Kayla

Project Management Template

Delight your customers, stay on track & feel confident in your day to day work

1

ONBOARDING

Goals

Collect the first payment, set up the design contract and make sure everyone is on the same page for what to expect throughout the project. You can also introduce your project management tool.

Tasks

Work

- Send invoice for desposit
- Send and sign design contract
- Set up the project in your project mangement tool

Feedback

- None at this stage, just answer any questions they might have about what to expect

Timeline

- Set a timeline you feel comfortable with

Communication

- Starting with email or any other way your client has initially contacted you. Once you have invited your client to the project management tool, you can choose to move the communication there
- Schedule the first/next meeting
- Use a tool like Quickbooks or Xero to send invoices
- Use a tool like Signable to collect signatures for the design contract

2

DISCOVERY

Goals

Talk more in depth to your client about the project goals and understand their customers and products or services better. This is also a great stage to collect any files you might need from your clients, like their previous brand guide or website copy.

Tasks

Work	• Prepare for the discovery meeting by reading up on the client - e.g. review their social media and website • Prepare questions for the meeting • Create a summary report for the client after the meeting to let them know what you have understood
Feedback	• Answers to your questions at the meeting • Signoff to your discovery summary
Timeline	• Set a timeline you feel comfortable with
Communication	• Schedule the next meeting • Request any files from your client thoughout your project with Kayla • Share the summary report with your client and collect their feedback

3

RESEARCH

Goals

Collect all the information you need before you start designing. This can include looking in to competitor visuals, what the target audience responds to and looking at trends in design.

Tasks

Work	• Gather information on the competitors, audience and additional information like keyword research if needed • Create mood boards or style scapes • Create a research report or presentation to look at during the meeting • Create a summary to send the client after the meeting
Feedback	• Answers to your questions at the meeting • Give feedback on the mood board or style scapes • Signoff to your research summary
Timeline	• Set a timeline you feel comfortable with
Communication	• Schedule the next meeting • Share the summary report with your client and collect their feedback

4

CONCEPTS

Goals

Presenting the concepts to your client and they pick a direction. You can then collect feedback on any iterations that need to be made.

Tasks

Work	• Review the research and mood board and make sure the whole team is clear on what the concepts need to accomplish • Create design concepts • Put together the concept presentation • Create a summary report to send to the client after the meeting
Feedback	• Pick a design concept/direction • Give feedback on any iterations needed • Signoff to your meeting summary
Timeline	• Set a timeline you feel comfortable with
Communication	• Schedule the next meeting • Share the summary report with your client and collect their feedback

5

ITERATIONS

Goals

Make any changes needed to the chosen concept and make sure the final designs are compatible with the client's business.

Tasks

Work	• Make any changes needed to the work • Put together the revised designs in a new presentation or report for the client to review
Feedback	• Review the new designs and give feedback • Sign off to the finalised designs after the iterations are made
Timeline	• Set a timeline you feel comfortable with
Communication	• Schedule the next meeting • Collect feedback through tools like Invision

6

HANDOFF & SUPPORT

Goals

Send out any remaining invoices. Make sure your client has all the assets they need to use the work you have created. This is also a great opportunity to offer additional services or retainers.

Tasks

Work	• Send out any final invoices • Prepare and export all files to hand off • Prepare a hand-off package, for example including prices for additional services, a request for a testimonials and potentially a thank you gift or message
Feedback	• Payment of any final invoices • A simple verification that they have received everything they need at this stage
Timeline	• Set a timeline you feel comfortable with
Communication	• You can use tools like Quickbooks or Xero to send out invoices • Share files with clients through a shared drive or project management tools

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of creatives and great tips
for you to explore.

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START COLLECTING FILES WITH EASE

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