



# How to Create a Portfolio in 8 Steps



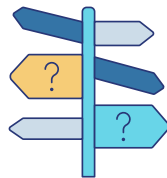
*Every trade or service business should have some form of portfolio or explanation of services on their website because clients often want to see examples of work before hiring someone. This worksheet will walk you through how to build a portfolio based on your business goals, and talk your clients through your process and products so they know what to expect.*

# Step 1

## Set Goals

A portfolio can be used for any or all of the following reasons and more:

- Highlight projects that you want to do more of
- Explain your business to clients
- Help clients understand what working with you will look like
- Help clients get an idea of how much their project will cost



**What are your goals for creating a portfolio? List out 3 reasons.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Step 2

# Identify Top Projects

These could be:

- Projects that you loved and want to do more of
- Projects that you're proud of
- A sample project in each area of your business
- Ones that you have good before and after pictures of
- One where you really nailed the pricing and margins you were looking for



List out the projects you would like to showcase

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## Step 3

# Explain Your Process


List out all the factors that go into your process. Listing out these factors is like giving your audience the backstory. When you explain the key factors behind each project, you're showing your thought process, problem-solving skills, and expertise. This not only helps potential clients understand your approach but also builds your credibility.



**How much time did these projects take?**

**What tasks did they include?**

**What line items were on the invoice?**



**What items might be included in this project, but weren't this time?**



## Step 4

# Explain Your Pricing

When you explain your pricing process, you're being transparent and fair. It helps potential clients understand why your services cost what they do. Plus, it shows that you're not just throwing numbers out there randomly - you've put thought into it. Being upfront about your pricing builds trust and makes it clear what clients can expect.



**What was the cost of each line item?**

**What did this price include (just labor? Labor plus materials?  
Just materials? Delivery?)**

# Step 5

## Project Summary

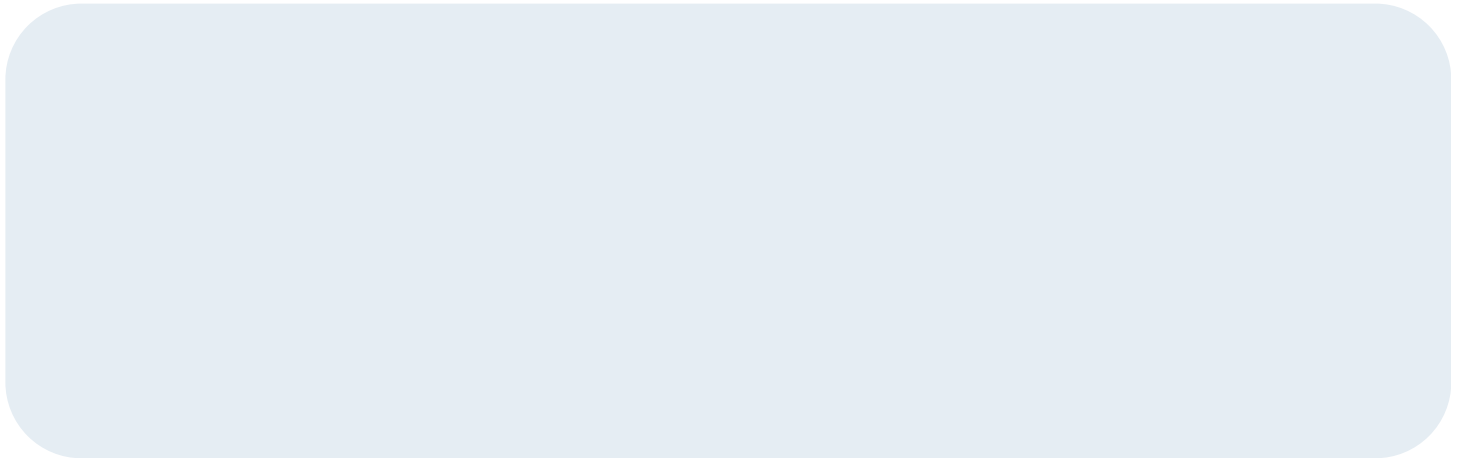
Descriptions give context and help potential clients see the real-world impact of what you've done. You can explain the problem you solved, the goals you achieved, or the challenges you overcame. These descriptions make your portfolio come to life and show that your work has substance.



**What was the customer's goal?**

**What did you have to remove or install?**

**Where there any atypical aspects to this job that are uncommon?**



**What prep work did you have to do to get the site ready?**



**Where did any waste go?**





## Step 6

# Collect Examples

These are especially important if you're in a field where there's a large visual difference such as landscaping, roofing, home organization etc. If you're in a field that doesn't have a large visual difference, such as plumbing, virtual assistant, or pet sitting, you can include behind-the-scenes videos, photos of your home office, or photos of play time.



List out 5 example or photo ideas you can use

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

# Step 7

## Collect Testimonials

Including client testimonials in your portfolio is a smart move. They act like real-life recommendations, showing potential clients that others have had a great experience working with you. Testimonials can also highlight your unique skills and make you stand out. So, if you want to impress and win over new clients, don't forget to showcase those glowing reviews.



**List out 5 past clients that have or can provide a testimonial**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## Step 8

# Put it all together!

This can be a PDF, a section of your website, YouTube video, a highlight reel, or booklet you leave with clients. Using Google Slides, Powerpoint, Keynote or other presentation software is a great way to build a project gallery that can be repurposed for a variety of formats. You can also look at what other people in your industry have done to showcase their work for some inspiration.



**What type of portfolio will work best for your services?**



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