

using drupal to build customized tools for your clients



Drupal Camp Ohio 2011 | December 3rd | jenna lynn colbaugh



using drupal to build customized tools for your clients > TO DISCUSS

about

the value of value-add

a look at { A } and { B }

how to

- 1 engage > build value into budget
- 2 conduct discovery > learn the ins and outs of what your client wants
- 3 manage expectations > turn goals into functional requirements
- 4 develop > engage client, gain feedback, ask questions
- 5 deliver > a client understood, client manageable, integratable tool



about jenna lynn colbaugh

background > engineer turned front-end developer/
designer/ business owner

passions > problem solving, organizing, working with &
enabling clients

web/business experience > marketing, consumer, branding,
UI, design, development (HTML, CSS, php, Java, the basics),
PM, business owner

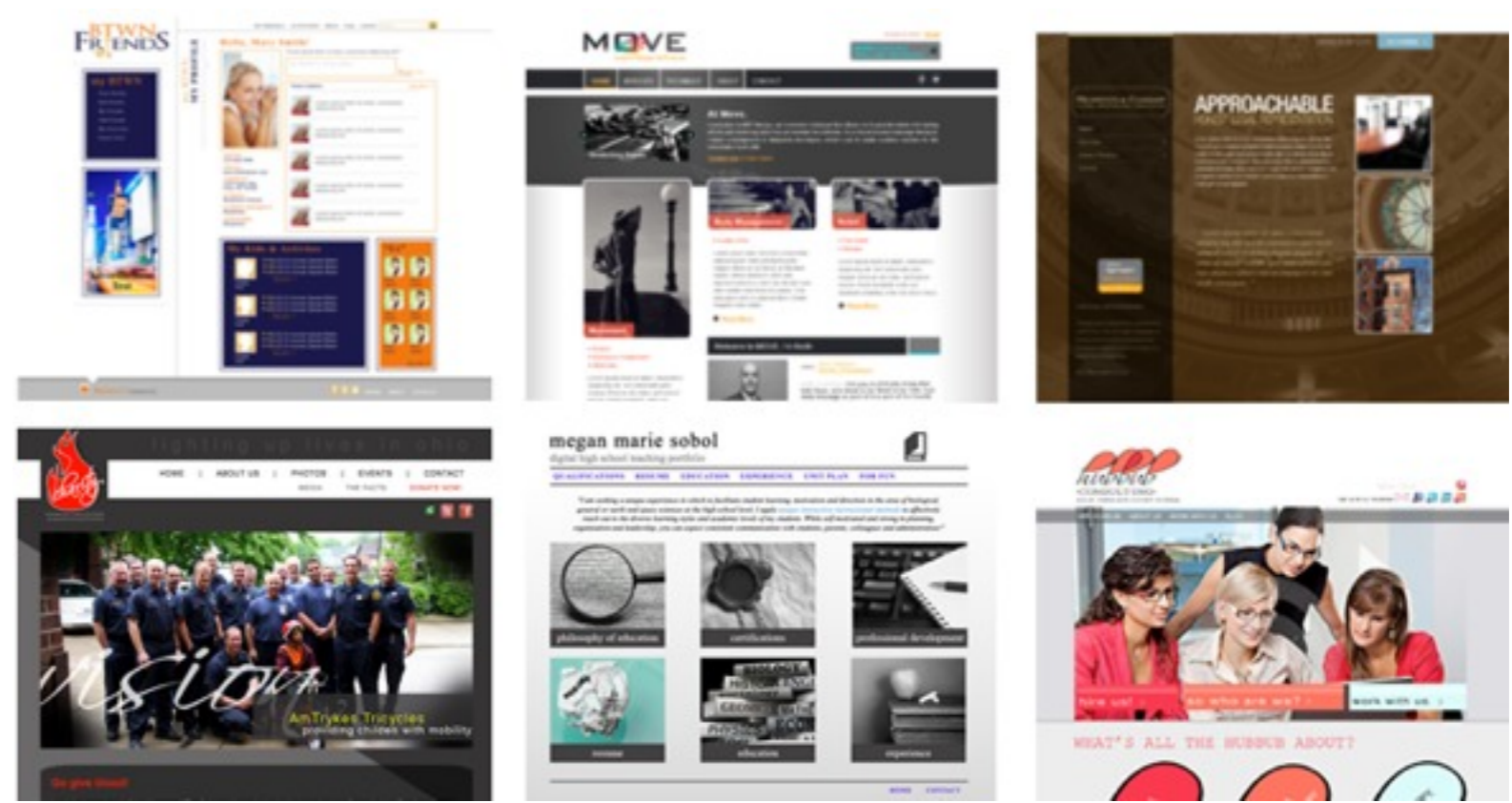
drupal > project manager for Promet Source drupal web
development (manage people who deliver cool things),
trainer, UI, site updates

current > project manager for Promet Source, owner j.l.c.



about j.l.c. graphic designs

“...achieves meaningful solutions that mature with its partners by extending the values of the organization into visual elements. using design as a medium, our dynamic team works hand-in-hand with you to creatively implement the total-business solution you’ve always dreamed of.”





about promet source

“we specialize in building complex drupal web sites. we have expert web developers with the capabilities to create customized modules, features and capabilities.”

promet source 





the value of value-add

HOW DOES THIS APPLY TO ME?

relationships: every drupal website, small or large, is a tool for your clients

best practice: applying big-business principles to every project is a *necessary* must-have <- THIS IS POSSIBLE!

growth: every project and client is an internal growing experience

reputation, “you are what you eat”: every project and client is an opportunity to put your best foot forward

simplification: better processes for easier project work and management

WHY?

define projects & resolve ambiguity: clients are typically web newbies, and processes help weed out and translate their true needs

end the cycle: documentation and value-add processes keep projects from experiencing cyclical behaviors (change requests), avoid scrum-style development, and keeps you from eating costs



a look at { A } and { B } > BACKGROUND

projects represent complexly structured, community & informational sites

	Project { A }	Project { B }
Budget	Large	Bare bones
Discovery	<ul style="list-style-type: none"> • 6 months • Many people involved • Brainstorming • Sharing 	<ul style="list-style-type: none"> • Client told us what they wanted • Brief discovery, NOT with key players
Planning	<ul style="list-style-type: none"> • Wireframes, revisions • Design Concepts, revisions • Functional Requirements/ PRD • Timeline/ milestones 	<ul style="list-style-type: none"> • Assigned resources to develop what client wanted • Loose e.t.a. promised • PM introduced later on
Development	<ul style="list-style-type: none"> • Shared with client piecewise, relating to requirements • Didn't operate in the unknown • One expert developer 	<ul style="list-style-type: none"> • Head underground, build a website we think makes sense • Multiple developers • Client P.O.C. changed
Delivery	<ul style="list-style-type: none"> • Smooth hand-off with training, in-person support • Explained the tool in-person 	<ul style="list-style-type: none"> • Let client know their site was live and sent them the URL



a look at { A } and { B } > RESULTS

	Project { A }	Project { B }
Delivery Time	On time	What delivery?
Profit	Steak dinner	Dollar menu
Client Satisfaction	Happy as clams	Disgruntled, confused
Repeat Client	Coming back for more	Finding another company for maintenance
Gloating Referral Client	Their friends might redo their site just to work with you	Oh, the harm twitter can do
Internal Stress Level	Let's do it again!	Sad to loose business, but happy to wash our hands
Post-Launch	Minor bugs/ change fixes	Major functional misses and total rework



a look at { A } and { B } > LEARNING

less discovery time = *more project time*

less planning = *more resources, late delivery,
less profit*

one-sided development = *rework, more development*

quick hand-off = *unhappy clients*

unhappy clients = *no repeat, no referral*



how to > 1 ENGAGE > build value into budget



*chew on this:
profit starts and depends on
the beginning of the project*



how to > 1 ENGAGE > the plan



the bane of open source > everyone “gets” it
the ego > i know better than you
the unknown > i mean, i think it’s what i want



this over that > budget friendly, makes sense
try something new > ok, this is somewhat selfish
explain rationale > implications on workflow, etc.



explain decisions > mutual understanding & plan
add value > we will build a tool for your business to grow
make your value a must-have > we care the most



how to > 1 ENGAGE > budgeting it in



OK, SO NO BUDGET HAS ROOM FOR ALL THIS FLUFF? **WRONG!**

> spending more time up front leads to less time down the line

> how so? to name a few:

questions are answered

correct resources are defined

operating in the known

client understood final product, no disappointment

clear expectations and plan

WAIT, WHO IS GOING TO DO THIS?

> define a principal, project manager, or main point of contact

> this person needs to be the client liaison

> your best internal resource who can manage client face-time, stressful project situations, and has an attention-to-detail mindset



how to > 1 ENGAGE > deliverables

DELIVERABLES

> Quote/ Task Order/ Proposal

include your understanding of the scope in comprehensive language

break down pricing into sections (design, development, PM...)

include training and post-launch support in the proposal

ask for signatures

> Client relationship

they have already established comfort and professional communication with you

NOTE: Some clients may shop-around for quotes. GUARANTEED if you follow this procedure they will return to you for development. Larger projects can consider billing for this phase!



how to > 2 CONDUCT DISCOVERY > learn the ins and outs of what your client wants



*play a little Sherlock Holmes;
don't you dare start design or development
until all questions are answered.
i'm watching you!*



how to > 2 CONDUCT DISCOVERY > the plan



“why do you want ____?” > is there a business purpose?

“if your website were ____?” > create analogy

“tell me about you ____?” > understand the client



“we want to be able to ____.” > the goal & web type

“we love raisins...” > the style & feeling for success

“i can't even use Word.” > plan use & management



strategize web must haves > create a fool-proof plan

examine competition > beat the best/ impress client

review > share thoughts for feedback/ understanding



how to > 2 CONDUCT DISCOVERY > add'l questions 1



MESSAGE

- > what is the purpose of your website?
- > what is the primary message you wish to convey? secondary message?
- > what are your overall goals?
- > who is your target audience?
- > how do you differentiate yourself from competitors?
- > what are key reasons customers choose your company?

PERCEPTION

- > three adjectives on how the site should be perceived by the user?
- > if a site rework, what do you want to be different?
- > what are your biggest challenges?
- > what are sites you find compelling?
- > your biggest competitors?



how to > 2 CONDUCT DISCOVERY > add'l questions 2



ACTION

- > what is the primary action you wish target users to take?
- > what do you want users to do before leaving your site?
- > what are key universal elements?

CONTENT

- > what styles and quantity?
- > basic structure, and how is it organized?

TECHNOLOGY

- > target platform and browser?
- > adaptive technologies to utilize?
- > database functionality, if any?
- > secure transactions and e-commerce?



how to > 2 CONDUCT DISCOVERY > add'l questions 3



MARKETING

- > what are short term marketing goals? long term?
- > how is the site going to help you achieve that?
- > what is your number one business problem?
- > how are you planning on distributing the URL/ new site?
- > what are you site update plans?

ADMINISTRATION

- > who are the primaries for management?
- > target launch date & what factors surround this?
- > budget limitations? can we break down into phases to meet your goals?

LEGAL

- > cultural factors affecting the interface design?
- > internal policies/ legal registrations?



how to > 2 CONDUCT DISCOVERY > deliverables

DELIVERABLES

> Discovery documentation

meeting notes

brainstorming thoughts

diagrams & workflow charts (explaining each step and how functionality is linked)

> Other

clear understanding on which to build functionality

valuable information for planning next steps



how to > 3 MANAGE EXPECTATIONS > turn goals into functional requirements



*i really love sticky notes for
brainstorming and planning, but i suppose
other methods will work*



how to > 3 MANAGE EXPECTATIONS > the plan



functionality meeting > review from previous processes
provide overview > share meeting outcome for feedback
PRD first version > draft, send to client



PRD review > discuss each piece in detail
workflow > describe how it all ties together
limit > be clear on what they are not getting



PRD revision > from client feedback
review > discuss any changes on part 2 rationale
finalize > get signatures



how to > 3 MANAGE EXPECTATIONS > the PRD



WHAT IS A PRD (PROJECT REQUIREMENTS DOCUMENT)?

- > Defines scope of development work to be done
- > Explains how things are going to work & how each piece fits together
- > Presents a medium for discussion prior to entering development
- > Defines final product/ deliverable client will receive
- > *Solves your management problems with one single document*

PRE-WORK

- 1 Gather final results from your discovery process (Stage 2)
- 2 Gather design concepts from the designer and separate them out (home, about, contact, shopping cart, checkout, general content, etc...)
- 3 Let client know what you are doing and the **purpose and value** of the work

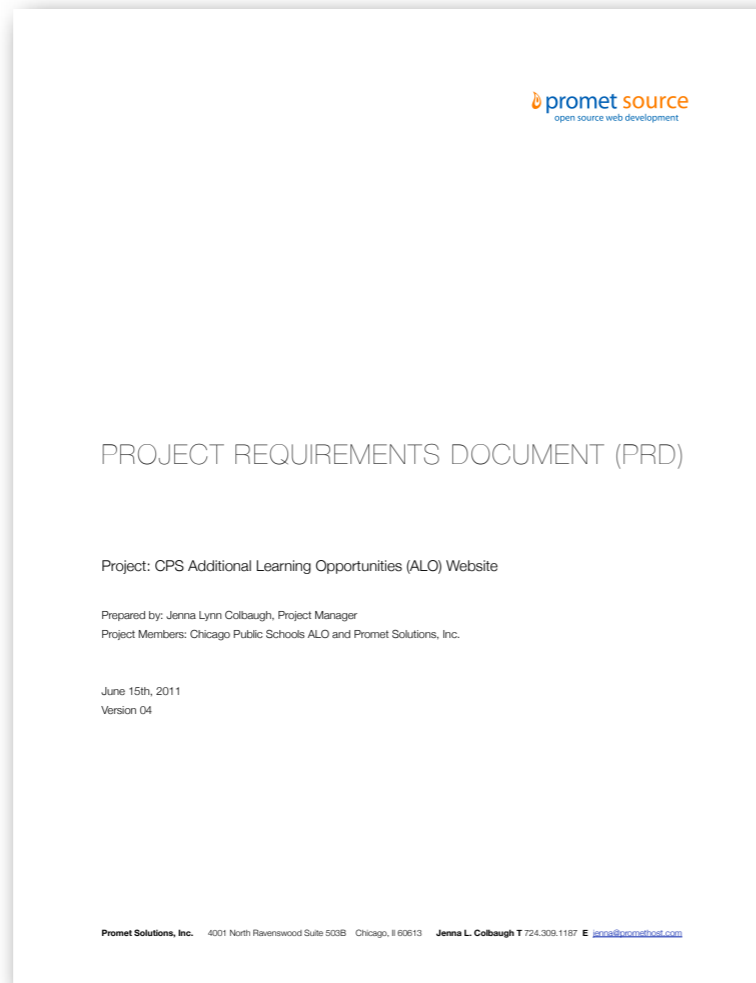


how to > 3 MANAGE EXPECTATIONS > the PRD



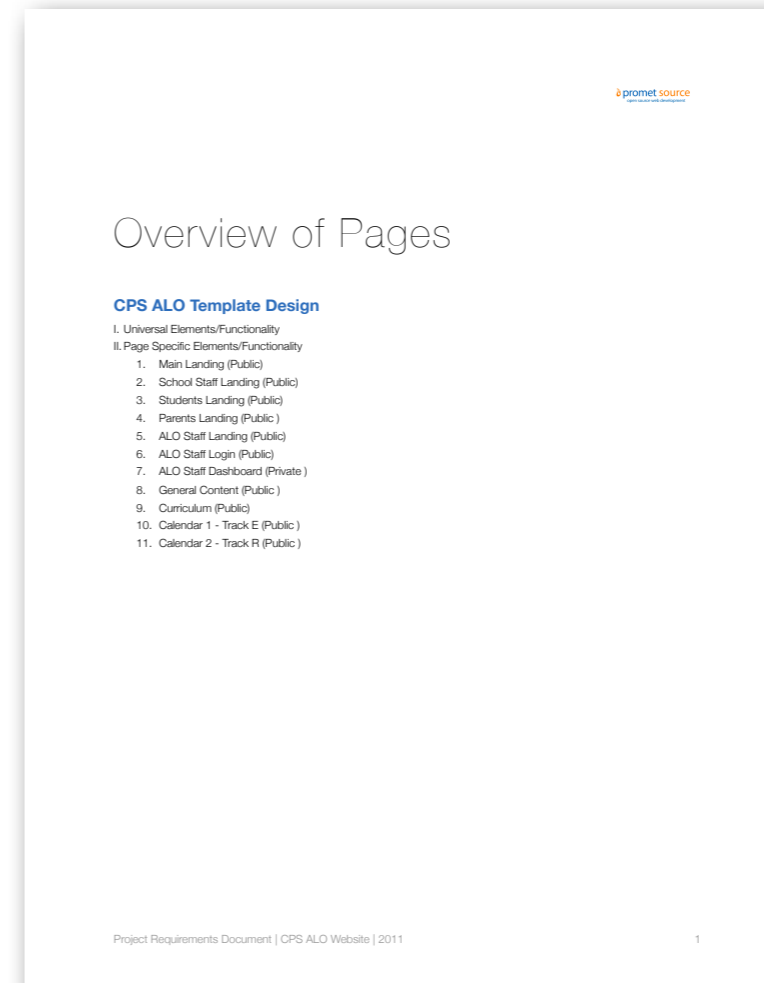
SETTING UP THE DOCUMENT

1 Title page



- > Your name
- > Client name
- > Project
- > Date

2 Outline/ Overview of pages



- > Global elements
- > List each page with unique functionality



how to > 3 MANAGE EXPECTATIONS > the PRD



SETTING UP THE DOCUMENT

3 Global Functional Elements

4 Individual Page Functionality

I. UNIVERSAL ELEMENTS/FUNCTIONALITY (Ref. Main Landing Page)

- Overall Use
 - Universal elements of the website, in which a user will:
 - Navigate within the site
 - Connect with ALO
 - Take action: get involved, contact or become a member (for staff)

Project Requirements Document | CPS ALO Website | 2011 2

- > Overall Use Statement
- > Functional Requirements (“The ability to...”)
- > Navigation
- > Social media
- > Link style/color
- > UI and experience

2. School Staff Landing: Public

- Overall Use
 - School Staff landing page of website, in which a user will:
 - View main information for the Staff user
 - Navigate to Staff related pages
 - Take action on Staff-directed links

Project Requirements Document | CPS ALO Website | 2011 7

- > Overall Use Statement
- > Functional Requirements (“The ability to...”)
- View_____
- Navigate to_____
- Absorb_____

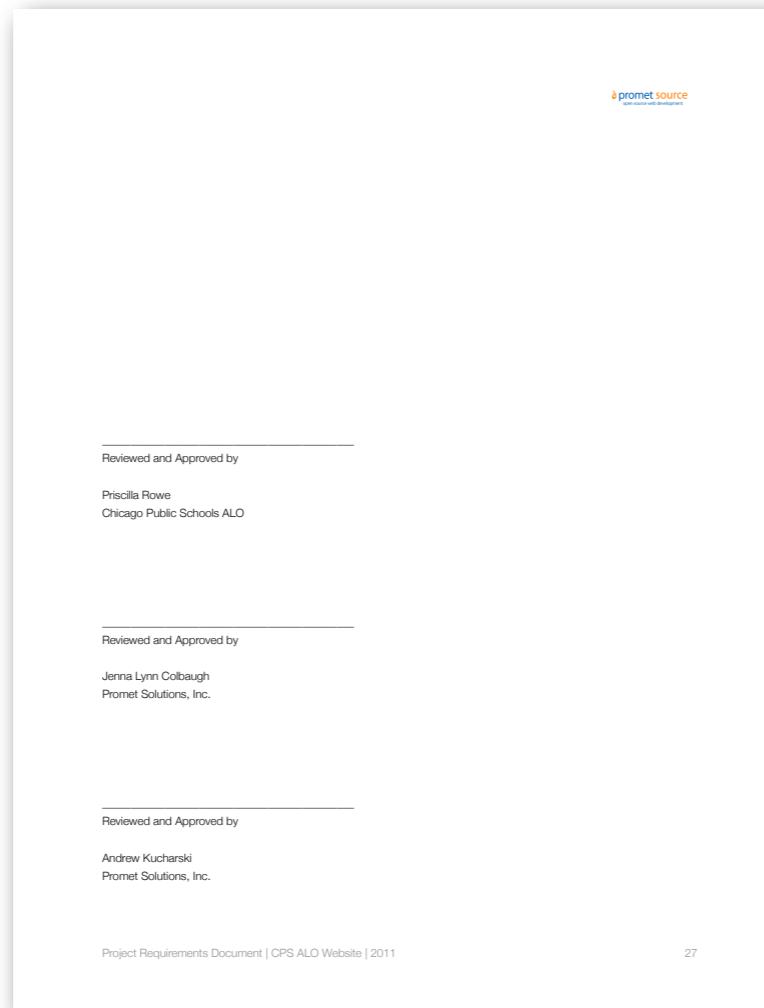


how to > 3 MANAGE EXPECTATIONS > the PRD



SETTING UP THE DOCUMENT

5 Signatures



- > Your PM
- > Your Principal
- > Their Main POC
- > Dated

OTHER

- > Revisions (keep to a minimum if possible)
- > Client review sessions
- > Record all conversations in meeting notes accessible to the client



how to > 3 MANAGE EXPECTATIONS > deliverables

DELIVERABLES

> Project Requirements Document (PRD)

include screen shots of each page/template

write specific functionality/ user actions for each page

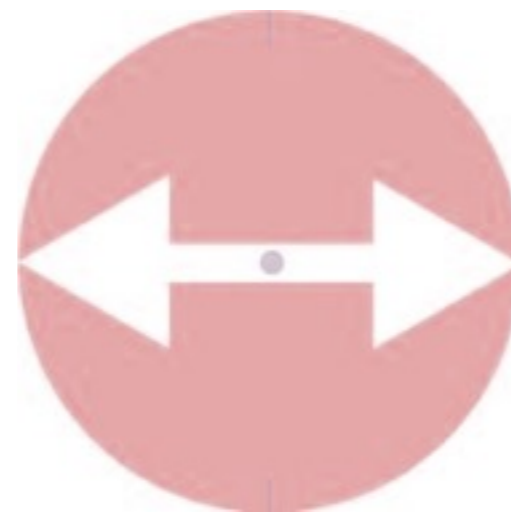
note any global elements

revisions, if necessary

request signature



how to > 4 DEVELOP > engage client, gain feedback, ask questions



*it isn't your website, it's the clients;
would your contractor build a custom-designed
house without back and forth with you?*



how to > 4 DEVELOP > the plan



ENGAGE
{ client }

let them know what's up > so no one's in the dark
be transparent > tell them you have a problem
schedule check-ins > review, create a connection



GAIN
{ feedback }

review live template > before adding functionality
review functionality > piece-wise (email/ phone)
discuss options > when they arise



ASK
{ questions }

“how do you like this?” > before perfecting
“what if we do this?” > allow flexibility
“can we deliver early?” > understand their needs



how to > 4 DEVELOP > the plan

MANAGING CHANGE REQUESTS



- > Don't reveal the site until you have self-QA'd and self-approved
- > Reference your handy PRD and meeting notes as guidelines:

Was in the PRD = you better do it!

Was unclear in the PRD = case-by-case basis

Was not in the PRD or prior communication = start a Phase 2 document



how to > 4 DEVELOP > deliverables

DELIVERABLES

> Custom drupal theme

created internally or a third party designer

> Template

> Final functionality on development enviroment

matches PRD requests

fulfills all needs as laid out in the scope

all requirements from proposal/ quote are met

> Final sign-off from client

get them to sign-off that you have achieved both scope and PRD requirements functionality



how to > 5 DELIVER > a client understood, client manageable, integratable tool



everyone wins



how to > 5 DELIVER > the plan

IN-PERSON
{ hand-off }

personalize, add a face > when you can
deliver security > we care, we are there for you
you matter > no matter how small

CLIENT
{ training }

deliver a usable tool > client can maintain/ integrate
answer questions > may solicit changes
two parts > allow time for trial

BUSINESS
{ suggestions }

they grow > you grow
scalability > plan to expand
phase 2 > smooth transition into next steps



how to > 5 DELIVER > the best way to train

TIMING: PIECE-WISE

- > prior to go-live, during client acceptance
- > once after go-live
- > review after client has time for trial and usage experience

CONTENT

- > provide admin manual for key tasks they desire for management
- > answer low level to high level questions

STRATEGY

- > set up a common ground for ongoing support
- > all follow-up questions should be under a maintenance contract





how to > 5 DELIVER > deliverables

DELIVERABLES

> Final web “Tool” in production environment

live, working version of the site that has been QA'd and approved in production

virtually bug-free functionality

> User/ admin manual

create internally via video or written documentation

> Support/ Maintenance contract

for follow-up questions

for change requests

for that Phase 2 list you compiled



summary

LESS
{ time }

MORE
{ money }

HAPPY
{ clients }

questions?