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# “Managing a Client... Drupal Style”

# Parts of Managing a Client



- Before the project begins (Contracts, Proposal)
- During the project (PM Software, Regular Updates)
- After the project (Followups, Case Studies, Awards)



# Before the Project

# Proposal



## 4 Parts of a Proposal

- About the Company/Staff
- Testimonials/References
- Cost/Timeline
- Agreement (Letter of Intent)

## Proposal Information

- 90% of creators of RFPs say they don't care about the order of information (They do care about length)
- Create a template for each different kind of client (RFPs, Project types, custom RFPs)
- Make sure your proposal tells the story of who you are (What makes it stick out?)



# Contracts

## What's the difference between the proposal and contract?

- Legal Jargon
- Final Timeline
- Scope of Work
  - Design expectations
  - Development features
  - Development environment
- Payment terms
- GNU License



### Web Contract Agreement

This Website Agreement is made by and between boostDFM ("Web Designer"), with its principal place of business at 7317 Merchant Court, Lakewood Ranch, FL 34240 and \_\_\_\_\_ ("Customer") with its principal place of business at \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ on this day, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.

WHEREAS, Customer desires to retain Web Designer to develop the Website (the "Website") for Customer as described in the Work Plan (as defined in Section 1 below);

WHEREAS, Web Designer desires to undertake the Design of the Web Design and agrees to do so under the terms and conditions set forth in this Agreement;

NOW, THEREFORE, for good and valuable consideration, the parties agree as follows:

**Section 1. WORK PLAN.** Web Designer has prepared a Work Plan for the Web Design, which includes the following:

- the specifications for the Web Design which comply with the requirements of the Customer's Request For Proposal and/or acceptable proposal;
- a listing of all items to be delivered to Customer (the "Deliverables");

Web Designer shall deliver the Work Plan to Customer with this Agreement. Customer shall have five (5) days to review and comment upon the Work Plan. Upon Approval of the Work Plan by Customer, it will be attached as Exhibit "A" and will become a part of this Agreement. Web Designer shall immediately commence Design of the Web Design in conformity to the Work Plan.

**Section 2. PAYMENT.** The total contract price for the Web Design shall be as set forth in the Work Plan and shall be payable in installments according to the payment schedule set forth therein. Each installment shall be payable upon completion of each project phase by Web Designer and acceptance by Customer.

**Section 3. CHANGES IN PROJECT SCOPE.** If at any time following acceptance of the Work Plan, Customer should desire to change the specifications or other elements of the Work Plan, Customer shall submit to Web Designer a written proposal specifying such changes. Web Designer shall evaluate each such proposal and shall submit to Customer a written response within five (5) working days following receipt thereof. Web Designer's response shall include a statement of the availability of personnel and resources, as well as the effect the proposed changes will have on the price, delivery dates or warranty provisions of this Agreement.

Any changes to the Work Plan shall be evidenced by a "Work Plan Amendment." The Work Plan Amendment shall be signed by authorized representatives of Web Designer and Customer, and shall be deemed a part of this Agreement. If Web Designer does not Approve the Work Plan Amendment, he shall not be obligated to perform any additional services hereunder.



:: CONFIDENTIAL ::

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# Are there more documents?



- NDA (Non-Disclosure Agreement)
- Payment Terms Statement
- Project Scope Statement



## Payment Terms Statement

Name of Company: \_\_\_\_\_

Project: \_\_\_\_\_

Total Cost: \_\_\_\_\_

Payment Terms:      Payment 1: \_\_\_\_\_ Date: \_\_\_\_\_

Payment 2: \_\_\_\_\_ Date: \_\_\_\_\_

Payment 3: \_\_\_\_\_ Date: \_\_\_\_\_

Payment 4: \_\_\_\_\_ Date: \_\_\_\_\_

Payment 5: \_\_\_\_\_ Date: \_\_\_\_\_

Payment 6: \_\_\_\_\_ Date: \_\_\_\_\_

Initials: \_\_\_\_\_

# Client Binder



## **“boostDFM’s no surprises binder”**

- Project Management Outline/Personnel
- Original Proposal
- Contract
- Payment Terms Statement
- Project Scope Statement
- Maintenance & Hosting Agreement
- Change Order Form
- Post-Project Evaluation





# The Project

*Project begins when contract is signed and start-fee has been paid*

# Kick-Off Meeting

## “Everyone is involved”

- Architect
- Lead Developer
- Designer
- Copywriter
- Project Manager
- Sales Rep



# Design Collaboration

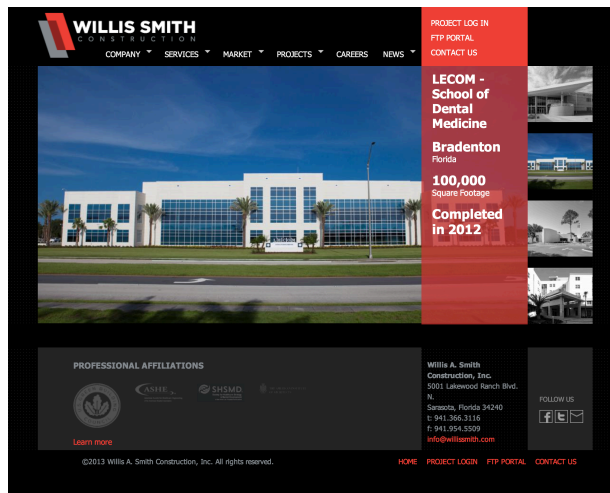


- Essential for designers and developers to work together to make sure the design doesn't call for "scope creep" or any other additional development concerns
- Use Project Management Software like Open Atrium to manage conversations and get everyone's opinions.
- Discuss all aspects of design including responsive designs, internal pages, unique pages

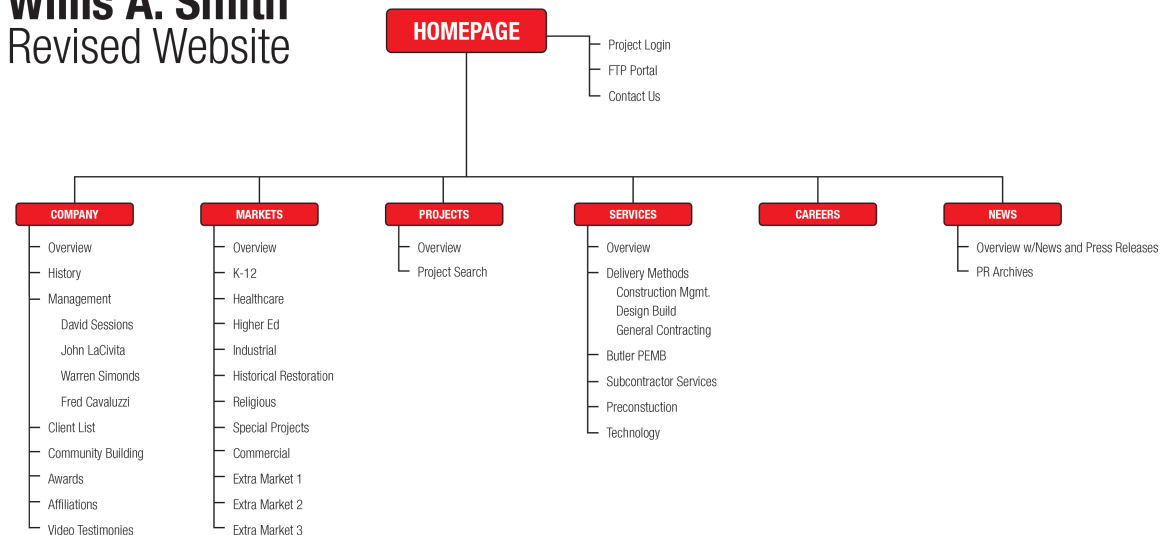
# Client Approvals Needed



- Once your team has discussed design, prepare for client approval.
- Sitemap and Designs must be approved before development begins (sometimes environment will be set up)



## Willis A. Smith Revised Website



# The Importance of a Project Management Software



- Keeps track of all conversations
- Keeps files, approvals, and calendar all in one place
- Assignment of tasks

The screenshot displays a user interface for a project management tool. At the top, there is a navigation bar with a user profile (claney), a home icon, and options for 'Create content' and 'Search'. Below this is a 'Dashboard' section with 'Add custom' and 'Customize dashboard' buttons. The main content area is divided into two columns. The left column, titled 'Recent activity', shows a list of comments from various users (Zivaa, RP, WSW, SP4, GIF, DFM) on different project items, dated Thursday, Mar 6 and Wednesday, Mar 5. The right column, titled 'My groups', shows a placeholder for a group image with the text 'Can't show our great clients names'.

Date	User	Activity
Thursday, Mar 6	Zivaa	vreinebach commented on Add, enable, and configure the Login Security module
Thursday, Mar 6	RP	vreinebach commented on Add, enable, and configure the Login Security module
Thursday, Mar 6	WSW	vreinebach commented on Combine Press Releases and News into one feed
Thursday, Mar 6	SP4	claney commented on Site Map Questions
Thursday, Mar 6	GIF	admin commented on Meeting Notes - 3.3.14
Thursday, Mar 6	DFM	vreinebach commented on Final BDFM Site Tweaks
Wednesday, Mar 5	DFM	vreinebach commented on Final BDFM Site Tweaks
Wednesday, Mar 5	CD	claney commented on Carpe Diem sketches
Wednesday, Mar 5	DFM	sboris commented on Final BDFM Site Tweaks
Wednesday, Mar 5	CD	admin commented on Carpe Diem sketches
Wednesday, Mar 5	CD	sboris commented on Carpe Diem sketches
Wednesday, Mar 5	RP	vreinebach commented on Add, enable, and configure the Login Security module
Wednesday, Mar 5	RP	admin commented on Main Navigation Drop Down Menus
Wednesday, Mar 5	RP	admin posted Add, enable, and configure the Login Security module

# Weekly / Biweekly Update



- Project Manager sets up a time either weekly or biweekly for updates.
- The contact is usually over the phone because it makes the situation more personable but email can be sufficient.
- Discuss progress and if there is anything else that is needed.

# Giving access to Dev

- Give the client access to the development environment
- Set expectations on development, theming and timeline.
- This is optional but gives client control of feeling like progress is being made during the project. It also shows transparency with the client.



# Training & Revisions



- Make sure Revisions are scheduled correctly with multiple instances of working with the client.
- Typically, boostDFM gives 1-2 weeks of revisions.
- The week before launch, give client access to dev environment to make content changes. 48 hours before launch, no changes can be made to site.
- Launch is typically during low traffic times. Weekdays in the evening. (SET expectations on revolving or clearing cache)





After Project Launched

# The First Month



- The first week is always the longest and most difficult. At boostDFM, we never launch a site within two weeks of each other so that you can focus on the post-launch work.
- Make sure you are going through maintenance and hosting agreement negotiations. Needs to be signed within first 30 days.
- boostDFM offers 30 days of support (up to 3 hours) at no additional cost

# 30-60 Days After Launch



- 30 day meeting. (Postpartum Meeting)
  - What went right/wrong?
  - Did we meet expectations?
  - Are there additional digital opportunities
- Have client fill out Post-Project Evaluation
- Begin Case Study Meetings
  - Meet with developers for dev information
  - Meet with design team to find out if they believe expectations were met
  - Meet with sales team and project manager

# The Case Study



Why do a case study?

- Make sure you met all the client requirements
- Did you stay within the budget/hours
- Able to track what was done right or wrong in design/development/pm process
- Can use it for future projects as reference of cost, modules used, and timeline

# The Case Study Cont...



What does a case study look like

- 6-7 Pages long
- Includes
  - Summary
  - Design
  - Technical Overview
  - Overview of Project
  - Future Opportunities

# The Case Study Cont...



- Summary includes everything in less than a paragraph
- Design includes a paragraph/sentences about initial designs, design comps and approval process, handoff development
- Technical Overview includes platform, theme, key contributed modules, custom built modules, added features with change order forms.
- Overview of Projects is everything including Project Management
- Future Opportunities includes maintenance and hosting, phase 2 opportunities, other media opportunities

# Final Steps

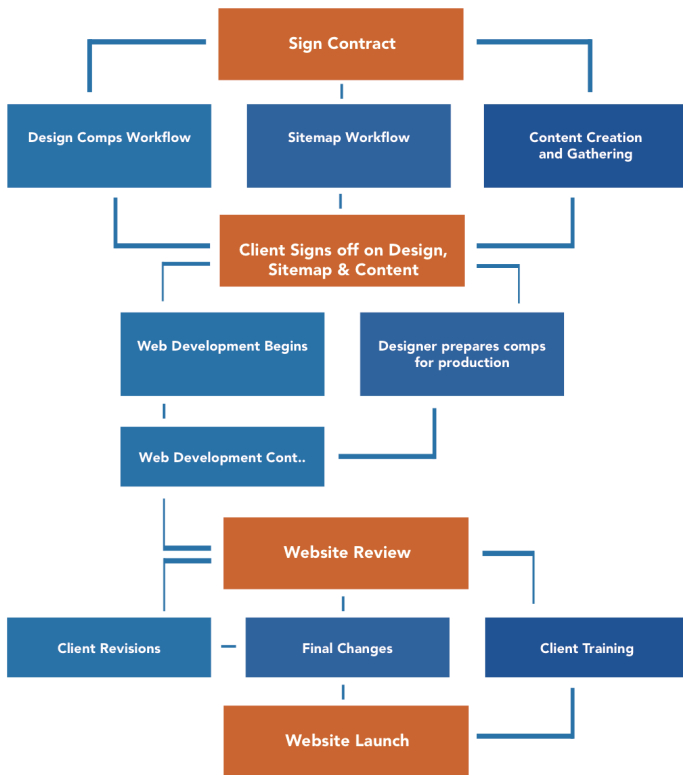


- Minimum – Send an email to client once a month following up unless there is ongoing work than continue regular calls
- Make sure you do a 6-month evolution if they are on a maintenance and hosting agreement.
- Upload your Case Study to [Drupal.org](https://drupal.org)
- Send case study link to your customer

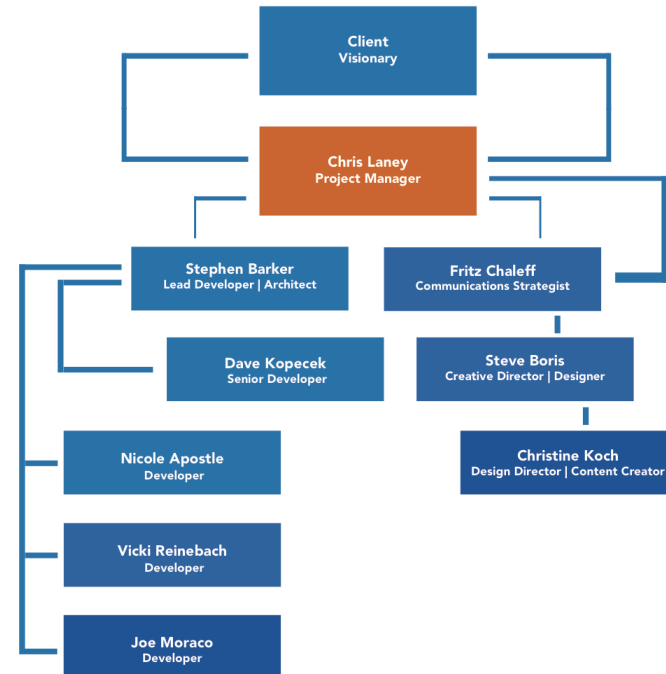
# Additional Documents



## Project Management Steps



## Project Management Personnel





# Additional Documents



## POST-PROJECT EVALUATION SURVEY

DIGITALFRONTIERSMEDIA

Please complete this brief survey to help us evaluate and improve our project management performance. If more space is needed for responses, please attached additional pages.

Project Title: \_\_\_\_\_

### Degree of Satisfaction

- |  | Low   | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | High |
|--|-------|---|---|---|---|---|---|---|---|---|----|------|
| 1. Completeness of Work Scope          |       | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |      |
| Comments                               | _____ |   |   |   |   |   |   |   |   |   |    |      |
|  | _____ |   |   |   |   |   |   |   |   |   |    |      |
| 2. Quality of Work                     |       | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |      |
| Comments                               | _____ |   |   |   |   |   |   |   |   |   |    |      |
|  | _____ |   |   |   |   |   |   |   |   |   |    |      |
| 3. Schedule Performance                |       | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |      |
| Comments                               | _____ |   |   |   |   |   |   |   |   |   |    |      |
|  | _____ |   |   |   |   |   |   |   |   |   |    |      |
| 4. Budget Performance                  |       | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |      |
| Comments                               | _____ |   |   |   |   |   |   |   |   |   |    |      |
|  | _____ |   |   |   |   |   |   |   |   |   |    |      |
| 5. Communications                      |       | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |      |
| Comments                               | _____ |   |   |   |   |   |   |   |   |   |    |      |
|  | _____ |   |   |   |   |   |   |   |   |   |    |      |
| 6. Overall Performance                 |       | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |      |
| Comments                               | _____ |   |   |   |   |   |   |   |   |   |    |      |
|  | _____ |   |   |   |   |   |   |   |   |   |    |      |
| 7. How likely are you to recommend us? |       | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |      |
| Comments                               | _____ |   |   |   |   |   |   |   |   |   |    |      |
|  | _____ |   |   |   |   |   |   |   |   |   |    |      |

Suggestions on how we can improve our performance on future projects:

Comments \_\_\_\_\_

NAME: \_\_\_\_\_ DATE: \_\_\_\_\_



## Change Order Form (Feature or Out-of-Scope Request)

Date: \_\_\_\_\_

Project Effected: \_\_\_\_\_

Request: \_\_\_\_\_

Cost: \_\_\_\_\_

Delivery Time: \_\_\_\_\_

Additional Notes:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Approved By:

\_\_\_\_\_  
Chris Laney, Digital Frontiers Media

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_



# Questions

Chris Laney

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