SETTING THE STAGE

Planning a Web Development Project

Presented by:

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session url www.gotomedia.com/atlanta00/stage

Cool cover illustration by Eunice Moyle

SESSION OUTLINE

1.0 **The Project:** Introduction

2.0 **Before You Start**: The Client

3.0 **The Proposal:** The Development Process

4.0 **Estimating:** Time and Resources

- **4.1** The Budget: Estimating by Hours
- **4.2** The Budget: Estimating by Task

5.0 **Creative Brief:** Defining Scope

6.0 **Competitive Analysis:** Informal Research

7.0 **Forms & Worksheets:** Blank Forms to Use

8.0 **The Proposal:** Detailed Overview

- **8.1** Proposal Format: Informal Letter
- **8.2** Proposal Format: Detailed Plan
- **8.3** Expectations and Follow-Up

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1.0 THE PROJECT: Introduction

SETTING THE STAGE

Before actually starting a Web site, there are several steps which can be taken to ensure the success of your project.In this session,we will cover the key elements in determining size, scope, budget and scheduling for your project. We will also cover additional items such as conducting an informal competitive analysis, and writing a creative brief. Whether you are an independent designer wearing multiple hats, or an internal Webmaster overseeing a team of people, many of the processes outlined here can be implemented into your existing workflow.

INCLUDED IN THIS SESSION

Items which will be covered in this handout are as follows:

THE PROJECT

THE CLIENT

THE PROPOSAL

ESTIMATING

CREATIVE BRIEF

COMPETITIVE ANALYSIS

FORMS

Setting the Stage: Determining Scope

You have a potential project that has just dropped into your lap. The client (or your boss) asks you the deadly question: "How much time is this going to take, and how much is it going to cost?" What is the first step you take in identifying the actual costs and timing associated with the project? How much information do you need up front in order to generate a realistic proposal? What other elements do you need to incorporate into the proposal to ensure you can say "yes" to the project without getting into over your head? This handout has been developed to help you make the right decisions and organize your existing information in a comprehensive manner allowing you to properly identify scope, budget and timing to "set the stage" before beginning an actual Web project.

How Much is Enough?

How much time do you put in before you actually are awarded the project? What additional components have you budgeted and scheduled for, including competitive analysis and usability testing? The answer is directly related to time and money. You have been given a task. What does your expertise and time allow in order for it to be successful? By taking preliminary action to properly define the project and set up proper expectations with the client, you will save yourself time and trouble in the end. The more experience you have in creating sites, the more predicting and troubleshooting you can do to save yourself unnecessary expense. The problem is, we don't often take the time to properly define the scope of a project. You can use the time now, or later. It is up to you.

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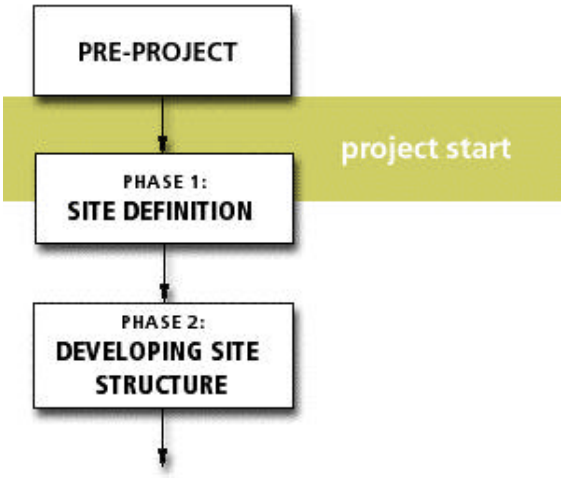

Send the Client Questionnaire

At the earliest opportunity, send the potential client your customized questionnaire (see "workflow handouts" in earlier session) to gather information and estimate the scope and details of the project. The individuals or companies who take the time to answer the questions in detail score higher/on the "good client bad client" scale. The client questionnaire and answers generated in this process are an important step in understanding the overall scope and direction the client wishes to take.

Screening Your Project and Client

Avoiding a bad situation is much easier if you do the legwork up front to make sure you are making good choices with the projects you take on. Identifying the scope and goals of the project will enable you to make a good decision and see if a project is a 'fit' for you and/or your team. One of the most important factors to consider with a new project is the person you will be working with to supply you direction, information, content and approvals. This can be an internal or external client. It is best to have one contact who is responsible for final sign-off and approval. This will help eliminate confusion and communication breakdown.

CLIENT QUESTIONNAIRE

Use the questionnaire supplied in the handout for "Web Design Workflow" to send to your client prior to starting the job. Modify questions to fit the specific needs of the project you are working on. Questions are organized into key categories, including:

MESSAGE

PERCEPTION

ACTION

TECHNOLOGY

MARKETING

ADMINISTRATIVE

You will get initial thoughts and feedback from the client regarding style and tone, competitive sites and audience.

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2.0 BEFORE YOU START: The Client

THE GOOD CLIENT

Working with an understanding and responsive client helps to make the development process a positive one. Having realistic expectations and an understanding of the process is a bonus. A good client understands the overall picture and works with you as a team player to make the Web site a success.

THE BAD CLIENT

The bad client is something to watch out for. Not only will you put in unnecessary hours due to disorganization and lack of content,but you may not get paid either. Working with someone for the first time is always a challenge, but there are things to watch out for which might help you stay away from projects that are potential nightmares.

GOOD CLIENT

A good client has some of the following attributes:

❑ Is goal oriented: focused on the big picture

❑ Answers questionnaire in clear and detailed manner

❑ Supplies an RFP, or clear outline of goals and scope

❑ Understands the Web environment and the development process

❑ Gives final sign-off and approval

❑ Is in agreement on deliverables, schedule and budget

❑ Is responsive to email and phone calls

❑ Has a "team"approach

❑ Gets you content on time

❑ Is part of the solution instead of the problem

RED FLAG CLIENT

Not necessarily a nightmare client, but some things to watch out for:

❑ A get it up quick attitude, unrealistic schedule requests

❑ Doesn't know what the content should be, but wants it to "look cool"

❑ Asks to create a demo site, "the real one will come later"

❑ He/she cannot give final approval or is not putting you in touch with the decision makers

❑ Doesn't have time to fill out the questionnaire

❑ Small budget, swift deadline

❑ Non-responsive, cannot make decisions, does not email or call back in a timely manner

❑ Indecisive, changes mind frequently

❑ Wants to handle the creative to "save money"

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ITEMS CONTAINED IN A STANDARD PROPOSAL

Introduction Letter/Note: A letter or an informal note separate from the proposal is a good way to set a friendly, informal tone and also to set up the expectations for the written material. This introduction is a chance to address the individual directly relay excitement and interest in the project.

Restate the Client's Needs: The first thing to address is a restatement of the project, as defined by the client (through email or conversation or RFP) and reinterpreted in your own words. This is necessary to ensure proper communication has taken place, and that the project has been properly defined.

Project Overview: This is the executive summary. Address the overall scope of the project. Include information about tasks to be performed (information architecture, interface design, competitive research, etc.) This is a general statement outlining the basic deliverables and goals of the project, as well as any additional considerations.

Schedule/Methodology: Addressing the schedule from a broad time frame and addressing the week-to-week methodology within that time frame allows you to address both timing and process at the same time. Show the deliverables as a weekly summary, staying away from specific dates. Be sure to state the desired launch date.

Budget Detail: Use a range of prices to determine overall budget for the project. Whether stated or not, most projects are based on time and materials and should be determined accordingly. Be sure also to list your 'assumptions' about the project, including details about back-end or programming functions. The more information you supply in the proposal stage, the more "fallback" room you will have questions at a later time.

Sitemap Overview: Sometimes a rough site plan is included to help understand the overall organization of the site and to get an idea of section and pages.

Project Team and Bios: Introduce the team (or individuals) who will be working on the project in a brief and professional manner. Avoid long, drawn out work history and stick to the items that most relate to the project at hand. Attach contact names and email addresses if appropriate.

References/URL's: Submit at short list of relevant URL's for review, choosing those that best relate to the project you are pitching. Include names and contact information for at least three references.

THE PROPOSAL

Oftentimes the first step to getting a project is creating a comprehensive proposal. Getting as much information from the client up front is helpful to creating a proposal that is accurate and reflects the true demands of the project. The more detailed the client is, the more accurate he proposal will be. The client should provide direction or an RFP to quote the site.

WHAT IS AN RFP?

An RFP is a Request For Proposal, which is a document prepared by the client showing their vision and scope of the project. This type of document can be anywhere from 2 to 20 pages, depending on the detail and complexity of the project, and the organizational skills of the client.Many times, the more detailed the RFP, the better and more realistic the response. If there is not an RFP, make sure to have the client fill out the questionnaire in detail and gather as much information as possible through meetings, phone calls

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4.0 ESTIMATING: Time and Resources

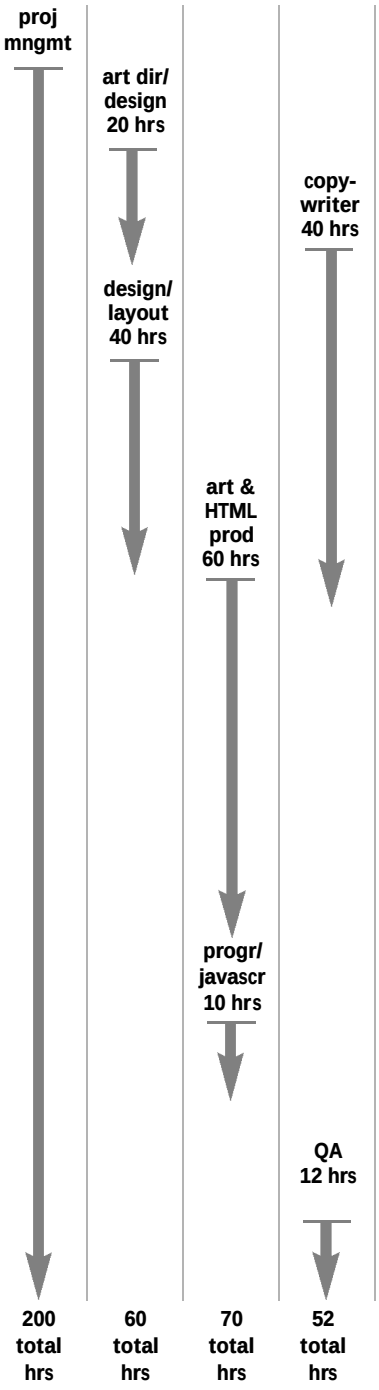
ESTIMATING REALITY

Why do design firms have such a hard time with the bottom dollar and letting others know what they have charged? The answer is simple -- WE CHARGE WHAT WE CAN. Many factors support this statement. How much a person or company charges is based on many things, experience & expertise, availability and resources, overhead,and in the end,how much the client has to spend. Usually there is a range to work with, and determining the range can be made working within an estimated range of hours and resources.

BASE COST ON HOURS

There are many methods of estimating time, from individual hours or by task (creative strategy, site architecture, design,production,etc.) Either way you present it to the client,it is based on HOURS. Base the project on a number of days or weeks and qualify your time according to overhead costs, complexity and detail of project,expectations and documentation, and experience. This will give you a base on which to build a realistic estimate.

PRE-PROJECT	Creative brief created.Outline site design goals. Concept developed and defined.Overall budget and schedule approved. Technical needs detailed.
WEEK 1	Site structure defined,navigation and page flow developed.Sitemap completed. Technical needs addressed and clarified.Content acquisition begins.
WEEK 2	User Interface (UI) Design begins. Design presented and look and feel is set.Content acquisition begins.
WEEK 3	HTML Protosite (non-design oriented) developed following approved page flow and UI design.Design is finalized.
WEEK 4	Art Production/GIF animation production begins using Protosite as outline and structure. Begin HTML production.
WEEK 5	Continue HTML production and necessary programming,incorporating content and graphics into final site.
WEEK 6	Beta version of site is "live" for client sign-off and internal testing and Quality Assurance (QA) begins. (usability testing takes place.) Freeze content.
WEEK 7	Site moved to end server for cross-platform/browser testing and QA.
WEEK 8	Additional testing & QA, necessary modifications. Final approval. LAUNCH



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Team Member	$ Rate	Est. Hours	Days	Subtotal	X % overhead	TOTAL
PROJECT MANAGER	$50	200	25 days	**$10,000**		
ART DIRECTOR	$50	20	2.5 days	**$1,000**		
DESIGNER	$40	40	5 days	**$1,600**		
ART PRODUCTION	$35	20	2.5 days	**$ 700**		
HTML PRODUCTION	$40	40	5 days	**$1,600**		
PROGRAMMING	$60	10	1.25 days	**$ 600**		
COPYWRITER	$35	40	5 days	**$1,400**		
QA/PROOFING	$25	12	1.5 days	**$ 300**		
				$17,270	50%	**$26,000.00**

note: these numbers are used for an example and a starting basis only. Different organizations, shops and individuals have different hourly rates depending on overhead and experience.

The amount of hours shown above can also be broken down into daily or weekly rates. Example, one week of PM work @$50 per hour = $2,000 per week for an 8-week project full time = $16,000.00

Multiply your total by a percentage to allow for contingencies and overhead costs. A 10% to 20% markup is standard for 'padding' and protection. A 50% to 100% markup is often applied to cover overhead such as rent, phones, and administrative tasks.

Sample Budget Worksheet Based on Hours

The above example is a standard worksheet outlining hourly rates for each team member. To estimate time, see the example on the facing page to get a sense of the amount of hours each component will carry within the project scope. Track time from weeks, to days, and then into hours. Allow for a 10% - 50% markup to allow for contingencies and overhead. In the end, provide your client a range of pricing based on your totals.

FIXED BID PRICING

Many clients request a fixed bid.If you do submit a fixed price, it is the responsibility of the project manager to keep the project scope under control, and also to track hours to make sure the project is within the budgeted hours. Some shops bid on 'time and materials' which is based on overall hours, tracked and billed throughout the project.

TRACKING TIME

Keeping a weekly tally of the project time is crucial to maintaining budget and scope requirements. Any time which is not budgeted for is either eaten by the Web development company, or, if scoped and tracked properly, charged to the client as an AC (additional charge.)

ADDITIONAL CHARGES

If the client asks for an additional feature or section which is not within the original definition of the project,smile and confidently say "No problem, I'll get back to you with a separate schedule and budget ASAP." You'll be surprised at how effective this approach is.

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4.2 THE BUDGET: Estimating by Task

TASK ORIENTED

Sometimes it is easier to break a project down by task rather than by individual time. This is another way to approach estimating by taking each task and determining how much time it will take. This might be an easier way to approach the project for an individual wearing multiple hats.

When the project is complex or contains several defined phases which need to be separately defined,this is a good way to define the scope of the project in a different manner.

Task	Est. Hours	$ Per Hr	Days	Subtotal
Project Definition	40	$50	5 days	**$2,000**
Site Architecture	40	$50	5 days	**$2,000**
Information Design	40	$50	5 days	**$2,000**
GUI Design (graphic)	60	$50	7.5 days	**$3,000**
Production	80	$40	10 days	**$3,200**
Programming	10	$60	1.25 days	**$ 600**
Usability Testing	30	$50	5 days	**$1,500**
Competitive Analysis	20	$50	2.5 days	**$ 1,000**
Copywriting	60	$50	7.5 days	**$ 3,000**
QA/Testing	12	$40	1.5 days	**$ 480**
				$18,780

X % overhead	TOTAL
50%	**$28,000.00**

Cost per hour can be determined by RATES which are set in advance. Most tasks can be classified in the following categories.

SAMPLE RATES:

Admin/Management = $50 per hour
Design/Creative = $50 per hour
Production = $40 per hour
Programming = $60 per hour

Round the total to an even number.

Sample Budget Worksheet Based on Task

The project is broken into appropriate tasks and associated times are given to each task in terms of days and weeks. Rates are applied for the type of task designated; admin, creative, production, programming -- and the totals are created in the same manner as before. If this type of estimating helps the client understand the total cost, use this method.

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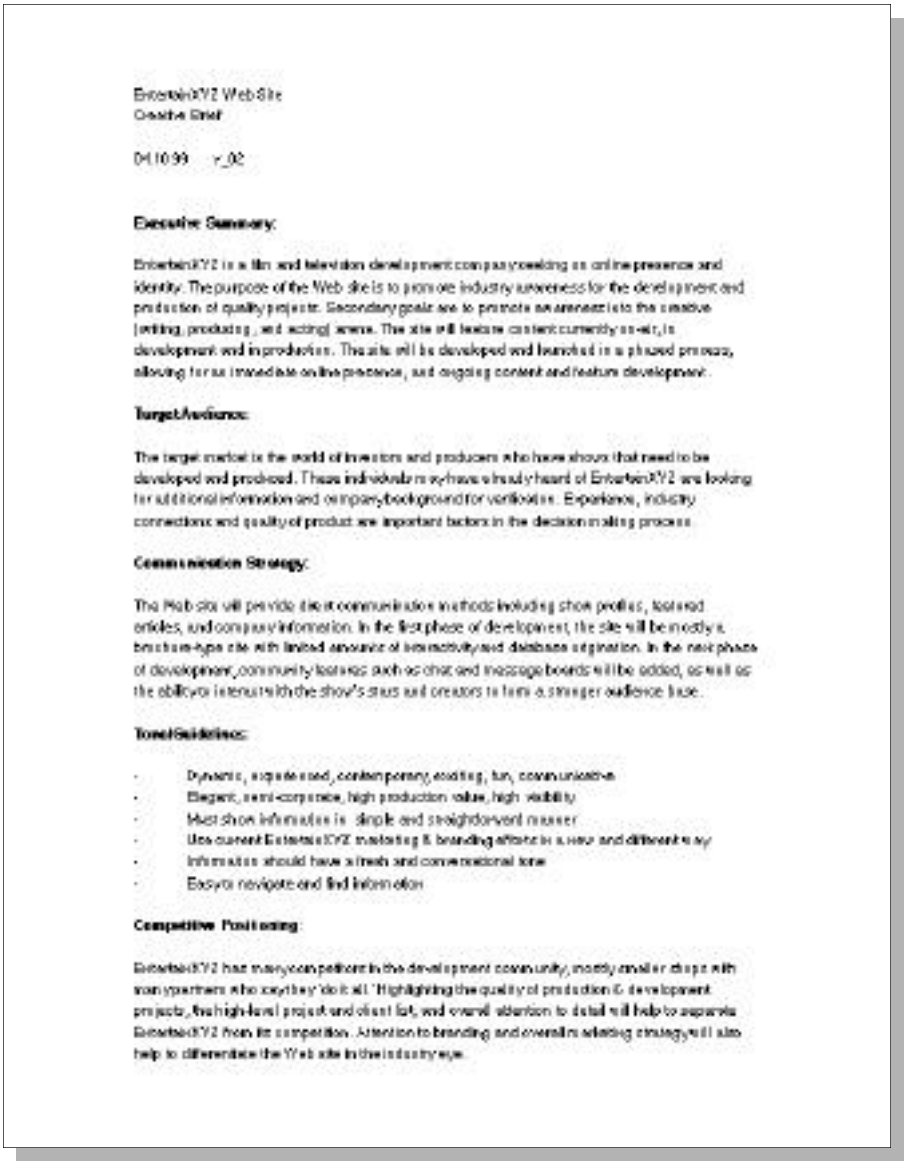

EntertainXYZ Web Site
Creative Brief

04.10.99 v_02

Executive Summary:

EntertainXYZ is a film and television development company seeking an online presence and identity. The purpose of the Web site is to promote industry awareness for the development and production of quality projects. Secondary goals are to promote awareness to the creative [writing, producing, and acting] arenas. The site will feature content currently on-air, in development and in production. The site will be developed and launched in a phased process, allowing for an immediate online presence, and ongoing content and feature development.

Target Audience:

The target market is the world of investors and producers who have shows that need to be developed and produced. Those individuals may have already heard of EntertainXYZ and are looking for additional information and company background for verification. Experience, industry connections and quality of product are important factors in the decision making process.

Communication Strategy:

The Web site will provide client communication methods including show profiles, featured articles, and company information. In the first phase of development, the site will be mostly a brochure-type site with limited amounts of interactivity and database origination. In the next phase of development, community features such as chat and message boards will be added, as well as the ability to interact with the show's stars and creators to form a stronger audience base.

Tone/Guidelines:

- Dynamic, sophisticated, contemporary, exciting, fun, communicative
- Elegant, semi-corporate, high production value, high visibility
- Must show information in simple and straightforward manner
- Use current EntertainXYZ marketing & branding efforts in a new and different way
- Information should have a fresh and conversational tone
- Easy to navigate and find information

Competitive Positioning:

EntertainXYZ has many competitors in the development community, mostly smaller shops with main partners who say they "do it all." Highlighting the quality of production & development projects, the high-level project and client list, and overall attention to detail will help to separate EntertainXYZ from its competition. Attention to branding and overall marketing strategy will also help to differentiate the Web site in the industry eye.

CREATIVE BRIEF

The creative brief is a document which is created by the development team outlining the visual and conceptual goals. Use the client questionnaire to help determine adjectives which describe the site in tone and style.

The brief can be a simple one page document (shown at left) or can be a multiple page document outlining specific marketing goals and strategy along with the standard visual direction.

The purpose of this document is to state in verbal terms the way the audience/user will perceive the site. Additional information (target audience, communication strategy, tone, etc.) helps the visual designer and information architect set the proper tone for the site.

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6.0 COMPETITIVE ANALYSIS: Informal Research

INFORMAL ANALYSIS

Strategic planning is an important part in the Web development process. A simple way to approach site strategy is to perform an informal competitive analysis to identify the key attributes of the type of site you are working on. You can easily gather information to establish the objectives of your client's Web presence, your approach and steps to insure a quality product.

TYPES OF SITES

First off, identify the type of site you will be working on. Gather information from the client regarding their main online competition,or search on your own.Some examples:

- ❏ Portal Sites
- ❏ E-Commerce Sites
- ❏ Entertainment Sites
- ❏ Educational Sites
- ❏ Community Sites
- ❏ Brochure Sites

REVIEW OBJECTIVES

Evaluate features and offerings. Compare characteristics of competition.Determine your approach in comparison to your competition,taking into consideration the overall site goals and budget allocation.

Feature Comparison	Competition A Brochure-site	Competition B Interactive	Competition C Dynamic
Company Name			
Company URL	**samplea.com**	**sampleb.com**	**samplec.com**
Site Classification	**brochure**	**destination**	**portal**
Search Function		x	x
Contests/Games	x	x	x
Email	x	x	x
E-Commerce	x		x
Ad Banners		x	x
Chat			x
Press Releases	x	x	x
Company Information	x	x	x
Video/Music Clips		x	x
Web Links	x	x	x
Contact Information	x	x	x
Press Releases	x	x	x
Client List	x	x	x
Feedback	x	x	x
Message Boards			x
Flash Animation		x	x
Other	x	x	x
Total # of features per site	**11**	**14**	**17**
Rank Effectiveness:	*	**	****

Create a feature list by looking at the type of site you are creating and making a list of overall features from as many similar sites as possible. Rank the importance of each feature, and determine how it applies to your overall site goals. Use this final list to compare your main competition which will help determine which features are important to include in your site.

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COMPETITIVE ANALYSIS: Informal Research

6.0

Graphic & Content Comparison	Competition A Brochure-site	Competition B Interactive	Competition C Dynamic
Company URL			
Site Classification			
Fast download (less than 50k)			
Frames based			
Use of animation			
Splash screen			
Scrolling on homepage			
Scrolling content on sub-pages			
Graphic buttons			
Text/HTML links			
Ad on homepage			
URL on homepage			
Printable homepage			
Global navigation on subpages			
Sitemap/Site Index			
Dynamic content (changes daily)			
Rollover navigation			
Email or feedback ability			
Pull-down menus			
Total # of features per site			
Rank Effectiveness:			

Compare other elements of the site besides basic features. Take graphic, content and functional elements into consideration. Identify download speeds and graphic weight of the competitive sites. Determine the best navigation methods. See which sites have splash screens and how effective they are as marketing and informational tools.

ESTABLISH OBJECTIVE

After conducting your competitive research,take into consideration the company's overall goals, time and financial constraints, and a logical starting point for your project.

Sample recommendation:

"EntertainXYZ will establish a Web presence as a brochure site with limited interactivity."

ESTABLISH BENEFITS

"This approach enables EntertainXYZ to establish their online presence immediately, and to develop a phased approach to initial site structure to allow for growth and content/functionality additions."

ESTABLISH SHORT TERM GOALS AND OBJECTIVES

Create a list of features you would like to include as a short term or immediate part of the site. Determine costs and scope issues.

ESTABLISH LONG TERM GOALS AND OBJECTIVES

Create a wish list of features to include on the site, which can be added in a later phase of production,with a separate budget and schedule.

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NOTES

Team Member	$ Rate	Est. Hours	Days	Subtotal	X % overhead	TOTAL
PROJECT MANAGER						
ART DIRECTOR						
DESIGNER						
ART PRODUCTION						
HTML PRODUCTION						
PROGRAMMING						
COPYWRITER						
QA/PROOFING						
				$		$

Project:

Date:

Name:

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Project:

Date:

Name:

Feature			
Company URL			
Site Classification			
Total # of features per site			
Rank Effectiveness:			

NOTES

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8.0 PROPOSAL FORMAT: Informal Letter

ENTERTAINXYZ

For the purposes of this session,we will use a made up company called "Entertain XYZ" as an example of how to create a proposal and properly plan for a Web site.

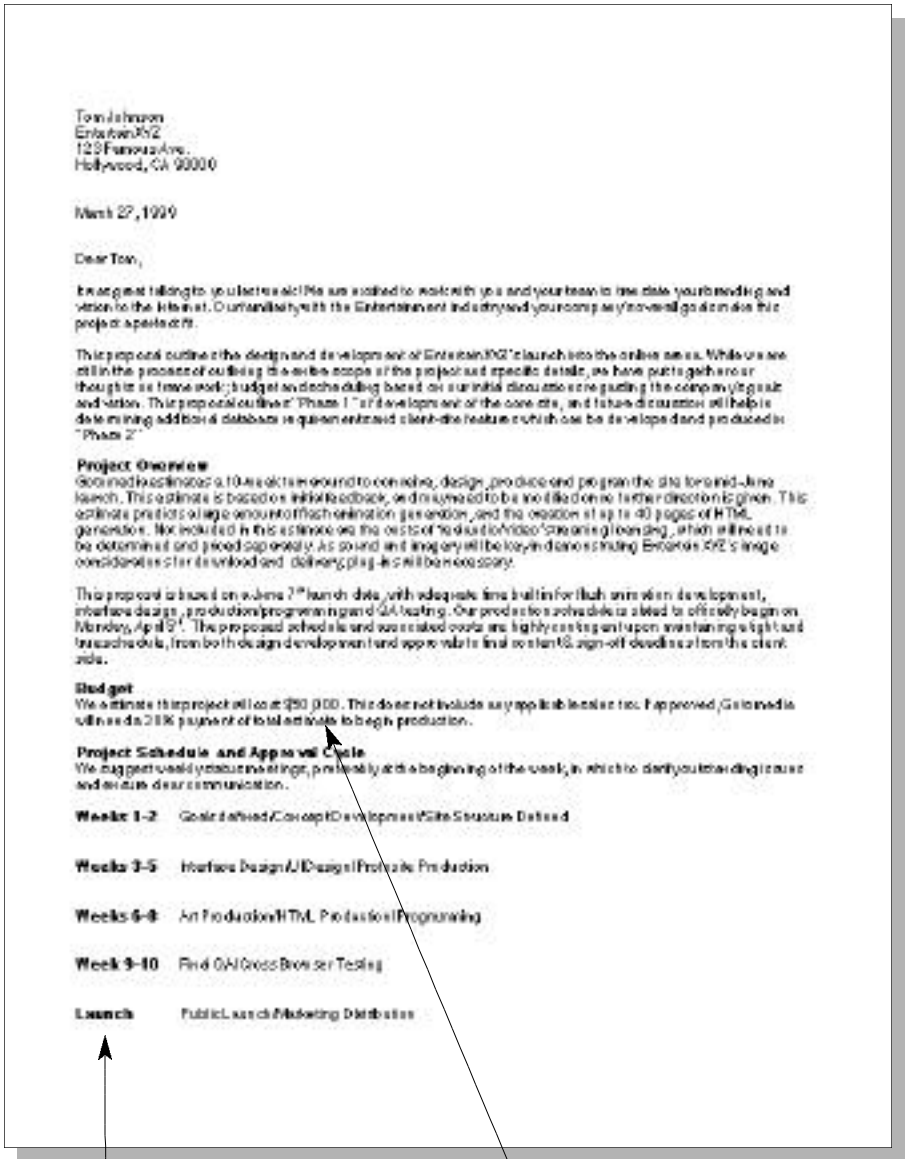
THE INFORMAL LETTER PROPOSAL FORMAT

The proposal information can be submitted in a letter format,shown to the right. This example is informal, friendly and outlines the scope, budget and timing of the project in a brief and succinct manner. It is a good method for projects which need a response but do not need a lot of documentation in order to proceed.

ITEMS TO INCLUDE

Make sure you outline the details of the project,including

- Project Overview
- Budget & Payment
- Project Schedule
- Details and Assumptions
- Team Leaders/Bios
- References



Tom Johnson
EntertainXYZ
123 Famous Ave.
Hollywood, CA 90000

March 27, 1999

Dear Tom,

It was great talking to you last week! We are excited to work with you and your team to tree date your branding and vision to the Internet. Our familiarity with the Entertainment industry and your company's overall goals make this project a perfect fit.

This proposal outlines the design and development of EntertainXYZ's launch into the online area. While we are still in the process of outlining the entire scope of the project and specific details, we have put together our thoughts on frame work; budget and scheduling based on our initial discussions regarding the company's goals and vision. This proposal outlines "Phase 1" of development of the core site, and future discussion will help in determining additional databases requirements and client-site features which can be developed and produced in "Phase 2".

Project Overview
Gotomedia estimates a 10-week turnaround to conceive, design, produce and program the site for a mid-June launch. This estimate is based on initial feedback, and may need to be modified once further direction is given. This estimate predicts a large amount of flash animation generation, and the creation of up to 40 pages of HTML generation. Not included in this estimate are the costs of "Radio/Video" streaming licensing, which will need to be determined and priced separately. As sound and imagery will be key in demonstrating Entertain XYZ's image considerations for download and delivery plug-ins will be necessary.

This proposal is based on a June 7th launch date, with adequate time built in for flash animation development, interface design, production/programming and QA testing. Our production schedule is slated to officially begin on Monday, April 5th. The proposed schedule and associated costs are highly contingent upon maintaining a tight and true schedule, from both design development and approvals to final content & sign-off deadlines from the client side.

Budget
We estimate this project will cost $50,000. This does not include any applicable sales tax. If approved, Gotomedia will need a 20% payment of total estimate to begin production.

Project Schedule and Approval Cycle
We suggest weekly status meetings, preferably at the beginning of the week, in which to clarify outstanding issues and ensure clear communication.

Weeks 1-2 Goals defined/Concept Development/Site Structure Defined

Weeks 3-5 Interface Design/UI Design/Prototype Production

Weeks 6-8 Art Production/HTML Production/Programming

Week 9-10 Final QA/Cross Browser Testing

Launch Public Launch/Marketing Distribution

This proposal shows a fixed bid format. This is a fee for the entire project (broken down into detail in the proposal following) which is based on hours. In this case, ranges were not shown, and it is expected that the producer will keep the project in scope and within this budget range.

This informal format allows you to present a schedule overview and introduce your approach and methodology at the same time. It shows the basic flow of a 10 week schedule, and gives scope to the project.

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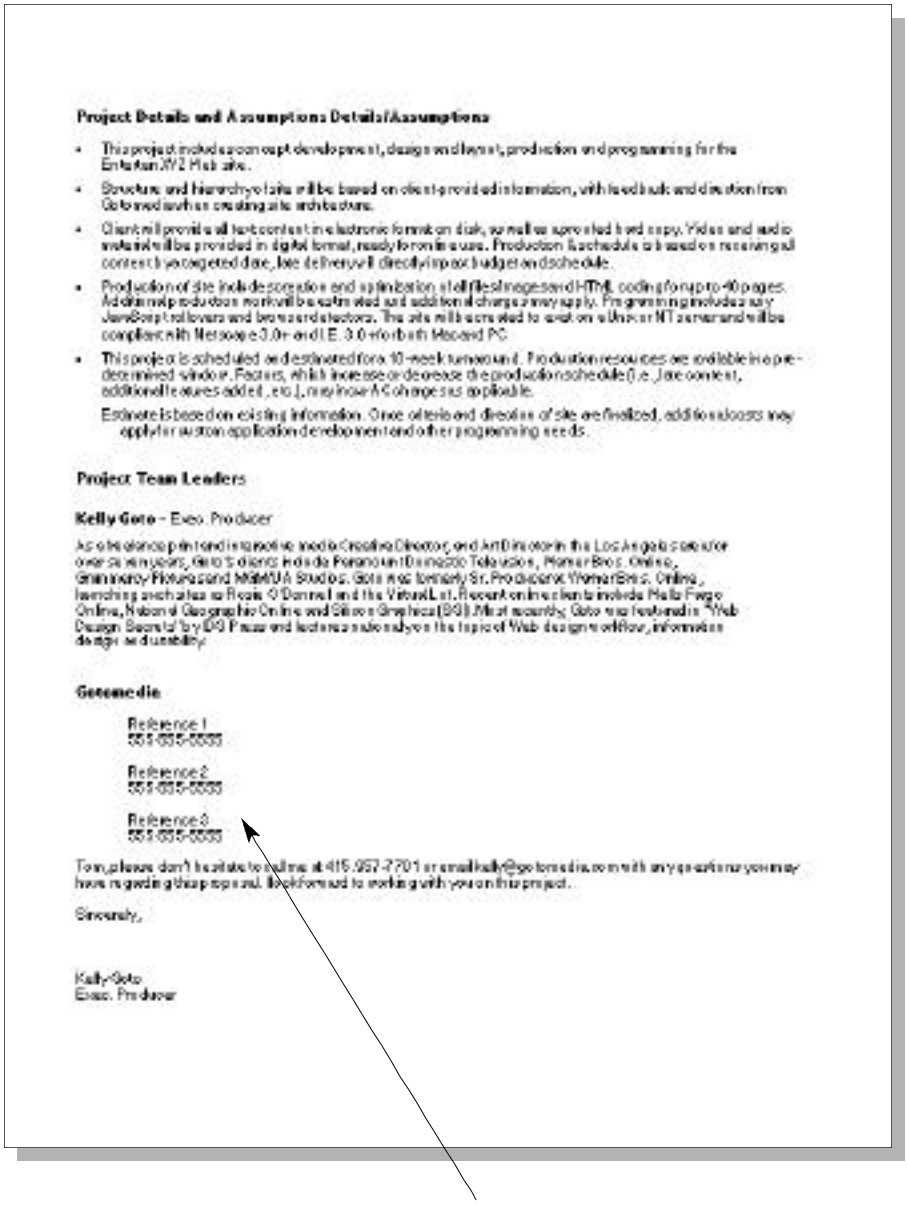

Project Details and Assumptions Details/Assumptions

- This project includes concept development, design and layout, production and programming for the Entertain XYZ Web site.
- Structure and hierarchy of site will be based on client-provided information, with feedback and direction from Gotomedia when creating site architecture.
- Client will provide all text content in electronic format on disk, as well as a printed hard copy. Video and audio material will be provided in digital format, ready for online use. Production & schedule is based on receiving all content by a targeted date, late delivery will directly impact budget and schedule.
- Production of site include screation and optimization of all files/images and HTML coding for up to 40 pages. Additional production work will be estimated and additional charges may apply. Programming includes any JavaScript rollovers and browser detectors. The site will be created to exist on a Unix or NT server and will be compliant with Netscape 3.0+ and I.E. 3.0+ for both Mac and PC.
- This project is scheduled and estimated for a 10-week turnaround. Production resources are available in a pre-determined window. Factors, which increase or decrease the production schedule (i.e., late content, additional features added, etc.), may incur A-C charges as applicable.

  Estimate is based on existing information. Once criteria and direction of site are finalized, additional costs may apply for custom application development and other programming needs.

Project Team Leaders

Kelly Goto – Exec. Producer

As a freelance print and interactive media Creative Director, and Art Director in the Los Angeles area for over seven years, Goto's clients include Paramount Domestic Television, Warner Bros. Online, Grammercy Pictures and MGM/UA Studios. Goto was formerly Sr. Producer at Warner Bros. Online, launching such sites as Rosie O'Donnell and the Virtual Lot. Recent online clients include Wells Fargo Online, National Geographic Online and Silicon Graphics (SGI). Most recently, Goto was featured in "Web Design Secrets" by IDG Press and lectures nationally on the topic of Web design workflow, information design and usability.

Gotomedia

Reference 1
555-555-5555

Reference 2
555-555-5555

Reference 3
555-555-5555

Tom, please don't hesitate to call me at 415.957-7701 or email kelly@gotomedia.com with any questions you may have regarding this proposal. I look forward to working with you on this project.

Sincerely,

Kelly Goto
Exec. Producer

References are not always necessary in an informal proposal, but it is a nice touch to ensure credibility, especially with known companies or previous clients. You can also list relevant URL's.

DETAILS & ASSUMPTIONS

Project details and assumptions assure you and the client are on the same page. Feel free to detail as much information as you can in this section as it will protect you once the project has begun.

BIOS/REFERENCES

Briefly give a history and background of key team members and your company. List current URL's or other projects and clients as it relates to the project. Include references and contact information.

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8.1 PROPOSAL FORMAT: Detailed Plan

DETAILED PROPOSAL

A more conventional format for proposals is a formal proposal outlining the project in a detailed manner. This type of proposal is used for projects both large and small,but usually ones which require more information and formality in order to properly understand the budget and scope.

INTRODUCTORY LETTER

As mentioned earlier, the introductory letter is a good way to add a casual,friendly tone to a rather stuffy proposal. It also allows you to give a brief overview of the contents of the proposal,to allow for faster information intake.

TIMING AND COST

Lay out the payment expectations and overall fee structure in the introduction.Being straightforward and direct about finances will only ensure understanding and prompt payment.It is a standard request to begin work after receiving the first payment (although getting the actual check is another story.)

Tom Johnson
EntertainNYZ
123 Famous Ave.
Hollywood, CA 90000

March 27, 1999

Dear Tom,

It was great talking to you last week! We are excited to work with you and your team to translate your branding and vision to the Internet. Our familiarity with the Entertainment industry and your company's overall goals make this project a perfect fit.

This proposal outlines the design and development of EntertainNYZ's launch into the online arena. While we are still in the process of outlining the entire scope of the project and specific details, we have put together our thoughts on framework, budget and scheduling based on our initial discussions regarding the company's goals and vision. This proposal outlines "Phase 1" of development of the core site.

Gotomedia estimates a 10-week turnaround to conceive, design, produce and program the site for a mid-June launch. The total estimated cost for the core site is $50,000.00. This estimate is based on initial feedback, and may need to be modified once further direction is given. This estimate predicts a large amount of flash animation generation, and the creation of up to 40 pages of HTML generation. As sound and imagery will be key in demonstrating EntertainNYZ's image considerations for download and delivery; plug-ins will be necessary.

This proposal is based on a mid-June launch date, with adequate time built in for flash animation development, interface design, production/programming and QA testing. Our production schedule is slated to officially begin on Monday, April 5th. The proposed schedule and associated costs are highly contingent upon receiving a tight and timely schedule, from both design development and approvals to final content & sign-off deadlines from the client side. If approved, Gotomedia will need a 30% payment of total estimate to begin production.

Please don't hesitate to contact me directly to discuss this proposal or to add more details. We look forward to working with you on this project and co-creating a showcase site.

Sincerely,

Kelly Goto
Exec. Producer

It is good to state your compensation expectations up front. If you are working for a larger organization, getting a check turned around quickly may not be possible, but keep the client to a 30/30/40 payment schedule or a 50/50 payment schedule. Don't be afraid to talk about money in a straightforward manner.

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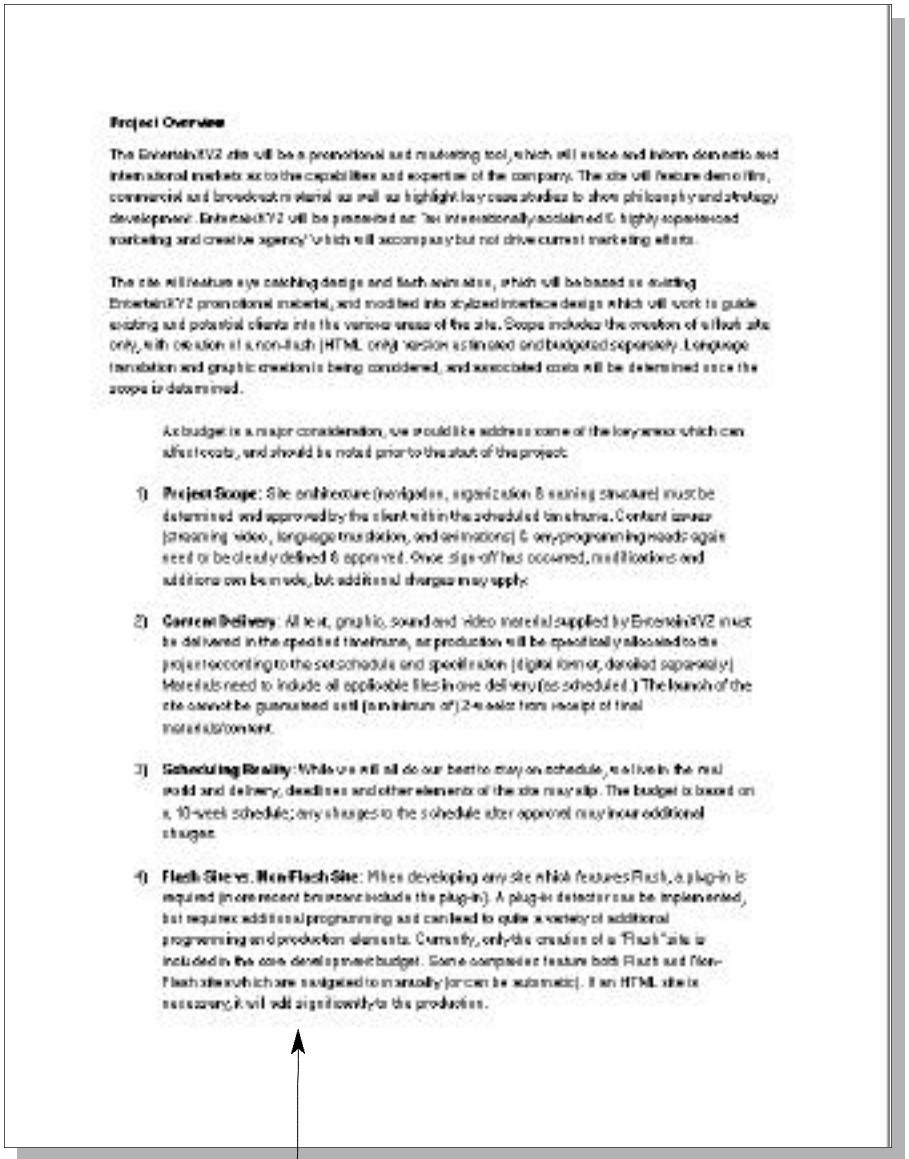
PROPOSAL FORMAT: Detailed Plan

8.1



Project Overview

The EntertainXYZ site will be a promotional and motivating tool, which will entice and inform domestic and international markets as to the capabilities and expertise of the company. The site will feature demo reels, commercial and broadcast material as well as highlight key case studies to show philosophy and strategy development. EntertainXYZ will be presented as "an internationally acclaimed & highly experienced marketing and creative agency" which will accompany but not drive current marketing efforts.

The site will feature eye catching design and flash animation, which will be based on existing EntertainXYZ promotional material, and modified into stylized interface design which will work to guide existing and potential clients into the various areas of the site. Scope includes the creation of a flash site only, with creation of a non-flash (HTML only) version is planned and budgeted separately. Language translation and graphic creation is being considered, and associated costs will be determined once the scope is determined.

As budget is a major consideration, we would like address some of the key areas which can affect costs, and should be noted prior to the start of the project:

1) **Project Scope**: Site architecture (navigation, organization & naming structure) must be determined and approved by the client within the scheduled timeframe. Content (server [streaming video, language translation, and animations] & any programming needs) again need to be clearly defined & approved. Once sign-off has occurred, modifications and additions can be made, but additional charges may apply.

2) **Content Delivery**: All text, graphic, sound and video material supplied by EntertainXYZ must be delivered in the specified timeframe, as production will be specifically allocated to the project according to the set schedule and specification (digital format, detailed separately). Materials need to include all applicable files in one delivery (as scheduled.) The launch of the site cannot be guaranteed until (a minimum of) 2-4 weeks from receipt of final material/content.

3) **Scheduling Reality**: While we will all do our best to stay on schedule, we live in the real world and delivery, deadlines and other elements of the site may slip. The budget is based on a 10-week schedule; any changes to the schedule after approval may incur additional charges.

4) **Flash Site vs. Non-Flash Site**: When developing any site which features Flash, a plug-in is required (in current browsers include the plug-in). A plug-in detector can be implemented, but requires additional programming and can lead to quite a variety of additional programming and production elements. Currently, only the creation of a "Flash" site is included in the core development budget. Some companies feature both Flash and Non-Flash sites (which are navigated to manually (or can be automatic). If an HTML site is necessary, it will add significantly to the production.

Details, such as items 1-4 shown above, are not necessary in all proposals. In this case, they were used as examples of where costs may be affected, as budget was a major concern to the client.

PROJECT OVERVIEW

The project overview is a restatement of the client's expectations for the project, to allow for apples to apples translation of the goals of the site into a comprehensive statement. This can be a short paragraph or a detailed breakdown of the project.

BREAK IT DOWN

Sometimes the project will be too complex to properly estimate without additional information.Break the project into phases and bid for the elements which you are able to put scope and budget towards. Keep in mind the client's expectations in regard to budget and timing and let the client know what can be effectively accomplished within those specifications.

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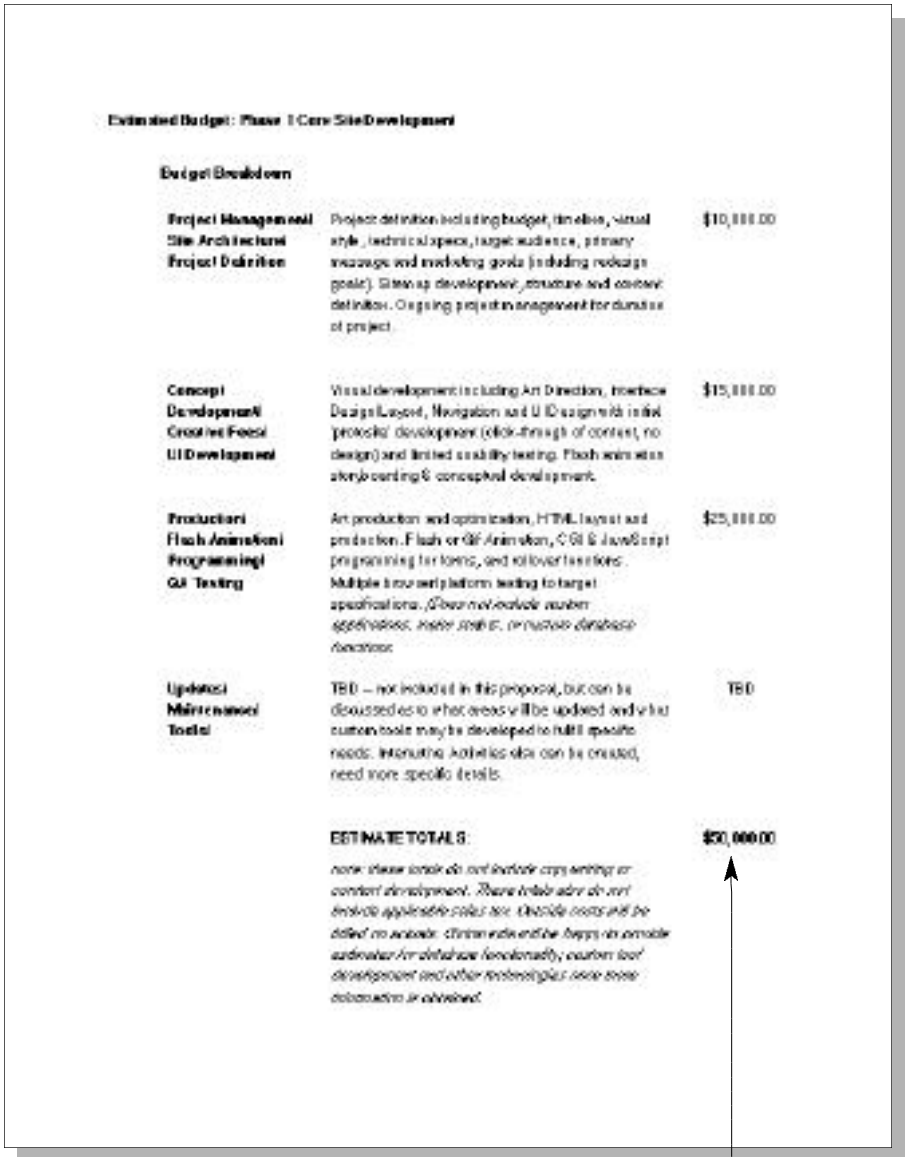
ESTIMATED BUDGET

Budgeting and estimating is one of the most difficult things to predict.Budgeting is generally based on time spent on the project. Sometimes a range is given,other times a fixed amount.Accurately predicting the amount of hours it will take to complete a project takes an experienced eye.

TYPES OF PRICING

If a fixed price is given,as shown in this sample, it is important to outline any contingencies for possible "scope creep" which will affect the budget.Be clear in defining each stage of production and all deliverables. In the end,any AC's (additional charges) added to the project need to be clearly defined and not come as a surprise. If the fixed price is the maximum allocation for the project, it is the responsibility of the project manager to keep on top of hours to ensure the project is staying within scope.

Often, time and materials billing is used for production-heavy projects. It is common practice to estimate projected hours, then track hours carefully and update the client weekly



Estimated Budget: Phase 1 Core Site Development

Budget Breakdown

Project Management/ Site Architecture/ Project Definition	Project definition including budget, timeline, visual style, technical specs, target audience, primary messages and marketing goals (including redesign goals). Sitemap development, structure and content definition. Ongoing project management for duration of project.	$10,000.00
Concept Development/ Creative Focus/ UI Development	Visual development including Art Direction, Interface Design/Layout, Navigation and UI Design with initial 'prototype' development (click-through of content, no design) and limited usability testing. Flash animation storyboarding & conceptual development.	$15,000.00
Production/ Flash Animation/ Programming/ QA Testing	Art production and optimization, HTML layout and production. Flash or GIF Animation, CGI & JavaScript programming for forms, and rollover functions. Multiple browser/platform testing to target specifications. *Does not include custom applications, back end, or custom database functions.*	$25,000.00
Updates/ Maintenance/ Tools/	TBD – not included in this proposal, but can be discussed as to what areas will be updated and what custom tools may be developed to fulfill specific needs. Interactive Activities also can be created, need more specific details.	TBD
	ESTIMATE TOTALS	**$50,000.00**
	note: these totals do not include copywriting or content development. These totals also do not include applicable sales tax. Shipping costs will be billed as actuals. Dimensions of the flash animation/animated GIF and other technologies used to be determined.	

ALLOW AT LEAST 10% PADDING

Always allow at least a 10% to 20% contingency within your existing budget for additional scope changes and miscalculation. Leaving a bit of room for the unexpected allows you to make some concessions for client changes.

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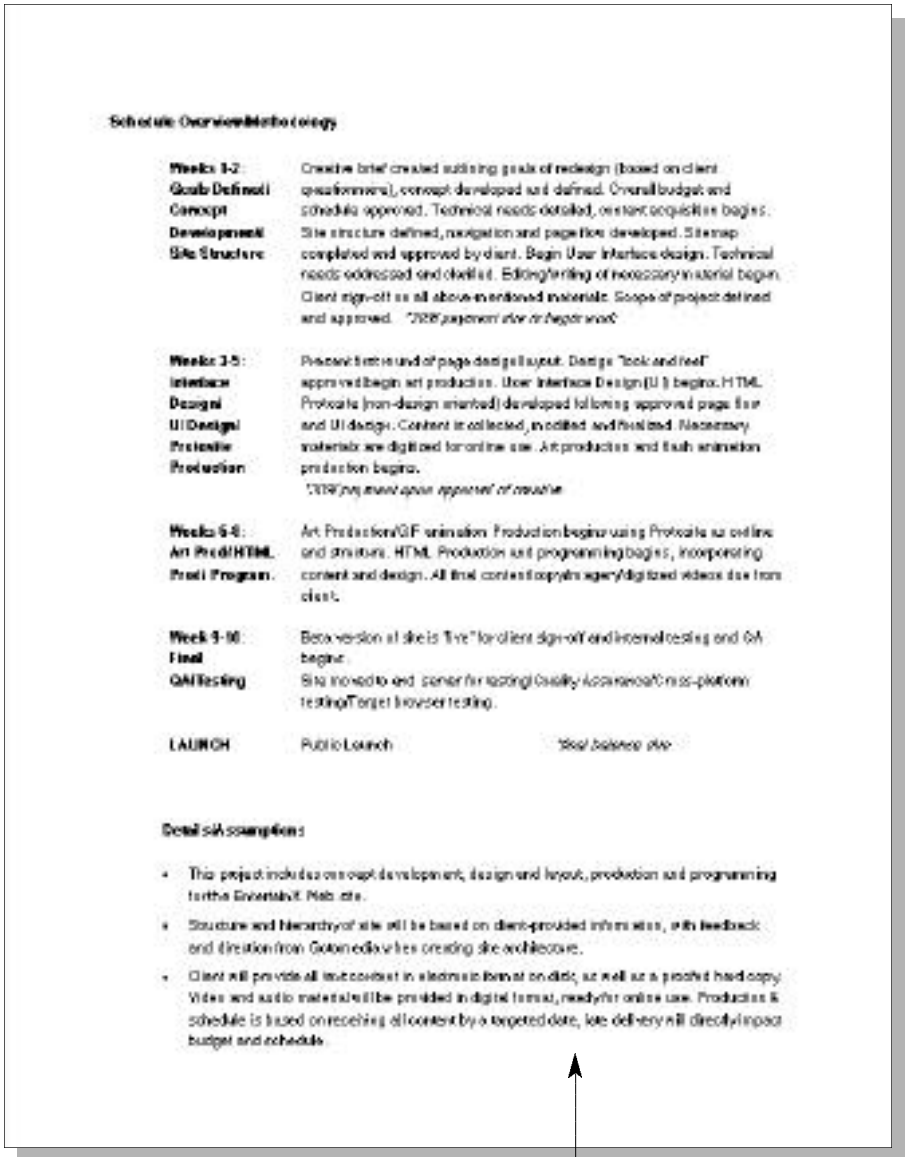

Schedule Overview/Methodology

Weeks 1-2: Goals Defined/ Concept Development/ Site Structure	Creative brief created outlining goals of redesign (based on client questionnaire), concept developed and defined. Overall budget and schedule approved. Technical needs detailed, content acquisition begins. Site structure defined, navigation and pagelists developed. Sitemap completed and approved by client. Begin User Interface design. Technical needs addressed and checklist. Editing/writing of necessary material begun. Client sign-off on all above-mentioned materials. Scope of project defined and approved. *"25%" payment due on begin work*
Weeks 3-5: Interface Design/ UI Design/ Prototype Production	Present first round of page design/layout. Design "look and feel" approved/begin art production. User Interface Design (UI) begins. HTML Prototype (non-design oriented) developed following approved page flow and UI design. Content is collected, modified and finalized. Necessary materials are digitized for online use. Art production and flash animation production begins. *"25%" payment upon approval of creative*
Weeks 6-8: Art Prod/HTML Prod Program.	Art Production/GIF animation Production begins using Prototype as outline and structure. HTML Production and programming begins, incorporating content and design. All final content copy/photography/digitized videos due from client.
Week 9-10: Final QA/Testing	Beta version of site is "live" for client sign-off and internal testing and QA begins. Site moved to and owner for testing/Quality Assurance/Cross-platform testing/Target browser testing.
LAUNCH	Public Launch *"Final balance due"*

Details/Assumptions

- This project includes concept development, design and layout, production and programming for the Gotomedia.com Web site.
- Structure and hierarchy of site will be based on client-provided information, with feedback and direction from Gotomedia who is creating site architecture.
- Client will provide all final content in electronic form on disk, as well as a proofed hard copy. Video and audio material will be provided in digital format, ready for online use. Production & schedule is based on receiving all content by a targeted date; late delivery will directly impact budget and schedule.

Clearly outline all assumptions about the project, including content delivery and browser compliancy. The more detail you add to this section, the more protection you will have at a later time when budget becomes an issue.

SCHEDULE OVERVIEW/ METHODOLOGY

In this example, the schedule overview is a great way to introduce your methodology approach to Web development. Outlining the deliverables in terms of weeks helps the client see the tasks required to make their site a reality. Stay away from actual dates attached to deliveries, and only list the assumed launch date and weeks required for production.

DETAILS/ASSUMPTIONS

Providing a list of details and assumptions in conjunction with a budget estimate or schedule is an important part of setting limitations to the project.It outlines your understanding in a bullet point fashion,allowing for a detailed explanation for content delivery expectations, browser compliancy, and more.

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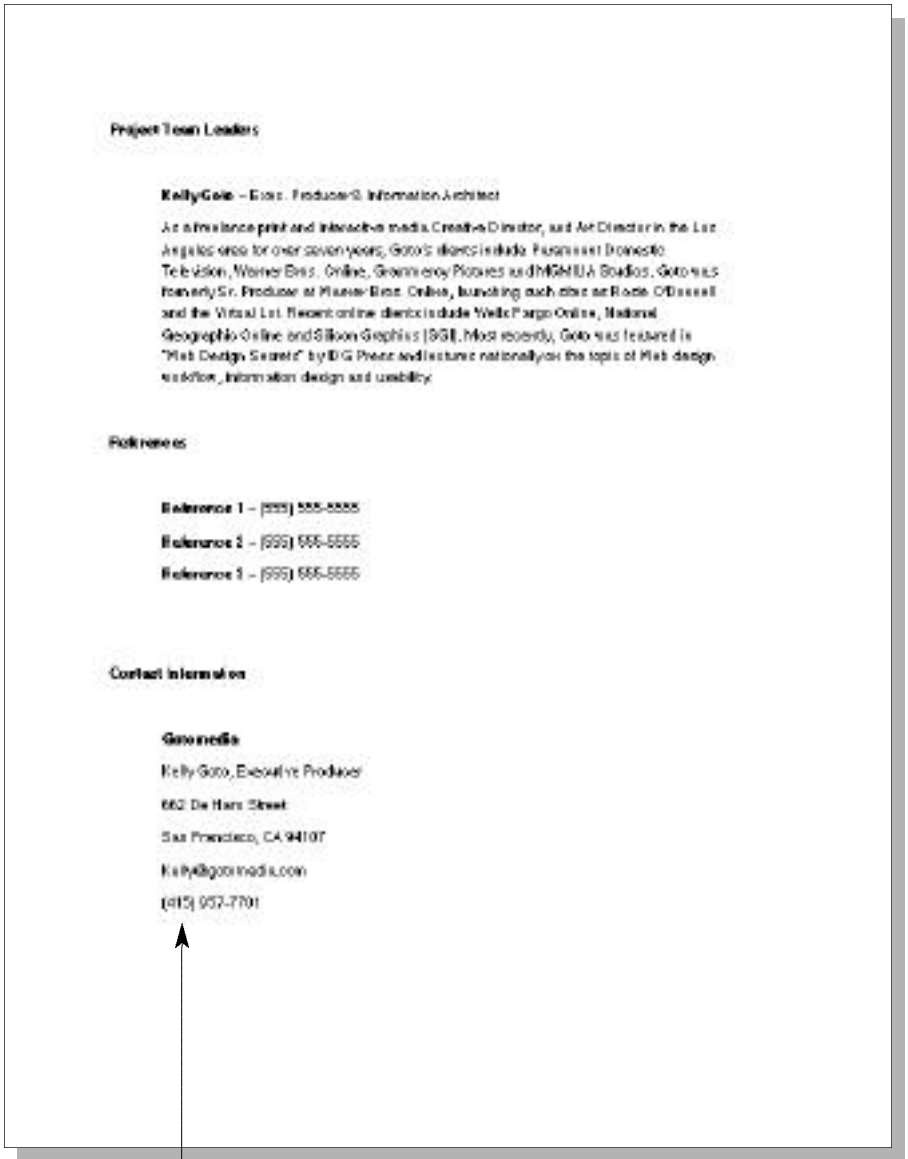
8.2 PROPOSAL FORMAT: Detailed Plan

PROJECT TEAM

Listing the team members or individuals who will be working on the site is an excellent chance to give solid references and background.An company overview can also be inserted instead of individual bios.

REFERENCES

Providing a list of references is standard in today's industry. List at least three individuals, along with names, titles, company and contact information.Often, it is good to let your references know they may be contacted so they can be prepared for the call or email.



Project Team Leaders

Kelly Goto – Exec. Producer & Information Architect

As a freelance print and interactive media Creative Director, and Art Director in the Los Angeles area for over seven years, Goto's clients include Paramount Domestic Television, Warner Bros. Online, Grammercy Pictures and MGM/UA Studios. Goto was formerly Sr. Producer at Warner Bros. Online, launching such sites as Rosie O'Donnell and the Virtual Lot. Recent online clients include Wells Fargo Online, National Geographic Online and Silicon Graphics (SGI). Most recently, Goto was featured in "Web Design Secrets" by IDG Press and lectures nationally on the topic of Web design workflow, information design and usability.

References

Reference 1 – (555) 555-5555

Reference 2 – (555) 555-5555

Reference 3 – (555) 555-5555

Contact Information

Gotomedia

Kelly Goto, Executive Producer

662 De Haro Street

San Francisco, CA 94107

Kelly@gotomedia.com

(415) 957-7701

A contact list or contact information is important to have in the proposal. Re list the key team members here for easy reference by the client.

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Follow Up With the Client

Calling or sending an email to confirm the receipt of a proposal is standard policy. Follow up in a gracious manner, and make sure to get a date by which the client promises to make their final decision. Ask if there are any questions they have regarding the proposal. Once you call, do not call again or bother the client until after the date of the final decision. If for some reason you do not get the project, you are entitled to a call or email from the client letting you know as quickly as possible, and take the opportunity to find out what the deciding factors were (budget, availability, expertise, existing relationship, etc.)

Track, Document and Sign

It's been said again and again, but here it is one more time: HAVE THE CLIENT SIGN OFF ON EVERYTHING. Whenever creating an agreement or document of importance to the project, create a line at the bottom for a signature and a date. You'll be surprised how much difference it makes when someone becomes responsible for the material they are approving. The documentation (proposals, budgeting, scheduling, etc.) will provide a clear frame of reference from the beginning of the project.

Letter of Engagement

Before beginning any work, create a work agreement for sign off. This should be a one page document which gives the project overview, details and assumptions, overall budget and payment agreement, and deliverables. In short, this is a condensed version of the proposal, with a line for a signature and date at the bottom. There are more formal contracts which can be used, and getting proper legal paperwork in place is always recommended.

HAVE A CONTRACT READY

While not all individuals or shops have legal paperwork in place, it is a good idea to have the client sign off on the final proposal and/or have a separate agreement/contract stating the basic details of the proposal including final estimated price and payment plan. This type of document,while not a legal paper, will help protect you in case of dispute. It is sometimes referred to as a "memorandum of engagement."

INVOICE IN A TIMELY MANNER THROUGHOUT THE PROJECT

Just as you would expect the client to pay you on time, it is important to bill on time and set up any additional charges in advance of each payment cycle. It is standard to request a partial (30% or 50%) payment up front to begin a project,however it is rare, especially in larger companies that this happens.

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