

Lesson 22 Action Workbook

Managing Freelance Projects Successfully

Module 3 of 5: Profiles, Proposals and Clients

Confirm scope and organise the project

Record the agreement before starting client work.

Name: _____ Date: _____

Project tracker

Record client, project, deliverables, owner, status and due date with time zone.

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Scope confirmation

List inclusions, exclusions, inputs, acceptance criteria and agreed revisions.

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Communication plan

Record contact method, update schedule, approvals and response expectations.

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Plan milestones and manage changes

Keep deadlines, dependencies and revisions visible.

Name: _____ Date: _____

Milestone plan

List tasks, deadlines, dependencies, review points and payment milestones.

Revision tracker

Record request, agreed scope, version, owner, due date and approval status.

Change request

Describe added work, fee and schedule impact; record approval before starting.

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Review, deliver and close the project

Check the agreed deliverables and confirm a clear handover.

Name: _____ Date: _____

Final delivery checklist

Check accuracy, completeness, filenames, formats, permissions and tested links.

Handover and approval

Record delivery location, usage notes, outstanding items and client acceptance.

Project review

Compare planned and actual time; note what worked and one improvement.