



EBOOK

The Freelancer Project Kickoff Guide

Five practical steps from a loose brief to an agreed starting point

Genesize

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About this product

Start a freelance design project with a clear brief, a deliverable list, an asset checklist, and a shared review process. This educational sample includes a fictional project example and reusable kickoff notes. Adapt the process to your own work and client.

The kickoff process

Prepare the brief, inputs, review process, and next milestone for a design project.

Introduction: Start with shared decisions

Choose a project and identify the decisions its kickoff needs to settle.

A project can have an enthusiastic client and still begin with an unclear request. "We need something fresh" describes a feeling, but it does not tell you what to design, who will use it, or how the client will review it. Your kickoff is the place to turn that request into a shared starting point.

This guide follows five decisions: the purpose of the work, the deliverables, the inputs, the review process, and the first milestone. You do not need a new app to use it. A shared document and a conversation are enough. Record uncertainty as an open question rather than filling the gap with your own assumption.

The examples follow Maya, a fictional freelance designer, and Leo, her contact at the fictional Fern Ceramics studio. Their project is a workshop promotion: an A4 print flyer and a 1080 × 1350 pixel social image. The scenario is illustrative. It does not describe a real client or measured results.

Worked example

In the fictional project, Leo initially asks for a workshop graphic. Maya records two unanswered questions before opening a design file: where will the graphic appear, and what should someone do after reading it? Those questions become the opening of their kickoff conversation.

Apply it

Choose one real or practice project. Write its current request in the client's own words, then list three things you still need to know. You are ready to continue when each uncertainty is written as a question you can ask, rather than a guess you have silently accepted.

Key takeaway

The kickoff output is a set of shared decisions and visible open questions. Begin by clarifying the purpose of the work.

1. Write the one-page brief

Describe the audience, intended action, and design priorities in plain language.

Begin with the situation, not the visual treatment. Ask who will see the work, what they need to understand, and what action the client wants to make available. A preference such as "bold" becomes more useful when it is connected to a purpose: a workshop title should be readable in a busy studio window.

Use three sentences to draft the brief. First name the audience and where they will encounter the design. Then describe the message and intended action. Finally identify the information or visual elements that must be present. Read the draft back to the client and invite corrections.

Add a short list of review priorities. These are things the design can actually demonstrate, such as visible event details, readable text, or a clear booking instruction. Keep wider business ambitions separate; a design review cannot establish how many people will eventually attend. Save unresolved questions with an owner so they remain visible.

Worked example

Illustrative brief: Fern Ceramics wants to invite local beginners to an introductory workshop. The flyer will appear in the studio window, and the social image will appear on its social account. Both designs need the workshop name, confirmed date and location, and an approved booking instruction. Leo will supply the final details before Maya sets the text.

Apply it

Draft your three-sentence brief and three review priorities. Underneath, write any open questions and the person who can answer each one. Send the brief to your client contact for correction. Completion means the contact has confirmed the wording or marked the exact parts still to resolve.

Key takeaway

A brief connects visual choices to a purpose. Once that purpose is clear, define the specific files you will create.

2. Define the deliverables

Make the output list specific enough to distinguish an agreed item from a new request.

A deliverable is a specific output, not a broad activity such as "branding" or "social media." Give each item a name, intended use, size, and file format. Ask about practical requirements before treating them as settled: a printer may need its own specifications, and a client may need an editable file as well as an export.

Keep a separate list of related work that is not part of the current plan. This is a project reference, not a substitute for your formal arrangements. It helps the conversation stay concrete when someone asks for an extra version. Confirm the revised work and its effect on the plan before adding it to your task list.

For each deliverable, identify the stage the client will review. An initial layout and a final production file serve different purposes. Naming those stages helps you explain what is ready for comment and what still depends on approval or missing inputs.

Worked example

For the fictional Fern project, the working list has two deliverables: an A4 flyer exported as a print PDF, with production settings confirmed with the printer, and one 1080 × 1350 pixel social image exported as a PNG. A logo redesign and additional social sizes are outside this project's current list. Leo asks Maya before adding another format.

Apply it

Write one row per deliverable with these headings: item, intended use, size, export format, review stage, and open specification. Add a separate 'Not in the current plan' list. Check the list with your client; every item should have either a confirmed specification or a named person responsible for confirming it.

Key takeaway

Specific outputs make the project easier to discuss. Next, identify the material required to produce each output.

3. Gather assets without guessing

Track the source, owner, and approval status of each required input.

An asset list turns "I'll send everything over" into a set of visible inputs. Start with the deliverables and work backward: what text, images, logos, links, or technical instructions does each one need? Put those items in one shared folder or document with a clear naming convention.

For every asset, record who will supply it and whether it is approved for this project. If there are several logo files, ask which one is current. If copy is still being written, label it as a draft. Do not invent a missing event date, booking address, or claim to make a layout look complete.

Some design exploration may be possible before every input arrives. Decide that explicitly with the client and label the work accordingly. Identify which missing item blocks the next review. Request access through the client's normal sharing controls; avoid asking them to send passwords in your project notes.

Worked example

In the fictional Fern project, Leo owns the approved workshop text and booking instruction. Maya has the studio logo but still needs the selected workshop photo. She records the photo as 'requested' and the copy as 'awaiting approval.' The first review remains a layout review until Leo supplies and confirms the missing material.

Apply it

Make an asset tracker with five columns: asset, supplier, shared location, status, and next action. Use statuses such as requested, received, and approved. The tracker is complete when every input needed for your first milestone has an owner and the missing items are visible to the client.

Key takeaway

A missing input is a decision to resolve, not permission to improvise facts. Make the review process just as explicit.

4. Agree on useful feedback

Set one review location, a client contact, and a clear way to resolve comments.

Before sharing a design, explain the decision you need from the review. For an early layout, you might ask about hierarchy and missing information. For a later review, you might ask the client to confirm the final wording and chosen image. Make those questions visible beside the work.

Send one review link and name the version being reviewed. Ask the client contact to collect comments in that document, resolve conflicting requests with their team, and return one agreed list. For each change, request the location, the problem, and the intended result. Agree on a review date together; if a decision is still open, record who will resolve it before revising that part of the design.

Separate a comment from a decision. 'The date feels small' is a useful observation; deciding to enlarge it and checking the revised layout is the next step. When a request conflicts with the brief, describe the trade-off and ask for direction. Keep the client involved in approval rather than treating silence as agreement.

Worked example

In the fictional Fern review, Leo collects one comment that asks for a larger workshop date

and another that asks for a larger photo. Maya shows the space trade-off and asks which information should take priority. Leo confirms that the date is more important for the window flyer. Maya records that decision before adjusting the layout.

Apply it

Prepare a review request containing the version name, the shared review location, two specific questions, the client contact, and a proposed review date. Agree on that date with the contact. Completion means everyone knows where feedback belongs and who will confirm the final decision when comments conflict.

Key takeaway

Useful feedback connects an observation to a decision. Record that decision before making the next version.

5. Confirm the first milestone

Send a kickoff recap that names the next output, its dependencies, and its reviewer.

End the kickoff with a small, specific next milestone. State what you will share, what it is for, and what it does not yet represent. "Initial flyer layout for hierarchy review" is clearer than "first draft" because it tells the client what kind of response you need.

List the inputs required before you can prepare that milestone. Agree on dates with the people doing the work and leave unresolved dates visibly unresolved. If an input changes or arrives later, revisit the sequence together rather than silently promising the same schedule.

Send one recap after the conversation. Include the brief, deliverables, missing assets, review method, next actions, and decisions still needed. Ask the client contact to confirm it or make corrections. Keep a dated copy with the project files. The recap is your working reference; update it when the team agrees to a change.

Worked example

For the fictional Fern project, the next milestone is an initial A4 flyer layout showing the agreed text hierarchy. Leo first confirms the workshop details and selects the photo. Maya and Leo then agree on a review date. The social image follows the approved visual direction; the recap makes that sequence explicit without inventing a deadline.

Apply it

Write a recap with three next-action rows: action, owner, and agreed date or decision needed. Include the first review's purpose and required inputs. Send it to your client contact. Your kickoff is documented when the contact confirms the recap and any unresolved item has a named next step.

Key takeaway

A clear first milestone joins the brief, assets, and review process into a working plan you can both follow.

Conclusion: Use the process on one project

Assemble the five working outputs and confirm the next action with your client.

You now have a sequence for preparing a design project: clarify its purpose, name the deliverables, gather the inputs, agree on reviews, and confirm the next milestone. These are working decisions, not a ceremony you need to make elaborate. Keep the notes short enough that both you and the client will actually use them.

Apply the process to one project before expanding it. Start with the brief, add the output and asset lists, and use the unresolved questions to guide your next conversation. Confirm the review method and send a recap before treating the starting point as agreed.

When the project changes, return to the affected decision. A new format belongs in the deliverables list. A missing photo belongs in the asset tracker. A conflict belongs with the person responsible for resolving it. After the first milestone, note which question you wished you had asked earlier and add it to your next kickoff.

Worked example

In the fictional Fern project, Maya's kickoff folder now contains a confirmed brief, two named deliverables, an asset tracker, review instructions, and a recap. These records show what the next design step requires. The example makes no claim about sales, client satisfaction, or how many revisions the project will need.

Apply it

Gather your brief, deliverable list, asset tracker, review request, and recap in one location. Check that the next action has an owner and that unresolved questions are still visible. Send any remaining decision to the client contact before proceeding with work that depends on it.

Key takeaway

A useful kickoff leaves you with an agreed next step and a visible way to handle what is still unknown.

Resources: Your reusable kickoff notes

Copy these working templates into your own project document and complete them with your client.

Copy the following templates into a shared project document. The empty lines are intentional writing spaces. Complete them with the client; if an answer is not known, write the question and its owner instead of inventing a detail.

One-page brief

- Project and client: _____
- Audience and where they will see the work: _____
- Main message and intended action: _____
- Required information and visual elements: _____
- Three review priorities: _____
- Client contact and confirmation: _____
- Open questions and owners: _____

Deliverable record

- Item and intended use: _____
- Size and export format: _____
- Technical specification confirmed by: _____
- Review stage: _____
- Related work outside the current plan: _____

Asset tracker

Asset	Supplier	Shared location	Status	Next action
Approved text				
Logo				
Selected image				
Technical instructions				

Review and recap check

- Name the exact version and the decision being reviewed.
- Include one shared review location and the client contact.

- Record the agreed review date and any missing inputs.
- Resolve conflicting requests before revising the affected work.
- Ask for explicit confirmation of the recap or specific corrections.
- Save the confirmed decisions with the project files.

Worked example

Illustrative recap for Fern Ceramics: 'Our next step is the initial A4 flyer layout for hierarchy review. Leo will confirm the workshop details and selected photo. Maya will prepare the layout after those inputs are confirmed. We will agree on the review date together and use one shared review document. Please confirm this recap or mark any corrections.'

Apply it

Use this final check before sending your own recap: Can the client identify the next output, the input it depends on, the person providing that input, and the person approving the design? If any answer is missing, add an open question with an owner. Share the document and request confirmation.

Key takeaway

Reuse the structure, but complete the decisions for each project. A template becomes useful when it reflects the actual work.