

From Kickoff to Close: Project Management for Freelancers

How to be managed well, and how to manage the work when you're the one holding the keys.

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PEOPLE



PROCESS



COMMUNICATION

You are always doing project management.

As a freelancer, you are usually standing on one — or both — sides of the work.

01

BEING MANAGED

How to be the freelancer
they hire again.

02

MANAGING THE PROJECT

How to keep the work moving
when you're holding the keys.

THE THREAD THROUGH BOTH:

Make the work predictable.

How to be the freelancer they hire again.

WHO GETS THE NEXT PROJECT?

DESIGNER A

Brilliant work.

- Goes quiet
- Misses messages
- Surprises the PM
- Raises issues directly with client

DESIGNER B

Very good work.

- Communicates early
- Keeps tools current
- Knows the escalation path
- Makes the PM's job easier

VOTE → A or B?

Communication is part of the deliverable.

The PM should not have to wonder whether the work still exists.

SLACK / TEAMS

quick alignment

CLICKUP/CHARTER

source of truth

EMAIL

formal recap

LOOM / VIDEO

show, don't type

MEETINGS

decisions + nuance

“Just an update: everything is on track for EOD today.”

Tiny message. Huge reduction in uncertainty.

Raise flags before they become fires.

Life happens. Surprises are what hurt projects.



RISK = anything that could threaten

TIME

BUDGET

QUALITY

SCENARIO

It's Wednesday. Your deliverable is due Friday.

You're realizing the work is taking significantly longer than expected.

- A Work late Thursday and hope.
- B Wait until Friday to see.
- C Tell your PM Wednesday.
- D Tell the client you need more time.

Freelancer identifies → PM assesses → PM decides how / whether to escalate.

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Freelancer identifies → PM assesses → PM decides how / whether to escalate.

Don't make the client scared about something the team hasn't assessed yet.



Escalation is not hiding a problem. It's understanding it before you amplify it.

Would I rehire this freelancer?

Thumbs up. Thumbs down. It depends.

Doesn't respond to Slack for two days.

NO

Flags a possible miss three days early.

YES

Needs reminders for every deadline.

...

Doesn't know ClickUp, so they work hard to learn the team's workflow.

YES

Produces amazing work but is difficult to manage.

...

Okay. Now somebody handed YOU the keys.

We're going to run one fictional eLearning project from kickoff to handoff.

30 min eLearning • 4 SMEs • 1 ID/Dev • 1 QA • 12 weeks • fixed budget

Three phases. A hundred tiny decisions.

01

INITIATION

Align before you build

02

EXECUTION

Keep work + people moving

03

CLOSEOUT

Finish cleanly

PM is the connective tissue across all three.

Pre-kickoff: align before you add more people.

Especially useful when the project has multiple SMEs, stakeholders, or constraints.

- Scope + deliverables
- Who needs to be involved?
- Known constraints / risks
- Budget + timing
- What is driving the deadline?

CLIENT:

**“We need it
October 30.”**

PM: **“What's driving October 30?”**

Kickoff: get everyone oriented to the same reality.

WHO

roles + ownership

WHAT

scope + deliverables

WHY

goal + business need

HOW

process + tools +
reviews

WHEN

timeline + cadence

A kickoff deck is optional. Alignment isn't.

One home for the project truth.

Call it a charter, project info log, or whatever your team will actually use.

PROJECT INFO / CLIENT ENABLEMENT COURSE			
PROJECT	PEOPLE	PROCESS	TECH
Objective Deliverables Seat time Drop-dead date	Sponsor SMEs PM ID / Dev QA	Review rounds QA / QAV Meetings File locations	Naming SCORM settings LMS testing Brand / access
DECISIONS + GLOBAL CHANGES + RISKS			

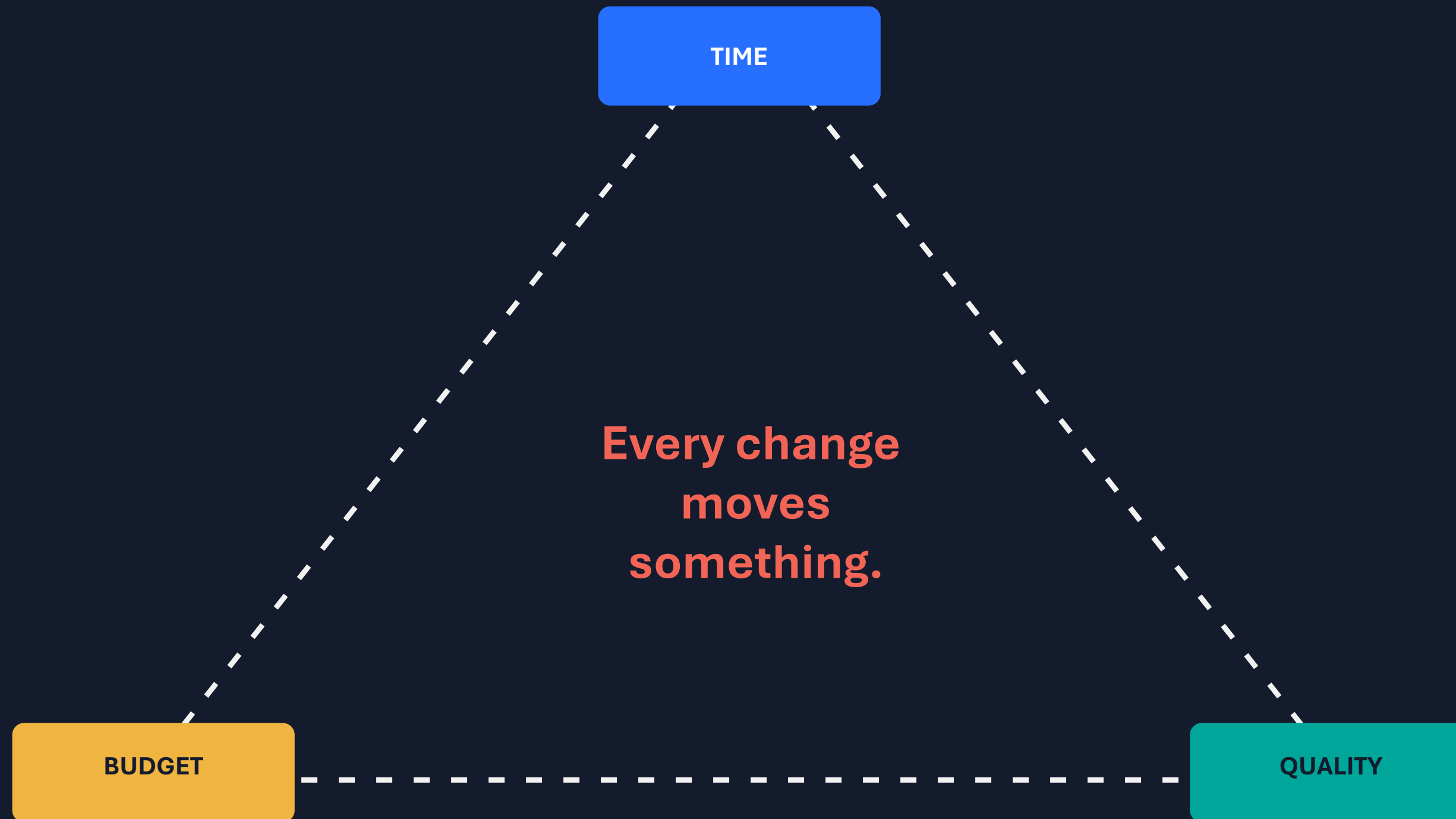
Build the review rhythm before the work begins.

A standard eLearning project often repeats the same production loop.



Budget + timeline decide how much process you can afford.

Congratulations. Your beautiful timeline survived four days.



SCENARIO

The SME is late.

Feedback was due yesterday. Your developer needs it tomorrow.

WHAT DO YOU DO FIRST?

1 Determine how much delay you can absorb.

2 Contact the SME / client PM.

3 Assess downstream dependencies.

4 Adjust internally if possible.

5 Escalate only if necessary.

6 Update the plan + communicate it.

Risk management = noticing early enough that you still have choices.

“Can we just add one more scenario?”

The four most dangerous words in a fixed-budget project: it shouldn't take long.

CLIENT

“Could we add another scenario here?”

“It shouldn't take very long.”

BEFORE YOU SAY YES:

- What's the lift?
- Who has to touch it?
- Does QA change?
- Does review change?
- **Timeline impact?**
- **Budget impact?**

Sometimes the answer is YES. Make it an informed yes.

Use enough process to make the project manageable.

Not every project needs the same PM machinery.

SMALL

Delivery emails
ClickUp / files
Meetings as needed

MEDIUM

Weekly client call
Recap + actions
Timeline updates

LARGE

Weekly status
Budget + risks
Internal + client cadence

Project management artifacts should serve the project, not become the project.

Everything was fine until Final.

Toward the end, communication gets tighter, not looser.

GLOBAL
CHANGE

SCORM
TEST

LMS
ISSUE

NEW
REVIEWER

FILE
CLEANUP

Have a process for breaking the process.

Friday. 3:47 PM.

Course launches Monday. The client finds a global terminology change — 37 occurrences.

IF YOU'RE THE PM

- Assess**
- Prioritize**
- Coordinate**
- Communicate**
- Protect the team**
- Get resources**

IF YOU'RE BEING MANAGED

- Respond**
- Clarify what's needed**
- Share availability**
- Don't disappear**
- Help solve the problem**

This is where both halves of the presentation collide.

Finish cleanly.

Delivery is more than sending the SCORM package and disappearing.

SOURCE FILES

clean + complete

SCORM

settings logged

TESTING

LMS / launch

NAMING

final conventions

APPROVAL

documented

ARCHIVE

decisions + changes

And close the human side: thank people. Celebrate the ship.

Make sure people have what they need to succeed.

SEE THE GAP

REMOVE THE BARRIER

CONNECT THE PEOPLE

KEEP MOMENTUM

“I don't know — **but I know who we need to ask.**”

A project is made or broken by the person keeping momentum.

P.S. Thank your PM. 😊

ONE LAST QUESTION

Would this freelancer want to work with me again?

Good project management goes both ways.

Great projects aren't managed by timelines.

They're managed by people who communicate.