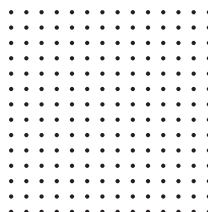
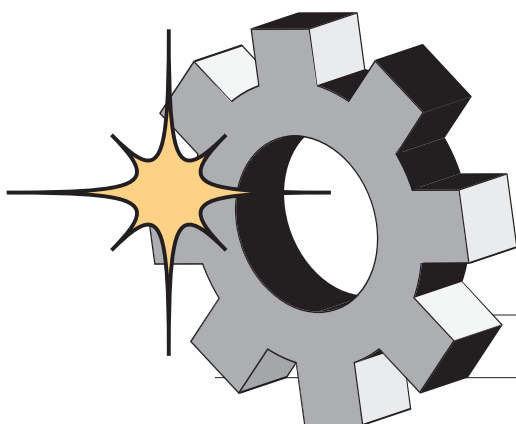
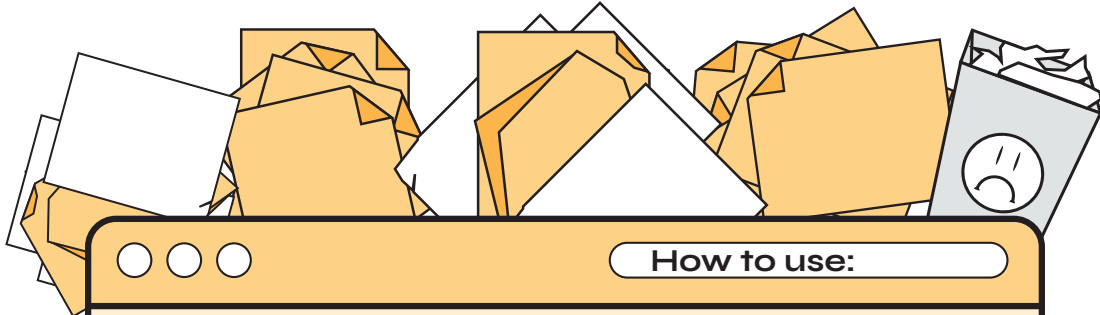


WELCOME TO THE ULTIMATE FREELANCE PLANNER

PDF NOTICE





How to use:

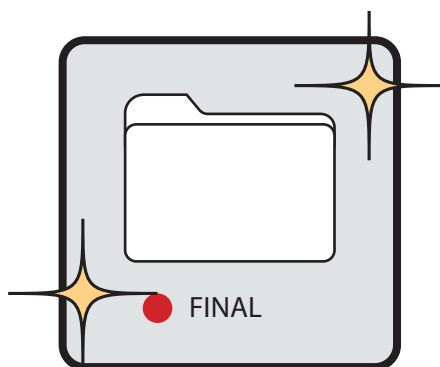
Embarking on a freelancing journey can feel daunting, confusing, and challenging, especially when navigating the intricacies of client relationships.

This Freelance Creative Notebook is here to make your experience smoother.

Packed with easy-to-follow steps and essential tools, this notebook empowers you to navigate the freelancing landscape with confidence.

Organize your thoughts, track your projects, and foster successful and healthy client relationships effortlessly.

If you are new to the practice or you simply want to get familiar with the process this short pdf Guide is for you.



PROCESS/CONTENTS



Section 1: Pre-Project Phase

1. Initial Consultation
2. Project Scope Definition
3. Proposal and Contract
4. Onboarding Process



Section 2: Planning Phase

1. Project Kickoff Meeting
2. Create Project Plan
3. Risk Assessment
4. Communication Plan

Section 3: Execution Phase

1. Regular Status Meetings
2. Client Feedback Sessions
3. Adjustments and Revisions
4. Quality Assurance

Section 4: Finalization Phase

1. User Acceptance Testing (UAT)
2. Final Revisions
3. Documentation
4. Training (if applicable)

Section 5: Launch and Post-Launch Phase

1. Deployment
2. Monitoring and Support
3. Client Handover
4. Closure Meeting
5. Feedback and Evaluation
6. Invoicing and Final Report

Discover the step-by-step process of managing projects seamlessly, from the early stages of client engagement to the finalization and evaluation of a successful project. Divided in **5 strategic phases** ensuring a well-orchestrated project journey.

INITIAL CONSULTATION



Invoice n*:

Organising every financial transaction is key to a long term success.

Budget:

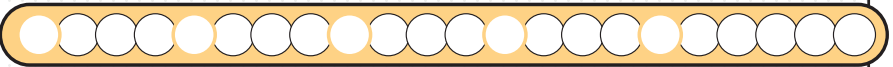
Openly discussing budget builds trust between the freelancer and the client.

Client Details:

Gathering new client details is fundamental for tailoring services, facilitating communication, setting expectations, building long-term relationships, ensuring smooth financial transactions, and meeting legal and contractual obligations.

Building a client database added to a newsletter can be a great way of making them return to your services.

Progress:



Deadline/Time frame:

You need to write down every key dates or deadline and also don't forget to be transparent and realistic with the client. Try to figure out if you need to prioritize important tasks.



General Brief:

Learn about your client as soon as possible so you can prepare relevant questions and show interest.

What is the primary message the client wants to convey? Look for keywords and phrases that emphasize the key themes or ideas.

Who is the intended audience for the creative project? Consider demographics, preferences, and characteristics to tailor your approach accordingly.

Beyond the explicit information, try to identify the emotional tone the client is aiming for. Are they looking for something uplifting, serious, playful, or sophisticated?



Notes and drafts ideas

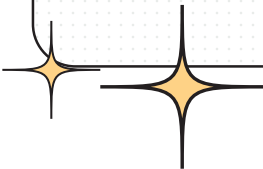
Look for any explicit design preferences or restrictions mentioned. Does the client have a specific vision for colors, fonts, imagery, or overall aesthetics?

Assess whether the client encourages creative freedom or innovation. Some clients provide detailed instructions, while others may be open to fresh ideas and concepts.?

Check if the client references competitors or benchmarks. Understanding their competitive landscape can provide insights into their industry positioning and expectations.

Don't forget to write some early concepts ideas that could come accross, they never end up being the final answer but they are always a precious piece of puzzle.

You need as much information as necessary to create the most pertinent and accurate outcome so ask as many questions as needed.



MAIN PROJECT RECAP



Project Scope



Try to define the genuine target of the project with simple words and determine what would be the best outcome for the client.

Deliverables

Be specific and accurate, highlights the pros and cons of different formats or level of definitions.



Challenges

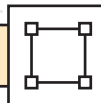
Having to learn new skills is not a limit but a new opportunity, don't be afraid of new softwares. Stay updated on industry trends and new tools.



PROPOSALS



Milestone/Process

☐☐☐☐☐☐☐☐

Take some time to divide your process in few easy steps the client can comprehend.

Contract

☐

Scope of work

☐

Paiment deadline and conditions

☐

Deposit

☐

Intellectual Property Rights

☐

Revisions

☐

Termination Clause

☐

Confidentiality

☐

Indemnification

☐

Mention

☐

Signage

If you need a contract template, head to the website:
www.voidcompost.com



T

Assets needed

☐☐☐☐☐☐☐☐

You always need all possible assets from your client like logos, fonts, Website loggings ...

Existing Guidelines

Always stay in brand, understand who's your client and what makes his identity.

LOGO

Access Passwords

PLANNING PHASE



Kick off Email/Meeting

Begin the kickoff meeting with a positive and enthusiastic tone to energize stakeholders and create a collaborative atmosphere.

Clearly articulate the overarching goals and objectives of the project. This sets the foundation for everyone to align their efforts.

Clearly define the metrics that will be used to measure the success of the project. This could include key performance indicators (KPIs) or specific project milestones.

Actively encourage questions and feedback from stakeholders. This ensures that everyone feels heard and contributes to a more collaborative environment.

Risks assessments



Take in consideration the elements that could be overly time consuming and threaten the project. Briefly touch on potential risks and how they will be managed. This demonstrates foresight and sets the stage for proactive risk management.

Communication Plan:



Month: _____

Year: _____

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Keeping an eye on time spent on a project is a good way of creating an healthy relationship with a client and reach success. It can also help you develop a more accurate way of pricing.

Total Hours:



Communication Plan:



Month: _____

Year: _____

Discuss and agree upon communication channels to be used throughout the project. This includes regular meetings, emails, and project management tools.

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday



Total Hours:



REVISION PHASE



Theme

Date:

N*



Create a non-defensive atmosphere where clients feel comfortable providing constructive criticism. This fosters honest communication.

Keeping notes of clients emotions is a good way of pushing forwards to the key of the final result.



To do list feedback

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☐
☐
☐☐
☐
☐
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Clearly communicate any adjustments to team members and clients, detailing the reasons behind the changes and their implications.

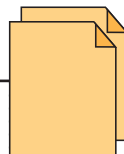
REVISION PHASE



Theme

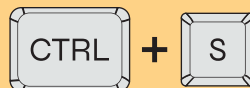
Date:

N*



Update the project plan and timeline to reflect approved adjustments. Ensure that everyone is aware of the revised expectations.

Back up your project data



When addressing feedback, provide context and explanations to help clients understand how adjustments will be made.

To do list feedbacks

- ☐
- ☐
- ☐
- ☐

Prioritize adjustments based on their impact on project goals and timelines. Focus on high-priority changes first..

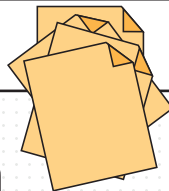
EXTERNALREVIEWS



Readproofing

Date:

N*



Proofreading helps catch grammatical errors, spelling mistakes, and typos that might have been missed during the initial drafting and editing phases. This enhances the overall professionalism and quality of the document.

External reviews bring in fresh eyes and perspectives. Individuals who were not deeply involved in the creation of the content can offer valuable insights and identify potential issues that may have been overlooked by the original team.

External reviewers are often more objective as they don't have the same level of attachment to the content. They can provide unbiased feedback, helping to improve clarity and coherence.

QUALITY ASSURANCE FEEDBACKS

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☐

FINAL REVISIONS



Final Check

Date:

N*



FINAL

The final asset check verifies that all components are correctly formatted, consistent, and ready for dissemination, ensuring a professional and polished end product.

Double check every assets after export, name file with organised and specified names:

ProjectX_LogoDesign_Format_Final_v2"

FINAL ASSET CHECK LIST

- | | |
|--|---|
| <input type="checkbox"/> FILE FORMATS | <input type="checkbox"/> FILE ACCESS |
| <input type="checkbox"/> DOCUMENTATION | <input type="checkbox"/> PRINTING GUIDE |
| <input type="checkbox"/> GUIDELINES | <input type="checkbox"/> TRAINING |
| <input type="checkbox"/> COLORS MODE | <input type="checkbox"/> PUBLICATION |

CLOSURE MEETING



Client Handover:

Deployment:

Date:

Overall feedback and evaluation:

Closure meeting with a client is crucial for wrapping up the project effectively, gathering valuable insights, and maintaining a positive and professional relationship that can lead to future collaborations.

Provides an opportunity to celebrate the project's success, acknowledging the collective effort and achievements of both the client and the project team.



Where to improve ?

There is always space for improvement, learning about the limits of your expertise help overcoming them. If it's too easy it's not funny.

INVOICING



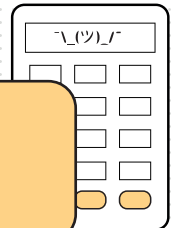
☐ Kindly remind your client the fulfillment payment deadline. xx

Expenses	References	Price
<div>Completes the documentation process at the end of the project, ensuring that all financial records are organized and accessible for future reference.</div>		

Total Expenses

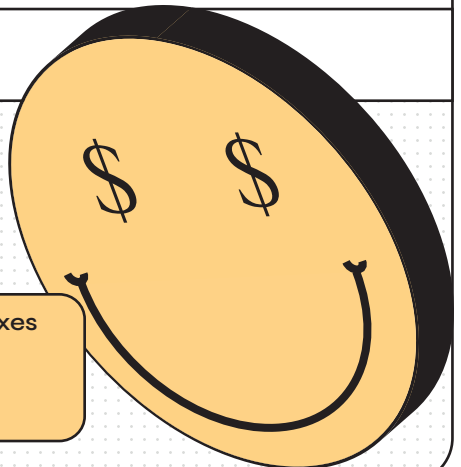
Total Paiement

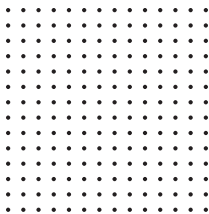
Allows for a detailed analysis of how well the project adhered to the initially allocated budget. Discrepancies can be identified and explained.



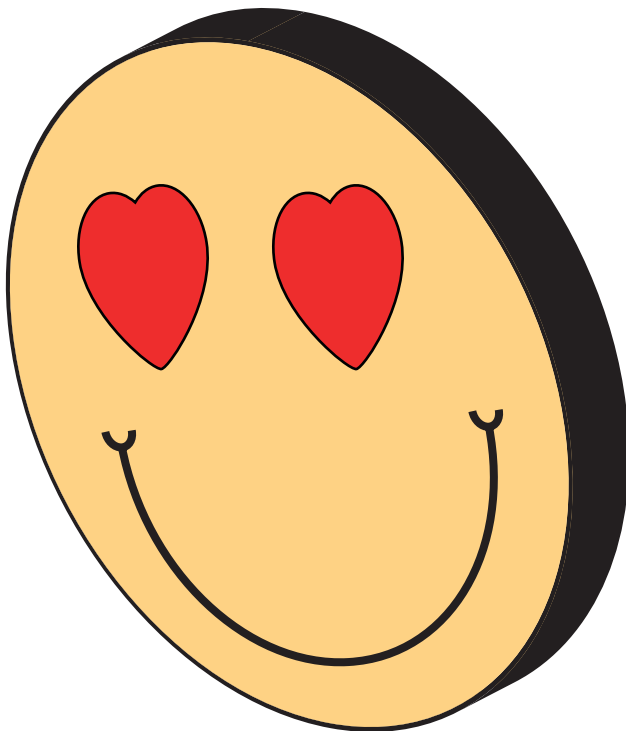
AFTER TAXES

When pricing, think about profit, margin, taxes investment but also the whole industry. The creative industry is





We hope that helped



Send suggestion
and feedbacks @

Thanks

WWW.VOIDCOMPOST.COM

