

Project workflow checklist

Every step from first inquiry to follow-up. Print one per project, or use the spreadsheet tracker to follow all your jobs in one place.

Project / property

Client

Shoot date

Delivery due

01 Inquiry

- ☐ Reply within your stated response time
- ☐ Confirm location, date and scope
- ☐ Ask about usage, deadline and budget
- ☐ Send your questionnaire or intake form
- ☐ Log the lead and where it came from

02 Estimate

- ☐ Price from your costs and target margin
- ☐ List deliverables, timeline and add-ons
- ☐ State deposit, reschedule and usage terms
- ☐ Set an expiry date on the quote
- ☐ Follow up if there's no reply

03 Booking

- ☐ Get the signed quote or agreement
- ☐ Collect the deposit, if you take one
- ☐ Add to your calendar with address and access
- ☐ Send a booking confirmation

04 Pre-shoot

- ☐ Send the prep checklist to the client
- ☐ Confirm access, parking and on-site contact
- ☐ Check the weather (and airspace for drone work)
- ☐ Charge batteries, format cards, clean lenses
- ☐ Prepare the shot list

05 Shoot day

- ☐ Arrive early and walk through the site
- ☐ Work through the shot list
- ☐ Capture alternates of key shots
- ☐ Back up files before you leave
- ☐ Leave the property as you found it

06 Editing

- ☐ Import, back up and cull
- ☐ Edit to your style guide
- ☐ Check verticals, color and consistency
- ☐ Remove or blur sensitive details if needed
- ☐ Export and name files consistently

07 Review and revisions

- ☐ Share a proof gallery or review link
- ☐ Collect feedback in one round
- ☐ Make the agreed revisions
- ☐ Quote extra changes separately

08 Payment

- ☐ Send the invoice with a due date
- ☐ Apply any deposit already paid
- ☐ Send a reminder around the due date
- ☐ Mark paid and send a receipt

09 Delivery

- ☐ Deliver final files by gallery or link
- ☐ Include a usage and licensing summary
- ☐ Confirm the client received everything
- ☐ Archive the project and files

10 Follow-up

- ☐ Send a thank-you
- ☐ Ask for a review or testimonial
- ☐ Ask permission to use work in your portfolio
- ☐ Note what to improve next time
- ☐ Schedule a check-in for future work

Project notes
