TASKLYTOOLS / FREE PLANNING RESOURCE

Freelancer Project Planning Checklist

Plan the brief, scope, delivery, and closeout of a client project.

Four-page PDF | No email required | Updated November 5, 2026

A practical checklist for the work around the work

Use this sheet to make the project brief, scope, schedule, client communication, and closeout visible in one place. Fill in what you know before the kickoff, update it as decisions change, and review it before the final invoice.

HOW TO USE THIS CHECKLIST

1. Before kickoff: capture the client, outcome, constraints, and decision-maker.
2. At approval: confirm deliverables, exclusions, price, and payment schedule.
3. During delivery: update milestones, decisions, and client dependencies.
4. Before invoice: run the delivery, handoff, and closeout checks.

A Project snapshot

Fill in the essentials. Leave fields blank if they are not agreed yet.

CLIENT	PROJECT
MAIN CONTACT	DECISION-MAKER
START DATE	TARGET COMPLETION
QUOTED PRICE	PAYMENT SCHEDULE
DEPOSIT / INVOICE REF	NEXT REVIEW DATE

Keep it current

A checklist is useful only when it reflects the real project. Update the scope, dates, and next action whenever a decision changes.

Brief and scope

Capture the problem before committing to the solution.

1 Brief and kickoff

The minimum context needed to start a project well.

- [ ] Client, project name, main contact, and decision-maker are recorded.
- [ ] The business problem is written in the client's own words.
- [ ] The desired outcome and success measure are explicit.
- [ ] The audience, offer, and constraints are documented.
- [ ] Known assumptions, risks, and open questions are listed.
- [ ] The client's required start date, deadline, and reason are confirmed.
- [ ] Brand, content, access, and approval dependencies are named.
- [ ] The kickoff owner, date, and attendees are agreed.
- [ ] The client knows what they need to provide and by when.

2 Scope and approvals

Make the boundary visible before work begins.

- [ ] Deliverables are listed by name and format.
- [ ] Exclusions and out-of-scope work are stated.
- [ ] Included review rounds and revision limits are agreed.
- [ ] Timeline, milestones, and client response times are documented.
- [ ] Price, tax treatment, deposit, and payment schedule are clear.
- [ ] The change-request process is written down.
- [ ] Ownership, confidentiality, and usage terms are agreed where relevant.
- [ ] The proposal or scope document has a validity period.
- [ ] Written approval is received before production work begins.

Protect the boundary

If a request changes the agreed deliverables, timeline, or effort, pause and confirm the change in writing. A short change note is better than an uncomfortable invoice conversation later.

Delivery and handoff

Keep milestones, communication, and reviews predictable.

3 Timeline and communication

A project feels calmer when the next step is visible.

- [ ] Milestones have owners and target dates.
- [ ] Client dependencies and feedback deadlines are on the calendar.
- [ ] The main communication channel and response expectations are agreed.
- [ ] Status updates have a fixed rhythm and a clear format.
- [ ] Decisions are recorded in one place, not scattered across emails.
- [ ] Blockers are raised early with a specific request for help.
- [ ] Review windows are long enough for the named approvers.
- [ ] Holidays, time zones, and planned absences are accounted for.
- [ ] Every milestone has a clear definition of done.

4 Review, testing, and handoff

Close the loop before the final invoice.

- [ ] Deliverables match the approved scope and agreed formats.
- [ ] Internal quality checks are complete.
- [ ] The client has the files, access, and instructions they need.
- [ ] Final feedback is consolidated through the named approver.
- [ ] Changes are separated into included revisions and new scope.
- [ ] Handoff notes explain what was delivered and what happens next.
- [ ] Support, maintenance, or warranty terms are stated where relevant.
- [ ] The project record is archived with the final files.
- [ ] A short project review or feedback request has been sent.

> **Before you call it complete**
> Confirm that the client can actually use what was delivered. A clean handoff is part of the work, not an optional extra after the final invoice.

Invoice and closeout

Finish the project with a clear record and a next step.

5 Invoice and closeout

Match the invoice to the approved work and confirmed payment terms.

- [ ] The final invoice matches the approved scope and change notes.
- [ ] Invoice number, issue date, due date, and client details are correct.
- [ ] Line items, currency, tax, discounts, and deposits are shown clearly.
- [ ] Payment instructions and references are accurate and tested.
- [ ] The invoice is saved with the project and accounting records.
- [ ] Payment status is tracked against the due date.
- [ ] A receipt is issued only after payment is confirmed.
- [ ] Final files are archived and the client knows where to find them.
- [ ] A follow-up or review date is scheduled where appropriate.
- [ ] The project is marked complete in your tracker.

PROJECT CLOSEOUT NOTES

One last check

Before you close the project, write down the one thing you would change next time. That note is often more valuable than a perfect-looking file archive.

This checklist is general planning guidance, not legal, tax, or accounting advice. Adapt it to your project, contract, and local requirements.