Large Scale Development Projects - CHECKLIST

CUSTOMER NAME:___________________________________

CUSTOMER WEBSITE: ________________________________

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1. ☐ - Sales Process – two weeks to two months
2. ☐ - Sales contacts Professional Services Team to discuss potential Sale
3. ☐ - Contract is signed by client (For scope creep – see #34)
4. ☐ - Initial progress payment received by Sales Department
5. ☐ - **PM** receives and reviews contract for familiarity
   - Pay special attention to:
     - Migration – Yes/No
     - Modules Included
     - Special Scope
6. ☐ - **PM** copies contract into Basecamp for future development
7. ☐ - **PM** copies scope as tasks into Basecamp for future development
8. ☐ - If there is a current website, **PM** reviews it for familiarity – Hold the contract against the current site.
   - Are there any differences?
   - Are there certain features in the old site that are not listed within the new?
   - Make a list and work with Ops Manager to determine if next steps are needed.
9. ☐ - **PM** determines where the client is hosted and if they are in or moving to The Company Hosting.
   - If client will, at launch be hosted with The Company, look for access information within the SaaS folder and enter it into basecamp – also note migration
     - IF the client is going to be hosted with us and there isn't any SaaS information, create a support ticket and ask for one. Email support@The Companymerchant.com
   - If client is hosted by another hosting company and will stay with that company after launch, we will need to reword the asset checklist to request a development site and credentials – also note migration
10. ☐ - **PM** sends a welcome letter and design questionnaire (1) (2) to client
11. ☐ - **PM** contacts client via phone to schedule a future GoToMeeting to discuss big picture design concepts
12. ☐ - **PM & DESIGN** discuss kick-off and big picture design items with client
13. ☐ - **PM** & **DESIGN** begin the design phase
14. ☐ - **DESIGN** creates 1-4 options of the storefront SNFT
15. ☐ - **PM** & **DESIGN** review concepts, tweak, and submit to client for review

Legend:

PM = Project Manager
SUP = Support
DESIGN = Web Design
DEV = Web Developer

(1) = Welcome Letter (page 5)
(2) = Design Questionnaire (page 6)
(3) = Asset Checklist (page 8)
(4) = Design approval form (page 11)
(5) = Web Dev Plan (page 12)
(6) = Addendum to contract (page 16)
(7) = Design Club turn over letter (page 17)

16. ☐ - **PM** contacts client for SNFT feedback and works with **DESIGN** on refinement and revisions
17. ☐ - Client accepts SNFT page and signs off on design direction via email confirmation
18. ☐ - Group meeting including **PM**, **DEV**, & **DESIGN**
    - (**DEV**) Begin evaluation of current website to determine if changes or upgrades should be considered by the client for the new site. They should receive a copy of Website Development Plan. Use **PM**'s early findings if need be.
    - (**DESIGN**) Discuss design of category, product, and checkout pages
19. ☐ - **DESIGN** creates new designs for the category, product, and checkout pages
20. ☐ - **PM** emails client asset checklist (3) to complete
21. ☐ - **PM** & **DESIGN** review concepts, tweak and submit to client for review
22. ☐ - **PM** continues to check if client has answered the needs of the asset checklist. Specifically;
    - Old admin access if applicable
    - Credentials for Social Media and Google Analytics
23. ☐ - **PM** contacts **SUPPORT** on hosting with The Company if applicable to create a dev site
24. ☐ - **PM** contacts client for category, product, and checkout page feedback and works with **DESIGN** on refinement and revisions
25. ☐ - Client approves the design/layout of the category, product, and checkout pages via design approval form(4)
26. ☐ - **PM** continues to check if client has answered the needs of the asset checklist. Specifically;
    - Product & Category Spreadsheets
    - Product & Category Images (Make sure prods are 700px on one side & cats are 350px on one side)
    - Static content & other links for Global Footer Pages
        - About Us
        - Contact Us
        - FAQ
        - Shipping & Returns
        - Videos/PDFs etc
        - How to's/Size Charts
        - Etc.
27. ☐ - **PM** verifies receipt of other host credentials if need be with dev site information if applicable
28. ☐ - **PM** notifies client of impending progress payment

Large Scale Development Projects - CHECKLIST

29. ☐ - **DEV** contacts **PM** if changes or upgrades are needed based on their evaluation of the clients site. (For scope creep – see addendum to contract)
30. ☐ - **PM** receives product and data spreadsheet from client, validates it, submits to **DEV** (refer to #15, item(3))
31. ☐ - **PM** continues to check if client has answered the needs of the asset checklist. Specifically;
    - Business rules on Shipping/Handling/Tax
    - Payment Gateway ID's for any of the following
        - Chase
        - Authorize.net
        - Paypal Payflow
        - First Data
        - Cyber Source
        - Paymetric / XiPay – (custom integration)
32. ☐ - **PM & DEV** contact client to discuss and determine if scope changes should take place
33. ☐ - **PM** contacts **DEV** to begin building store
    - Local build /. Static html pages
    - Move to development site
    - Install modules and add features
34. ☐ - **PM** contacts **DESIGN** to review and make comments on CSS build of site against original graphics
35. ☐ - **PM** notifies client of impending progress payment
36. ☐ - **PM** contacts **DEV** to continue building store
    - Data import & Misc
    - QA Feedback
    - Email SUP the following
        - Day of expected launch
        - SSL ready to be installed
        - DNS pointed correctly
    - Peer review
37. ☐ - **PM** sets up Goto for formal training
38. ☐ - **PM/DEV** begins formal training
39. ☐ - **PM** notifies client of impending progress payment
40. ☐ - **PM** notifies client of and confirms launch date
41. ☐ - If client ordered Google Analtyics Training**, PM** locates who will train and set's up future GoTo for approximately 2 weeks after site launch.

42. ☐ - **PM** discusses with client the advantages of joining Design Club
43. ☐ - **PM** request DEV for a final QA
44. ☐ - **Site launch**
45. ☐ - **PM** contacts new site two weeks after launch to check status and introduce to Design Club Account manager if not already in the Design Club
46. ☐ - **Scope Creep / Addendum to contract.** With approval of the Operations Manager or General Manager, a PM may initiate hourly rates for scope creep. Because this is a case by case basis, discuss issues with them before mentioning to the client. See addendum to contract[6]
47. ☐ - **Design Club Turnover Letter.** PM to work with Ops Manager to determine the clients Design Club Account Manager. After Launch, email the client a Design Club Turnover Letter[7]

Hello {new client},

My name is (name). I am your dedicated Project Manager and main point of contact here at The Company while we design and develop your new site.

Let me start by thanking you for choosing The Company. We have been supporting online businesses for nearly fifteen years and pride ourselves in not only providing exceptional deliverables, but also impactful and essential support during our entire working relationship with our clients.

Our project consists of a complete site design, data migration and integration, module additions, and validation of hosting.

Your new SEO friendly website will be built on top of The Company's powerful e-commerce back-end administration tool, also known as the "admin". Through the admin, you will have the ability to add products, categories, control inventory, and manage your customer orders.

Below, please find an estimated timeline of completion along with a high-level projected schedule.

Timeline of Completion
Your website should take approximately **12-16** weeks to complete.

Projected Schedule (Estimated)
(Date) - Proposed Design Kick-off Meeting
(Date) –Client to work on static page content
(Date) - Designs for the Storefront, Category, Product, and Checkout Pages approved by client
(Date) – Progress payment due
(Date) – Client to deliver static page content
(Date) – Client to begin working on category/product data as well as business rules
(Date) – Web Development begins
(Date) – Progress payment due
(Date) – Client completes category/product data for upload into the admin as well as delivers business rules
(Date) – Standard Development ends
(Date) – Special programming, custom features completed
(Date) – Progress payment due
(Date) – Client completes QA of site
(Date) – The Company completes QA of the site
(Date) – Estimated Launch

Large Scale Development Projects - CHECKLIST

Because your site is unique, our proposed **Timeline of Completion** and **Projected Schedule** may not be an accurate accounting of when your site will launch. We re-evaluate the launch date based on the rate of design approvals, data migration, module additions, and unexpected obstacles while keeping you aware and updated of any course change.

In closing, please expect a follow-up email to discuss the best time to have a “design kick-off meeting”.
In preparation of this meeting, note that we will cover the following questions;

Design Kick-off Meeting Questions
1. How do you define your brand?
2. How do you define your company?
3. Who are your customers?
4. What is your goal for the website?
5. Who is your competition?
6. Even if the business is unrelated, what are your favorite websites and why?

Thanks again for choosing The Company; we look forward to working with you over the next few months.

If you have any questions, comments, or concerns about any of the information mentioned, please do not hesitate to contact me.

All the best,

Design Meeting Questionnaire

Purpose: To assist The Company in understanding not only your business, but also your vision and current competition. Completion of this form will give us a good understanding of who you are and where you want to go.

Your answers will enable us to successfully navigate our first "kick-off design meeting" and get us on track to fulfilling your business needs. Take your time to carefully reply to these questions. It is important that we are able to translate your thoughts into our actions.

If you are unable to complete this form prior to our kick-off meeting, please let us know so that we can reschedule it to a time that works best for you.

Do you have a mission or business statement? If so, please copy it here	
Who is your target audience?	
Gender:	
Age range:	
Professional and/or private sector:	
General Interests of your customers:	
Location (specific country and/or province/state):	
Who is your competition?	
Business Names:	
Websites:	
Please list a few sites that appeal to the same target audience or communicate an image or style that is similar to what *you* want. ***Please make sure to list what you like or dislike about each***	

Large Scale Development Projects - CHECKLIST

Website Addresses (URLs)	Comments
Do you have a specific color pallet or hue pallet that we should follow?	
Is there anything within this form that has not been addressed that The Company should be aware of with regards to the design of your site?	
Do you have images or graphics that we will require to start your site? If so, please send them directly to your Project Manager. We accept ZIP files and Dropbox capabilities	
Logo (EPS,PSD,JPG,GIF)	
Background (PSD)	
Images (PSD/JPG/GIF	
Other:	

Thank you for completing this form.

Please email this form back to us prior to our Design Kick-off Meeting.

We are looking forward to your success.

The Company

Large Scale Development Projects - CHECKLIST

Document: 3 – Asset Check List **Click here to go home**

Hi {client},

While we continue/conclude the design of your site, there are a number of assets we would like to begin collecting. A great number of these essential to the development portion of your site.

Old admin access if applicable

1) **Old admin access**: Visit the following link to supply us with as much information as you can. Do not forget to include your Facebook and Google Analytics information as well. https://www.The Companymerchant.com/ecommerce-web-design/client-access-form

Website Development

2) **Category Spreadsheet**: To import your categories, we will require completion of a category spreadsheet. Note the attachment for reverence and visit this blog to assist. http://blog.The Companymerchant.com/564/getting-started-with-the-category-spreadsheet/

3) **Product Spreadsheet**: To import products, we will require completion of a product spreadsheet. Note the attachment for reverence and visit this blog to assist https://support.The Companymerchant.com/supportsuite/index.php?/Knowledgebase/Article/View/959

4) **Product Images:** In most cases, you will only need to provide us with a single large image for each product. We can discuss with you the best size and delivery method at that time.

5) **Category Images:** In some cases, one may choose to display a special category image that differs from a product image. An example of a category image might be an "in-use" shot instead of a standard white-background product image. We can discuss with you the best size and delivery method at that time.

6) **Static Content**: If the quote included static pages such as "About Us or Contact Us" to incorporate into the new site, please provide text content. If already available, send links to existing pages.

7) **Social Networking**: Outside of Facebook which is covered within # 1 of this list, we will require all links applicable to any Social Media connections you would like inserted into your Global Footer.

Admin Development

8) **Hosting**: If hosting with us, verify / provide credit card information. If hosting at a premier partner or other methods, please let me know and we can discuss further

9) **Payment Gateway**: Please provide login information or appropriate 'keys' for your gateway as well as any alternative checkout methods

10) **Emails:** Please supply us with appropriate emails for the following
    a. Merchant Order Confirmation: TO
    b. Customer Order Confirmation: FROM
    c. Newsletter Sign Up: TO
    d. Contact Us: TO
    e. Questions: TO

11) **Shipping Rules:** We will require a document that details your carrier preference for USPS, UPS and/or Fed Ex. In addition, include special pricing requirements based on flat-rate and/or price/weight based shipping along with specific carrier account numbers and global handling fees. Lastly, note if you will be shipping internationally.

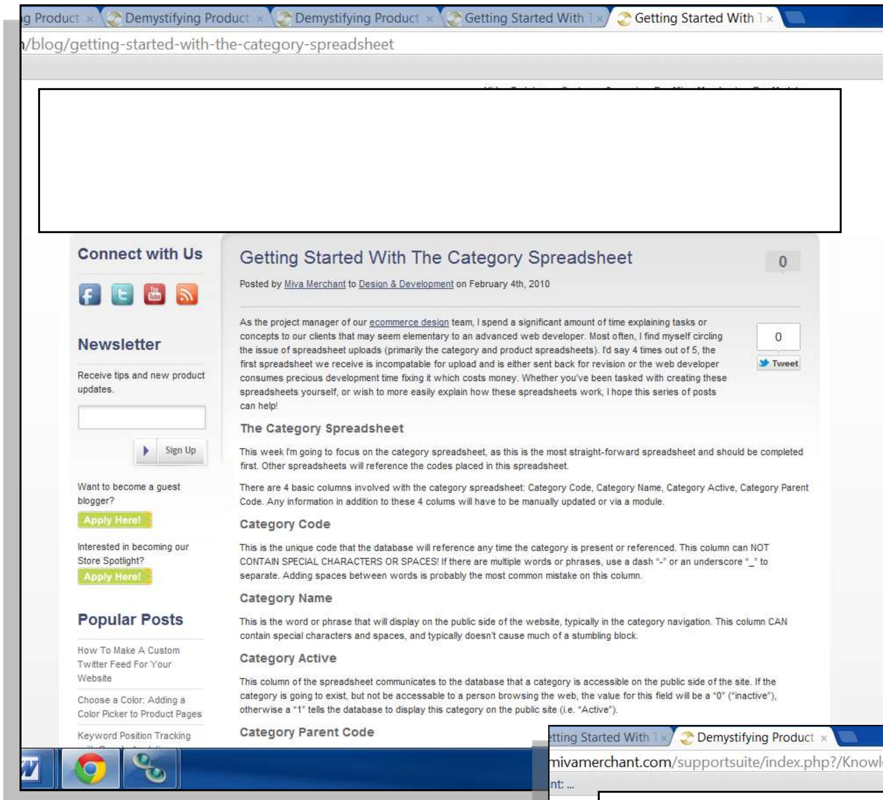
12) **SSL / Security Logos**: If hosted with us, disregard, otherwise please be sure that the SSL will be active for your new domain/site. We may need your log-in credentials to display the security logo on your site.

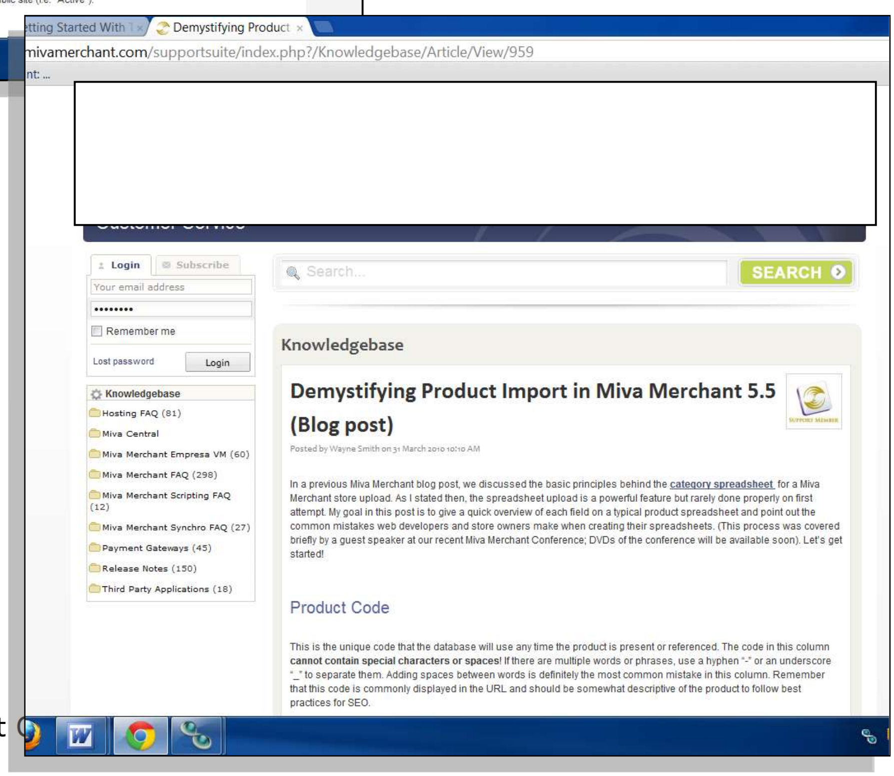
13) **Tax**: We will require a document detailing your taxation needs be it, state based, zip based, and/or rooftop. If you have nexus, make sure to include the state(s) and their tax rates.

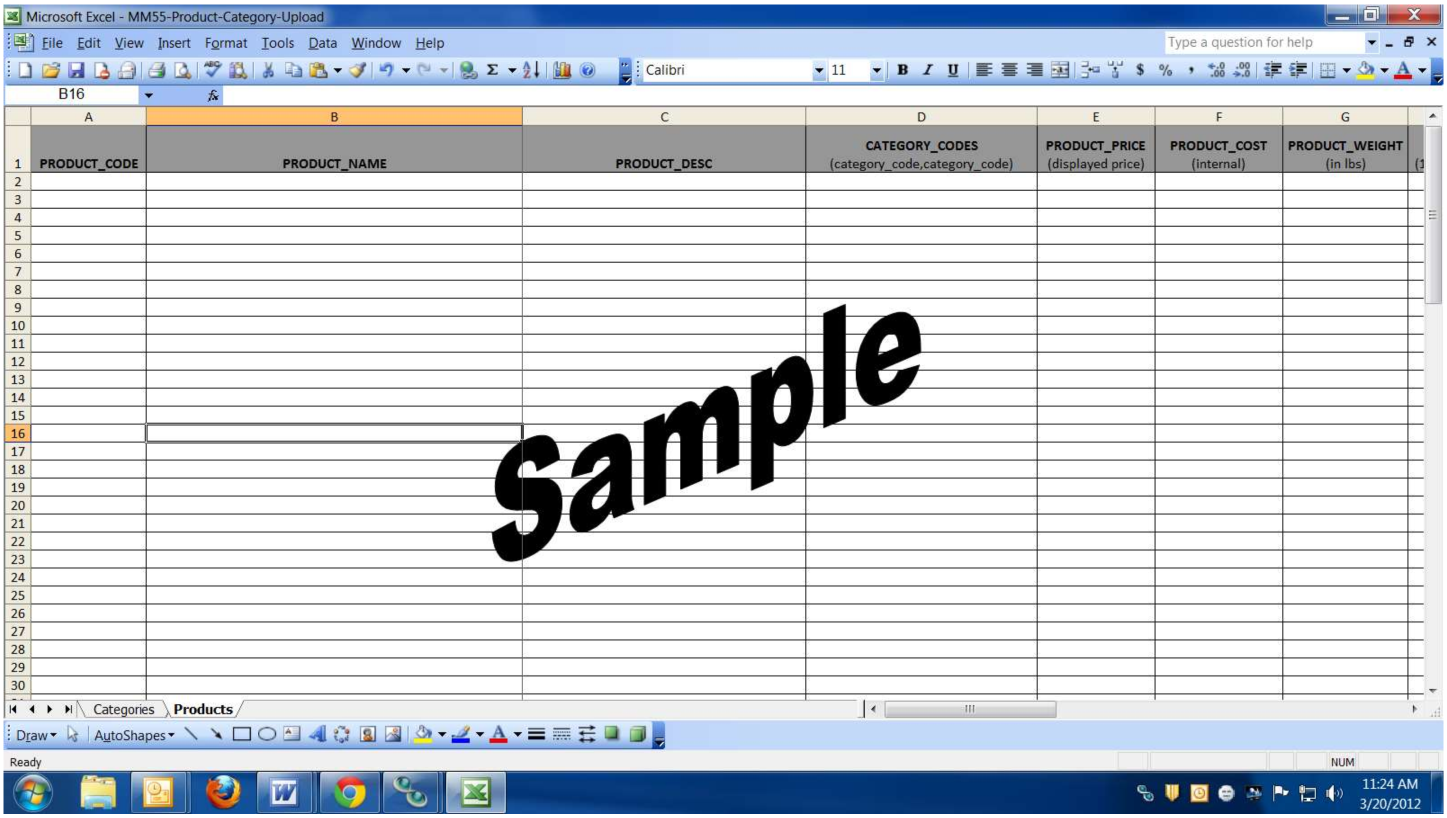
Please advise if any of these items are unclear.

Large Scale Development Projects - CHECKLIST

Document: 3 – Asset Check List – links






Microsoft Excel - MM55-Product-Category-Upload
PRODUCT_CODE
PRODUCT_NAME
PRODUCT_DESC
CATEGORY_CODES (category_code,category_code)
PRODUCT_PRICE (displayed price)
PRODUCT_COST (internal)
PRODUCT_WEIGHT (in lbs)
Sample
Categories
Products

Dear Client,

After reviewing the final graphic concept mockups of your storefront, category, and product pages, take a moment to read over, print, and sign the following approval. Once signed, scan and then email it to your Project Manager.

If at this point you have further changes that have not been addressed or require immediate attention, please DO NOT sign this form. Instead, contact your Project Manager to discuss the issue at hand or any other related questions.

Upon receipt of this signed form, we may then begin the development phase.

Thank you,

The Company

Design Approval

I agree that the custom designs created uniquely for my The Company website are to my satisfaction and ready to enter the web development phase. I accept responsibility for any costs incurred from significant, additional design changes after signing this approval form. I hereby approve that all colors, navigation, logos, imagery and other graphic elements (excluding placeholder text and images) are accurate and to my satisfaction.

Print First Name | Print Last Name

Signature | Today's Date

www.mypartysupply.com

Domain Name/URL

Website Development Plan

Date:	
Website URL:	
Project Manager:	

The goal of the development plan is to make sure the designs and the functionality portrayed in the designs match exactly what is on the quote. It is also to make sure the client is getting everything they paid for outlined in the quote (and any project revisions). If something is portrayed on the designs but not accounted for within the quote this is the time to catch it and notify the client.

A secondary goal is to verify that the quote is correct and that any custom functionality quoted can be reasonable accomplished in the time allotted. If there are any blatant errors our goal is to catch them in this phase vs. after the development has already begun. It is the developer's responsibility to review the quote in detail and understand all the functionality involved and verify he can complete the project in the hours projected.

If any one item stands out as incorrect or not enough time to complete this is the time to bring it up.

A third goal of the development plan is to give the developer a full picture of what is involved in the project and create a roadmap to get the project completed. The developer should verify they have everything they need to complete the project from start to finish including hosting, images, properly formatted product data, modules and anything else they will need to complete the project. If things are missing they will need to make a list of all items to collect from the client. This will ensure we have them when they are needed during the development lifecycle.

Depending on the size of the project a completed development plan should take 2 to 4 hours to complete. The development plan will be reviewed by the project coordinator and signed off on by the developer, the project coordinator and also the web design manager before any development will be allowed to begin.

If at any point during the development cycle unaccounted for functionality or additional work gets brought up, both the developer and the project coordinator will have clear picture of what's included and what's not included in the project scope and be able to bring theses additional changes back to the client for a project revision at the time they are brought up.

Large Scale Development Projects - CHECKLIST

Development Plan Checklist		
Functionality		
Description	Done	Notes
Do we have credentials to their existing site?		
Number of informational / Static pages is correct (contact us, faq, policy pages etc)?		
Custom Programming – Do you fully understand all the functionality outlined in this section? Can you complete the functionality in the time estimated? If not, which items and why?		
Are there multiple category page layouts? Any custom product page templates? If so, how many of each and were these accounted for quote?		
Will they be using category tree images to display sub cats? If so what are the image dimensions needed and is the client aware they need to provide these?		
Will they be using category title images on the category pages? If so, what are the image dimensions needed and is the client aware they need to provide these?		
Are there any image sliders/slide-shows?? Was this accounted for?		
Is there any functionality that will be utilizing custom category, customer and/or product fields? If so estimate how many. Make sure the client has this info as part of their spreadsheet.		
Other Notes:		
Modules / Custom Programming		
Description	Done	Notes
Do they have a drop down / cascading menu?		
Do they have the product image on the basket page? If so does this change based on attributes? Does the client know the images the will need to provide to accomplish this?		
Do we have a list of all the modules needed?		
Other Notes:		

Large Scale Development Projects - CHECKLIST

Email Management		
Description	Done	Notes
Do they have a mailing list sign-up box? If so is this just our script or does it link to their mailing list program? Do we have log-in for their mailing list program?		
Is there a custom design for the customer and/or merchant confirmation emails?		
Other Notes:		

Order Status / Order History / Inventory		
Description	Done	Notes
Are they using our built in system or do they have a third-party module like Sebenza's Ultimate Order Status? Are they using an order processing service like Stone Sdge / Shipworks?		
Will they be tracking inventory? At the attribute level?		
Other Notes:		

Shipping / Tax		
Description	Done	Notes
How are they going to ship? Do we have the modules we need and/or their account information?		
What state do they collect sales tax? What is the tax rate? Do they want zip code based sales tax?		
Other Notes:		

Products / Images		
Description	Done	Notes
Is this a 4 to 5 upgrade?		
Have the attributes been taken into account (import or client sets up via admin)?		
Do we have properly formatted product / category spreadsheets?		
Do we have properly named and sized images?		
Other Notes:		

Large Scale Development Projects - CHECKLIST

SSL / Gateway		
Description	Done	Notes
Do they have an SSL currently? If so with who? If not are they in the process of getting one?		
Do we have the clients log-in credentials for security seals or any other trust marks?		
Who is their Gateway? If they do not have one, are they in the process of obtaining one that works with The Company?		
Other Notes:		

Project Sign Off

All functionality outlined in the design comps is in the proposal and vise versa?

Can the entire project be completed in the time estimated?

Project Name ____
Date: ____

Web Developer _______________________________________
Project Manager ______________________________________

Addendum to Contract Invoice

Original Contract Order #: 030112
Original Contract Date: 03/01/12

Invoice # 22461

Today's Date: March 26, 2012
Charge Date: March 26, 2012

5060 Shoreham Place, Suite 130
San Diego, CA 92122
Phone 858-490-2570 Fax 858-731-4200

BUSINESS NAME:
CONTACT NAME:
CONTACT PHONE #:
CONTACT ADDRESS1:
CONTACT ADDRESS2:
CITY/ST/ZIP COUNTRY/PROVINCE:
APPLICABLE URL:
OTHER:

Due to the increased project scope of our original contract, Miva Merchant and the following client have agreed to add features and or workload to their current contracted project. This document is a validation of the increased workload. Please make sure to read it completely. If approved, immediately sign/date this invoice and then fax or scan/email it directly to your Project Manager. Upon its receipt, we will add the new scope into your production schedule.

DESCRIPTION	Cost
Mega Menu Top Navigation (dynamic / CSS Based)	
Template modifications on checkout pages for custom shipping/ payment setup	
Ultimate Order Status (Sebenza)	
Editable Basket Attributes (Sebenza)	
Ultimate Gift Certificates (Sebenza)	
	TOTAL DUE:

By signing this document, you agree to be charged the total due as stated within this form. This is a supplement payment to your existing contract scheduled progress payments.

Print Name

Date

Signature

NOTE: The Credit Card that is on file with us will be charged upon receipt of this signed document. If the credit card is invalid, we will contact you for another payment source.

Large Scale Development Projects - CHECKLIST

Document: 7 – Design Club turnover letter **Click here to go home**

Dear ,

Thank you for the opportunity to project manage your website development, it has been truly an honor.

As part of the launch process, one of my final duties is to officially turn over your account to a designated "Account Manager" XXXXXX. They will, from this point out, be your main point of contact for most additions and alterations to your new store. Reaching out to them is easy, simply email all updates, requests, and changes to Design@The Companymerchant.com.

Of course, I am always here for questions however, they are truly the next phase in your sites evolution and can pay particular attention to your needs as your site grows.

I look forward to hearing great things.

Sincerely,