STRETCHLEARN · WORKBOOK

Freelance Project Management — Workbook

This workbook turns the course into a working operating system for your client projects. Complete each section as you finish the matching module, and by the end you will have a work-breakdown and definition of done, a personal Kanban board with work-in-progress limits, a buffered estimate built on your own time data, a weekly planning ritual, a status-update cadence, and a structured revision process. Use the templates to break down projects, track your board, estimate from history, and send updates in minutes.

Why Solo Project Management Is Different

Diagnose where projects slip today, choose the lightweight practices you will actually run, and scope your next project into a work-breakdown with milestones and a definition of done.

Exercise: Audit Your Last Project Honestly

Pick your most recent finished or stalled client project and find where the project management broke down. Be specific and unflinching; this audit tells you which parts of the course to apply first.

• Where did the timeline slip, and was the cause your work, a client delay, or an unclear plan?

• What unrequested extras crept into the scope, and what did they cost you in time?

• How many revision rounds did it actually take, and why did feedback not converge sooner?

• Where did the client seem anxious or chase you, and what update would have prevented it?

Checklist: Choose Your Lightweight Practices

[ ] I will visualize all my work on one Kanban board I check daily
[ ] I will cap my work in progress to two or three active tasks
[ ] I will plan in a short weekly ritual instead of reacting daily
[ ] I will scope each project with a work-breakdown and a definition of done
[ ] I will protect my timeline with a buffer rather than padding every task
[ ] I will keep the system simple enough to run on my busiest week

Worksheet: Build a Work-Breakdown for Your Next Project

Take a real upcoming project and decompose the deliverable into tasks of roughly half a day to two days each. Then group them into milestones and write the definition of done. Use the Project Planner template to capture and estimate every task.

The whole deliverable in one plain sentence

Task list (each item half a day to two days; break down anything larger)

Milestone 1 and the visible result the client approves (tie to a payment)

Milestone 2 and the visible result the client approves (tie to a payment)

Milestone 3 and the visible result the client approves (tie to a payment)

Definition of done: the files delivered, what works, what the client confirms

Explicitly out of scope (so completion is not deferred by new requests)

Planning and Visualizing the Work

Stand up your Kanban board, set a work-in-progress limit you will hold, and turn optimistic guesses into buffered estimates grounded in your own tracked time.

Worksheet: Set Up Your Personal Kanban Board

Build one board in Trello, Notion, ClickUp, Asana, or on a physical wall, holding every task across all clients. Define your columns and load your current work into the backlog. The Kanban Board Starter template gives you a ready column structure and example cards.

Tool you will use (one board only)

Your columns (Backlog, This Week, In Progress, Waiting On Client, Review, Done)

Every committed task across all clients, loaded into Backlog

What currently belongs in Waiting On Client (blocked on feedback or assets)

The time of day you will check the board, every working day

Exercise: Commit to a Work-in-Progress Limit

Decide the maximum number of tasks allowed in your In Progress column at once, then practice pulling work to done instead of starting more. Adopt the mantra: stop starting, start finishing.

- What is your starting limit (two is recommended), and how will you visibly enforce it on the board?
- How many tasks are currently in progress for you, and which can you push to done first?
- When you feel the urge to start something new with a full column, what will you do instead?
- How will you count Waiting On Client tasks so they do not consume an active slot?

Worksheet: Estimate From History and Add a Buffer

Build a reference table of how long your common task types actually take, then estimate your next project from that history and add a project buffer. Use the Estimate and Time Log template to record estimates against actuals and sharpen future quotes.

Time-tracking tool you will run on every project (Toggl Track, Clockify, Harvest)

Reference table: common task type and its average actual hours from past work

Estimate for each task in your current project, summed (not one guess for the whole)

Client-dependent waiting time assumed for reviews (in business days)

Project buffer added at the end (roughly 20 to 50 percent of the honest estimate)

The buffered date you will quote to the client and aim to beat

Checklist: Planning Readiness Checklist

[ ] All my work lives on one board with a Waiting On Client column
[ ] I have set and will enforce a work-in-progress limit
[ ] I track time on every project, including fixed-fee work
[ ] I estimate by analogy to my tracked history, not from scratch
[ ] I quote a buffered date and aim to deliver early

Executing Across Multiple Clients

Prioritise deliberately across competing clients, timebox your week onto a real calendar, and install a weekly planning ritual that keeps you steering instead of firefighting.

Worksheet: Prioritise This Week With Eisenhower and MoSCoW

Sort everything on your plate so you work on what truly matters next, not just what is loudest. Apply the Eisenhower matrix across projects and MoSCoW within each project.

Urgent and important: do now

Important but not urgent: schedule (protect this quadrant-two work)

Urgent but not important: minimize, batch, or decline

Neither: drop

For your main project: Must / Should / Could / Will-not-have-this-time items

Exercise: Timebox Your Week

Move this week's selected tasks onto your actual calendar so plans become finite, protected time. Block deep work at your sharpest hours and batch admin. Notice the moment your calendar runs out of room before your task list does.

• When are your sharpest hours, and which deep-work tasks will you block there?

• Which one or two slots will you reserve for batched email, invoicing, and admin?

• Where is your protected, client-free block for your own business (marketing, proposals)?

• How many real working hours do you have this week, and do your boxed tasks fit inside them?

Worksheet: Design Your Weekly Planning Ritual

Commit to a fixed thirty-to-sixty-minute session each week to review, chase, reprioritize, select, schedule, and plan your communication. Write down when it happens and what it covers so it actually runs.

Day and time of your weekly planning session (same every week)

Review: which boards and projects you will scan

Chase: the follow-ups you will send to clear Waiting On Client

Select: how you will size This Week to your real available hours

Schedule: how you will timebox selected tasks onto the calendar

Communicate: the client updates you will line up for the week

Your five-minute daily check-in routine (morning priorities, evening board update)

Checklist: Execution Checklist

[ ] I prioritize with a clear method instead of serving the loudest client
[ ] I protect time for important-but-not-urgent work each week
[ ] Every important task has a slot on my calendar, not just my list
[ ] I run a fixed weekly planning ritual and a short daily check-in
[ ] I size my week to the hours I actually have and descope honestly when over

Communication, Revisions, and Closeout

Install a status cadence that pre-empts anxious check-ins, run revisions in defined rounds with consolidated feedback, and close projects cleanly to win the next one.

Worksheet: Set Your Status-Update Cadence

Decide the rhythm and format of the proactive updates you will send every client, and agree it at kickoff. Use the Status Update template so each one is a five-minute fill-in-the-blanks task pulled straight from your board.

Update rhythm you will commit to (for example, every Friday plus each milestone)

Channel or shared doc where updates live as a single findable record

Your standard update format (what got done, what is next, what you need, on track or not)

How you will flag risks early and how far ahead of a deadline

How you will pull update content from your Done, In Progress, and Waiting On Client columns

Worksheet: Build Your Revision and Change Process

Define how feedback is given, how many rounds are included, and how out-of-scope requests are handled, then write it into your proposals. Use the Project Planner's change-log section to keep additions visible and priced.

Number of revision rounds included, and the rate for additional rounds

How you will request feedback (one consolidated batch, single point of contact, set date)

Your script for distinguishing a revision from a new, out-of-scope request

Your warm line for pricing an out-of-scope request without conflict

Where you will log change requests so they are agreed and either paid or traded

Exercise: Run a Project Closeout

Plan how you will end your next project so goodwill, payment, testimonials, and the next engagement are all captured at the peak. Walk through the closeout while the work is fresh.

• How will you confirm the definition of done and get explicit sign-off?

• How will you package and hand over the deliverables, and what rights transfer on payment?

• When and how will you ask for a testimonial, and what prompts will you suggest?

• What specific next step (retainer, follow-on, future phase) will you propose?

Checklist: Closeout and Improvement Checklist

[ ] I send proactive status updates on a fixed cadence the client can rely on
[ ] I flag risks and bad news early, with a proposed solution
[ ] I run revisions in defined rounds with consolidated feedback
[ ] I price out-of-scope requests warmly instead of absorbing them
[ ] I confirm sign-off, hand over cleanly, and invoice promptly
[ ] I capture a testimonial, propose a next step, and run a two-minute retrospective

Your Action Plan

1. Audit your last project to find where timelines, scope, revisions, and communication broke down
2. Scope your next project into a work-breakdown with milestones and a written definition of done
3. Stand up one Kanban board holding all your work, with a Waiting On Client column
4. Set a work-in-progress limit of two and practice pulling work to done instead of starting more
5. Track time on every project and build a reference table to estimate from history
6. Quote a buffered date with the project buffer placed at the end, and aim to beat it
7. Prioritise with Eisenhower and MoSCoW, then timebox the week onto your real calendar
8. Run a fixed weekly planning ritual plus a five-minute daily check-in
9. Send proactive status updates on a fixed cadence, pulled straight from your board
10. Run revisions in defined rounds with consolidated feedback and a clear change-request process
11. Close every project with sign-off, clean handover, prompt invoice, testimonial, and a named next step