FREELANCE CLIENT MANAGEMENT CHECKLIST

APEP practical checklist: enquiry, onboarding, delivery, payment and retention.

CLIENT ENQUIRY

[ ] Record client name, contact details and communication channel.
[ ] Record the client need, problem, service and expected outcome.
[ ] Record enquiry source and next action.
[ ] Respond professionally.

CLIENT QUALIFICATION

[ ] Confirm the work fits your skills and service scope.
[ ] Check requirements, budget, timeline and decision-makers.
[ ] Confirm project fit before preparing a proposal.

PROPOSAL & AGREEMENT

[ ] Define deliverables and exclusions.
[ ] Define milestones, deadlines and responsibilities.
[ ] State revision policy.
[ ] Define payment terms and schedule.
[ ] Document the agreement before work begins.

CLIENT ONBOARDING

[ ] Send a welcome message.
[ ] Collect files, information, access and brand assets.
[ ] Confirm communication channels.
[ ] Create the client record and project workspace.
[ ] Share timeline and next steps.

PROJECT DELIVERY & CONTROL

Keep work, communication and scope visible.

PROJECT SETUP

[ ] Create the task list and milestones.
[ ] Set internal deadlines before client deadlines.
[ ] Record dependencies and approval points.
[ ] Keep project information central.

PROJECT DELIVERY

[ ] Track tasks and milestones.
[ ] Record completed deliverables.
[ ] Request approvals at defined stages.
[ ] Keep project status current.
[ ] Flag delays or blockers early.

SCOPE MANAGEMENT

[ ] Keep agreed scope visible.
[ ] Record new requests before acting on them.
[ ] Separate included work from additional work.
[ ] Confirm scope changes in writing.
[ ] Update price or timeline when required.

COMMUNICATION

[ ] Set response-time expectations.
[ ] Use consistent communication templates.
[ ] Send agreed progress updates.
[ ] Confirm important decisions in writing.
[ ] Keep communication organised.

REVIEWS & REVISIONS

[ ] Track each review round.
[ ] Group feedback where possible.
[ ] Confirm included changes.
[ ] Record additional revision requests.
[ ] Close each review round before moving forward.

PAYMENTS, DELIVERY & RETENTION

Close projects cleanly and maintain useful client relationships.

PAYMENT TRACKING

[ ] Record project price.
[ ] Record deposits or milestone payments.
[ ] Track outstanding balances.
[ ] Send professional payment reminders.
[ ] Keep payment status in the system.

FINAL DELIVERY

[ ] Confirm all agreed deliverables are complete.
[ ] Complete a final quality check.
[ ] Obtain final approval.
[ ] Deliver final files through the agreed channel.
[ ] Confirm receipt.

CLIENT FEEDBACK & FOLLOW-UP

[ ] Request feedback after delivery.
[ ] Record useful feedback.
[ ] Ask whether the client has additional needs.
[ ] Schedule an appropriate follow-up.

CLIENT RETENTION

[ ] Keep useful client information organised.
[ ] Record completed services and future opportunities.
[ ] Follow up when there is a genuine reason.
[ ] Identify suitable repeat-service opportunities.
[ ] Keep the relationship professional and useful.

AI-ASSISTED CLIENT MANAGEMENT

Use AI to reduce repetitive work while keeping human review and appropriate safeguard

AI WORKFLOWS

[ ] Draft routine client communications.
[ ] Summarise meeting notes and action points.
[ ] Structure project information.
[ ] Create reusable workflow templates.
[ ] Review AI-generated content before sending.
[ ] Apply privacy and confidentiality safeguards.

WEEKLY REVIEW

[ ] Review active projects.
[ ] Check overdue tasks and approvals.
[ ] Check outstanding payments.
[ ] Review scope changes.
[ ] Review upcoming deadlines.
[ ] Identify communication requiring a response.

MONTHLY REVIEW

[ ] Review client pipeline.
[ ] Review project completion and delays.
[ ] Review outstanding payments.
[ ] Review retention opportunities.
[ ] Update templates and workflows.
[ ] Remove unnecessary manual steps.

SYSTEM AUDIT & 14-DAY PLAN

Use the final section to identify the next improvements to make.

SYSTEM AUDIT

[ ] Find every active client quickly.
[ ] See the status of every project.
[ ] Identify outstanding payments.
[ ] See upcoming deadlines and approvals.
[ ] Document agreements and scope decisions.
[ ] Keep client communications organised.
[ ] Maintain repeatable onboarding and delivery processes.

THREE BIGGEST GAPS

1. ____
2. ____
3. ____

14-DAY IMPROVEMENT PLAN

Days 1-2: Audit your current client workflow.
Days 3-4: Standardise client information and project records.
Days 5-6: Create or improve onboarding.
Days 7-8: Standardise communication and follow-up.
Days 9-10: Improve scope, revision and approval controls.
Days 11-12: Improve payment and delivery tracking.
Days 13-14: Review the system and remove unnecessary manual steps.

NEXT STEP

Explore The Freelance Client Management System from APEP for a more complete ope
toolkit.