Essential Information & Terms for Clients

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This guidance is to clarify the joint working method that I've found gets you the best results and value I can provide, and gives me the ability to best support the range of clients I regularly work with. Web design and development freelancers or agencies work in various ways so I'm offering this in our mutual best interests after years of experience. You may have worked with me on a different basis in the past, but this is what's available going forward. It's meant to be direct but terms are always negotiable so if you're unsure we can talk...

Work Philosophy

Websites are complicated, time-consuming things. Open-ended timescales with ill-defined goals and unrealistic budgets are problematic for both sides. Every project has unique requirements which tend to change through the course of the work – this is natural and we should gear our way of working around it.

I've found it's impossible for me to set an accurate final budget for a custom website. Scope of work can creep, time and costs can start to balloon. One of us will lose out in time, money or results if we've committed to a budget that's proved to be wrong. You might have in your mind some idea of how your 'finished' website should work and what it should look like, but how well defined is it and are you ready to communicate that accurately to me?

I'd recommend thinking of your site as an organically evolving creation which should respond to demands you may not anticipate in the beginning. Probably there's no such a thing as a finished website project - not one of continuing usefulness anway - just one that's working well enough for that point in time.

I think the answer to overwhelm is to keep work goals realistic by making them relatively small and quickly achievable. We'll set goals of 'deliverables' over fairly short 'work blocks' with frequent invoicing and payment, review the results and decide on the next step from there. Regular, iterative development based on feedback is much more likely to shape your site into something of real value to you and your visitors. This isn't an original idea, lots of 'Agile' software developers have been using this process for many years:

"Release early. Release often. Listen to your customers."

Working in short timescales allows us to change direction without having to adhere to a rigid master plan. A new site can be released early in a simple form, to be built on further in incremental stages which are easier to imagine and define. It's under control, you can re-evaluate regularly and take a break on development at any time without being tied in to an ambitious contract. I get a good idea of what you're expecting from me in each block, and I can concentrate for a sustained period without distraction so I can produce good results.

As long as you're happy with the value of what I produce for you, you can ask me to keep working. If you decide you're not getting the value, we're likely to be able to settle up without disagreement and move on. You can put the project on hold or find someone else to continue it, and I won't have invested unpaid working time. If you decide to do this, everything I've provided as a deliverable will be fully accessible, both to you and to other web developers.

Project Work Pricing & Scheduling

I offer blocks of Project work that last one week, Monday to Friday, regular 9-5 working hours. Ask me what the current cost of one of these blocks is. Each block would be invoiced on the Friday afternoon. I would need full payment for a block before progressing to the next one.

We'd agree the exact scope of work in advance, in as much detail as possible. During this week I'd work towards this defined 'deliverable', with your co-operation. You can't add to the scope during the week but we can adjust something if it's important.

As my first priority client that week, I'd dedicate the main part of each working day to your Project. You'll be able to contact me throughout each working day with anything I need to progress. However I wouldn't be working on your Project exclusively, all day every day, as I also need to keep up with work for other clients who are on a Maintenance agreement. The aim is still to produce the agreed deliverable by the end of the week.

Please be ready to respond promptly to any requests I have through the week, and be prepared with material or information that I need. If I'm waiting for essential content, designs, access details or answers from you, this will hold up progress. I'm not offering a service charged at an hourly or daily rate whenever I do your work. Due to the collaborative nature of most projects, it's unusual that I can work for days on end without needing something back from you, so my progress is dependent on your availability. If I don't get what I need from you during the week and we fall short of the goal, the block doesn't extend and you'll still need to pay me for it. You're getting my presence and skills over a set time period, and if you don't use them, you lose them – the same as if I was a salaried employee in your business.

You can book me for the next available block at any time. Weeks can be consecutive if available, or spaced out to allow you to review the work and prepare further design ideas or content.

If you're not engaging me on a work block, I'll still be available for quick and general queries to help you progress, normally at the beginning and end of the day. I won't be available for coding or anything specific or time-consuming, since I'll be focusing on another client's Project work.

Once your Project is up and running, we can continue to work in weekly blocks for further development, agree on Maintenance work to keep things ticking over, or both.

Maintenance Work Pricing & Scheduling

Maintenance work is charged at £100 quarterly or bimonthly, or multiples of £100 monthly - depending on your requirements. Work would be invoiced at the start of the period, with payment due before the end of the period.

The budget and scope of the work is defined and agreed in advance. It generally consists of routine monitoring and reporting on your established Project to help you make decisions, or regular development tasks which don't qualify as one-off Project blocks. Think of it like an insurance policy to ensure that important aspects of your ongoing web presence are going to be covered. Budget and scope can be adjusted up or down for following periods, depending on requirements – there's no lock-in beyond the agreed maintenance period.

As examples, responsibilities could include:

- **monitoring** your domain and hosting renewal requirements
- **upgrading** your hosting account and content management system for security
- **implementing** ways to enhance site performance (speed)
- **introducing** additional features of functionality
- **creating** visual or textual content
- **updating** content
- **storing** access details for your web-based accounts as a secure backup
- **optimising** content for search engines (SEO)
- **analysing** visitor behaviour for content prioritisation (Google Analytics)
- **sharing** of most relevant statistical reporting
- **registering** with Google search indexing (Search Console)
- **supporting** you with general website or email-related technical issues
- **communicating** with third party web providers supporting your business
- **investigating** technical solutions to 'pain points' of your business's web process
- **assisting** with a regular email or social media marketing campaign

You'll be able to send me requests during the week, but I won't be able to respond immediately if I'm working on a Project as this takes priority. Rest assured that I'll have your routine work scheduled into our task management system and will let you know progress.

Task Management

I'll be consulting directly with you as the single point of contact for your business or company, for final decisions on any work that I produce. You'll have weekly opportunities to review and provide feedback. We'll use email, talk by phone/videocall, use screensharing for demonstration or training, and I'll visit your office or site if necessary. You can send me material at any time and I'll keep it organised.

I use a task management system called [Basecamp](#) for project planning, private and secure communication, and sharing of content including text copy, images, Office and pdf files. Basecamp is the leading system of its kind and keeps jobs, responsibilities and materials organised into threads for easy reference. I'll provide our account so we can communicate, share information and view progress at any point.

Basecamp will show you what's on my 'to-do' list with an expected schedule. The more you use it, the more it helps me to get your work done most efficiently. If you prefer to stick to email that's fine, messages will often still be recorded in Basecamp for the record.

Important security details such as login usernames and passwords that I collect for your website-related accounts can also be kept up to date in Basecamp, in a password-protected pdf file for safety.

If you think work has stalled, it's a good idea to double check your Basecamp messages for any unanswered questions that may have been lost in your email inbox. Often I can't progress with work until I get a response, and in order to keep working I need to switch to another job. You won't always get me at short notice on the phone as I need to set aside time to concentrate on coding.

Domain Registration, Site Hosting & Other Services

You'll need a domain name at an early stage. I'd recommend either a *.com* or *.co.uk* domain, or *.org* if your business is non-profit. Search engines use the words in the domain name as a ranking factor, so try combinations of various keywords specific to your business. Bear in mind that you can register relatively cheaply all of the main domains for a couple of keywords and direct them all to one site - this is also a good idea to prevent confusion with other websites that may register a related domain in future.

If you don't already have website hosting I can help to open a suitable account on your behalf at any preferred provider, and then set up your site there with any additional services such as email addresses. If you're using a CMS, this may have specific host server requirements which I can assist with, or you may prefer to deal directly with the hosting company yourself.

Subsequent to this setup, the maintenance of this host server account will be up to you. It's not necessary but usually preferable to reduce renewal admin by keeping your domain registration along with your site hosting provider.

I can alternatively offer to host your site on my own managed server, which brings benefits of additional control to optimise your site for significantly better performance, as compared to standard shared hosting accounts.

I'd recommend investing in an SSL secure certificate to cover your domain with the *https* protocol. Thisis becoming more common for perception of browsing security now and is also a search engine ranking factor.

Generally it's best for you rather than me to maintain billing arrangements directly with any third party service providers of hosting, domains, shopping carts, payment gateways, secure certificates, images etc. Although there's more admin for you in renewal of these services when necessary, you'll be obtaining them at cost and ownership remains with you, not me. Remember though that unpaid bills here could mean (at worst) permanent loss of your site and domain name if time limits expire.

Content Management Systems & Static Sites

A content management system (CMS) simplifies the secure entry, updating and removal of website content by your approved users, without requiring specialist knowledge of HTML code. If you need a CMS I can recommend one suited to your initial requirements. Alternatively, you can use another CMS which we agree on. Bear in mind that the more complex the CMS usage, the higher your technical overhead may be, and the less likely your website will display quickly and efficiently. A CMS will need regular upgrading for optimum security, performance and features, so allowance for this maintenance cost should be considered.

Often I build 'static' sites (as opposed to 'dynamic' CMS-based sites), which require minimal server-side processing so offer significant performance benefits. This kind of site is simpler, quicker and cheaper to build, is easily portable across hosting providers, and doesn't require ongoing CMS upgrades. All of your content is still modifiable, however for minor and infrequent alterations it's quicker and easier for me to make the changes to the source code of the content as part of a Maintenance agreement. If need be, you or anyone else with access to the site files and a certain degree of technical knowledge of HTML & CSS would also be able to make these code-based changes.

Your Content

I'm not responsible for writing your original text content, taking photos or creating sophisticated graphic elements like logos, icons or ads for you. Normally you'd supply me with these, created elsewhere, to work with. Occasionally though I can offer to write copy, take photos or videos and create graphics where you really need this service.

Text content should either be provided as structured but unformatted plain text (for example in a .txt file or as email text) or saved directly into your content management system if you have one. You should supply photographs in a digital raster format such as .jpg, as the original version or in as high a resolution as possible. I will probably apply some image processing to optimise for web viewing. You should supply other graphic files in an editable vector format where possible. If you choose to buy stock photographs I can suggest libraries. Video should be supplied in a standard format.

Ideally as much real content is possible is preferable at an early stage, so the design can be built around the content as much as possible, rather than the other way around. What's most important at an early stage is to organise the priority of your content. Instead of fitting your content into pre-defined pages, we can decide what pages to create from the initial content you provide.

Design

I deliver templates developed from HTML5 markup, CSS3 styling, JavaScript/jQuery for behaviour, and for server-side generation most often PHP/MySQL. I create flexible responsive layouts and look-and-feel designs that adapt to the complete range of screen sizes and the capabilities of most web-enabled devices.

The CSS styling takes care of the majority of the 'look and feel' of the site. I normally create designs iteratively, using static wireframe ('mockup') plans and style guides, followed by development pages which evolve into the final coding. The wireframes are for layout planning and content prioritisation, and the style guides indicate a look-and-feel direction (colour, texture and typography).

Initially a general page design overview can be useful, however final design would come after your content is fully organised, so it's not efficient to go into detail with colours and layouts at an early stage.

Browser Testing

Browser testing no longer means attempting to make a website look the same in browsers of different capabilities or on devices with different size screens. It does mean ensuring that a person's experience of a design should be appropriate to the capabilities of a particular browser or device.

I test work in current versions of major desktop browsers including those made by Apple (Safari), Google (Chrome), Microsoft (Edge & Internet Explorer 11), Mozilla (Firefox) and Opera. Most of these browsers automatically upgrade themselves these days. Internet Explorer is more problematic than other browsers but is rapidly disappearing. I'll ensure IE version 11 users get a functional experience but I won't be optimising your site for specific IE versions.

I test work in the most popular mobile operating systems and devices, including iPhone, iPad and Android phones and tablets.

I don't test in older or minor desktop browsers, nor in Blackberry, Opera Mobile, Symbian or other less popular mobile browsers.

That's all!