones that had two already.

5

Day 5 to 7

On Friday, check Tess's hours check: she shows the week's hours and empty days and asks what is missing. Then: "Finn, prepare last month's invoices as drafts." Finn and Tess share the work: Tess makes the overview per client and the monthly invoice drafts, Finn handles payment reminders and overdue invoices.

TIP

Requests that work well for this kit: "Noor, here are my notes from today's session with [client], write the recap.", "Tess, how many hours have I logged this month per client?", "Ruben, which finished clients can we ask for a testimonial?", "Noor, what is still open in my pipeline?"

05

Good to know

WATCH OUT

Tess never adds up hours or money in her head. She uses her helper, so totals are exact. Still, you check every invoice before you send it. VAT and invoice rules follow the country in your profile, and Dutch rules (btw, urencriterium) apply only when the country is NL. Confirm anything unclear with your accountant.

- After you add the team, Noor's two inquiry rounds, Tess's Friday hours check and monthly invoice overview, and Ruben's weekly LinkedIn posts switch on in **Triggers → Schedules**. Your computer must be on and Locally open. Toggle any job off there or ask Michael to pause it.
- Files land in **Documents → Locally → services**: `services/proposals`, `services/clients/<client>`, `services/hours.csv`, `services/invoices/<month>`, `services/linkedin` and `services/testimonials`. Email replies land in your mailbox's **Drafts** folder.
- Noor and Nina share your inbox. Noor takes new-work inquiries, proposal replies and project mail from current clients. Nina takes general questions. A mail with a draft already counts as handled.
- Ruben never writes or improves a quote in a client's name. Testimonials are saved in the client's exact words with the permission they gave, and nobody is asked twice.

Stuck? We help.

Send us a message with a screenshot of what you see. A real person answers.

SUPPORT

Whop chat: whop.com/locallyai · Email: info@locallyai.nl

WEBSITE

locallyai.whop.site

WHOP

whop.com/locallyai

LINKEDIN

linkedin.com/company/locallyaiorg

INSTAGRAM

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