

Freelancer AI Stack Checklist

A practical, free-first setup for doing better work in less time.

AI is most useful when it supports a repeatable workflow—not when it adds another tab to manage. Use this checklist to build a lean stack, test it on low-risk work, and upgrade only when the time saved clearly pays for itself.

Rule of thumb: start free, keep your human judgment in the loop, and make every tool earn its place.

1. Free-first stack by workflow

● Research

- **Perplexity Free** or **ChatGPT Free** — map a topic and find follow-up questions.
- **Google Search + Docs** — verify primary sources and capture notes.
- **NotebookLM** — ask questions against your own uploaded sources.

Keep a source log: URL, author, date, and the claim you used.

● Writing

- **ChatGPT Free** or **Claude Free** — brainstorm, outline, rewrite, and pressure-test.
- **Google Docs** — version history and comments for client review.
- **LanguageTool** or your editor's spellcheck — catch mechanics last.

Give AI a brief, examples, constraints, and a draft—not "write this."

● Proposals & sales

- **Google Docs** or **Notion Free** — one modular proposal template.
- **ChatGPT Free** — turn discovery notes into scope and assumptions.
- **Calendly Free** + **Stripe Payment Links** — make the next step obvious.

Speed up first drafts while you own pricing, positioning, and promises.

● Delivery

- **Trello Free**, **Notion Free**, or **Linear Free** — tasks and decisions.
- **Google Drive** — predictable folders for every client.
- **Loom Free** — explain handoffs asynchronously.

Every project should show the next action, owner, and due date.

● Design

- **Canva Free** — quick graphics, presentations, and layouts.
- **Figma Starter** — collaborative mockups and comments.
- **Remove.bg** free credits — quick asset cleanup.

Use AI for ideation or placeholders; confirm commercial rights.

● Automation

- **Zapier Free**, **Make Free**, or **n8n** — connect routine work.
- **Google Sheets** — the simplest useful system of record.
- **Text snippets** — automate repeated words before complex flows.

Start with one trigger → one action, then add error handling.

2. Paid upgrades—when they are worth it

Upgrade when a free-tool limit costs more in time, risk, or inconsistency than the subscription. Good signals:

Research / writing

Pay for higher limits, longer context, stronger models, or reliable access during busy weeks.

Proposals

A CRM, e-signature, or proposal platform pays off when follow-up and close rate—not templates—are the bottleneck.

Delivery

Upgrade when guests, permissions, automations, or reporting create collaboration friction.

Design

Pay for a shared brand kit, premium assets, version control, or client-ready collaboration.

Automation

Pay when a workflow saves measurable hours, or when retries, logs, and webhooks matter.

Privacy

Choose a business plan for admin controls, stronger data commitments, or workspace separation.

Before paying: run a 2-week time audit. Estimate monthly hours saved × your real billable value, then compare with the monthly cost and switching cost.

3. Setup order checklist

1 Find the friction

Write down your five most repeated weekly tasks.

3 Make a home

Create a **/Templates** folder for prompts, briefs, and checklists.

5 Write a prompt template

Include context, goal, audience, constraints, examples, and format.

7 Test automations

Use dummy data and document how to stop every flow.

2 Choose one tool

Pick one tool per workflow; avoid overlap at first.

4 Standardize projects

Use **01 Brief / 02 Working / 03 Review / 04 Final**.

6 Keep a human gate

Review before anything goes to a client or gets published.

8 Review monthly

Keep, consolidate, downgrade, or remove tools.

One-week challenge: pick one workflow, install one free tool, and use it consistently before adding anything else.

4. Privacy & client-data cautions

Convenience is not permission. Treat every tool like a new vendor until you have checked its terms, controls, and fit with your agreement.

- Read the current training, retention, and subprocessors policy before using client material.
- De-identify where possible: replace names, emails, domains, amounts, and unique facts with placeholders.
- Turn off model training or use an approved business workspace when the tool provides that control.
- Verify every factual claim, citation, calculation, image license, and generated code snippet.
- Never paste passwords, API keys, private contracts, payment details, health information, or identifying personal data into a consumer AI tool.
- Check your contract and NDA before uploading client content or third-party material.
- Keep source files and final deliverables in your normal storage system—not a chat.
- Tell clients where AI is used when your agreement, industry, or their policy requires disclosure.

Simple boundary: if you would not email it to a new contractor without a data-processing agreement, do not paste it into an unapproved AI tool.

Your next step

A lean stack beats a clever stack. Pick one workflow, install one free tool, and use it for a week before adding anything else.

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