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Cal Poly Humboldt Project Process

Preliminary Research & Discovery

Before meeting with the client for the first time I will look at their current site, review any notes about the project, and do up to an hour of research based on the request.

Intake Meeting

When meeting with the client I try to be all ears and take detailed notes on their request. I ask a lot of questions and do my best to understand why they are asking for certain things. I will guide the conversation if necessary and talk about our options and ideas found in discovery. We will also talk about scope, project budget, and timeline for completion. Deadlines are always discussed.

Meeting Agendas

When running large intake meetings I will create a meeting agenda, share it with the team, and when necessary share it with the client. This helps keep us on track and make sure we accomplish what is needed during the meeting. It also helps me to set goals for the meeting ahead of time.

Project Planning

After the meeting I do another hour of project management to get all my notes transferred into an action plan which includes an estimate and projected timeline. I may also do more research at this time if there was anything discussed that was unclear. I often split the recap of the meeting notes into two parts, with one set for me and the other for the client.

Internal Meeting

This is when we discuss the full scope of the project, what we can do for the client, the budget and time limitations, and any other barriers we see that may hold up the project.

Sending Estimate, Timeline, and To-do List to Client

After my timeline and estimate are approved by the Creative Director and/or Web Manager I will send it to the client with a to-do list, discuss further steps, and who is to be gathering content. Some clients need more followup than others.

Content Inventory

I analyze and document the current site structure in a spreadsheet template. This helps to identify red flags and content issues that need to be addressed. It also helps us to see where we need the most research for design solutions. It's also a tool for outlining redirects. Not all projects require a content inventory.

Research & Discovery

This phase will be done before and/or after the content needs are sent to the client. I try to find a wide range of examples, and make notes on what I like and don't like about each. The main lesson I have learned over the years is that just because someone (or many people) are doing something a certain way doesn't mean it's the right way. I will research examples from live sites or dive into other online resources for design ideas and UI elements or solutions.

Sketching

I don't always do hand sketches but when a project is more complex or doesn't have a clear organizational structure, hand sketching makes it easier to get ideas flowing. It could be for a new design, content organization, or sometimes just a specific feature on the site.

Sitemap Exploration & Content Organization

When the content inventory is done and the project estimate is approved, I review the goals of the project and start the process of building a sitemap. I will look at all content on the current site, review what the client has asked for, and how much new content may be needed. What I do at this stage depends on how complex the content structure needs to be and how much time has been budgeted. The process for organizing content is often ongoing as we build the site as well. We will often adjust it several times up to the launch of the project.

Suggested Sitemap

After research & discovery, sitemap exploration, and content organization are done I will review it with the Creative Director and Web Manager and get it ready to present to the client. This stage can sometimes be combined with delivery of a prototype if the project is simple. The deliverable can be done in multiple different ways depending on the project. It can be done with sketches, in a figma file, on a site like SlickPlan, or on a development site. It all depends on how complex the content structure needs to be and how much time has been budgeted for this stage of the process.

Design & Prototyping

These might include a single component or the whole site design. I use currently use Figma for all my mockups and prototypes. This allows for real time collaboration with the Marketing Director and Web Manager and also allows us to easily send mockups to clients and get feedback. I have been using Figma since 2017 but I also work with XD on occasion. Before Figma, I did layout work in Illustrator and then mockups in InDesign. I briefly worked in Sketch and InVision before switching to Figma full time. I am also very familiar with Photoshop but was taught to use it for color correcting photos, cropping, optimizing photos, and photo manipulation.

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File Management

Project folders may contain estimates, project outline, content inventory, research notes, meeting agendas, meeting notes, wireframes, sitemaps, hand sketched designs, a photo search folder, approved printed designs, and a shared content folder for copy. I organize the copy folder based on the approved sitemap structure, using numbers to order and nest the pages to mimic the sitemap. I will also outline the content that needs to be created, copyedited, or reviewed and help the client or editorial staff with direction on web copy.

Content Gathering

I do a lot of content wrangling and regularly collaborate with the Marketing Director and Web Manager to make sure the language of the site fits the University's brand messaging. Our editorial department will often do some of the high level copywriting for the sites and most of the secondary content writing comes directly from the client with my guidance on voice, tone, and length.

Building Sites with Drupal/OpenHSU

I build every site that I design. We create a new site with our custom upstream on Pantheon and configure all settings for the site. Sometimes I will clone a built out version if this is an Academic site. The process for building a site on a Domain Access installation includes doing most of the content buildout in the live environment which is not ideal. Although we have found many work-arounds for local development we still have to do all the database changes in the live environment then clone it down and do the styling and custom theming. OpenHSU on Pantheon gives us a solid starting point for all of our Drupal 7 sites and makes pushing code to all sites (200+) a fairly painless process. A custom upstream is key to my successful site building and the tooling on pantheon makes development a seamless process.

Customizing OpenHSU

A customized version of our upstream may include:

- new Drupal content types (not included with OpenHSU)
- new views for displaying content and css to make them look nice
- custom css files for overriding OpenHSU colors and design
- new Panelizer layouts (similar to radix layouts)

Feeds, Migrating Content, & Features

When I am rebuilding a site I often utilize feeds exports/imports for moving content to new or existing content types, exporting views or other content types we have built to repurpose them, and sometimes utilize features exports for code and custom configuration.

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Content Polishing

This can be a very time consuming process where I fine tune content on each page, make sure all the css is meshing with content, often finishing css as I polish each page's design or page template.

Reviewing the Final Site Build

At this point the client is very familiar with the site and I will send a link with instructions for final review. Occasionally, I set up a meeting to review the final site with the client if we have not had a lot of contact during the process.

Redirects

When launching a new site I review the content inventory and make sure that all existing pages are mapped to the new website's pages with redirects if necessary. This ensures that there will be little to no broken links from the old site structure. To do this I often include hundreds of redirects and am familiar with managing redirect imports.

Launch Site

Create the test and live environments, add a site plan, email ITS to create the domain and add Pantheon DNS, add domain to live environment, and send the final link to the client. Make sure caching is enabled.

Training Content Editors

Just before or after site launch I set up and do training with the client. I have created a training manual that I use for all of my Cal Poly Humboldt training sessions.

Billing

Once the project is wrapped up, I run a report of my hours, put them on the invoice, close out the invoice and send it to our office manager or print services director for billing.