A COLLECTION OF RESOURCES

Freelance Instructional Design: Theory, Taxes, Guides, and Checklists

Introduction

Hi!

The field of freelance instructional design is relatively new and, therefore, unexplored. This makes it quite challenging to break into this specialization successfully as there are multiple things you may not know or expect.

We've conducted a study on this field and identified the most common issues freelance IDs face today:

- Professional knowledge
- Working with SMEs and stakeholders
- Money issues
- Taxes

In this collection, you'll find in-depth insights into all these aspects, created and curated by industry experts and lawyers.

We hope this will be a huge help to you and will make it much easier to advance in a freelance career!

Have a super productive time!

The iSpring Team

Instructional Design Theories and Models

Regardless of whether you're just starting out in instructional design or have been there for years, it's always important to have a firm grasp of the essential theory of instructional design. Here, you'll find the 5 most popular adult learning theories and 8 commonly used ID models.

Now you have all the essentials at hand!

5 adult learning theories

Andragogy

Developed by Malcolm Knowles in 1968, the concept of andragogy is described by its creator as the art and science of helping adults learn. Andragogy has 4 principles:

1. Adults learn better from their experiences, and their past knowledge should be taken into account.
2. They favor a pragmatic approach and need to be able to apply learning to solve a specific problem.
3. Adults are most interested in learning things that have immediate relevance.
4. They need to be involved in the planning and evaluation of their instruction.

Best suited for:

- Self-motivated learners
- Structured formal learning with applied goals
- Specific problem solving

Transformational learning

Developed by Jack Mezirow in 1978, transformative learning theory posits that all learners use different assumptions, expectations, and beliefs to make sense of the world around them.

Transformational learning attempts to help learners change – or transform – their existing frames of reference through a process of problem solving, procedural tasks, and self-reflection.

Learning transformations occur when individuals face a "disorienting dilemma" that challenges their existing beliefs, leading them to reflect critically upon what has taken place.

It's considered one of the "stickiest" types of learning because it can shift an individual's perspective on how to behave, interact, or solve problems.

Best suited for:

- Personal change and a growth mindset
- Complex analytical processes
- Situation evaluation and analysis

Experiential learning

Developed by David Kolb in the 1970s, by drawing on the work of John Dewey, Kurt Lewin, and Jean Piaget, experiential learning requires a hands-on approach that puts the learner at the center of the learning experience.

- Active participation is key, but the theory says that learning happens only when the individual reflects upon what they are doing.
- The four elements of experiential learning are active involvement, reflection upon practice, conceptualization of the experience, and use of knowledge gained from experience.

Best suited for:

- Systematic thinking
- Process-oriented tasks
- Mechanical skills development

Self-directed learning (SDL)

SDL is rooted in Malcolm Knowles' theory of adult learning; in 1997, D.R. Garrison added elements of self-management to the model.

- SDL is a process where individuals take the initiative to diagnose learning needs, form learning goals, identify resources, implement a learning plan, and assess their own results.
- SDL often occurs with the help of teachers, mentors, resources, and peers.
- It requires the learner to be able to access and select appropriate learning.
- The learner exercises control over all learning decisions.

Best suited for:

- Self-motivated learners
- Technology-based learning
- Teaching systems-based or process-based knowledge
- Massive open online courses (MOOCs)

Project based learning (PBL)

Developed by John Dewey in 1897, project based learning theory holds that learners acquire deeper knowledge through active exploration of real-world problems. Dewey called this principle "learning by doing."

- PBL requires learners to solicit feedback and continually review results. This iterative process is believed to increase the possibility of long-term retention of skills and knowledge.
- It requires the use of diverse skills, including inquiry, critical thinking, problem solving, collaboration, and communication.

Best suited for:

- Long term project management activities
- Process improvement
- Software and technology research and development

Action learning

Developed by Reg Revans in 1982, action learning is an approach to problem solving that involves taking action and reflecting on the results.

- The goal of action learning is to improve problem solving processes and simplify the resulting solutions.
- This approach tackles problems by first asking questions to clarify the problem, reflecting and identifying possible solutions, and only then taking action.
- Questions build group dialogue and cohesiveness, develop innovative and systems thinking, and improve learning results.
- Action learning requires that the group be able to take action on the problem it's working on. If learners make recommendations only, the group loses its energy, creativity, and commitment.
- There should be a coach who helps the group to learn and work smarter and more effectively.

Best suited for:

- Uncovering areas of learning need
- Filling in gaps in organizational knowledge
- Team building

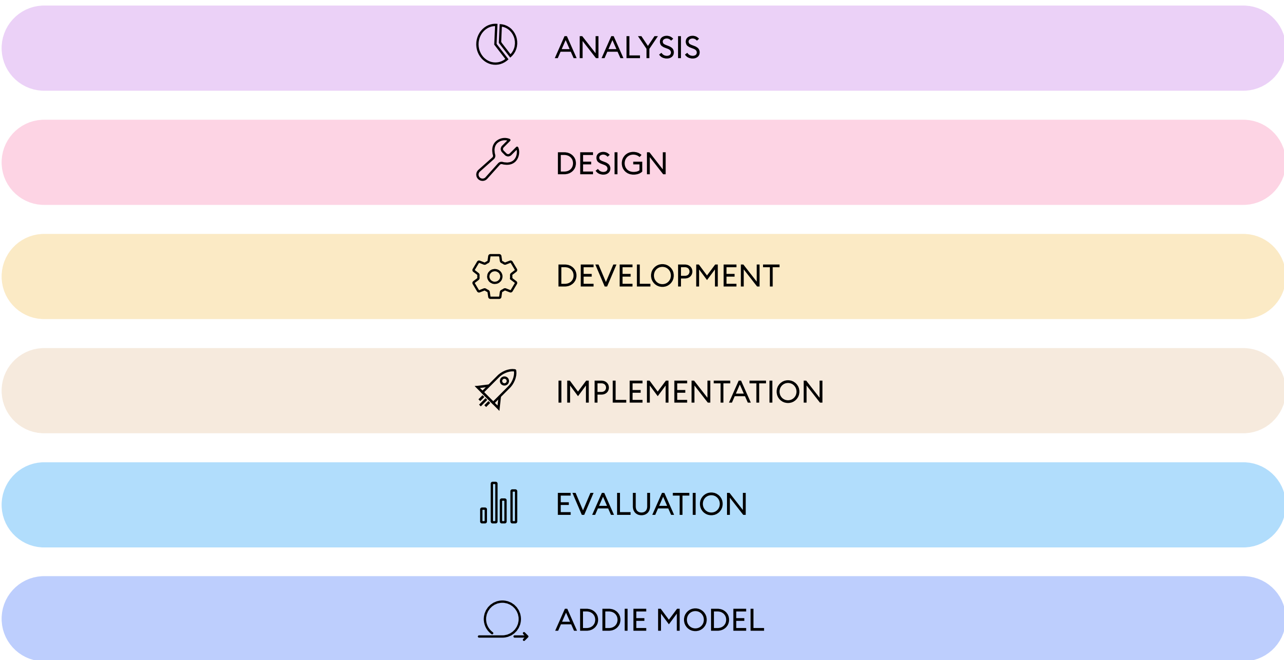
General tips:

- Adult learners have a wealth of experience to draw on when learning and they want their voices heard.
- They learn best when there are opportunities to self-reflect and internalize the learning.
- They aren't used to receiving direction in education and want to be respected for their experience. Ideally, they want to contribute their experience and wisdom when in a learning environment, rather than just absorbing content.
- Adult learners need a purpose or motivation for learning. It might be that learning a framework can make a process more efficient and/or the learning might help them achieve goals – ranging from realizing personal achievements to improving in their current role, or even preparing for a new role.
- They want their ideas and learning needs to be incorporated into the process; they want to be involved.
- Many adult learners are self-directed, meaning they like to learn independently in a self-paced environment.
- They don't have a lot of extra time in their day or life for learning and prefer chunks/bursts of learning (microlearning) and individualized training. They are more motivated to learn if they have quick wins by completing learning rapidly.

8 ID models

ADDIE Model

The first handy design tool you should have in your eLearning arsenal is the ADDIE framework.



The ADDIE model has been around since the 70s and tackles the five stages each eLearning project goes through (which gives rise to the acronym). **They are:**

- **Analysis.** In the analysis phase, you need to clarify at least two things. Who is your target audience, and what should they know or be able to do after completing the course?
- **Design.** Now that it's clear who you'll train and what knowledge they should get, you need to understand how. Which instructional methods, activities, textual content, and media assets will you use to create a killer learning experience?

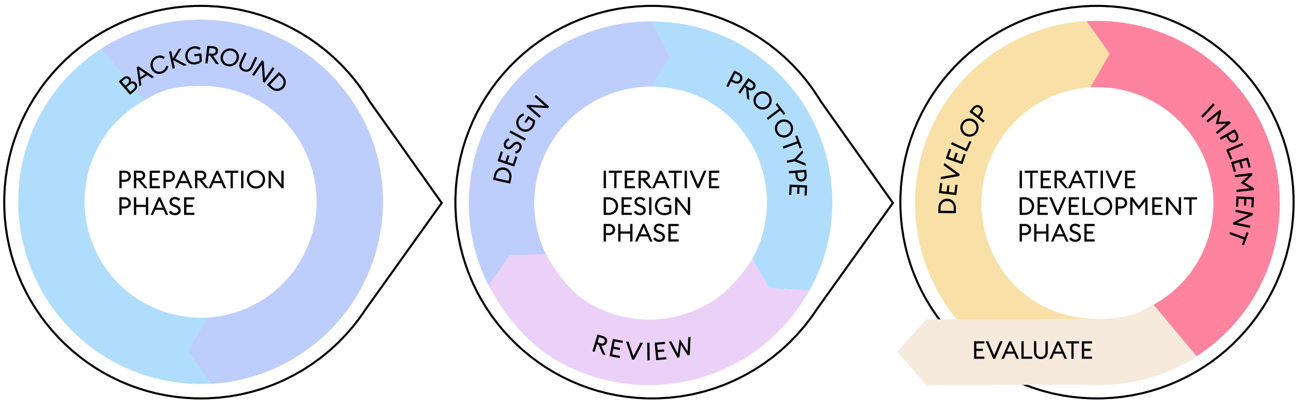
- **Development.** Now it's time to translate all this into reality. You need to storyboard the text, produce graphics and videos, and develop the learning interactions outlined in the design stage. Then, gather all the content and start building a course. This can be a challenging and time-consuming phase, but authoring tools can make your job quicker and easier.
- **Implementation.** This is the phase where the course goes live. Since it's ready now, share it with your learners. For example, you can deliver a course right to the LMS that they use.
- Evaluation. Since evaluation can help make training even better, it's crucial to gather learners' feedback. You need to find out what works, and what should be improved.

Make sure to read about the ADDIE model in more detail.

SAM (Successive Approximations Model)

The SAM model is a more recent instructional design model, created by eLearning pioneer Michael Allen. It's built to help you design meaningful, memorable, and motivational learning experiences.

The SAM model is an alternative to the ADDIE model and aims to fix some limitations of its predecessor. The main difference is probably that, with the SAM model, there's more creativity and freedom in the project creation process, while ADDIE has a strict structure that makes you follow each step. **Here's how you'll create your eLearning project if you choose SAM:**



SAM (Successive Approximations Model)

- **Preparation Phase.**
  Collect background information on learners' prior knowledge, weaknesses, strengths, and other factors. Brainstorm ideas on every aspect of your project. By the end of this phase, you are to come up with a potential design for every content area.
- **Iterative Design Phase.**
  Design and prototype your project and send it to other people for review. Based on the feedback, fix the weaknesses.
- **Iterative Development Phase.**
  Finish your online course and implement it. Collect feedback from your learners, evaluate the training program, and fix issues if necessary by returning to the iterative design phase.

Kirkpatrick's Four-Level Training Evaluation Model

Don Kirkpatrick suggests 4 levels of training evaluation: Reaction, Learning, Impact, and Results.

REACTION	Did the learners enjoy the training?
LEARNING	Did training transfer occur?
IMPACT	Did the training change behavior?
RESULTS	Did the training influence performance?

Kirkpatrick's Four-Level Training Evaluation Model

Here's what to do if you decide to evaluate your course with this model:

- **Level 1: Reaction**
  Collect learners' feedback on the course.
- **Level 2: Learning**
  Measure how much new knowledge learners gained from your course.
- **Level 3: Impact**
  Assess how much an employee's behavior changed after the training program.
- **Level 4: Results**
  Analyze quality, efficiency, productivity, and customer satisfaction ratings to evaluate the overall impact of your course on the organization.

Make sure to learn about this and other training evaluation models.

Gagné’s Nine Events of Instruction

Gagné’s Nine Events of Instruction, when used together, form a framework for a successful learning process. The idea is that once you complete each step, your learners are likely to be more engaged in learning and subsequently retain new knowledge and skills. Consider these events when designing an eLearning course:

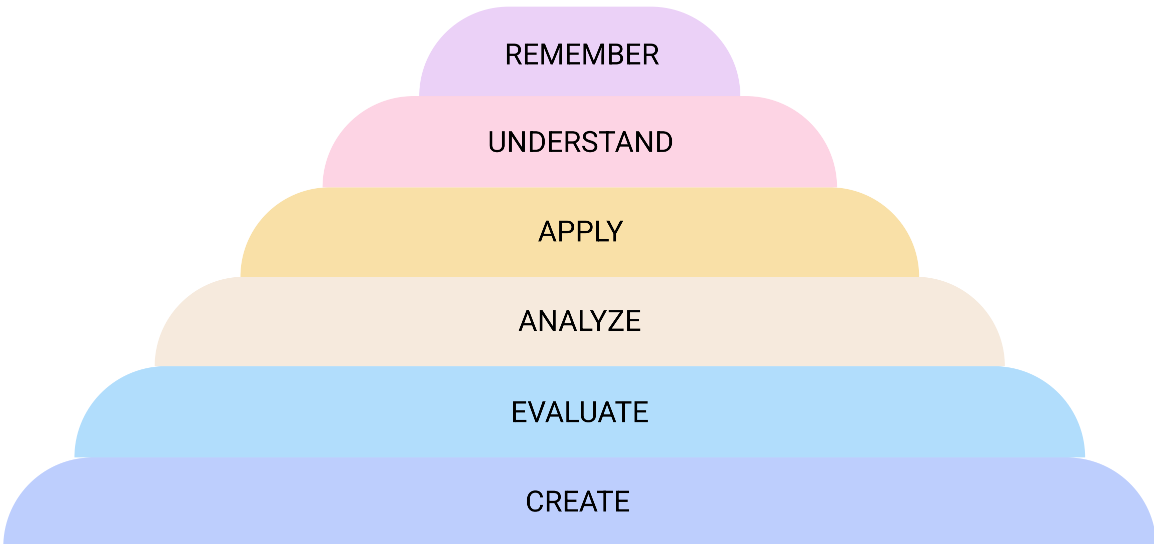
Gagné’s Nine Events of Instruction

The Revised Bloom's Taxonomy

The original Bloom's taxonomy included these 6 categories:

- **Knowledge**
- **Comprehension**
- **Application**
- **Analysis**
- **Synthesis**
- **Evaluation**

However, in 2001, a group of cognitive psychologists and education specialists offered a revision of this taxonomy that proved to be more effective. Instead of nouns used by Benjamin Bloom, they used action words – verbs and gerunds – that describe the learner's cognitive processes. They also changed the sequence and replaced the "Synthesis" category with the "Create" step. **Check it out:**



The Revised Bloom's Taxonomy

- **Remember**
  Recall facts and basic concepts.
  Define, duplicate, list, memorize, repeat, state.

- **Understand**
  Explain ideas or concepts.
  Describe, discuss, explain, identify, locate, recognize, report, select, translate.

- **Apply**
  Use information in new situations.
  Execute, implement, solve, use, demonstrate, interpret, operate, schedule, sketch.

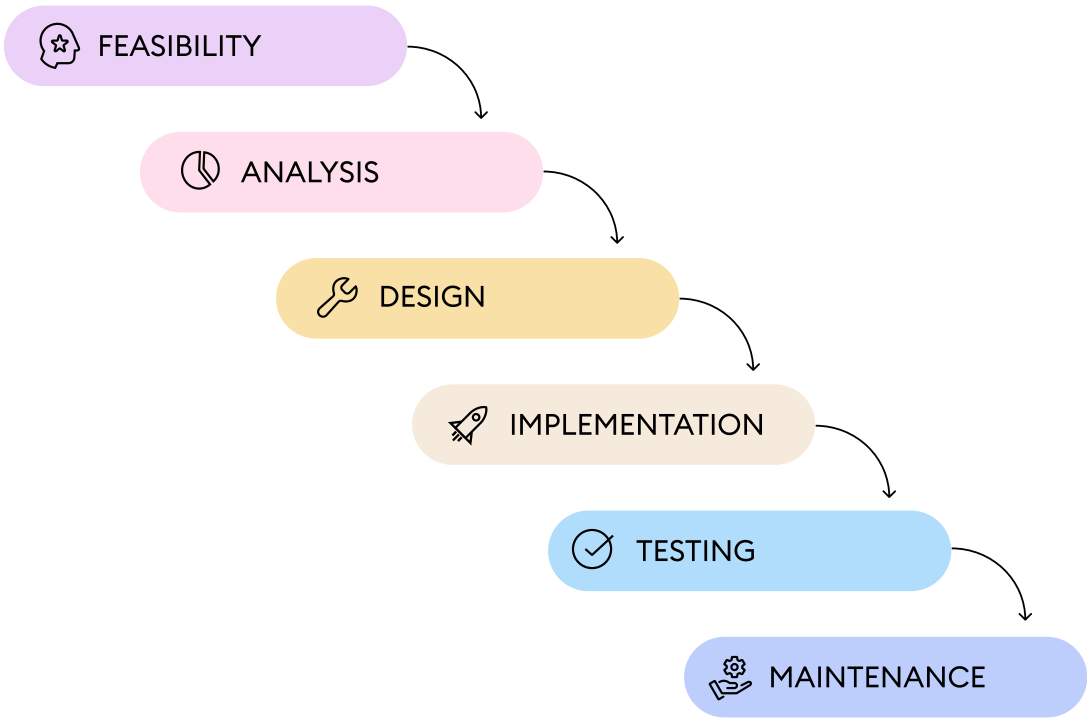
- **Analyze**
  Establish connections among ideas.
  Differentiate, organize, relate, compare, contrast, distinguish, examine, experiment, question, test.

- **Evaluate**
  Justify a stand or decision.
  Appraise, argue, defend, judge, select, support, value, critique, weigh.

- **Create**
  Produce original work.
  Design, assemble, construct, conjecture, develop, formulate, author.

Waterfall Model

The Waterfall model is a sequential linear adaptation of the ADDIE model that includes these 6 steps: feasibility, analysis, design, implementation, testing, and maintenance.

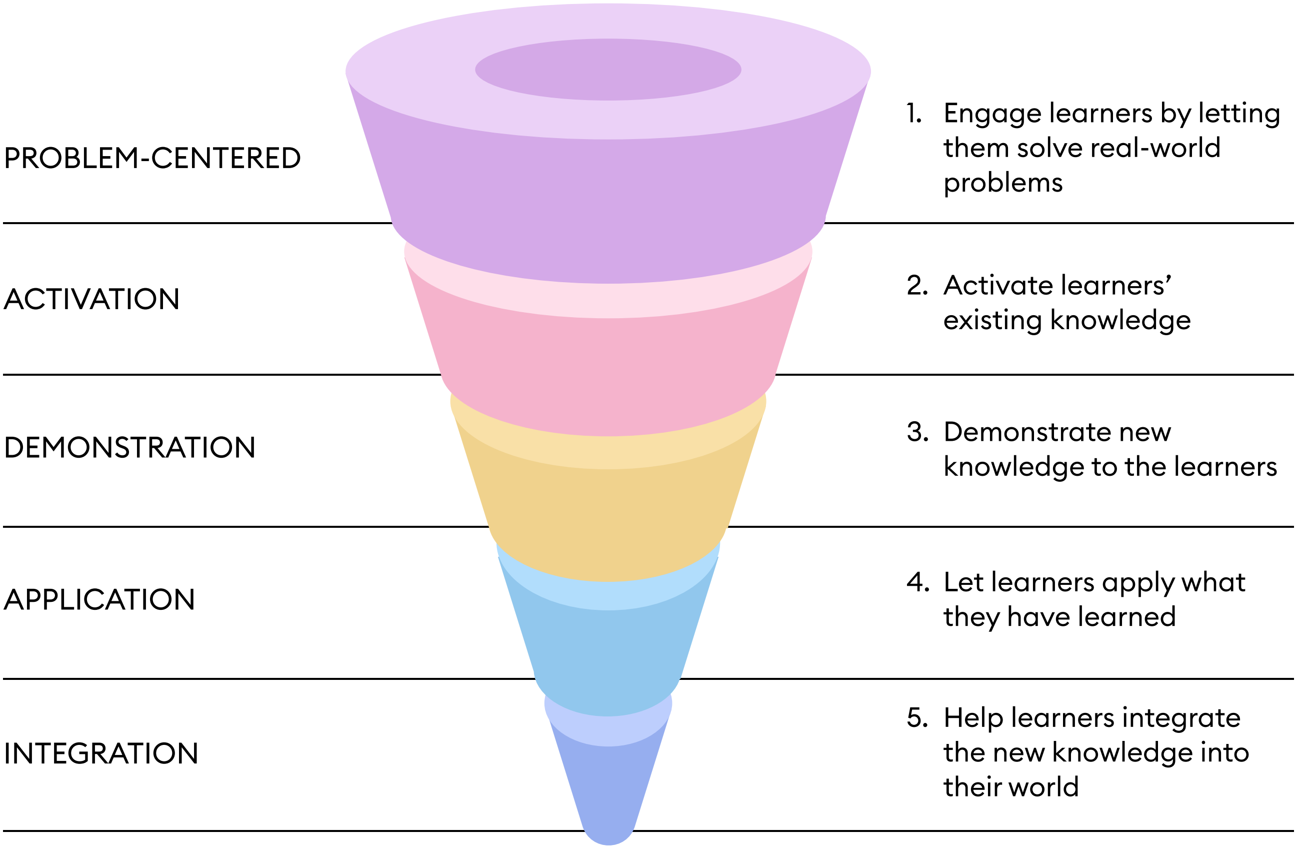


Waterfall Model

The model is based on the idea that each following step is easier than the previous one, as is the case with a waterfall: water falls faster and faster until it hits the ground. The course development happens quickly because once you finish a step, you don't come back to it, so you don't spend extra time running through content, visuals, and other project components. However, this might affect the overall course quality.

Merrill's Principles of Instruction

David Merrill suggested 5 instructional design principles that will help you create a truly effective learning experience:



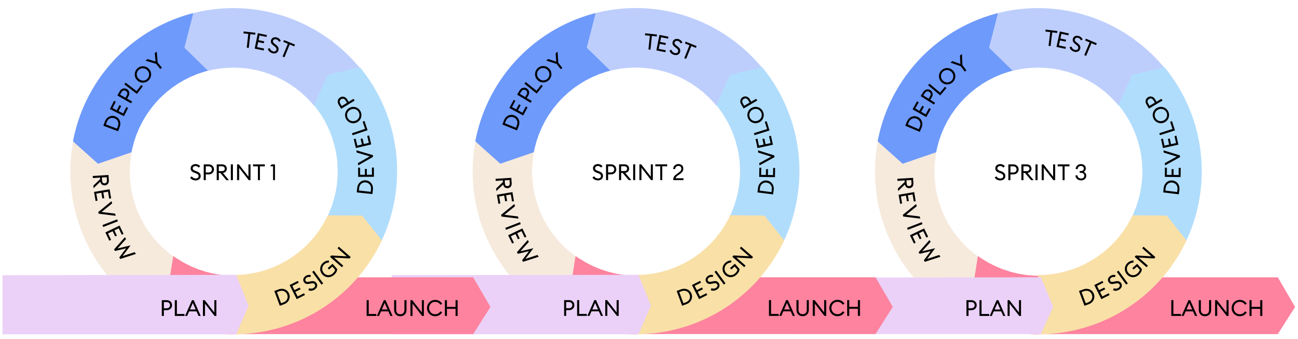
Merrill's Principles of Instruction

- **Principle 1: Problem-Centered**
  Engage learners by letting them solve real-world problems:
  - Show an example of the task that learners will perform.
  - Make sure learners understand what they are going to do and are interested in the task.
  - Provide learners with a basic problem, then give them a complex real-life problem to solve.
- **Principle 2: Activation**
  Activate learners' existing knowledge and use it as a foundation for new knowledge. Ask them about their relevant experience and knowledge, and make up examples and tasks that connect both with these experiences and new information.

- **Principle 3: Demonstration**
  Learners need to see everything: learning outcomes, new knowledge application examples, etc. Your task is to show it to them using media that will engage them.
- **Principle 4: Application**
  Let learners apply what they've learned. Provide them with guidance on how to use new knowledge and skills, and give them an opportunity to practice them.
- **Principle 5: Integration**
  Help learners integrate new knowledge into their world. In order to do this, let them demonstrate new skills to others, reflect on them, and encourage learners to transfer what they have learned into their lives.

AGILE

AGILE is another course development model that focuses on one eLearning module at a time. You move to the next one only after you've finished the previous one. This results in a higher quality course because you pay more attention to details in each segment.



AGILE

Here's what you should do according to the AGILE model:

- **Align**
  Set goals and objectives.
- **Get Set**
  Plan how you are going to develop your eLearning project.
- **Iterate and implement**
  Develop the project following the plan.
- **Deploy**
  Test the module.
- **Evaluate**
  Collect feedback, analyze, and assess the module. Fix any issues.

Working with SMEs and Stakeholders

Communicating with subject matter experts (SMEs) and stakeholders are the two biggest challenges freelance IDs face (apart from money issues) according to our study. There's lots of misunderstanding, irritation, and even sabotage on the part of the SMEs. The following guide will help you get the most out of your relationships with SMEs and stakeholders and reduce all the risks to a minimum.

This guide is based on the webinar session with **Tom McDowall**, Senior Instructional Designer and Chief eLearning Geek at Evolve Learning Design. You can watch the entire session here.

Please note: Although the original session was mostly about working with SMEs, most of the steps and recommendations below are relevant for communicating with stakeholders as well.

And feel free to follow Tom McDowall for more insights into instructional design and eLearning:

www.linkedin.com/in/tom-mcdowall

twitter.com/tommcdowall3

www.youtube.com/@InstructionalDesignTips

Step 1: Identify the type of SME

Before you actually start working with a subject matter expert, you need to make sure you know who you're dealing with and what value they can add.

Tom McDowall outlines three categories of SMEs:

1. **Technical**
   They provide content knowledge and check to see if every detail related to the content is correct. They have years of experience on the subject matter and can share unique expertise. You'll design learning experiences around the fundamental information they provide.

2. **Functional**
   These SMEs share audience and implementation knowledge related to modality and design. They might not know the subject thoroughly but they are the best experts on all processes related to it. For example, if you need to prepare a software tutorial, functional SMEs will tell you about every button and what issues users most often encounter.

3. **Sentinel**
   These are senior stakeholders and board members with minimal technical or implementation knowledge. They want to be involved in your project just to be able to tell other board members that they were involved. However, they do add value to your work – sometimes when you need to get something done, it's only having their name attached to your project that will do the trick.

You need to be careful at this stage and ask SMEs only those questions that fall within their expertise. Otherwise, if you ask a senior stakeholder about content, for example, they'll either just say they don't know (if you're lucky) or will take a guess, which might affect the quality of your content later on.

Step 2: Determine their motivation

One of the crucial aspects of effective communication with SMEs is knowing their motivation. It matters. Experts from within a company and external experts who volunteer to help you with your projects have completely different levels of involvement. You should take this into consideration and interact from that perspective.

There are two ways to categorize SMEs based on their motivation: by whether they belong to a company and whether they're getting paid. Let's start with the first one:

- **Internal**
  Experts from within the organization. They are actively involved in your project, care about the result, and are motivated to do the best they can to make an impact on their team and business.

- **External**
  Wider industry experts and professional SMEs. They don't belong to the organization you're doing the project for, so they are unlikely to want to go that extra mile and explore exactly what their subject matter will look like in the final product. At least, not right away. They need some more time to get up to speed. And it's fine if you know this from the start and play a long game.

Another important factor you need to consider is whether an SME is getting paid. Here's how it affects your relationship with them:

- **Paid**
  These are specialists who offer dedicated time and are used to working as SMEs. As they are paid to work with you, they're under increased pressure and are more willing to help.
  This subtype includes not only paid external experts but internal experts as well – their supervisor just needs to tell them that they are to work with you for 10 of their 40-hour week, for example. Then it becomes their official duty, for which they're paid.

- **Volunteer**
  These are experts who want to help but are required to fulfill other responsibilities as well. Even if these SMEs are highly motivated to add value to your project, they may simply lack the time to be 100% into it. You might need to adjust to their schedule to make the most out of your relationship with them.

Once you identify the type and motivation of an SME, you can understand clearly what that SME can do for you and why they do it. Knowing the what and why of it will make your work a lot easier and more productive than working blind.

Step 3: Make friends with them

The worst thing that can happen to your relationship with an SME is when you come to them only when you need them. Nobody likes people who show up only when they need your help moving, for instance.

A more productive approach would be getting to know them and making friends with them. Here are some tips on how to achieve that:

- **Build relationships from day one**
  Day one isn't the day when you need to interview an SME. It's the very first day you start working on the project. Try to identify potential SMEs who could be useful for your project and have a brief chat with them. Introduce yourself and ask how you can help them in terms of training.
- **Generate social capital**
  Social capital works just like your bank account – you can't use it if it's empty. And you do need to use it. Whenever you have burning deadlines or need to ask SMEs for extra time – it's only social capital that will help. So, work on it whenever possible from the very start.
- **Always be easy to work with**
  The biggest issue SMEs face when communicating with instructional designers or L&D specialists is when those aren't easy to work with. Here are some of the most common examples:

  — Forcing SMEs to work in ways they're unfamiliar with

  — Using jargon

— Forcing them to do something they don't need to, like getting to know the essentials of instructional design

— An SME wants to know only what precisely they need to provide you with to get your project moving and help the business. They don't need to know about ID models, synchronous or asynchronous learning, authoring tools, etc. – this is all about learning experience design, which is your job, not theirs.

Step 4: Define the relationship

People need to know where they stand, what they're responsible for, and who they are working with. It's not enough to just say that you're an ID and they are an SME. An SME might be performing this role for the first time and may have no idea what it includes. So, you need to make your relationship very clear to ensure it'll be effective.

Here's what you need to clarify:

- **Roles**
  Keep these simple and clear – who reports to whom and in what capacity.
- **Responsibilities**
  Everyone must have clear deliverables and an understanding of what they are responsible for.
- **Input**
  Who will have input on what aspect of the project? Not everyone will be involved in every decision.
- **Sign off**
  Who will have the final sign-off on each aspect of the project?

If you get this stage right, it will be much easier for you to work with an SME afterward. For example, let's say an SME doesn't like the color of a course player and you don't like the language used in the course. If you clarified that an SME has no input on visual design and you have no input on language, everyone's happy. Otherwise, you'll have difficulties debating on multiple aspects and details.

Step 5: Help, adapt, and guide

From this moment forward, you're the one calling the shots. And you bear all the responsibilities. If you don't keep an eye on all the aspects, the project may fail.

Here's what you need to do:

- **Vision**
  Paint a picture of the completed project.
- **Map**
  Show how each step moves the project toward success.
- **Ownership**
  Remember that you are delivering the project, but you don't own it.
- **Simplify**
  Provide simple guidance, checklists, and process maps.
- **Communicate**
  Use stand-up meetings, town hall meetings, and lunches to have open and honest conversations on the project. Keep everyone in the loop.
- **Lead**
  Step outside of your process. But remember that nobody likes to be forced into ways of working that they're unfamiliar with. So, make sure you don't do this.

Step 6: Wrap up and review

The end of the project does not mean the end of the relationship. A wrap-up is just as important as a stand-up and can drive continuous improvement from project to project.

Here's what you need to do:

- **Celebrate success**
  Take the time to celebrate a successful project or milestone. This will keep morale high and enhance future performance.
- **Share feedback**
  Collect and share honest feedback from all parties.
- **Workshop**
  Make sure to run a lessons learned workshop for all involved and identify key improvements for future projects.
- **Reflect**
  Allow time for personal reflection on your performance, the process, and the project's outcomes.

Would you do it again? Were you happy with the project? Reflect and analyze your answers. And before blaming SMEs or stakeholders, start by assuming that you're the problem. This won't always be the case, but it will definitely help you grow and avoid unfair criticism.

If you're interested in this topic, be sure to watch the entire webinar with Tom McDowall for more insights and tips.

6 Tips to Make Six Figures Working as a Freelance Instructional Designer

The perks of freelance are exciting. The freedom of when, where, and how much to work. A variety of projects. Earning money based on skills and the quality of your work. And the pay is much higher, especially for skilled instructional designers who don't have years of experience. But getting up to six figures is still not a simple task. Here are some tips that will point you in the right direction.

Please note that the original article was first published on eLearning Industry.

Tip #1. Take many more standard projects

If you want to earn more money, you need to work more, right? Well, not exactly. You actually need to land more projects – and that doesn't necessarily mean working harder.

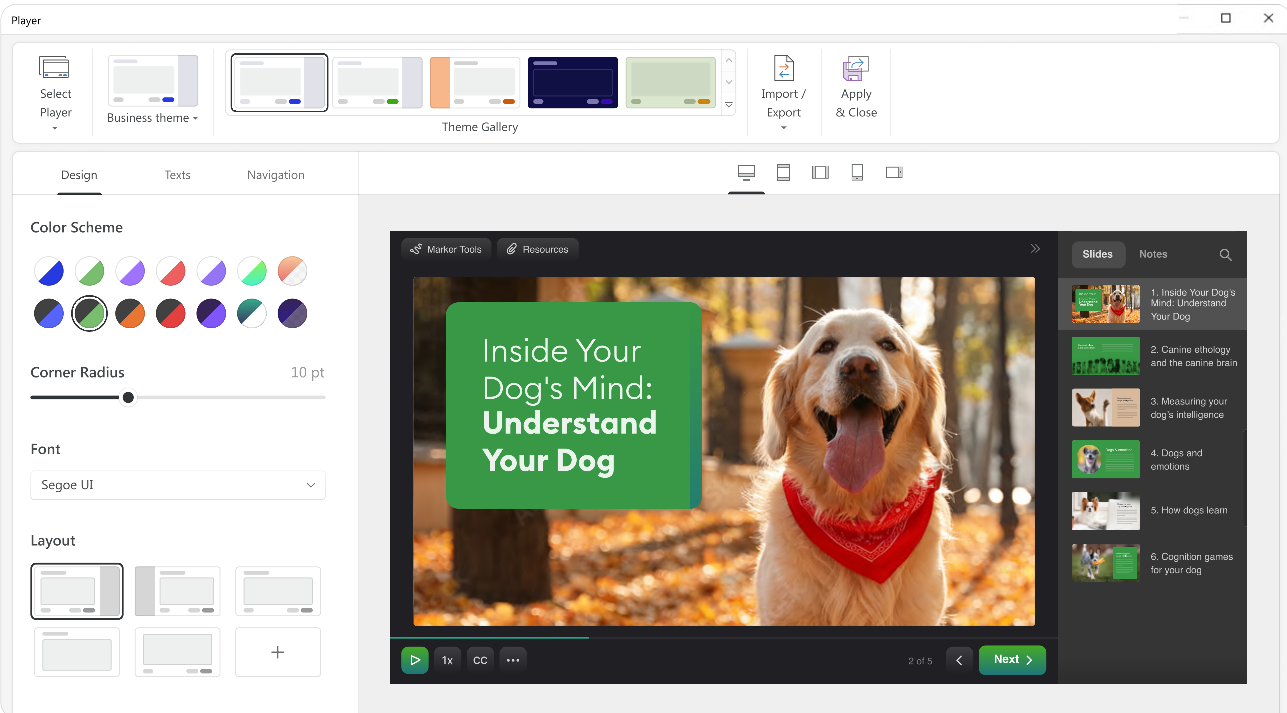
Usually, instructional designers have one "main" project that takes most of their time and 3-4 relatively simple standard projects, like onboarding programs, product training, content updates, or individual pieces. The main project takes months and side projects can take only a week or two. So, while you can't take on several main projects to realize greater profit (you'll burn out), you can increase the number of side projects. These side projects are 90% of the training content your clients need, and they take only 10% of your time when your workflow is streamlined.

Creating such courses with complex instructional design tools can be a headache. They're designed purely for advanced eLearning content and thus have too many features for standard projects, thus making you spend hours developing something simple, like a welcome course. So, you might want to add some other tools to your arsenal that are built for this task.

You can check out this feature comparison of the most popular ID tools to get a better sense of what exactly to look for in new software.

For example, the new iSpring Suite works great in this respect. It has all sorts of templates and lets you create course presets in keeping with clients' brand identity. You can customize a course player for a particular client once and then simply select it for further projects. It saves you lots of time and energy, so you can take on multiple similar projects without overworking and burning out.

Freelance instructional designers deliver projects over 2 times faster with iSpring Suite than with other tools



This will also make your connection with clients stronger and more stable. As they see that you're able to provide them with both advanced and basic pro-level courses, they'll have no reason to look for other ID services and will assign all of their projects to you.

Tip #2. Pivot away from hourly pricing

Or don't. What you need to figure out is which pricing is the most beneficial for you. Hourly pricing is great for beginners, as they work slowly. So, if you're a novice and want to become an instructional designer, or take on a project in a new field (and will thus need to spend more time on research, etc.), you can bill by the hour and increase your hourly rates over time.

But, in general, hourly pricing punishes efficiency, and you need to pivot to project pricing for higher profits. For instance, let's return to the previous tip. With presets and templates, you won't spend many hours creating courses. And if you're billing by the hour, it means you won't get much money either.

Hourly pricing doesn't reward you for your experience and skills. You complete projects fast because you know how to accelerate your workflow, not because the project is simple. Some other specialists might spend twice as long to do what you accomplish. That's why you need to charge clients for your skills and experience.

Price a project based on how much time you'll spend on it and how much time other people would spend on it on average. Also, discuss how many reviews you're going to allow. If a client approves your storyboard, but later, when you present the final project, they ask you to rewrite your script, you should charge for this extra work. This approach will not only help you get greater profits but will also help you build a professional relationship with your clients in which you both respect each other's time and effort.

Tip #3. Optimize your yearly expenses

The annual expenses of a freelance instructional designer should be around $14,000 (higher or lower depending on where you work from, which software you use, etc.). They include everything from legal costs and tools to insurance and office expenses (which can be a room in your apartment).

If you spend more, you might want to analyze your expenses and see if they can be optimized.

Some of the most commonly optimizable expenses are:

1. **Basic tools**
   These are the tools you need for your job, from instructional design software to bookkeeping applications. If they exceed $2,000 in total, you might want to see whether they're worth it. Maybe there are cheaper alternatives, or you don't use some applications often enough to pay for them on a yearly basis. You can also check for special pricing plans for freelancers – some vendors offer them.

2. **Optional tools**
   Optional tools help you develop your business. They include cloud storage, a library of ready-made eLearning content, an email marketing tool, a custom email domain to look more professional when communicating with clients, etc. Again, consider how valuable they are for your business and see if you can do without them. For example, some vendors offer a built-in content library and cloud storage, so you might not have to spend extra on these tools.

Tip #4. Produce content that shows your expertise

In other words, go blogging. The instructional design market has become very competitive, and this might be only the beginning of a long-term trend. If you want to land high-paying projects, you need to stand out from other candidates. Showing your expertise in blogs, YouTube videos, or podcasts is a great way to do this.

It can also bring you new clients. They might read your posts, watch your videos, or hear your podcasts, like your approach, and offer a project.

Above all, high-quality instructional content shows that you're an industry leader and allows you to set your rates accordingly.

Tip #5. Forget Upwork and other freelance platforms

Upwork – along with Fiverr, Freelancer, and other platforms – is a regular subject of discussion in ID groups. Some people like them, and some don't. But if we're talking about a six-figure income, having these freelance platforms as your main source of income is not a great approach.

Here are only a few reasons why:

- You often make an offer and never hear back from a client
- You get ghosted
- You work for less than minimum wage
- Clients cut your offer in half after long discussions and pick someone else in the end
- Upwork fees are disastrous: 20% of earnings up to $500, 10% of $500-$10,000, and 5% of earnings over $10,000 – for each client

But if you're starting out and really want to use Upwork, or you want to land some extra projects there, here's a tip: add phrases like "curriculum development" or "curriculum writer" to your searches along with "instructional design." Lots of freelance positions like that don't specify they're looking for an ID, so they won't show up in your searches.

Tip #6. Turn to good old networking instead

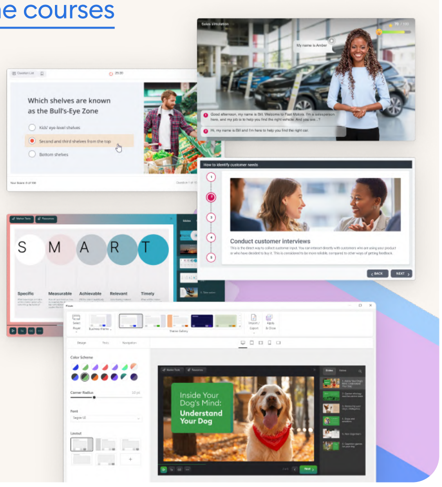
The biggest gigs that'll make you six figures aren't on Upwork. You can land them only through self-promotion or customer referral. So, networking is vital.

You build trust, and people go out of their way to support those they trust. If you're not a fan of networking, remember that few people are – it's an essential part of your business success, so it needs to be done.

Here are a few ways you can network:

- Join LinkedIn, Reddit, and other social media groups to connect with colleagues and clients
- Go to eLearning conferences like DevLearn, Learning Solutions Conference, and Canadian eLearning Conference (yes, some of them are expensive, but they eventually pay off)
- Join volunteer projects to meet like-minded people and build connections with them

Another key element of your six-figure success is your level of interest: if someone sees how passionate you are about a particular project, they get excited to collaborate with you on future projects. So, try to pick projects you're really interested in, not only those that pay a lot. Feel free to ask current clients for more work – even if they don't have projects for you, they might introduce you to someone who does.



Essential Info on U.S. Laws and Taxes Regarding Freelance

As freelancers can't rely on anyone, except themselves, it's essential for you to know the basic ins and outs of laws, regulations, and taxes regarding freelance. You'll find all you need to be aware of below.

Please note that this information applies to the U.S. only.

1. Freelancer: definition

1.1 As a general rule, a freelancer is an individual (physical person) who earns money on a per-job or per-task basis, usually for short-term work as an independent contractor[1]. A freelancer is at liberty to complete different jobs concurrently by various individuals or firms unless contractually committed to working exclusively until a particular project is completed. Freelancers tend to work in the creative, skilled, or service sector, such as in film, art, design, editing, copywriting, proofreading, media, marketing, music, acting, journalism, video editing and production, illustration, tourism, consulting, website development, computer programming, event planning, photography, language translation, tutoring, catering, and many others.

Professional activities of freelancers have a close relationship with the so-called gig economy. "A gig economy is a labor market that relies heavily on temporary and part-time positions filled by independent contractors and freelancers rather than full-time permanent employees. The gig economy is based on flexible, temporary, or freelance jobs, often involving connecting with clients or customers through an online platform[1]." The gig economy can benefit workers, businesses, and consumers by making work more adaptable to the needs of the moment and the demand for flexible lifestyles.

[1] See more: https://www.investopedia.com/terms/f/freelancer.asp

At the same time, the gig economy can have downsides due to the erosion of traditional economic relationships between workers, businesses, and clients.

1.2 From a legal perspective, there are two types of workers in the United States; employees and freelancers. Today, most people prefer working as freelancers instead of traditional employment for many reasons. To work as a freelancer in the US legally, one has to be a resident or have an immigrant visa that allows one to work permanently or temporarily in the United States. However, whether the person has the approval to work in the US or not, once the person does freelance work on US soil, they need to pay taxes on the earnings.

The IRS can provide a TIN for free, even if a person does not meet the legal requirements to work in the US. You can use it to submit taxes and avoid tax evasion charges. It will also allow you to open a US bank account to receive tax refunds and payments from some businesses.

The benefits of being a freelancer include having the freedom to work from home or other unconventional workspaces, a flexible work schedule, and a better work-life balance. Freelance work can benefit workers who have been laid off, reducing the incidence of overall unemployment in an economy. Drawbacks include uncertainty about future income, job stability, and consistency with getting new work. There is also a lack of employer benefits, such as insurance and retirement plans, and sometimes lower per-hour rates compared with employed salary earners[2]. Aside from those who were qualified during the pandemic for Pandemic Unemployment Assistance (PUA)[3], freelancers are not eligible for unemployment insurance.[4]

[2] https://www.investopedia.com/terms/f/freelancer.asp#citation-12
[3] https://www.investopedia.com/pandemic-unemployment-assistance-pua-definition-4802064
[4] https://www.investopedia.com/who-doesn-t-get-unemployment-insurance-4802117

2. Legal status

2.1 Freelancers are typically not considered to be employees of the companies they work for. Therefore, the scope of national legal acts that regulate labor relations does not apply to freelancers. It also means that customers of freelancers have no obligations to pay social security or medical insurance contributions. Freelancers must pay those contributions themselves.

2.2 But what is the legal status of freelancers in light of the law?

The Internal Revenue Service (IRS)[5] categorizes freelancers as self-employed. A self-employed person is an independent contractor or a sole proprietor who reports self-employment income. Self-employed people work for themselves in a variety of trades, professions, and occupations rather than working for an employer. Depending on the jurisdiction, self-employed persons may have special tax filing requirements. A self-employed person is someone who earns their living from any independent economic activity, rather than working for a company or an individual.

- The business structures that self-employed people might choose include independent contractors, sole proprietorships, partnerships, corporations, S corporations, and limited liability companies (LLCs).
- Self-employed individuals are generally highly skilled at a particular kind of work.
- The self-employed have traded the comforts of security for a greater sense of freedom.

In the majority of cases, freelancers will be considered independent contractors and might do their contract work full time or as a side job to supplement full-time employment, time permitting.

[5] https://www.irs.gov

In general, to be considered an independent contractor, you're required to sign a contract with a customer/client and agree on a predetermined fee based on the time and effort required to complete the task. This fee may be a flat fee or a per-hour, per-day, or per-project fee, or some other similar measure.

The exception to this rule will be if the state or local law clearly states that a freelancer has to be treated as an employee. For example, local and state laws in California and New York City have placed certain conditions on employers who hire freelancers[6].

To qualify as an independent contractor, you must meet the set standards (depending on the state where you reside). The regulations vary from one state to another, with some having relatively higher standards. California, for instance, has the ABC test, which states that you can only qualify to be a freelancer if:

- You do not have control of the hiring company
- You can work outside your ordinary course of business of the hiring organization
- You have an independent occupation, business, or any other established trade

Aside from California, three other states use the ABC test to determine whether an individual is a freelancer or not. These states include Massachusetts, Vermont, and New Jersey[7].

A sole proprietor is someone who owns an unincorporated business by oneself. However, if the person is the sole member of a domestic limited liability company (LLC), then they are not a sole proprietor.

[6] https://bytescout.com/blog/work-legally-as-a-freelancer-usa.html
[7] https://bytescout.com/blog/work-legally-as-a-freelancer-usa.html

2.3 Freelancers in California

According to California's AB 5 law[8], a customer has to treat a freelancer as an employee once they receive more than 30 submissions of work. California enacted the AB 5 employment law in September 2019 and it came into effect on January 1, 2020. Most media and technology companies receive hundreds of submissions from freelancers monthly. That's why the affected employers are no longer taking freelancers who are based in California. For CA freelancers, that means lost work opportunities. However, the AB 5 law exempts those who hire freelance doctors, architects, lawyers, insurance agents, real estate agents, grant writers, tutors, manicurists, and truck drivers[9].

2.4 The Freelance Isn't Free Act

New York passed the Freelance Isn't Free Act[10], which came into effect on May 15, 2017. The Act states that all contracts valued at $800 and above are in writing. The law establishes and enhances protections for freelance workers, specifically providing the right to:

- A written contract
- Timely and full payment
- Protection from retaliation

The law establishes penalties for violations of these rights, including statutory damages, double damages, injunctive relief, and attorney's fees. Individual causes of action will be adjudicated in state court. Where there is evidence of a pattern or practice of violations, the Corporation Counsel may bring a civil action to recover a civil penalty of not more than $25,000.

[8] https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201920200AB5
[9] See more at https://bytescout.com/blog/work-legally-as-a-freelancer-usa.html
[10] https://www.nyc.gov/site/dca/about/freelance-isnt-free-act.page

This law also requires OLPS to receive complaints, create a court navigation program, gather data, and report on the effectiveness of the law. Furthermore, it requires employers to pay the full amount on the date specified in the contract. Alternatively, they must make payments within 30 days after service delivery, if the contract does not specify a date. Employers risk exposure to liabilities such as fines for late payment. Overall, the act aims to protect freelancers from exploitation, and ensure that freelancers pay their taxes on time.[11]

3. Registration

3.1 What elements have to be considered:

The majority of freelancers tend to work under one of the two most popular legal structures–either as self-employed ("sole traders" or "partnerships") or via a private limited company.

Tax structure
Depending on which legal structure you choose for your freelance business, you'll be taxed differently. Sole traders pay taxes on all profits they make over the year via the self-assessment process. Limited companies, on the other hand, pay corporation tax on all annual profits they make, and company directors pay personal income tax on all earnings drawn from the company.

Invoicing
The financials might be your least favorite part of the business, but you'll need to do them to get paid. When it comes to invoicing, there are a few legal details that must be included. For sole traders, it's enough to include your full name, your business name if you're using one, and your legal registered address. For those working via a limited company, the invoice must include the full company name[12].

[11] Ibid
[12] https://n26.com/en-eu/blog/how-to-register-as-a-freelancer

3.2 While freelancers can work from outside the USA, they need to get an employment-based immigrant visa to work on US soil. US Citizenship and Immigration Service provides information on how to immigrate and work in the USA[13]. There are no specific visas for freelance workers versus non-freelance workers.

3.3 Do freelancers need to register a company? Not legally. In the beginning, it's easier to work as a “sole trader.” This allows you to focus on getting the freelance business up and running. Opening the company will be more challenging: appointing directors, registering with the relevant authorities, completing company accounts, and filing annual tax returns. However, opening a company can provide tax savings.

Sole traders typically pay income tax, while limited companies typically pay corporation tax, and currently, corporation tax offers a kinder rate. Also, income tax can increase, while corporation tax stays the same despite earnings.

Freelancers will have to register the company only if they don’t feel comfortable doing the business under their own name. If the freelancer decides to work under their name, then it will be necessary to become familiar with tax forms W-9 and 1099-MISC[14].

3.4 License in California

In California, a freelancer can still work as a sole proprietor, but it's recommended to obtain a license or business tax certificate. In California, this varies by occupation and the location of the business. The state of California doesn’t require or issue a state-wide business operating license.

[13] https://www.uscis.gov/working-in-the-united-states
[14] A W-9 form is simply a copy of basic personal information that clients can keep for their legal records and use to complete a 1099-MISC tax form properly. A 1099-MISC form is essentially a receipt from clients. This form is proof that their business paid a freelancer a specific amount of money. Clients are legally required to provide the freelancer with a 1099 form by January 31st in the following calendar year. See more at: https://mattolpinski.com/articles/start-freelancing-legally/

Most of the time, this license is sufficient for freelancers, but in every case, it has to be checked as to whether the additional license will be required. It also might be an option to open the company in the form of an LLC (Limited Liability Company).

LLCs in California must have words in their names that clearly identify them as limited liability companies. This means your LLC's name must include one of the following: "Limited Liability Company" (you may abbreviate "Limited" as "Ltd" and "Company" as "Co.") "L.L.C.", or "LLC." The name of the LLC cannot be misleading to the public.

For example, the name can't falsely imply any of the following: government affiliation (avoid the words such as "Commission" or "Municipal."), professional corporation (don't use "Professional Corporation," "Prof Corp," "P.C.," or "PC"), or insurer – unless the business is an insurer that's subject to California's insurance code[15]. The next step will be conducting a business name search and a business name request[16].

An LLC needs a registered agent to receive any legal or government documents, such as service of process or annual renewal forms, on behalf of the business. While California does allow LLC members to act as its own LLC's registered agent, anyone stepping into this role must be at least 18 years of age. They will also need to have a physical address within the state. It has to be noted that the name and address of whoever is chosen to be a registered agent will become part of the public record.

This often gives rise to privacy concerns. Many LLCs opt to hire a registered agent service instead. The price range is usually between $50 and $150 per year, and some companies even provide the first year for free. The fastest way to get your LLC up and running in California is to file the LLC paperwork online[17].

[15] https://www.forbes.com/advisor/business/how-to-start-an-llc-in-california/
[16] https://bpd.cdn.sos.ca.gov/corp/pdf/name-reservation-request-form.pdf
[17] https://bizfileonline.sos.ca.gov

Or, to file by mail, download and fill out Form LLC-1 (Articles of Organization). You can also file in person.

Note that while the normal LLC filing fee in California is $70, the state has temporarily waived this fee for applications submitted between July 1, 2022 and June 30, 2023. Foreign LLCs–that is, LLCs formed in another state–that wish to do business in California, must register by completing and submitting Form LLC-5 (Application to Register a Foreign Limited Liability Company[18]).

4. Taxes

4.1 Freelancers need to report all income to the IRS, even though income might come from many different sources. As a freelancer, instead of getting the W-2 form[19] for reporting taxes, freelancers will get multiple 1099-MISC[20] forms from their clients. Moreover, the IRS requires that everybody who is working in the USA pay their taxes, even if they are illegal immigrants. To do that, it's necessary to apply for and get an IRS tax identification number[21]. The IRS will not ask about your immigration status but will want to know your physical address and contacts.

Freelancers and small businesses are required to pay their taxes 4-5 times annually. This requirement applies to a freelancer in the US who is a sole proprietor or the sole owner of a limited liability company (LLC).

In the US, freelancers must file and pay taxes by mid-April. Then they need to make quarterly payments by mid-June, mid-September, and mid-January. You don't need to fill any forms when making quarterly payments.

[18] https://www.forbes.com/advisor/business/how-to-start-an-llc-in-california/
[19] https://pdf.co/us-form-w2-wage-and-tax-statement?utm_referer=https%3A%2F%2Fwww.google.com%2F
[20] https://pdf.co/blog/sign-irs-form-1099?utm_referer=https%3A%2F%2Fwww.google.com%2F
[21] https://www.irs.gov/individuals/international-taxpayers/taxpayer-identification-numbers-tin

If a freelancer has registered a corporation or an LLC with multiple owners, they need to file taxes twice: first as an individual, and then for the corporation/LLC, separately.

4.2 The tax forms:

According to the IRS, once a 1099-MISC has been received, as an independent contractor or freelancer, it will be necessary to fill out three forms. The type of form to fill out will depend on the period and whether earnings are $400 or more.

Schedule C (Form 1040 or 1040-SR) is used to report the income as an independent contractor or freelancer.

Schedule SE (Form 1040 or 1040-SR) is used if earnings are $400 or more. The form also helps to determine how much social security and Medicare tax will have to be paid on the income.

Form 1040-ES is used to file an estimated income tax if the income is not subject to withholding. This includes freelancing income, dividends, rents, alimony, interest, etc.

Form 2210 is used when timely estimated tax payments were not made. This form helps to see if there are unpaid taxes and penalties, and the total amount that needs to be paid to the IRS.

4.3 As the IRS considers freelancers to be business owners, they have to pay self-employment tax as both an employer and an employee.

Social Security tax in 2022 is assessed at a rate of 6.2% for an employer and 6.2% for the employee (the rate for both employers and employees is set to hold steady in 2023). An independent worker, such as a freelancer, would be taxed **6.2% + 6.2% = 12.4%**, as they are considered to be both an employer and an employee[22].

[22] Internal Revenue Service. "Self-Employment Tax (Social Security and Medicare Taxes)." https://www.irs.gov/businesses/small-businesses-self-employed/self-employment-tax-social-security-and-medicare-taxes

The self-employment tax applies to a freelancer who earned $400 or more in any given tax year. The tax has two components: one for Social Security and the other for Medicare.

The Social Security tax is only applied to the first $147,000 of income earned[23] in 2022 (this so-called taxable maximum will be raised to $160,200 for 2023). The Medicare tax rate, which is 1.45% for both entities, is 2.9% for the self-employed worker. The total self-employment tax rate that a freelancer has to pay is therefore **12.4% + 2.9% = 15.3%**[24].

Freelancers may qualify for certain tax deductions that business owners can claim on their business expenses. According to the IRS, these have to be ordinary and necessary expenses (O&NE)[25] for the operation of the business. Freelancers are required to pay estimated income taxes to the IRS, in advance, and on a quarterly basis, as they have no taxes withheld from their paychecks.

5. Intellectual Property

In the context of freelancing, IP is generally considered the work that is brought into existence by a freelancer during a freelance contract. It is important to know what does and does not constitute IP in order to be aware of how to protect intellectual property. While intellectual property refers to a broader set of things, such as patents and trademarks, copyright is a segment of this broader set of what is called intellectual property.

A copyright is the right to reproduce, sell, distribute, publish and reprint a given work. This right can be exercised by the creator, as well as other people and organizations that the creator authorizes.

[23] https://www.investopedia.com/terms/e/earnedincome.asp
[24] Social Security Administration. "Fact Sheet: 2023 Social Security Changes", Page 1. https://www.ssa.gov/news/press/factsheets/colafacts2023.pdf
[25] https://www.investopedia.com/terms/o/oandne.asp

Copyrights serve intellectual property protection and they protect an original piece of work (such as writing, music, or design) created by someone. Nevertheless, just because there is a creation, it does not mean that the creation is copyrightable. For instance, a concept or an idea does not fall under the category of copyright material.

In order to qualify an original work as copyright material, it has to have a 'physical' or digital form. This might sound a little complicated, but let's take a look at some examples to clarify the issue.

Here are some examples that can be considered copyrightable: freelance graphic design, software, any kind of digital or non-digital art (poetry, musical composition or lyrics, books, films, etc.), other virtual content (such as articles on a blog, and reviews or other types of web content).

Elements to be considered:

1. Form - intellectual property needs to be in a substantial form - ideas don't count;
2. Confidentiality - intellectual property includes other types of legal protection such as patents, trademarks, and trade secrets;
3. Country-specific approaches;
4. Value of work - intellectual property (such as designer copyrights).

The fact of the matter is that ownership of intellectual property or copyright mostly depends on:

- Whether the ownership of an original piece of work is the type of contract or agreement that binds the Client and the Freelancer.

- The legal framework in which two parties are operating. The freelance contract or, more generally, the freelance service contract that determines the overall framework of a freelance project, can either state that the property is owned by the creator (Sole ownership) or it can declare that multiple parties possess ownership of the work (Joint ownership).

This being said, we must emphasize that, although it is not set in stone, in most cases, the intellectual property is owned by the client[26].

What you might consider doing:

- Avoid joint partnerships if possible
- Get copyrights, patents, or trademarks
- Make sure to register the name of a business, domain, or product
- Secure the business arrangement through the appropriate type of agreement
- Sign a non-disclosure agreement, confidential disclosure agreement, proprietary information agreement, or secrecy agreement

6. Freelance Contract

6.1 A freelance contract is a document signed by the client and freelancer that explains the terms of their working relationship and the services to be provided. It sets clear expectations between the two parties for a specific project over a set period of time. This type of document is legally binding and ensures that everyone working on a given task is on the same page in terms of service guidelines.

[26] https://ruul.io/blog/all-you-need-to-know-about-intellectual-property-as-a-freelancer

What you must include:

- The names, addresses, and requisites of the Parties
- Details about the services delivered and the expectations of both parties
- Specific dates for the work
- Terms of payment
- Legal clarification of the contractor's role

6.2 A freelance contract is needed for a single project over a clear time frame, as opposed to a permanent, general work relationship. A company also may not involve the freelance worker as an official part of the company.

Note that a Freelancer is not a Temporary Worker. Temporary workers are technically employees of the staffing agency, whereas independent contractors are self-employed. Independent contractors will generally cost a company less money than an employee does because they do not receive traditional work benefits such as health care, vacation pay, sick pay, or retirement. Independent contractors usually work on their own schedules and are not expected to come to an office. Unlike salaried workers, freelance workers have no upward limit on their potential earnings. They are, however, expected to pay for out-of-pocket expenses, unless these are approved by the company. A company's insurance does not cover the contractor, making freelancers responsible for obtaining their own insurance.

6.2.1 Description of Services:

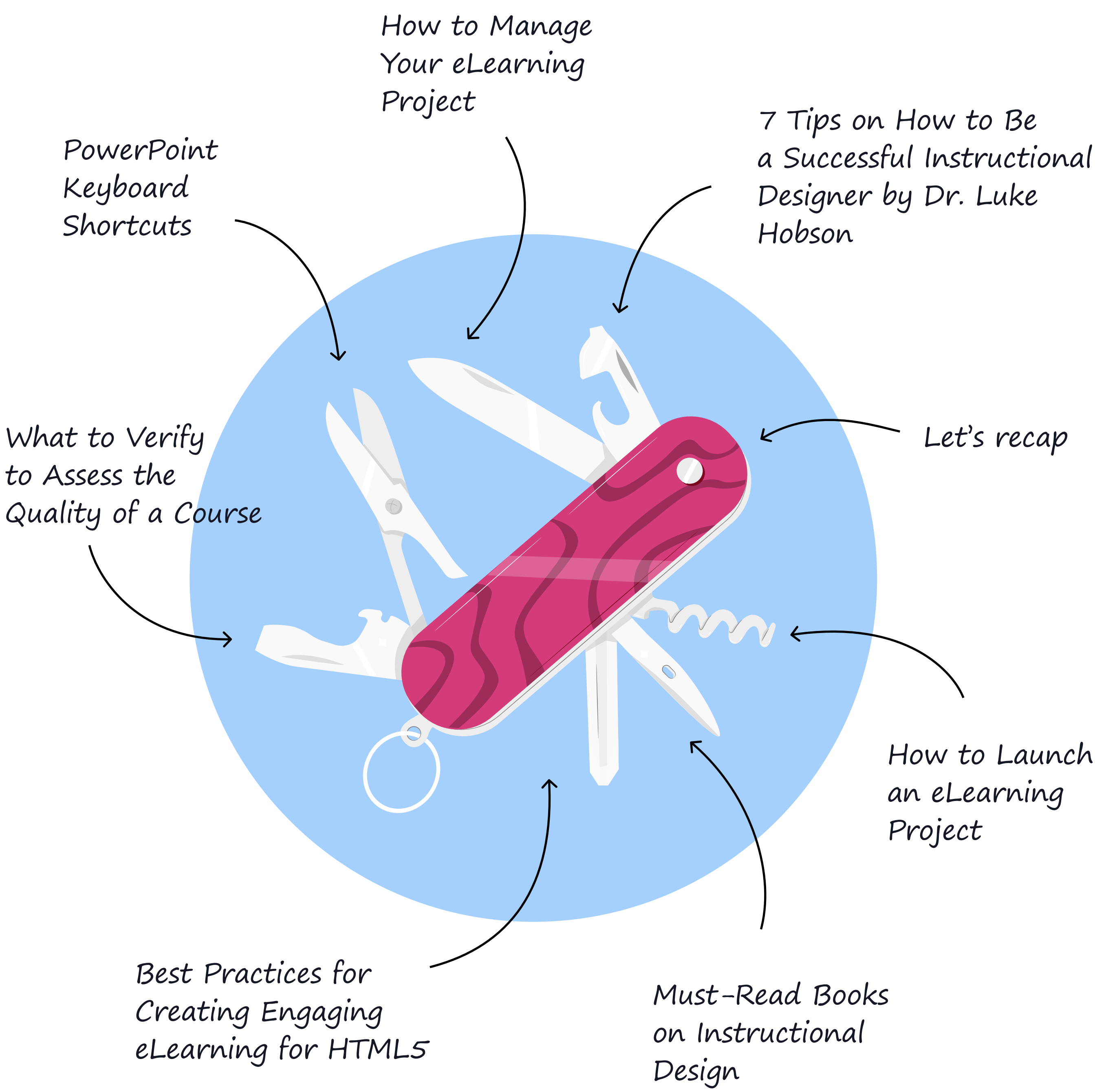
1. The scope of the project and the goals must be specified. The way the work will be submitted, for example, specify whether the files should be submitted as PDF or Word documents, or sent via email.

2. Is there a non-disclosure agreement (NDA) or other confidentiality form? Will the client be granted exclusivity to the contractor's work?
3. What are the client's responsibilities? Are there guidelines to follow if the client wishes to change the project once it is underway?

6.2.2 Mutually agreed schedule of the Service Provision (deadlines, possible penalties, etc.)

6.2.3 Compensation and Clarification of Legal Relationship. How much the client will pay the freelancer, how and when the payment will be sent, when such payment is considered to have been made (upon sending or upon receipt), and payment terms (upfront or post-factum).

Useful Resources for All Seasons



Guide

How to Launch an eLearning Project

1. **Define the learning objective**
   What do you want to achieve with eLearning? The more specific the goal, the more likely you are to make it happen.

2. **Choose the right training tools**
   As a rule, companies use one or both of these two types of tools: a course authoring tool and a learning management system (LMS).

3. **Define a budget and an action plan**
   Develop a budget and an action plan, which you'll need to present to your senior managers. Be convincing when explaining how eLearning can drive the business.

4. **Prepare the learning content**
   Ideally, you should have a one-year eLearning development plan. Initially, however, it's enough to create a single course as a test.

5. **Run a pilot eLearning project**
   Ask a small group of employees to take the course to define the difficulties in using your LMS and see if your course is effective.

6. **Motivate employees to learn**
   Keep your staff engaged with interactive multimedia and participation, provide feedback and recognition, and share success stories.

7. **Evaluate eLearning effectiveness**
   Assess your employees' knowledge regularly, gather feedback on what should be improved, and monitor how their work performance is changing.

Tips and tricks

Best Practices for Creating Engaging eLearning for HTML5

- Analyze all content and ask SMEs questions prior to production in order to reduce the amount of rework.
- Know your target audience (ages, locations, etc.) and keep that in mind when creating your learning project: you must relate to your audience.
- Design an overall template and vision of the project (colors, font scheme, and 5-10 basic page types for quick creation).
- Chunk presentation into 5-10-minute bite-sized components for easy retention and digestion of material.
- Integrate all content into templates and use the optimization needed for the target audience (mobile data, etc.).
- Stimulate engagement: interactivity, animation, exploratory content, and videos.
- Quality assurance: check your work on different devices and browsers.

Presented by **Michael Cerantola**
(KnowledgeOne) in collaboration with iSpring

Checklist

What to Verify to Assess the Quality of a Course

- [ ] Course goals and objectives are clearly stated
- [ ] Contents or a course map have been created
- [ ] The time needed to take the training is stated
- [ ] The function of each button in the course is explained
- [ ] There is no information that can be removed without causing a loss in meaning
- [ ] A maximum of 3 fonts and colors are used in the course's design
- [ ] Images/screenshots are of sufficient quality, and the information they contain is clearly visible
- [ ] The course is designed using a single unified style
- [ ] There are compelling examples that show how to apply the new knowledge
- [ ] Practical tasks help consolidate the learning material
- [ ] The course looks perfect both on desktop and mobile devices
- [ ] The course has a final test or assessment

How to Manage Your eLearning Project

Develop an eLearning project plan

Define project milestones, specify what resources you'll need for each milestone, and set deadlines.

Gather your resources

Get all the human resources (designers, course developers, etc.) and tech tools (an authoring tool, an LMS, etc.) that you need for your project.

Develop the course

Organize your staff to create the course while ensuring that all the processes occur on time, within budget, and to standard.

Beta test your course

Organize a trial run by assembling a group of learners who will take the entire course and provide feedback on the content and overall user experience.

Finalize the project

Arrange a project close-out meeting, where you both celebrate your wins and discuss what can be improved.

Scan this QR code to download a free eLearning Project Plan template.

Must-Read Books on Instructional Design

Continue your list of eLearning bestsellers

Read	Title/Author	Rating
☐	**Design for How People Learn (Voices That Matter), by Julie Dirksen** Find the golden mean between providing knowledge and stimulating interest.	○○○○○
☐	**The Accidental Instructional Designer: Learning Design for the Digital Age, by Cammy Bean** Learn best ID practices, read case studies, and discover the most common mistakes to avoid when designing an eLearning program.	○○○○○
☐	**Map It: The hands-on guide to strategic training design, by Cathy Moore** Learn to distinguish between cases that need training and those that need something different to make the eLearning content you design more engaging and effective.	○○○○○
☐	**The Mom Test: How to talk to customers and learn if your business is a good idea when everyone is lying to you, by Rob Fitzpatrick** Learn how to get a subject matter expert talking, what questions to ask, and how to avoid one-word responses.	○○○○○

Must-Read Books on Instructional Design

Read	Title/Author	Rating
☐	**What I wish I knew before becoming an instructional designer, by Dr. Luke Hobson** Follow the guide to become an instructional designer and advance in the ID field.	○○○○○
☐	**iSpring Suite 10: The Essentials, by Kevin Siegel** Learn how to use all the features of a powerful authoring tool in just one day.	○○○○○
☐		○○○○○
☐		○○○○○
☐		○○○○○
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☐		○○○○○

Check out more books.

Tips and tricks

7 Tips on How to Be a Successful Instructional Designer by Dr. Luke Hobson

Just starting out in instructional design? Take advice from Dr. Luke Hobson, the author of What I wish I knew before becoming an instructional designer.

1. Develop human skills. The majority of the things in instructional design is working with people.
2. Get out of your comfort zone. Don’t be afraid of new experiences. Embrace them and try to get the most out of them.
3. Accept that you don't have all the answers. You have the opportunity to go and find out. Connect with others, and then bring that back.
4. Take action. Don't just buy 5 books or watch 20 YouTube videos on eLearning. At some point, stop consuming content and start doing.
5. Show learners the end goal. When learners know what they will achieve, they’ll get motivated. And if they don’t understand the purpose of your course, they won’t follow through.
6. Prepare a Plan B, Plan C, and even E sometimes. And be ready if none of them work.
7. Be a lifelong learner. You have to enjoy learning. It’s important that you enjoy teaching yourself, because that's what's going to help you. You basically need to be able to take all this content and then make something that's then going to teach another person.

Check out the podcast with Dr. Luke Hobson.

PowerPoint Keyboard Shortcuts

For Windows

Objects

Duplicate an object	Ctrl + D
Group items together	Ctrl + G
Ungroup items	Ctrl Shift + G
Grow an object	Shift + ↑
Send an object to the front	Ctrl Shift + {
Send an object to the back	Ctrl Shift + }
Select all objects	Ctrl + A
Select another object	Tab

Texts

Make selected text bold	Ctrl + B
Apply italic formatting	Ctrl + I
Apply underline formatting	Ctrl + U
Center the paragraph	Ctrl + E
Left align the paragraph	Ctrl + L
Right align the paragraph	Ctrl + R
Copy formatting only	Ctrl Shift + C
Paste formatting only	Ctrl Shift + V
Find and replace text	Ctrl + H
Increase the font size	Ctrl Shift + →
Decrease the font size	Ctrl Shift + ←
Insert a hyperlink	Ctrl + K

Navigation

Move the selected slide or section forward in order	Ctrl + ↑
Move the selected slide or section back in order	Ctrl + ↓
Add a new slide	Ctrl + M
Duplicate a slide	Ctrl + D

Slideshow

Start a slideshow from the first slide	F5
Start from the current slide	Ctrl + F5
Zoom in/out	Ctrl + mouse scroll
End the slideshow	Esc

Let’s recap

If you learn something new and want to master it, apply it.

Get in touch with industry leaders to boost your expertise.

Use LinkedIn and Facebook to keep up with your new contacts.

Challenge yourself every day! It’s fun and motivational.

Mix up learning with practice to become a better professional.

Join the iSpring community to take training to the next level.

If you can’t find a solution, ask for expert advice.