

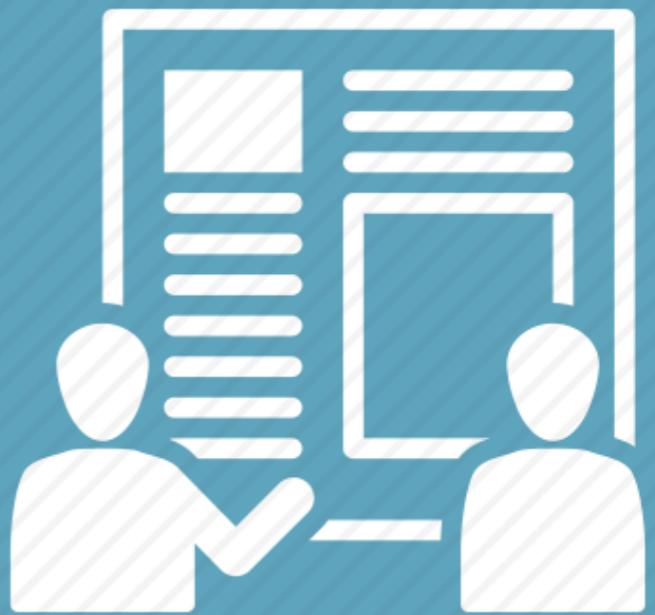
# Drupal Website Redesign

## Are you planning to succeed or succeeding to fail?

### It all starts with your RFP.

Friday, July 24th  
**Drupal GovCon 2015**

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# Available tools

- Request for Proposal (RFP)
- Request for Information (RFI)

# Your experience with RFPs?



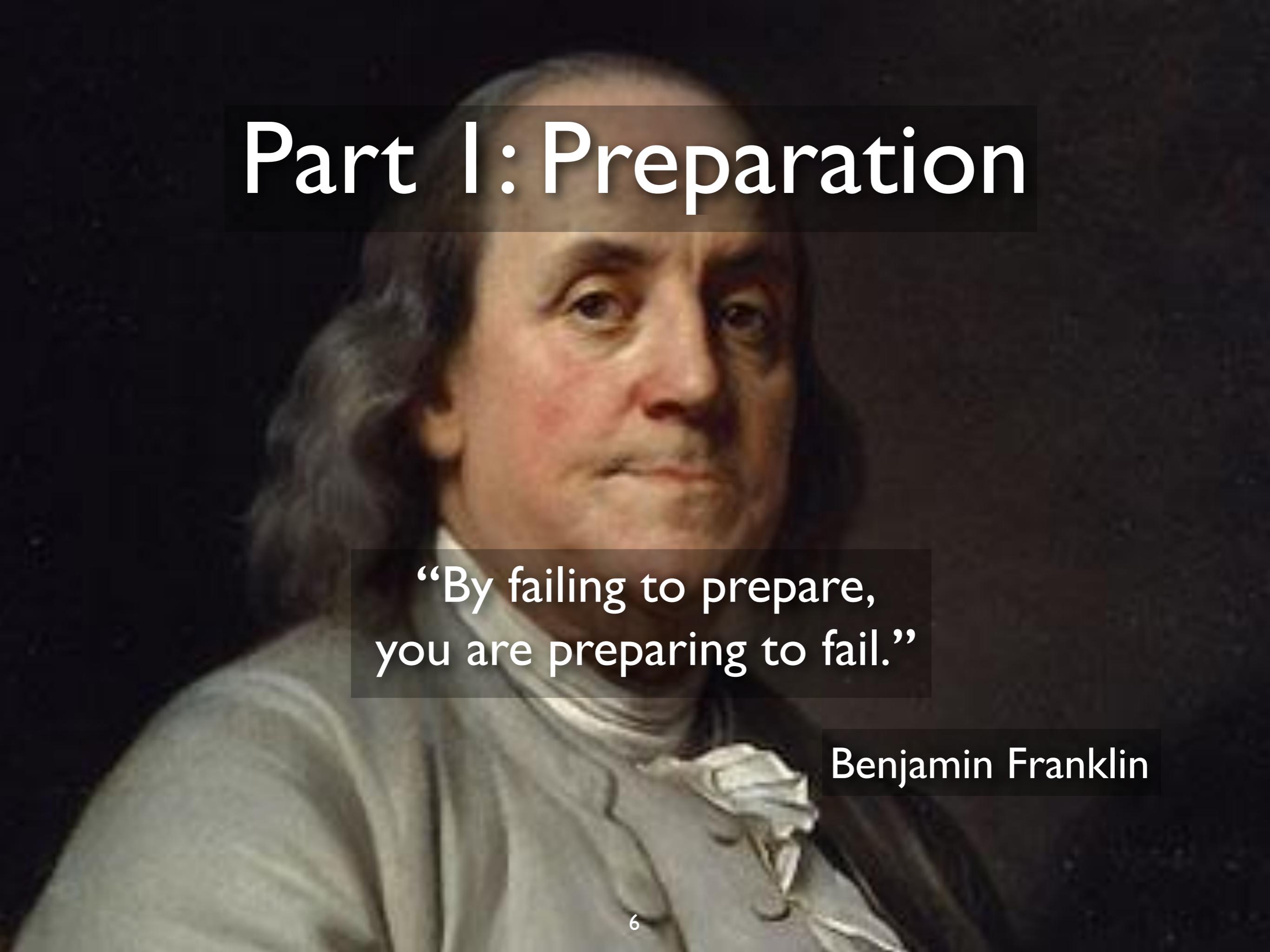
# Your experience with RFPs?

- Ready to do first?
- Have done one?
- Have done many?

# Overview

- Part I: Preparation
- Part 2: Resource allocation
- Part 3: RFP elements

# Part I: Preparation

A portrait painting of Benjamin Franklin, an American polymath and Founding Father. He is shown from the chest up, wearing a dark green velvet jacket over a white cravat and a blue waistcoat. His right hand is resting on his chin in a thoughtful pose. The background is a soft-focus interior.

“By failing to prepare,  
you are preparing to fail.”

Benjamin Franklin

# Planning for success

- Create a short list
- Know your audience
- Identify goals
- Define success
- Define budget range
- Determine timeframe



Create a short list

# How to shorten your list

- Do you want “order takers” or “partners”
- Get referrals
- Meet, in person if possible
- Ask & listen
- Identify priorities
- Consider an RFI

A wide-angle photograph of a public outdoor concert or event. In the foreground, a massive crowd of people is seated in rows of blue and green folding chairs, facing a stage area. The stage is sheltered by a large, intricate canopy made of many curved metal beams and panels. The background shows a city skyline with several skyscrapers. The overall atmosphere is casual and social.

# Know your audience

# What does your audience want?

- Internet/tech savvy?
- Demographics
- What do your users want from you?
- Why choose to visit your website?
- What do you want from them?

A photograph of a man in traditional archery attire, including a white robe with a horse emblem and a black belt, pulling back a bowstring. He is looking intently at his target. In the background, several other people are standing with bows, some wearing sunglasses. The sky is clear and blue.

Identify goals:  
strategy vs tactics

# How to identify goals

- What are your organizational goals?
- What website goals support your organizational goals?
- SMART goals (Specific, Measurable, Attainable, Relevant, Time-bound)
- Strategy vs. tactics
- Remember ROI

# Tactics

- Focus on user interaction
- Measurable
- Should follow from goals
- Remember ROI
- Don't be trendy



Define success

# Imagine the end result

- Be specific
- Think in terms of supporting “bottom line”
- How will you measure success?
- Minimal viable product, iterative releases

# Possible metrics

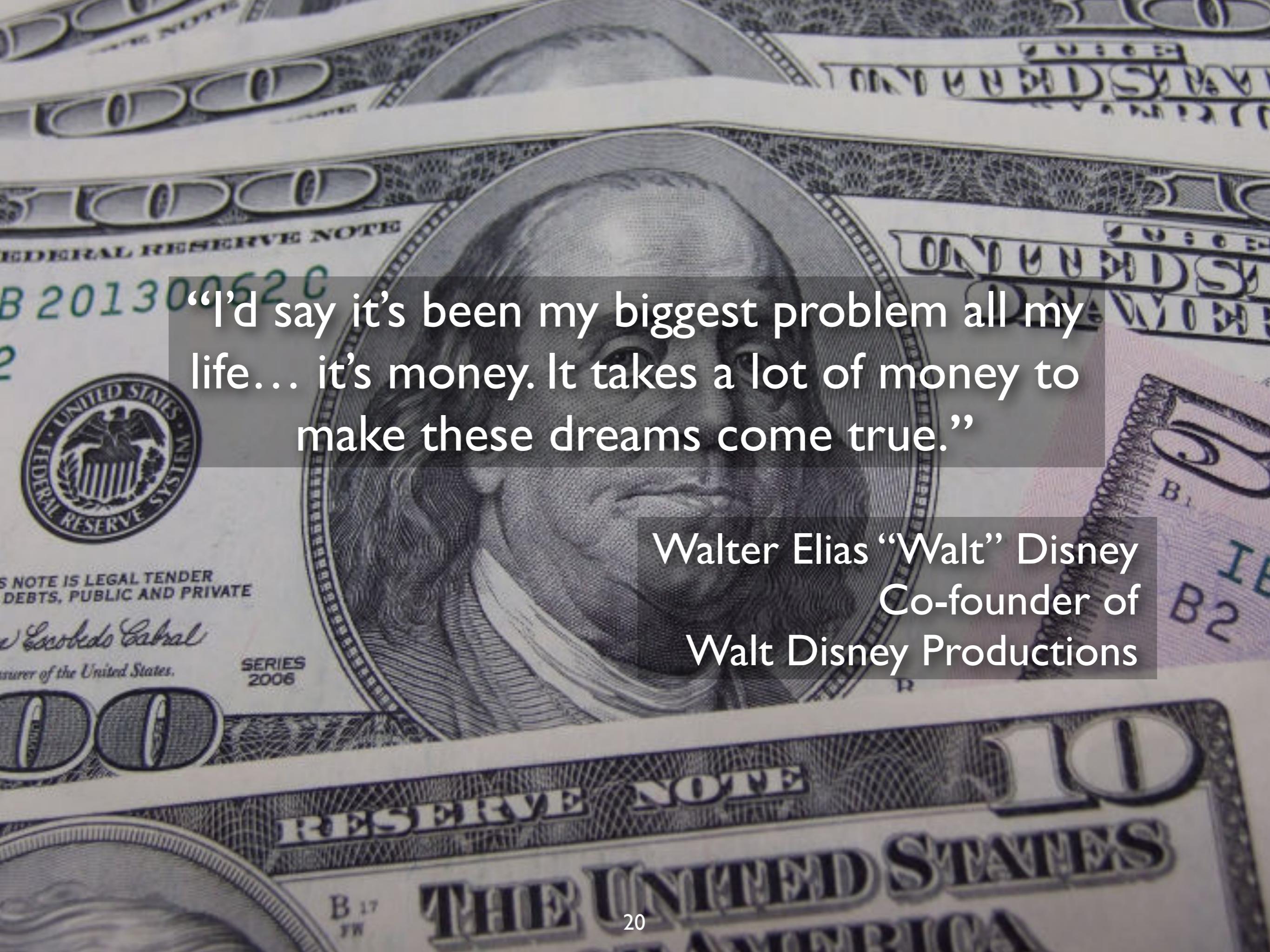
- Page views & visits
- Lead capture
- Online orders
- Sharing

# Tips: Preparation

- Clearly define goals
- Define metrics for success
- Don't lose sight of users' needs
- Plan for user feedback to influence later development phases

# Define budget range





“I’d say it’s been my biggest problem all my life... it’s money. It takes a lot of money to make these dreams come true.”

Walter Elias “Walt” Disney  
Co-founder of  
Walt Disney Productions

# Budget Considerations:

- Do you have an allocated budget?
- Think in terms of total cost of ownership
- If not paying cash, opportunity costs
- Flexibility of budget/schedule/scope?
- How you measure success

# Budget affects:

- Technological approach
- Level of customization
- Level of integration
- Ability to plan for future expansion

# Tips: Budgets

- Projects always cost more than expected — plan around Minimum Viable Product needs.
- For context, indicated who created your current website, as well as the development cost, and annual maintenance.



# Schedule

A black and white photograph of Henry Kissinger. He is seated in a patterned armchair, wearing a dark suit, a white shirt, and a dark tie. He has dark hair and is wearing glasses. He is smiling and holding a telephone receiver to his ear with his right hand. A small brooch is visible on his left lapel.

“There cannot be a crisis  
next week. My schedule  
is already full.”

Heinz Alfred “Henry” Kissinger  
US Secretary of State &  
Recipient of Noble Peace Prize

# Plan time for:

- Deployment
- Design, Development, QA
- Planning content/data migration
- Selection process
- Submission process
- Creating your short list

# Tips: Schedules

- Allow enough time to review and compare your short list people
- If you think you have set aside enough time, you probably haven't
- Projects often take 2x3 times longer than you think they should

# RFP Fails: Schedule

“The website project is critical for the success of our new product launch, which will be released in five weeks. We propose the following schedule:

Time for firms to draft proposals (1 week)  
Time to select firm (2 weeks)  
Time to design and develop website (???)  
Time to review beta website (2 weeks)”

# Part 2: Resource Allocation

# Your choices:

- You
- Staff members
- Volunteers/interns
- Freelance/individuals
- Agencies/firms



“Plans are only good intentions unless they immediately degenerate into hard work.”

Peter Drucker  
Management Consultant

# You?

## Pros

- No additional cost
- Readily available

## Cons

- Opportunity cost
- Do you have the necessary skills?

# Staff?

## Pros

- No additional cost
- Readily available

## Cons

- Opportunity cost
- Less scalable than freelance or agency

# Volunteers and interns?

## Pros

- Free or cheap
- Augment internal capabilities

## Cons

- Less stable than freelance or agency
- Less scalable than freelance or agency

# Freelance and individuals?

## Pros

- Less expensive than agency
- Augment internal capabilities

## Cons

- Less stable than agency or firm
- Less scalable than agency or firm

# Agencies and firms?

## Pros

- Stability
- Technical capabilities
- Scalability

## Cons

- Most expensive



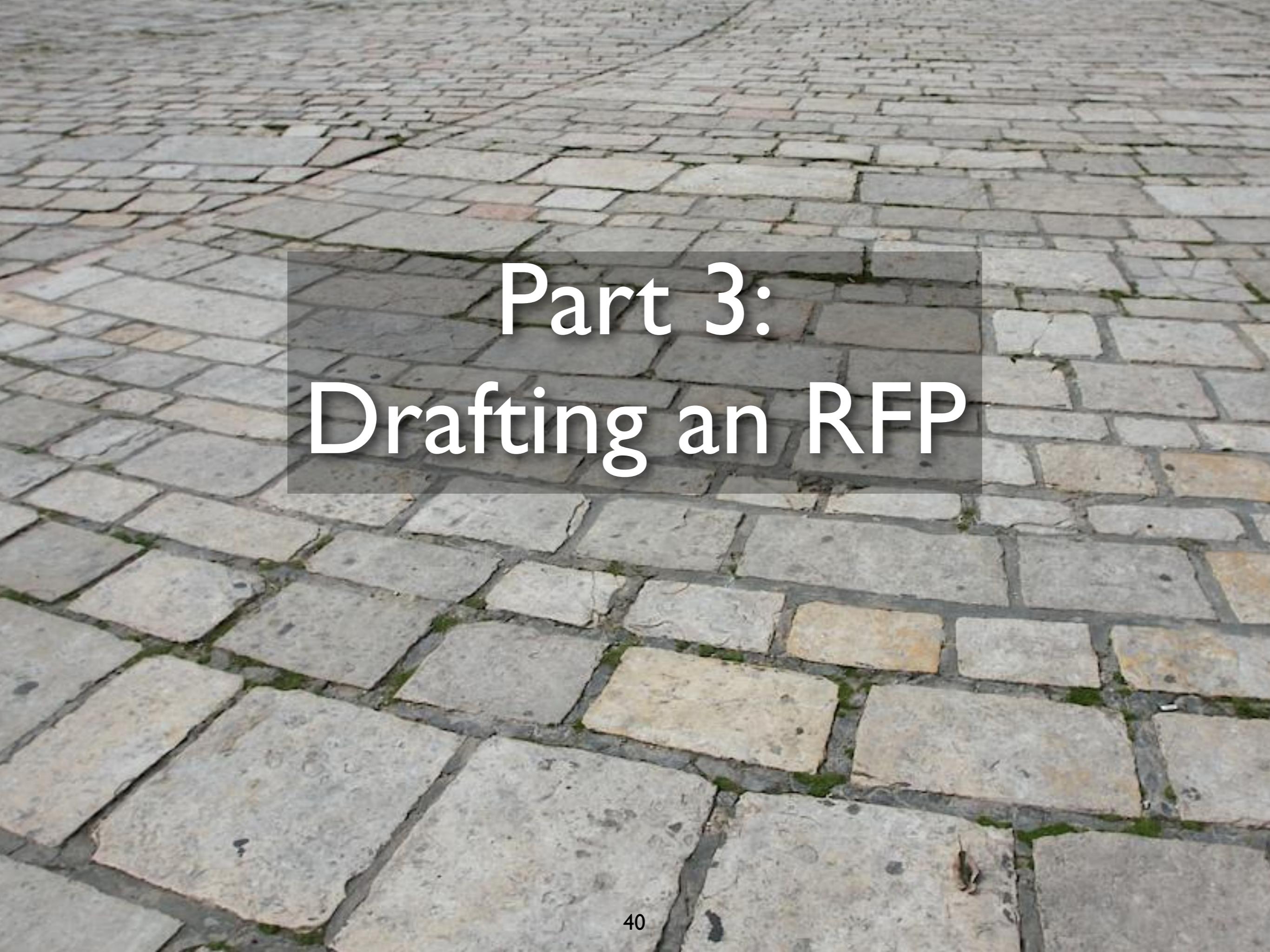
# Who runs the project?

# Project management

- Improves efficiency
- Lowers costs
- Reduces chance of failure
- Improves chance of success

# Tips: Management

- More decision makers lead to longer and more expensive projects!
- Provide single points of contact for project production workers.



# Part 3: Drafting an RFP

# RFP Process

- Writing an RFP
- Selecting firms to approach
- Comparing vendors



“If you think it’s expensive to hire a professional to do the job, wait until you hire an amateur.””

Paul Neal “Red” Adair  
blowout/oil firefighting pioneer

A photograph of a spice vendor's stall. In the foreground, there are several white plastic containers filled with different types of spices, each with a small green price tag and a wooden spoon. In the background, there are many larger glass jars with red lids, also containing spices. A man in a striped shirt and apron is standing behind the counter.

# Vendor information

Without real information, responses are just a guess.

# Vendors need to know

- Goals and Metrics for Success
- Functionality
- Constraints
- Schedule
- Budget
- Decision making criteria

# Goals and Metrics for Success

- What is your organization trying to achieve?
- What are the obstacles?
- How can technology overcome the obstacles?
- How will you measure success?



# Functionality

- Specific functionality
- Public vs. private content
- Third party integration
- Identify Minimum Viable Product (MVP)



# Constraints

- Technology requirements
- Hosting requirements
- Security requirements
- Organizational requirements



# Schedule

- Timeline for selection process
- Desired start date
- Desired launch date



# Budget

- Without a target budget, firms will guess
- What is minimum feature set for allocated budget?
- If you don't know your budget, you aren't ready for an RFP, go for an RFI instead



# Selection criteria

- Price?
- Schedule?
- Technical experience?
- Samples of similar work?
- Company infrastructure?
- Geographic location of vendor?



# RFP Fails: Budgets

“Pricing must be submitted on a ‘not-to-exceed’ basis. If there is a ‘residual’ amount at the end of the project, CLIENT will retain the difference by not spending the funds. In contrast, if the cost ceiling is exceeded, the vendor is to finish the work at no additional compensation.”

# RFP Fails: Requirements

“Proposals must be submitted on a fixed price, fixed schedule basis, based on the project specification. The specification is currently incomplete.

The finished specification will be provided to the winning vendor on the project start date.”

# RFP Fails: Requirements

**DesignHammer:** Is there any critical information necessary for the success of the project that was not included in the RFP?

**Prospect:** Yes

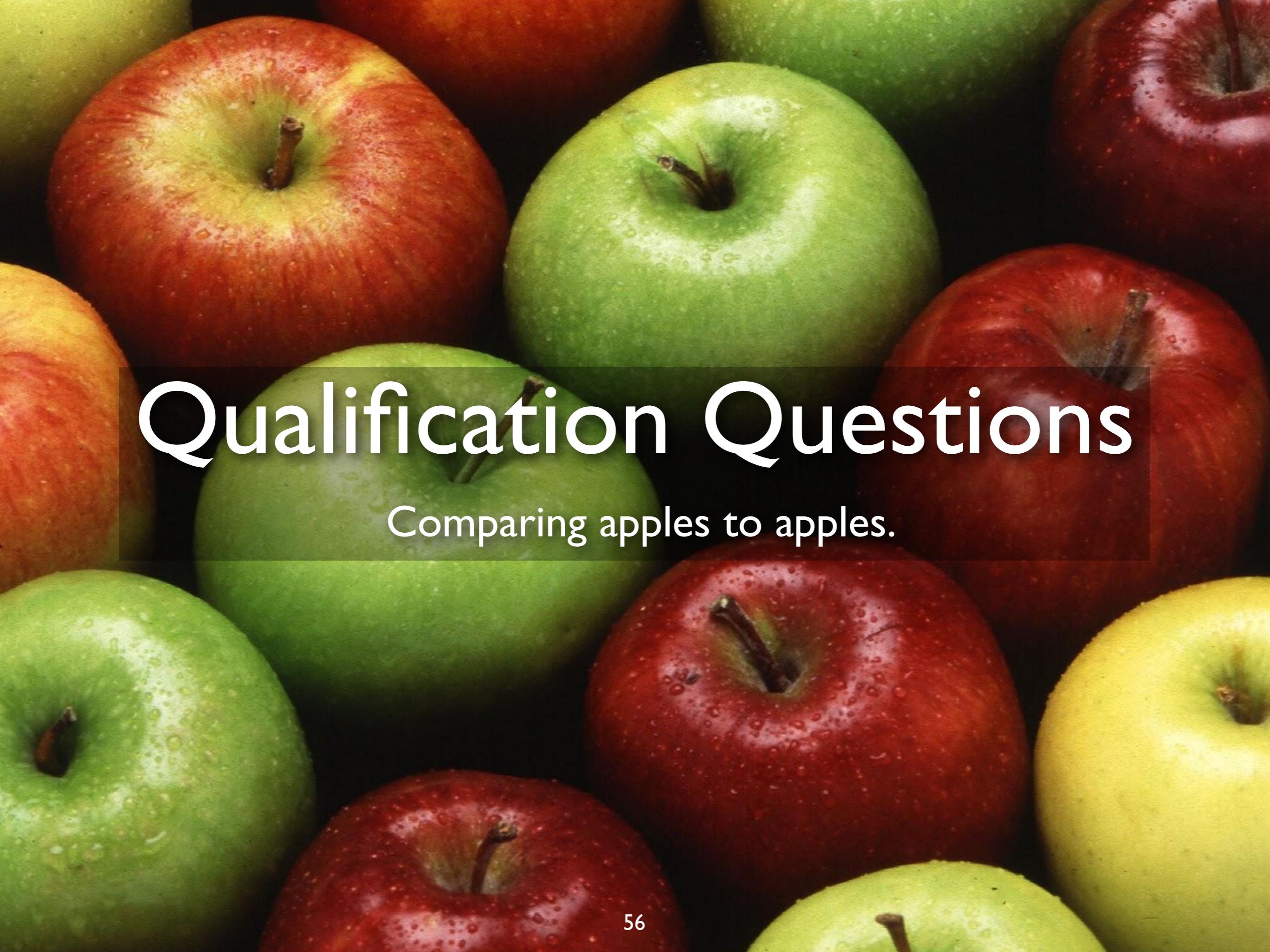
# RFP Fails: Requirements

**DesignHammer:** Is the 10,000 record figure for the proposed content migration provided in the RFP accurate?

**Prospect:** No, we don't actually have any idea how many records we need to migrate; we just took a guess.

# RFP Fails: Requirements

“We need to integrate the website with a third-party service we have selected. The service is currently developing an API, but has not released it. How much will this cost, and how long will it take?”



# Qualification Questions

Comparing apples to apples.

# Some questions for vendors

- Sample of past projects & References
- Minimum/average project budgets
- Do you subcontract? If so why?
- Design & development philosophy
- Technological capabilities
- Capacity

# Tips: Qualification

- Schedule initial calls or meetings to allow both you and the vendors to pre-qualify each other.
- If you openly publish your RFP, don't be surprised by the number of responses you receive.

# Tips: Qualification

- Limit the length. Saves you and the vendors significant time and effort.
- Ask specific questions to better compare vendors.
- Effort required to respond to your RFP should be commensurate with your budget.

# RFP Fails: Spec work

“As part of the response to the RFP, proposers must provide an initial draft project plan for achieving the objectives of this project.”

# RFP Fails: Spec work

“The proposal must include ‘Design for key pages, including: Home page, Examples of other primary/secondary content pages (including About Us, Events, Media, Our Staff, Our Work, Our Results; Funder/Partner pages, Financial Info, etc...)’”

A photograph of a market stall featuring several metal bins filled with various dried fruits and nuts. In the foreground, there's a large bin of green peas and another of dried apricots. Behind them are bins containing raisins, dates, and other dried goods. A person in a striped shirt is visible in the background, and a pink scale is on the counter.

# Vendor Selection

A good decision is based on more than numbers.

# Which ones?

- Ask your peers
- Attend conferences (like Drupal GovCon)
- Do web searches
- Review your competitors' websites

# How many?

- Does your organization have a minimum bidding requirement?
- Ideally 3–5
- If really unsure, consider Request for Information (RFI) to narrow number

# Compare vendors

- Review proposals with vendors through meetings or calls
- Ask for an apples-to-apples comparison if vendor proposals do not line up
- Everything is negotiable

# Tips: Selection

- Indicate what type of vendor created the current website.
- Was the current vendor invited to submit an RFP response?
- Why are you seeking a new vendor?

# Tips: Selection

- How many vendors have been invited to respond? What types of vendors?
- Most professionals will not provide spec work, but you should ask for samples and/or portfolio.

# Tips: Selection

- You want to select the vendor most qualified to successfully complete the project, not most qualified to win the account!

# RFP Fails: Selection

“Your firm had the best qualifications, but we chose not to hire you since your sales team did not seem enthusiastic enough. Maybe you were tired after driving six hours to present to our leadership team?”

# It Doesn't End Here

No website lasts forever.

# Conclusion

- Planning is essential
- Understand the pros and cons of resources
- Make the most of RFP process

# Special thanks





David Minton  
Stephen Pashby

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