Planning a Web Development Project

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Cool cover illustration by Eunice Moyle
SESSION OUTLINE

1.0 The Project: Introduction

2.0 Before You Start: The Client

3.0 The Proposal: The Development Process

4.0 Estimating: Time and Resources
   4.1 The Budget: Estimating by Hours
   4.2 The Budget: Estimating by Task

5.0 Creative Brief: Defining Scope

6.0 Competitive Analysis: Informal Research

7.0 Forms & Worksheets: Blank Forms to Use

8.0 The Proposal: Detailed Overview
   8.1 Proposal Format: Informal Letter
   8.2 Proposal Format: Detailed Plan
   8.3 Expectations and Follow-Up
SETTING THE STAGE
Before actually starting a Web site, there are several steps which can be taken to ensure the success of your project. In this session, we will cover the key elements in determining size, scope, budget and scheduling for your project. We will also cover additional items such as conducting an informal competitive analysis, and writing a creative brief. Whether you are an independent designer wearing multiple hats, or an internal Webmaster overseeing a team of people, many of the processes outlined here can be implemented into your existing workflow.

INCLUDED IN THIS SESSION
Items which will be covered in this handout are as follows:

THE PROJECT
THE CLIENT
THE PROPOSAL
ESTIMATING
CREATIVE BRIEF
COMPETITIVE ANALYSIS
FORMS

1.0 THE PROJECT: Introduction

Setting the Stage: Determining Scope
You have a potential project that has just dropped into your lap. The client (or your boss) asks you the deadly question: “How much time is this going to take, and how much is it going to cost?” What is the first step you take in identifying the actual costs and timing associated with the project? How much information do you need up front in order to generate a realistic proposal? What other elements do you need to incorporate into the proposal to ensure you can say “yes” to the project without getting into over your head? This handout has been developed to help you make the right decisions and organize your existing information in a comprehensive manner allowing you to properly identify scope, budget and timing to “set the stage” before beginning an actual Web project.

How Much is Enough?
How much time do you put in before you actually are awarded the project? What additional components have you budgeted and scheduled for, including competitive analysis and usability testing? The answer is directly related to time and money. You have been given a task. What does your expertise and time allow in order for it to be successful? By taking preliminary action to properly define the project and set up proper expectations with the client, you will save yourself time and trouble in the end. The more experience you have in creating sites, the more predicting and troubleshooting you can do to save yourself unnecessary expense. The problem is, we don’t often take the time to properly define the scope of a project. You can use the time now, or later. It is up to you.
BEFORE YOU START: The Client

Send the Client Questionnaire

At the earliest opportunity, send the potential client your customized questionnaire (see “workflow handouts” in earlier session) to gather information and estimate the scope and details of the project. The individuals or companies who take the time to answer the questions in detail score higher/on the “good client bad client” scale. The client questionnaire and answers generated in this process are an important step in understanding the overall scope and direction the client wishes to take.

Screening Your Project and Client

Avoiding a bad situation is much easier if you do the legwork up front to make sure you are making good choices with the projects you take on. Identifying the scope and goals of the project will enable you to make a good decision and see if a project is a ‘fit’ for you and/or your team. One of the most important factors to consider with a new project is the person you will be working with to supply you direction, information, content and approvals. This can be an internal or external client. It is best to have one contact who is responsible for final sign-off and approval. This will help eliminate confusion and communication breakdown.

CLIENT QUESTIONNAIRE

Use the questionnaire supplied in the handout for “Web Design Workflow” to send to your client prior to starting the job. Modify questions to fit the specific needs of the project you are working on. Questions are organized into key categories, including:

- MESSAGE
- PERCEPTION
- ACTION
- TECHNOLOGY
- MARKETING
- ADMINISTRATIVE

You will get initial thoughts and feedback from the client regarding style and tone, competitive sites and audience.
THE GOOD CLIENT

Working with an understanding and responsive client helps to make the development process a positive one. Having realistic expectations and an understanding of the process is a bonus. A good client understands the overall picture and works with you as a team player to make the Web site a success.

GOOD CLIENT

A good client has some of the following attributes:

- Is goal oriented: focused on the big picture
- Answers questionnaire in clear and detailed manner
- Supplies an RFP, or clear outline of goals and scope
- Understands the Web environment and the development process
- Gives final sign-off and approval
- Is in agreement on deliverables, schedule and budget
- Is responsive to email and phone calls
- Has a “team” approach
- Gets you content on time
- Is part of the solution instead of the problem

THE BAD CLIENT

The bad client is something to watch out for. Not only will you put in unnecessary hours due to disorganization and lack of content, but you may not get paid either. Working with someone for the first time is always a challenge, but there are things to watch out for which might help you stay away from projects that are potential nightmares.

RED FLAG CLIENT

Not necessarily a nightmare client, but some things to watch out for:

- A get it up quick attitude, unrealistic schedule requests
- Doesn’t know what the content should be, but wants it to “look cool”
- Asks to create a demo site, “the real one will come later”
- He/she cannot give final approval or is not putting you in touch with the decision makers
- Doesn’t have time to fill out the questionnaire
- Small budget, swift deadline
- Non-responsive, cannot make decisions, does not email or call back in a timely manner
- Indecisive, changes mind frequently
- Wants to handle the creative to “save money”
ITEMS CONTAINED IN A STANDARD PROPOSAL

**Introduction Letter/Note:** A letter or an informal note separate from the proposal is a good way to set a friendly, informal tone and also to set up the expectations for the written material. This introduction is a chance to address the individual directly and relay excitement and interest in the project.

**Restate the Client’s Needs:** The first thing to address is a restatement of the project, as defined by the client (through email or conversation or RFP) and reinterpreted in your own words. This is necessary to ensure proper communication has taken place, and that the project has been properly defined.

**Project Overview:** This is the executive summary. Address the overall scope of the project. Include information about tasks to be performed (information architecture, interface design, competitive research, etc.) This is a general statement outlining the basic deliverables and goals of the project, as well as any additional considerations.

**Schedule/Methodology:** Addressing the schedule from a broad time frame and addressing the week-to-week methodology within that time frame allows you to address both timing and process at the same time. Show the deliverables as a weekly summary, staying away from specific dates. Be sure to state the desired launch date.

**Budget Detail:** Use a range of prices to determine overall budget for the project. Whether stated or not, most projects are based on time and materials and should be determined accordingly. Be sure also to list your ‘assumptions’ about the project, including details about back-end or programming functions. The more information you supply in the proposal stage, the more “fallback” room you will have questions at a later time.

**Sitemap Overview:** Sometimes a rough site plan is included to help understand the overall organization of the site and to get an idea of section and pages.

**Project Team and Bios:** Introduce the team (or individuals) who will be working on the project in a brief and professional manner. Avoid long, drawn out work history and stick to the items that most relate to the project at hand. Attach contact names and email addresses if appropriate.

**References/URL’s:** Submit a short list of relevant URL’s for review, choosing those that best relate to the project you are pitching. Include names and contact information for at least three references.

**THE PROPOSAL:** The Development Process

Oftentimes the first step to getting a project is creating a comprehensive proposal. Getting as much information from the client up front is helpful to creating a proposal that is accurate and reflects the true demands of the project. The more detailed the client is, the more accurate the proposal will be. The client should provide direction or an RFP to quote the site.

**WHAT IS AN RFP?**

An RFP is a Request For Proposal, which is a document prepared by the client showing their vision and scope of the project. This type of document can be anywhere from 2 to 20 pages, depending on the detail and complexity of the project, and the organizational skills of the client. Many times, the more detailed the RFP, the better and more realistic the response. If there is not an RFP, make sure to have the client fill out the questionnaire in detail and gather as much information as possible through meetings, phone calls...
ESTIMATING REALITY

Why do design firms have such a hard time with the bottom dollar and letting others know what they have charged? The answer is simple -- WE CHARGE WHAT WE CAN. Many factors support this statement. How much a person or company charges is based on many things, experience & expertise, availability and resources, overhead, and in the end, how much the client has to spend. Usually there is a range to work with, and determining the range can be made working within an estimated range of hours and resources.

BASE COST ON HOURS

There are many methods of estimating time, from individual hours or by task (creative strategy, site architecture, design, production, etc.) Either way you present it to the client, it is based on HOURS. Base the project on a number of days or weeks and qualify your time according to overhead costs, complexity and detail of project, expectations and documentation, and experience. This will give you a base on which to build a realistic estimate.

<table>
<thead>
<tr>
<th>PRE-PROJECT</th>
<th>Creative brief created. Outline site design goals. Concept developed and defined. Overall budget and schedule approved. Technical needs detailed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEEK 1</td>
<td>Site structure defined, navigation and page flow developed. Sitemap completed. Technical needs addressed and clarified. Content acquisition begins.</td>
</tr>
<tr>
<td>WEEK 2</td>
<td>User Interface (UI) Design begins. Design presented and look and feel is set. Content acquisition begins.</td>
</tr>
<tr>
<td>WEEK 3</td>
<td>HTML Protosite (non-design oriented) developed following approved page flow and UI design. Design is finalized.</td>
</tr>
<tr>
<td>WEEK 4</td>
<td>Art Production/GIF animation production begins using Protosite as outline and structure. Begin HTML production.</td>
</tr>
<tr>
<td>WEEK 5</td>
<td>Continue HTML production and necessary programming, incorporating content and graphics into final site.</td>
</tr>
<tr>
<td>WEEK 6</td>
<td>Beta version of site is “live” for client sign-off and internal testing and Quality Assurance (QA) begins. (Usability testing takes place.) Freeze content.</td>
</tr>
<tr>
<td>WEEK 7</td>
<td>Site moved to end server for cross-platform/browser testing and QA.</td>
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<tr>
<td>WEEK 8</td>
<td>Additional testing &amp; QA, necessary modifications. Final approval. LAUNCH</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>proj mgmt</th>
<th>art dir/design 20 hrs</th>
<th>copy-writer 40 hrs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>design/layout 40 hrs</td>
<td>art &amp; HTML prod 60 hrs</td>
</tr>
<tr>
<td></td>
<td>progr/javascr 10 hrs</td>
<td>QA 12 hrs</td>
</tr>
</tbody>
</table>

200 total hrs  60 total hrs  70 total hrs  52 total hrs
### THE BUDGET: Estimating by Hours

The above example is a standard worksheet outlining hourly rates for each team member. To estimate time, see the example on the facing page to get a sense of the amount of hours each component will carry within the project scope. Track time from weeks, to days, and then into hours. Allow for a 10% - 50% markup to allow for contingencies and overhead. In the end, provide your client a range of pricing based on your totals.

**Sample Budget Worksheet Based on Hours**

<table>
<thead>
<tr>
<th>Team Member</th>
<th>$ Rate</th>
<th>Est. Hours</th>
<th>Days</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROJECT MANAGER</td>
<td>$50</td>
<td>200</td>
<td>25</td>
<td>$10,000</td>
</tr>
<tr>
<td>ART DIRECTOR</td>
<td>$50</td>
<td>20</td>
<td>2.5</td>
<td>$1,000</td>
</tr>
<tr>
<td>DESIGNER</td>
<td>$40</td>
<td>40</td>
<td>5</td>
<td>$1,600</td>
</tr>
<tr>
<td>ART PRODUCTION</td>
<td>$35</td>
<td>20</td>
<td>2.5</td>
<td>$700</td>
</tr>
<tr>
<td>HTML PRODUCTION</td>
<td>$40</td>
<td>40</td>
<td>5</td>
<td>$1,600</td>
</tr>
<tr>
<td>PROGRAMMING</td>
<td>$60</td>
<td>10</td>
<td>1.25</td>
<td>$600</td>
</tr>
<tr>
<td>COPYWRITER</td>
<td>$35</td>
<td>40</td>
<td>5</td>
<td>$1,400</td>
</tr>
<tr>
<td>QA/PROOFING</td>
<td>$25</td>
<td>12</td>
<td>1.5</td>
<td>$300</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>X% overhead</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>50%</td>
<td>$26,000.00</td>
</tr>
</tbody>
</table>

The amount of hours shown above can also be broken down into daily or weekly rates. Example, one week of PM work @ $50 per hour = $2,000 per week for an 8-week project full time = $16,000.00

Multiply your total by a percentage to allow for contingencies and overhead costs. A 10% to 20% markup is standard for ‘padding’ and protection. A 50% to 100% markup is often applied to cover overhead such as rent, phones, and administrative tasks.

### 4.1

**Fixed Bid Pricing**

Many clients request a fixed bid. If you do submit a fixed price, it is the responsibility of the project manager to keep the project scope under control, and also to track hours to make sure the project is within the budgeted hours. Some shops bid on ‘time and materials’ which is based on overall hours, tracked and billed throughout the project.

**Tracking Time**

Keeping a weekly tally of the project time is crucial to maintaining budget and scope requirements. Any time which is not budgeted for is either eaten by the Web development company, or, if scoped and tracked properly, charged to the client as an AC (additional charge).

**Additional Charges**

If the client asks for an additional feature or section which is not within the original definition of the project, smile and confidently say “No problem, I’ll get back to you with a separate schedule and budget ASAP.” You’ll be surprised at how effective this approach is.
### TASK ORIENTED

Sometimes it is easier to break a project down by task rather than by individual time. This is another way to approach estimating by taking each task and determining how much time it will take. This might be an easier way to approach the project for an individual wearing multiple hats.

When the project is complex or contains several defined phases which need to be separately defined, this is a good way to define the scope of the project in a different manner.

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#### THE BUDGET: Estimating by Task

<table>
<thead>
<tr>
<th>Task</th>
<th>Est. Hours</th>
<th>$ Per Hr</th>
<th>Days</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Definition</td>
<td>40</td>
<td>$50</td>
<td>5</td>
<td>$2,000</td>
</tr>
<tr>
<td>Site Architecture</td>
<td>40</td>
<td>$50</td>
<td>5</td>
<td>$2,000</td>
</tr>
<tr>
<td>Information Design</td>
<td>40</td>
<td>$50</td>
<td>5</td>
<td>$2,000</td>
</tr>
<tr>
<td>GUI Design (graphic)</td>
<td>60</td>
<td>$50</td>
<td>7.5</td>
<td>$3,000</td>
</tr>
<tr>
<td>Production</td>
<td>80</td>
<td>$40</td>
<td>10</td>
<td>$3,200</td>
</tr>
<tr>
<td>Programming</td>
<td>10</td>
<td>$60</td>
<td>1.25</td>
<td>$ 600</td>
</tr>
<tr>
<td>Usability Testing</td>
<td>30</td>
<td>$50</td>
<td>5</td>
<td>$1,500</td>
</tr>
<tr>
<td>Competitive Analysis</td>
<td>20</td>
<td>$50</td>
<td>2.5</td>
<td>$ 1,000</td>
</tr>
<tr>
<td>Copywriting</td>
<td>60</td>
<td>$50</td>
<td>7.5</td>
<td>$ 3,000</td>
</tr>
<tr>
<td>QA/Testing</td>
<td>12</td>
<td>$40</td>
<td>1.5</td>
<td>$  480</td>
</tr>
</tbody>
</table>

**Cost per hour can be determined by RATES which are set in advance. Most tasks can be classified in the following categories.**

**SAMPLE RATES:**
- Admin/Management = $50 per hour
- Design/Creative = $50 per hour
- Production = $40 per hour
- Programming = $60 per hour

Sample Budget Worksheet Based on Task

The project is broken into appropriate tasks and associated times are given to each task in terms of days and weeks. Rates are applied for the type of task designated; admin, creative, production, programming -- and the totals are created in the same manner as before. If this type of estimating helps the client understand the total cost, use this method.
THE CREATIVE BRIEF

CREATIVE BRIEF

The creative brief is a document which is created by the development team outlining the visual and conceptual goals. Use the client questionnaire to help determine adjectives which describe the site in tone and style.

The brief can be a simple one page document (shown at left) or can be a multiple page document outlining specific marketing goals and strategy along with the standard visual direction.

The purpose of this document is to state in verbal terms the way the audience/user will perceive the site. Additional information (target audience, communication strategy, tone, etc.) helps the visual designer and information architect set the proper tone for the site.
INFORMAL ANALYSIS

Strategic planning is an important part in the Web development process. A simple way to approach site strategy is to perform an informal competitive analysis to identify the key attributes of the type of site you are working on. You can easily gather information to establish the objectives of your client’s Web presence, your approach and steps to insure a quality product.

TYPES OF SITES

First off, identify the type of site you will be working on. Gather information from the client regarding their main online competition, or search on your own. Some examples:

- Portal Sites
- E-Commerce Sites
- Entertainment Sites
- Educational Sites
- Community Sites
- Brochure Sites

REVIEW OBJECTIVES

Evaluate features and offerings. Compare characteristics of competition. Determine your approach in comparison to your competition, taking into consideration the overall site goals and budget allocation.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Competition A Brochure-site</th>
<th>Competition B Interactive</th>
<th>Competition C Dynamic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>samplea.com</td>
<td></td>
<td>samplec.com</td>
</tr>
<tr>
<td>Site Classification</td>
<td>brochure</td>
<td>destination</td>
<td>portal</td>
</tr>
<tr>
<td>Search Function</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Contests/Games</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>E-Commerce</td>
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<td>x</td>
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</tr>
<tr>
<td>Ad Banners</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Chat</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Press Releases</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Company Information</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Video/Music Clips</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Web Links</td>
<td></td>
<td>x</td>
<td>x</td>
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<tr>
<td>Contact Information</td>
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<tr>
<td>Press Releases</td>
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<td>Client List</td>
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<td>Feedback</td>
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<td>x</td>
<td>x</td>
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<tr>
<td>Message Boards</td>
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<td>x</td>
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<tr>
<td>Flash Animation</td>
<td></td>
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<td>x</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Total # of features per site</td>
<td>11</td>
<td>14</td>
<td>17</td>
</tr>
<tr>
<td>Rank Effectiveness:</td>
<td>*</td>
<td>**</td>
<td>****</td>
</tr>
</tbody>
</table>

Create a feature list by looking at the type of site you are creating and making a list of overall features from as many similar sites as possible. Rank the importance of each feature, and determine how it applies to your overall site goals. Use this final list to compare your main competition which will help determine which features are important to include in your site.
**ESTABLISH OBJECTIVE**

After conducting your competitive research, take into consideration the company’s overall goals, time and financial constraints, and a logical starting point for your project.

Sample recommendation:

“EntertainXYZ will establish a Web presence as a brochure site with limited interactivity.”

**ESTABLISH BENEFITS**

“This approach enables EntertainXYZ to establish their online presence immediately, and to develop a phased approach to initial site structure to allow for growth and content/functionality additions.”

**ESTABLISH SHORT TERM GOALS AND OBJECTIVES**

Create a list of features you would like to include as a short term or immediate part of the site. Determine costs and scope issues.

**ESTABLISH LONG TERM GOALS AND OBJECTIVES**

Create a wish list of features to include on the site, which can be added in a later phase of production, with a separate budget and schedule.
# 7.0 FORMS & WORKSHEETS

## NOTES

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<table>
<thead>
<tr>
<th></th>
<th>X% overhead</th>
<th>TOTAL</th>
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<tbody>
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</table>

Project:

Date:

Name:
<table>
<thead>
<tr>
<th>Feature</th>
<th>Notes</th>
<th>Notes</th>
<th>Notes</th>
<th>Notes</th>
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<th>Notes</th>
<th>Notes</th>
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<th>Notes</th>
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<tbody>
<tr>
<td>Company URL</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Site Classification</td>
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<tr>
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<tr>
<td>Rank Effectiveness:</td>
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</table>
ENTERTAIN XYZ

For the purposes of this session, we will use a made-up company called “Entertain XYZ” as an example of how to create a proposal and properly plan for a Web site.

THE INFORMAL LETTER PROPOSAL FORMAT

The proposal information can be submitted in a letter format, shown to the right. This example is informal, friendly and outlines the scope, budget and timing of the project in a brief and succinct manner. It is a good method for projects which need a response but do not need a lot of documentation in order to proceed.

ITEMS TO INCLUDE

Make sure you outline the details of the project, including:

• Project Overview
• Budget & Payment
• Project Schedule
• Details and Assumptions
• Team Leaders/Bios
• References

This proposal shows a fixed bid format. This is a fee for the entire project (broken down into detail in the proposal following) which is based on hours. In this case, ranges were not shown, and it is expected that the producer will keep the project in scope and within this budget range.
PROPOSAL FORMAT: Informal Letter

DETAILS & ASSUMPTIONS

Project details and assumptions assure you and the client are on the same page. Feel free to detail as much information as you can in this section as it will protect you once the project has begun.

BIOS/REFERENCES

Briefly give a history and background of key team members and your company. List current URL’s or other projects and clients as it relates to the project. Include references and contact information.

References are not always necessary in an informal proposal, but it is a nice touch to ensure credibility, especially with known companies or previous clients. You can also list relevant URL’s.
DETAILED PROPOSAL

A more conventional format for proposals is a formal proposal outlining the project in a detailed manner. This type of proposal is used for projects both large and small, but usually ones which require more information and formality in order to properly understand the budget and scope.

INTRODUCTORY LETTER

As mentioned earlier, the introductory letter is a good way to add a casual, friendly tone to a rather stuffy proposal. It also allows you to give a brief overview of the contents of the proposal, to allow for faster information intake.

TIMING AND COST

Lay out the payment expectations and overall fee structure in the introduction. Being straightforward and direct about finances will only ensure understanding and prompt payment. It is a standard request to begin work after receiving the first payment (although getting the actual check is another story.)

It is good to state your compensation expectations up front. If you are working for a larger organization, getting a check turned around quickly may not be possible, but keep the client to a 30/30/40 payment schedule or a 50/50 payment schedule. Don’t be afraid to talk about money in a straightforward manner.
PROJECT OVERVIEW

The project overview is a restatement of the client’s expectations for the project, to allow for apples to apples translation of the goals of the site into a comprehensive statement. This can be a short paragraph or a detailed breakdown of the project.

BREAK IT DOWN

Sometimes the project will be too complex to properly estimate without additional information. Break the project into phases and bid for the elements which you are able to put scope and budget towards. Keep in mind the client’s expectations in regard to budget and timing and let the client know what can be effectively accomplished within those specifications.

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PROPOSAL FORMAT: Detailed Plan

Details, such as items 1-4 shown above, are not necessary in all proposals. In this case, they were used as examples of where costs may be affected, as budget was a major concern to the client.
ESTIMATED BUDGET

Budgeting and estimating is one of the most difficult things to predict. Budgeting is generally based on time spent on the project. Sometimes a range is given, other times a fixed amount. Accurately predicting the amount of hours it will take to complete a project takes an experienced eye.

TYPES OF PRICING

If a fixed price is given, as shown in this sample, it is important to outline any contingencies for possible "scope creep" which will affect the budget. Be clear in defining each stage of production and all deliverables. In the end, any AC's (additional charges) added to the project need to be clearly defined and not come as a surprise. If the fixed price is the maximum allocation for the project, it is the responsibility of the project manager to keep on top of hours to ensure the project is staying within scope.

Often, time and materials billing is used for production-heavy projects. It is common practice to estimate projected hours, then track hours carefully and update the client weekly.

ALLOW AT LEAST 10% PADDING

Always allow at least a 10% to 20% contingency within your existing budget for additional scope changes and miscalculation. Leaving a bit of room for the unexpected allows you to make some concessions for client changes.
SCHEDULE OVERVIEW/METHODOLOGY

In this example, the schedule overview is a great way to introduce your methodology approach to Web development. Outlining the deliverables in terms of weeks helps the client see the tasks required to make their site a reality. Stay away from actual dates attached to deliveries, and only list the assumed launch date and weeks required for production.

DETAILS/ASSUMPTIONS

Providing a list of details and assumptions in conjunction with a budget estimate or schedule is an important part of setting limitations to the project. It outlines your understanding in a bullet point fashion, allowing for a detailed explanation for content delivery expectations, browser compliance, and more.

Clearly outline all assumptions about the project, including content delivery and browser compliance. The more detail you add to this section, the more protection you will have at a later time when budget becomes an issue.
PROJECT TEAM

Listing the team members or individuals who will be working on the site is an excellent chance to give solid references and background. An company overview can also be inserted instead of individual bios.

REFERENCES

Providing a list of references is standard in today’s industry. List at least three individuals, along with names, titles, company and contact information. Often, it is good to let your references know they may be contacted so they can be prepared for the call or email.

A contact list or contact information is important to have in the proposal. Re list the key team members here for easy reference by the client.
Follow Up With the Client

Calling or sending an email to confirm the receipt of a proposal is standard policy. Follow up in a gracious manner, and make sure to get a date by which the client promises to make their final decision. Ask if there are any questions they have regarding the proposal. Once you call, do not call again or bother the client until after the date of the final decision. If for some reason you do not get the project, you are entitled to a call or email from the client letting you know as quickly as possible, and take the opportunity to find out what the deciding factors were (budget, availability, expertise, existing relationship, etc.)

Track, Document and Sign

It’s been said again and again, but here it is one more time: HAVE THE CLIENT SIGN OFF ON EVERYTHING. Whenever creating an agreement or document of importance to the project, create a line at the bottom for a signature and a date. You’ll be surprised how much difference it makes when someone becomes responsible for the material they are approving. The documentation (proposals, budgeting, scheduling, etc.) will provide a clear frame of reference from the beginning of the project.

Letter of Engagement

Before beginning any work, create a work agreement for sign off. This should be a one page document which gives the project overview, details and assumptions, overall budget and payment agreement, and deliverables. In short, this is a condensed version of the proposal, with a line for a signature and date at the bottom. There are more formal contracts which can be used, and getting proper legal paperwork in place is always recommended.

HAVE A CONTRACT READY

While not all individuals or shops have legal paperwork in place, it is a good idea to have the client sign off on the final proposal and/or have a separate agreement/contract stating the basic details of the proposal including final estimated price and payment plan. This type of document, while not a legal paper, will help protect you in case of dispute. It is sometimes referred to as a “memorandum of engagement.”

INVOICE IN A TIMELY MANNER THROUGHOUT THE PROJECT

Just as you would expect the client to pay you on time, it is important to bill on time and set up any additional charges in advance of each payment cycle. It is standard to request a partial (30% or 50%) payment up front to begin a project, however it is rare, especially in larger companies that this happens.