



Project Workflow Proposal for SiteXYZ

This document will describe a potential process for implementing Web development projects at SiteXYZ. This process is designed for ongoing content creation projects, including tools, articles, channels, and other standard types of Web content. The process should be flexible enough, especially the actual development process, to accommodate special development projects, for example marketing initiatives, co-brand deals, bridge sites, and other projects that require development but fall outside the regular content creation definition.

Some of the goals of instituting a repeatable development process are

- Keep the focus of any project consumer-centric and concentrate on providing the best possible experience for the end user.
- Ensure consistent quality for the end-user.
- Provide project sponsors and project team members with a consistent process to follow with known, documented milestones and checkpoints to ensure project success.

The Idea Stage

The majority of ideas for site development will be coming from the production and editorial teams. This is not to say that good ideas cannot come from other people or departments, but the producers and editors are charged with providing compelling content for the site and this is part of their core job function. This process is designed with this assumption in mind.

1. **The Creative Meeting.** Similar to print magazine workflow, a weekly creative meeting should be held to discuss and refine content ideas. The production and editorial teams will present ideas that are either already shaped into Web applications or thematic in nature and need to be shaped into a format suitable for the Web. The goal of the meeting is to identify the best ideas and give them form. The main deliverables of the meeting would be an ongoing list of potential development ideas. This list would act as an idea archive where ideas can reside until they have been given priority or are deemed ready to be moved along in the production process. The other deliverable from this meeting would be Creative Briefs for ideas that are ready to be moved to the next step in the development process.
 - 1.1. **Attendees.** Representatives from the following groups should attend this meeting: production, editorial, business development, marketing, tech, project management.
 - 1.2. **Agenda.** A representative from each group will come to the meeting with a list of her group's top two or three ideas for content creation. These ideas will have been prioritized and discussed in the editorial group in preparation for the meeting. She will present the ideas to the group and give a brief explanation of each. The meeting facilitator will record the ideas on a whiteboard. The group will briefly discuss the merits of each idea from all angles, business, creative, and technical. The goal of this discussion is to single out an idea that will be further discussed from a feasibility perspective.

This initial phase of the meeting could take up to an hour, so it may be more realistic to alternate the focus of the meeting on a weekly basis and hear from only a few groups per week. This should be discussed at the first meeting.

Once an idea has been identified as a potential development project the group would discuss its feasibility, keeping in mind the ultimate goal of good user experience and business objectives. The group would brainstorm ways to bring the idea to life, streamline the user experience, the idea business case, market the idea, and implement the idea. The moderator would record the suggestions on the whiteboard. Suggestions could be singled out for discussion.

Once the discussion ended, the moderator would record the ideas presented in an idea archive and record the suggestions discussed for shaping the chosen idea.

The project manager would be responsible for collaborating with the original idea sponsor on writing a Creative Brief which would include the suggestions discussed at the meeting.

- 1.3. **Ongoing.** Each week this process is repeated at the meeting. If there are no new ideas, the group can discuss ideas from the archive not previously discussed.

Ideas that do not originate from an editor or producer will be culled from the idea list which is maintained by the production group.

- 1.4. **Benefits.** The benefits of conducting this meeting would be the collection of ideas in an organized, monitored way, allowing the best ideas to rise to the top and be given shape and readied for presentation to management. This meeting would also provide a weekly discussion forum allowing all the various substance groups the ability to gel into a more solid team.

2. **Management approval.** Each week the project manager would be responsible for handing off the Creative Brief that came from the creative meeting to the management team.

The management team would discuss the brief at their weekly meeting and either approve or disapprove the idea for development or ask for more clarification.

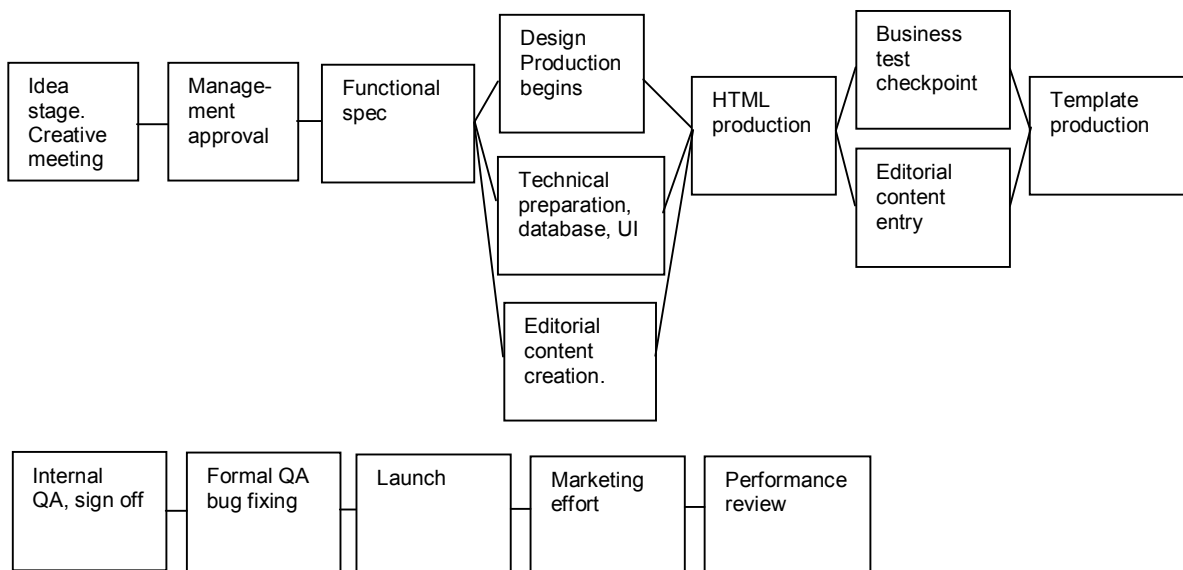
- 2.1. **Production queue.** Approved ideas would be prioritized by management against development projects currently in the production queue. A process for establishing priority and resource allocation needs to be established in order to allow production projects to be weighed against each other. The production queue needs to be maintained by someone as well; either a manager or another resource.

The Development Phase

1. **The production team.** The production team would be considered the project sponsors or stake holders. Content development projects that result from the creative meeting would be jointly managed by a member of the editorial and production staffs. This pairing could be decided at the creative meeting or in a less formal setting. The production team would be responsible for managing the content creation, and the design process and ensuring that the business objectives of the project are met and clearly defined in the project specification. This team would work closely with the project manager on the project specification.
2. **The project manager.** The project manager would be responsible for the project specification, project timeline, communication, technical management and all other standard

project management responsibilities, including managing milestones, QA, and all deliverables. The project manager would maintain the project development portfolio of ongoing and upcoming development projects.

3. **Business test checkpoint.** For certain projects, usually projects of a larger nature that would require significant resource devotion, a business test checkpoint would be inserted into the development timeline. The checkpoint would allow the business/marketing group the opportunity to review the project and possibly do market testing before the project has gone through the entire development process. The checkpoint would occur after the project has been mocked up in HTML so all pages will be viewable in a Web browser but before the templates have been built (some database work might have been completed by this time). By holding the checkpoint at this point in the process, the most expensive and involved development waits until business signs off on the continuation of the project. Also, any modifications to the project spec, scope, or plan due to business considerations could be incorporated more easily at this point in the development.
4. **Workflow.** The following illustration outlines the development process from idea to delivery. It also shows dependencies and parallel efforts. The development process outlined in this illustration is for standard content creation projects; however this process would work for other types of development projects as well.



- Idea stage. no dependencies.
- Management approval. no dependencies.
- Functional spec. Dependent on creative brief from creative meeting and management approval.
- Design production. Dependent on at least a creative brief is a functional spec is not yet ready.
- Technical preparation. Can happen parallel to design production. Technical preparation would be dependent on a functional spec as well. This step could range from a tech kick off meeting to the creation of database tables and a UI.
- HTML production. Dependent on finished design and design specs.

- Business test. Dependent on the scope of the project requiring this step and if so the test would require the pages mocked up in HTML.
- Editorial content entry. Dependent on the creation of a UI. This step usually happens in parallel to the actual page templates being created.
- Templates. Dependent on the HTML being completed and signed off on.
- Internal QA, Sign-off. Once the application or site is completed the project team as well as management would be required to test the project and sign-off as complete before going to formal QA.
- Formal QA. Dependent on project team and management sign off. Bug fixing would occur parallel to testing.
- Launch. Dependent on all bugs being fixed and final sign off by project team.
- Marketing effort. Dependent on having a product to market.
- Performance Review. No dependencies, however, we should institute regular reviews of all substance applications to test for technical as well as business performance.