

MANAGING WEB PROJECTS

A PRACTICAL GUIDE FOR WEB DEVELOPERS AND DESIGNERS

SECOND EDITION

*To my Dad
You're fantastic*

Contents

Contents	3
Introduction	5
The Pitch	6
Research.....	6
Size of the company	7
Direct Competitors.....	7
Type of company	7
Budget	7
Existing Site	8
Purpose Of New Site	8
Legacy Systems	8
Target Audience	9
Marketing Strategy	9
Current Branding/Promotions	9
The Presentation	10
The Quote	12
Know Thy Client.....	12
Know Thy Competitors	12
Hourly Or Fixed Rates?	13
Working out your rate	13
And we work out the rate by:	15
How Long Will The Work Take?	15
Site 1	16
Site 2	16
The Contract	19
The TRS	24
Managing the Project & the Team	31
The Design Process	40
The Development Process	45
Testing the Product	51
The Change Request Form	59
Sign-off and Delivery	62
Invoicing the Client	66
Managing Maintenance Contracts	69
Life in the Real World	74
Afterword	81

Appendix One - The Workflow	82
Appendix Two - Project Management	83
Appendix Three - Developer Tools.....	87
Appendix Four - Useful Links.....	88
Appendix Five - Change Request Form.....	97
Appendix Six - Sample Contract	99
Appendix Seven - Sample TRS.....	106

Introduction

This book is taken from a collection of posts on my blog, [“Flipping Heck!”](#). I must admit the series took longer to write than I had anticipated which was down to a variety of factors, including a massive bout of procrastination!

The series came about because I was looking for a resource on the Internet on managing the lifecycle of a project - specifically *web* projects. Sure, there were lots of sites and articles on generic project management but as we all know, each particular industry has its own quirks and pitfalls.

After much research I found nothing. Seriously! There were bits and pieces of information here and there, but not one “true” resource covering the whole of the project. This was quite important for me as I had just started a new job where I was expected to sell, quote, design, build, deliver, test and invoice a client - and that’s a lot to take on when you’re not sure what you are doing!

The chapters in this book are broken down by workflow stage (see Appendix One) and cover the whole lifecycle of a “general” (if there is such a thing!) web project.

Enjoy!



The Pitch

So, you've been invited to pitch your website idea to a client. This could be your big break and put you on the road to website "superstardom". But how do you go about it?

Research

The first, and probably most important step is to research the client. There's no point going into the meeting and pitching a £500,000 website when all they want is a 10-page mini-site costing £2,000.

There are several things to consider before you start your pitch; here are the most basic needs that need to be looked at:

- Size of the company
- Direct competitors
- Type of company (market)
- Budget
- Existing site
- Purpose of new site
- Legacy systems
- Available technologies
- Target audience
- Marketing strategy
- Current branding/promotions

You will be able to get this information from research on the Internet, looking at company brochures, and of course asking the person you will be pitching to provide the information. Don't be afraid to ask, or think that they'll think less of you - they'll be impressed you're taking the time to get to know the company and tailor your pitch to them as an *individual* rather than trying to hawk some off-the-shelf product they don't want, need or will use.

I know there are more things we could add to the above list but these are the fundamental considerations. Without looking at these there is no way you could pitch successfully. Let's go through each one:

Size of the company

If they are a huge multi-million pound company with 10,000 employees, their requirements are going to be very different from a small start-up with 2 employees.

Size of the company often affects corporate culture and this in turn will affect what the client wants from the site, how they (and in turn their clients) will use it and what they're willing to pay for.

Direct Competitors

What are their direct competitors doing well, more importantly, what are they doing *badly*? You should be able to go to the client and say "XYZ is selling through their website, you're missing out on a great opportunity" or "XYZ hasn't got an online presence, if you get in their first you'll capture the market".

Prove to the client that you want them to succeed and that you know what market they're operating in and you're on to a winner.

Type of company

What do they do? If they sell, do they actually need an online store? Perhaps a brochureware ^[1] site would be more effective?

If they are a service related company, can these services be translated into a workable online presence?

Think about what the client *does* then you can start to work out what they *need*.

Budget

How much are they willing to spend not how much can they spend?

Just because a company has a multi-billion dollar turnover doesn't mean that they *want* to spend \$1 million on a new website and back-end infrastructure - how do you think they made that much money in the first place?

Treat whatever budget they give you as the absolute maximum, other pitchers will go in and treat this as the minimum level so you'll already have a head start.

^[1] Similar to a brochure, these sites are simply electronic marketing pieces with no ability to perform transactions.

Existing Site

What do they like about their existing site, what don't they like? Keep the bits they do like and improve the rest.

How accessible is it? very, and that's what you'll have to live up to; not at all and you can stress this factor and it's importance in today's marketplace.

How often do they update it and how is it done? If it's hardly ever updated, the importance of new and relevant content can be stressed and facilitating easy updates will make the client more inclined to look at this option. After all, who wants to wait a week for a web developer to update 3 lines of text on your site when you can do it yourself?

Purpose Of Their New Site

Is this simply a redesign as they've changed their brand image or are they losing out to competitors online and want to make some money?

Don't design a site for the sake of it; design it for what they want it for. There's no point giving them a full-blown Content Management System when they want one page with a map on it as no one can find their office.

Legacy ^[1] Systems

What systems do they currently have in place? Are you going to have to use an ancient database that's been used for years or are they willing to migrate to something newer?

If you have to integrate with existing backend systems, what are they like? Will they be compatible with the technologies you want to use?

Can they (or will they) upgrade? More importantly will you have access and at sufficient user levels? All the above could affect your core idea so they're definitely worth taking into consideration.

^[1] An existing system that is deployed in an organization. Legacy systems will eventually be upgraded, replaced or archived.

Target Audience

Needless to say, but you don't pitch a site aimed at a 14 year old to a client who's trying to sell to 50 year olds (mind you, you'd be surprised!).

What demographics on their intended audience do they have - they must have done research (mustn't they?!).

Are there any special considerations to take into account with this audience (people with visual difficulties etc.)?

Again, this can greatly affect the way you go about your pitch.

Marketing Strategy

What is their current marketing strategy? How are they branding themselves and whom are they targeting?

Are they wanting to go and push certain services through the site, get people to signup for a newsletter, have specially branded pages for certain customers?

Current Branding/Promotions

What is their branding like at the moment? Does it change quite often? What are they trying to say with it?

Most of the above might sound obvious but I've lost count of the number of times people have pitched at me and the pitch was way above or below my needs. You can never do too much research into a prospective client, and all it's costing you is time, but you'll look more professional for it.

The Presentation

So, you've done your research, you know exactly what the company wants, it's at the right price and will fit in with their existing systems, all you have to do is present it! I think the best thing to do is to build a mock-up of areas of the site you think the client would be interested in seeing. The branding or design doesn't have to be perfect (after all you haven't got the job yet!), but the functionality and workflow should be obvious.

The demo could be a series of static html files, a PowerPoint presentation ^[1] or even interactive flash movies. Whatever you feel most comfortable with will be fine as long as it gets the message across to the client.

So, how to present it? I think it would be important to ensure that the room you're meeting in has a projector (and suitable screen); not only will you look, act and feel more professional when presenting, having six people sitting around a 15" laptop screen whilst your trying to demo something is not the best way to sell a site.

Whatever you do, do **not** use notes. This makes it look like you haven't prepared and don't know what you're talking about. If someone asks you a question and you can't remember (or don't know) the answer, politely ask him or her if you can get back to them on that later and take his or her contact details.

It's also worth mentioning here that you should gauge the level of technical ability of the people you're pitching to before you start, there's no point in explaining how the internet works to the Network Admin of a Fortune 500 company, but it would be to 60-year-old Dotty who's just got her first PC.

After your pitch, summarise the most important points so they're fresh in everyone's minds and give out handouts highlighting the main points of your presentation (not full notes or slideshow), make sure your name, logo and contact details are prominently displayed on each page. Along with this, make sure everyone in the room gets your card and let them know it's okay to contact you if they have any questions.

Finally, and I think most importantly, make sure you take the time to thank *them* for giving you the opportunity to present your idea - you'll be surprised how many people fail to do so.

^[1] Although, remember not to go overboard with car crash noises and blinking text! Visit <http://www.presentationzen.com> for hints and tips on how to build a good PowerPoint presentation.

At the end of the pitch you will have a good idea of what the requirements are, they'll be impressed and you'll get the job - hoorah! And that leads us on to the next step: "The Quote".