



# **Juggling Act: Project Management for the Freelance Instructional Designer**

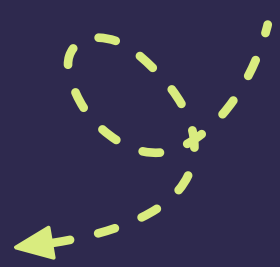
**Presentation by Andrea Dottling, M.Ed.**



**OUT TO  
LUNCH**



# Defining Project Goals & Deliverables



1

## UNDERSTAND THE PROJECT'S REQUIREMENTS:



Take the time to **fully comprehend the project requirements** before setting targets. If you have questions—ask them! It's totally normal and expected to need clarification at the start of a new project, so don't be shy.

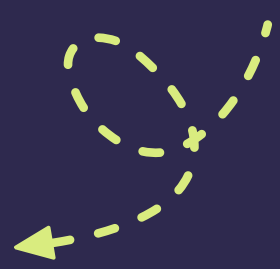
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## BREAK DOWN THE PROJECT INTO MILESTONES:



**Divide the project into smaller, manageable milestones or phases.** Baby step to project completion. This way you can set specific targets for each phase, making it easier to track progress and manage your deadlines. Plus, it makes everything a lot less overwhelming!

# Defining Project Goals & Deliverables (cont.)



3

## CONSIDER TIME, RESOURCES, AND CONSTRAINTS:



Evaluate all your **available time, resources, and any constraints that may impact the project.**

Take into account factors like your own capacity, client deadlines, your tv watching schedule, and potential bottlenecks. Doing this will help you set targets that are realistic and achievable within the given constraints.

4

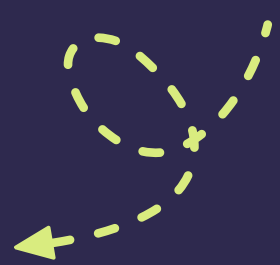
## PRIORITIZE TASKS AND SET CLEAR DEADLINES:



Figure out the **order of priority for tasks and set clear deadlines for each of them.** Identify critical tasks that must be completed first and be sure to put aside sufficient time for their completion.

Setting realistic and manageable deadlines helps prevent the accumulation of unfinished tasks and reduces the chances of dreaded scope creep!

# Defining Project Goals & Deliverables (cont.)



5

**COMMUNICATE AND COLLABORATE REGULARLY:**



**Engage in open communication with the client and other stakeholders** throughout the project. Keep them informed about your progress, discuss any challenges or changes, and seek their input when necessary. The sooner you can address concerns and modifications, the better!

6

**REVIEW, ADJUST, AND BE FLEXIBLE:**



**Regularly review project tasks and targets** to assess their feasibility and adjust them if necessary. Be honest with yourself! As the project progresses, circumstances may change or new information may come to light. Be flexible and willing to adapt!

# Prioritization Techniques



1

## ASSESS ALL YOUR DEADLINES: ✓

Take a look at and **really absorb all the deadlines associated with each task of the project.** Identify those with approaching or fixed deadlines that require immediate action. Tasks with tight deadlines should be done first! Duh!

2

## FIGURE OUT HOW SIGNIFICANT EACH TASK IS: ✓

Consider the **impact or consequences of delaying or completing a task.** Determine the significance of each task in terms of its contribution to project milestones, client satisfaction, or overall project success. For example, you don't want to sleep on "make the course." Once you've done this, you can figure out the ideal order you want to complete your tasks in.

# Prioritization Techniques (cont.)

3

## CREATE AN URGENCY MATRIX:



An **urgency matrix** is a way to visually categorize tasks based on their importance. Divide tasks into four categories: urgent and important, important but not urgent, urgent but not important, and not urgent or important. For instance, Keanu Reeves would fit squarely into those first two categories.

4

## CONSIDER YOUR PERSONAL EFFICIENCY AND EXPERTISE:



Be honest with yourself— **what are you great at and what are you kinda slow at?** Every single one of us has strengths and weaknesses. Don't even ask us to use a ruler to measure something. Don't even. Prioritize tasks that align with your strengths and expertise, as they are likely to be completed faster and better!

# Prioritization Techniques (cont.)

5

## ALIGN YOUR WORK WITH CLIENT PRIORITIES:



Again, ya gotta consider your client. They are the one paying you, after all. **Engage in open communication with clients to understand their priorities.** Regularly check in with them to gather feedback, clarify expectations, and identify any shifts in priorities. By aligning your work with client priorities, you can better prioritize tasks and ensure client satisfaction.

# Managing Deadlines & Time Constraints



1

## CREATE A SCHEDULE:



Yes, it's obvious but yes, it's also super important. **Develop a daily, weekly, or monthly schedule to outline your tasks and allocate specific time slots for each activity.** Prioritize important and time-sensitive tasks, and consider your energy levels and peak productivity times when scheduling.

2

## MAKE USE OF PRODUCTIVITY TOOLS:



**Take advantage of the 8 million productivity tools and apps that can help you manage your time effectively.** These tools can include project management software, task lists, time trackers, and calendar applications. They offer features like reminders, notifications, and progress tracking, assisting you in staying organized and meeting deadlines. Plus, most of them have free trials!

# Managing Deadlines & Time Constraints (cont.)



3

## SET SMART GOALS:



Establish **Specific, Measurable, Achievable, Relevant, and Time-bound (SMART) goals** for each project or task. Break down larger projects into smaller, manageable goals that can be accomplished within a certain timeframe. If this isn't your style, try DUMB goals—Demonic, Ungovernable, Malevolent, Barbaric.

4

## PRIORITIZE AND FOCUS :



**Figure out the most important and urgent tasks and prioritize them accordingly.** Concentrate on one task at a time, minimizing distractions and multitasking. You might even try working for a set period (e.g., 25 minutes) and then taking a short break. Plus, it's a reason to buy a cute desk timer.

# Managing Deadlines & Time Constraints (cont.)



5

## SET CLEAR BOUNDARIES:



**Establish boundaries to protect your time and maintain a healthy work-life balance.** Clearly define your working hours and communicate them to clients and colleagues. Do not overcommit yourself! You are not meant to work every minute of the day.

6

## OUTSOURCE IF POSSIBLE:



Have you considered **outsourcing some of your work to a fellow freelancer?** It's true—this is an actual thing you can do! Outsourcing non-core activities that can be handled by others will free up your time to focus on high-value tasks.

# Managing Deadlines & Time Constraints (cont.)



7

## TAKE REGULAR BREAKS:



Give yourself **short breaks throughout the day to recharge and rejuvenate**. Stepping away from work for a few minutes can help clear your mind, reduce stress, and increase productivity when you return. Take a walk, watch a YouTube video, eat a snack, or gaze into the abyss!

# Collaboration & Communication



1

## ESTABLISH COMMUNICATION CHANNELS AND PREFERENCES:



Set up **clear communication channels from the start**, like email, texting, slacking, project management software, or collaboration tools. Ensure that all stakeholders and team members have access to these channels and know when it's ok to contact them. Not everyone is in your time zone, dawg!

2

## CHECK-IN WITH CLIENTS REGULARLY:



**Schedule regular check-ins with clients, stakeholders, and team members** to provide updates on project progress, discuss any hiccups, and address questions or concerns. These check-ins can be in the form of meetings, video calls, or status reports, depending on the project's needs and everyone's vibe.

# Collaboration & Communication (cont.)



3

## SET REALISTIC EXPECTATIONS:



**Clearly communicate project timelines, milestones, and deliverables** with all parties involved. Make sure everyone understands what is expected from them and what they can expect from others. Address any potential risks or constraints upfront to manage expectations proactively.

4

## BE TRANSPARENT:



**Just be honest. Share information openly and transparently.** Communicate project updates, changes, and decisions in a timely manner. Transparent communication builds trust, encourages collaboration, and allows for early identification of issues that may impact project progress.

# Collaboration & Communication (cont.)



5

## ENGAGE IN ACTIVE LISTENING:



**Practice active listening** when engaging in discussions or receiving feedback. Pay attention to others' perspectives, ideas, and concerns. Show genuine interest and ask clarifying questions to ensure a thorough understanding of the information shared.

6

## WRITE EVERYTHING DOWN:



**Keep track of decisions made, action items assigned, and any follow-up tasks** required. Documenting these details helps ensure accountability and provides a reference point for future discussions or project evaluations. Plus, you can get a really cute notebook.

# Collaboration & Communication (cont.)



7

## BE AVAILABLE AND RESPONSIVE:



**Respond promptly to emails, messages, or requests for information.** Prompt responses show your commitment to effective communication and help maintain project momentum! Remember, this person is paying you.

# Mitigating Risks & Problem-Solving



1

## CONDUCT A RISK ASSESSMENT:



**Conduct a thorough risk assessment at the beginning of the project.** Identify potential risks by considering past experiences, industry best practices, and input from stakeholders. Brainstorm with the project team to uncover any specific risks associated with the project scope, timeline, resources, or stakeholders.

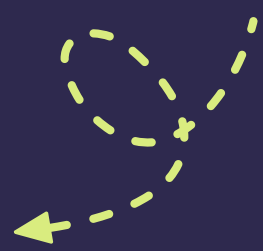
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## EVALUATE RISKS BASED ON THEIR LIKELIHOOD:



**Evaluate the identified risks based on their likelihood of occurrence and potential impact on the project.** Prioritize the risks based on their severity to focus on addressing the most critical ones first. How likely is your client to ACTUALLY turn into an anthropomorphic cockroach?

# Mitigating Risks & Problem-Solving (cont.)



3

## DO SOME RISK MITIGATION PLANNING:



**Develop a risk mitigation plan that outlines specific actions to address and minimize identified risks.** Figure out timelines for each mitigation strategy. Consider strategies such as contingency planning, alternative approaches, having a long cry, or resource allocation adjustments.

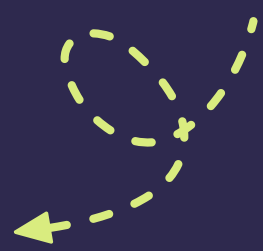
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## MONITOR PROJECT PROGRESS:



**Continuously monitor project progress and try to proactively identify any signs of emerging risks.** Implement regular check-ins and progress reviews to stay on top of potential roadblocks or deviations from the project plan. **NEVER DEVIATE FROM THE PLAN!**

# Mitigating Risks & Problem-Solving (cont.)



5

## CONDUCT A LESSONS- LEARNED SESSION:



After project completion, **conduct a lessons-learned session with yourself to identify valuable insights!** Document risks you encountered, their impact, and how you dealt with them. This will help you get stronger at your game until you're an unstoppable risk mitigation machine.

# Self-Care & Work-Life Balance



1

## LEARN TO SAY NO:



Don't be afraid to **say no to projects that don't jive with your priorities or capacity**. Overcommitting yourself can lead to burnout and compromise the quality of your work...and also your brain. Prioritize projects that align with your expertise and interests, and be selective when accepting new clients

2

## CREATE A DEDICATED WORKSPACE:



Set up a **designated workspace that is separate from your living area if possible**. Having a dedicated space for work helps create a mental and physical boundary between your professional and personal life. It also helps you mentally switch into work mode when you enter that space. Make sure you make it FUN and functional. It's always a good sign if you want to hangout in your own office space.

# Self-Care & Work-Life Balance (cont.)



3

## PRACTICE STRESS MANAGEMENT TECHNIQUES:

**Explore stress management techniques** like deep breathing exercises, meditation, those squeazy balls, ASRM, or mindfulness practices. These techniques can help you stay calm and centered amidst work pressures. Find what works best for you and integrate it into your daily routine.

4

## FIND YOUR PEEPS:

**Connect with other freelancers or professionals in your field** to share experiences, seek advice, and find support. Did you know that IDLance has its own very special, very cool community? It's true! [You can join our free Slack Community by clicking right here!](#)

# Self-Care & Work-Life Balance (cont.)



5

## PRIORITIZE SELF-CARE:



I know we're all getting tired of hearing about "self-care" but try to **make time for activities that nourish your mind, body, and soul**. Engage in hobbies, spend time with loved ones, read, listen to music, or just do whatever the heck makes you happy. Self-care is essential for maintaining overall well-being and preventing burnout.

# Wanna Partner with IDLance?

If you're interested in partnering with IDLance on your next project, get in touch with our **Director of Business Development, Ann York, today!**



**Schedule a Call with Ann!**

**HAVE A BURNING QUESTION OR COMMENT FOR IDLANCE? DON'T HESITATE TO REACH OUT TO US!**  
headhonchos@idlance.com

