

<!-- ===== -->
<!-- AI PORTFOLIO SERVICE - STANDARD WORKFLOW & CHECKLIST -->
<!-- ===== -->
<!-- This is your complete project delivery system -->
<!-- Use this for EVERY client to ensure consistency -->
<!-- Estimated time per project: 8-12 hours total -->
<!-- ===== -->

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AI PORTFOLIO SERVICE - PROJECT WORKFLOW

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CLIENT: _____

PACKAGE: Starter Professional Executive

START DATE: _____

TARGET DELIVERY DATE: _____

ACTUAL DELIVERY DATE: _____

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PHASE 1: INTAKE & SETUP (Day 0-1)

Time Estimate: 30-45 minutes

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CLIENT INQUIRY RECEIVED

Date: _____

Source: Website LinkedIn Referral Other: _____

SEND INITIAL RESPONSE EMAIL (within 24 hours)

Template: "Thank you for your interest! Here's what happens next..."

Include:

- Link to intake questionnaire
- Package pricing reminder
- Expected timeline
- My availability for questions

CLIENT COMPLETES INTAKE QUESTIONNAIRE

Date received: _____

All required fields completed

Resume uploaded

Photo uploaded (if applicable)

- REVIEW INTAKE FORM (20 minutes)
 - Check for completeness
 - Flag any missing information
 - Identify unique challenges or requirements
 - Prepare questions for discovery call

Notes:

- SEND PAYMENT INVOICE & CONTRACT
 - Invoice sent via [Stripe/PayPal/Other]: _____
 - Service agreement sent
 - Payment received: \$ _____
 - Receipt/confirmation sent
- SCHEDULE DISCOVERY CALL (If included in package)
Date/Time: _____
Meeting link sent: Yes
Calendar invite sent: Yes

- CREATE PROJECT FOLDER
 - Location: _____
 - Structure:
/client-name/
 /source-materials/
 /drafts/
 /final/
 /assets/

PHASE 2: DISCOVERY & CONTENT PLANNING (Day 1-2)

Time Estimate: 60-90 minutes

- CONDUCT DISCOVERY CALL (Professional & Executive packages)
Duration: 60 min 90 min 120 min
Date completed: _____

Key Discussion Points:

- Career goals and target roles
- Top 3-5 accomplishments (with numbers/impact)
- Unique value proposition / what makes them different

- Key projects to feature prominently
- Skills they want to highlight
- Geographic/remote preferences
- Salary expectations (if comfortable)
- Design preferences and inspiration
- Timeline expectations

Recording/Notes: _____

ANALYZE EXISTING MATERIALS (30 minutes)

- Review resume/CV
- Review LinkedIn profile
- Check any portfolio/GitHub links
- Note gaps or inconsistencies
- Identify strongest selling points

Key Insights:

CREATE CONTENT OUTLINE

- Hero section tagline/pitch
- About section narrative arc
- Skills categories (4-6 categories)
- Experience summary for each job (3-4 positions)
- Featured projects to highlight (3-5 projects)
- Certifications list
- Education summary

IDENTIFY CHATBOT KNOWLEDGE BASE STRUCTURE

- List all experience/positions
- Break down projects per company
- Organize skills by category
- Define response patterns for common questions
- Set availability/salary response parameters

CHOOSE COLOR SCHEME

Primary color: _____

Secondary color: _____

Accent color: _____

- Client approved colors
- Using template colors (client trusted my judgment)

PHASE 3: CONTENT CREATION (Day 2-4)

Time Estimate: 3-4 hours

WRITE HERO SECTION (15 minutes)

- Name and title/role
- Compelling tagline (1-2 sentences)
- Brief pitch paragraph highlighting unique value
- Call-to-action buttons configured

Draft: _____

WRITE ABOUT SECTION (30 minutes)

- Engaging H3 headline
- 3 paragraphs telling their story:
 - Paragraph 1: Overview of expertise and experience
 - Paragraph 2: Hands-on skills and technical depth
 - Paragraph 3: Unique differentiators and approach
- Stats configured (years, projects, certifications)

WRITE SKILLS SECTION (30 minutes)

- 4-6 skill category cards created
- 5-6 bullet points per card
- Skills organized logically
- Mix of technical and soft skills
- Reflects actual expertise from intake

WRITE EXPERIENCE TIMELINE (45 minutes)

For each position:

- Job title, company, dates
- 2-4 sentence summary paragraph
- Highlights key accomplishments
- Mentions relevant technologies

Positions written:

- Position 1: _____
- Position 2: _____
- Position 3: _____
- Position 4 (if applicable): _____

WRITE FEATURED PROJECTS (45 minutes)

For each project (3-5 total):

- Project name

- 2-3 sentence description
- Technology tags (4-6 tags)
- Impact/results highlighted

Projects written:

- Project 1: _____
- Project 2: _____
- Project 3: _____
- Project 4: _____

CONFIGURE CERTIFICATIONS SECTION (if applicable)

- Top 4 certifications highlighted with icons
- Full list provided
- Active vs expired noted

WRITE CONTACT SECTION

- Email configured
- LinkedIn link added
- GitHub link added (if applicable)
- Resume download link prepared
- Social links configured

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PHASE 4: AI CHATBOT CONFIGURATION (Day 4-5)

Time Estimate: 2-3 hours

BUILD CANDIDATE_INFO OBJECT (90 minutes)

- Basic info configured:
 - Name, title
 - About summary
 - Years experience, projects completed

Skills object populated (8-12 categories):

- Category 1: _____
- Category 2: _____
- Category 3: _____
- Category 4: _____
- [Continue for all categories]

Experience array completed:

For EACH job:

- Title, company, period, description
- projectsAtCompany array with 3-8 projects per job
- Each project has: name, description, technologies, impact

Projects array (independent projects):

- Side projects
- Open source contributions
- Personal portfolio items

Education configured

Certifications array populated (all certs listed)

Interests array populated

Contact info configured

Clearance info (if applicable)

TEST CHATBOT RESPONSES (30 minutes)

Test these common questions:

- "What technologies does [Name] know?"
- "Tell me about [Name]'s experience with [key skill]"
- "What projects has [Name] worked on?"
- "What are [Name]'s biggest accomplishments?"
- "Why should I hire [Name]?"
- "What certifications does [Name] have?"
- "Tell me about [Name]'s work at [Company]"
- "Is [Name] available for remote work?"
- "What's [Name]'s salary expectation?"

Issues found:

REFINE CHATBOT RESPONSES

- Add missing information
 - Improve response quality
 - Ensure accuracy
 - Test edge cases
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-

Time Estimate: 30 minutes

EXTRACT ALL SKILLS FROM CANDIDATE_INFO

- Technical skills
- Tools and technologies
- Frameworks and methodologies
- Certifications
- Domain expertise

TEST JOB FIT CHECKER (Test with 3 sample job descriptions)

Test 1: Perfect match job

- Score: ____ %
- Strengths accurate: Yes Needs adjustment
- Gaps accurate: Yes Needs adjustment

Test 2: Good match job

- Score: ____ %
- Analysis appropriate: Yes Needs adjustment

Test 3: Poor match job

- Score: ____ %
- Correctly identifies mismatch: Yes Needs adjustment

CALIBRATE SCORING IF NEEDED

- Skill weighting appropriate
- Experience level matching working
- Leadership detection working
- Score ranges make sense (70+ = High, 45-69 = Medium, <45 = Low)

PHASE 6: DESIGN & CUSTOMIZATION (Day 5-6)

Time Estimate: 1-2 hours

APPLY COLOR SCHEME

- Update CSS variables in styles.css:

--primary: _____

--secondary: _____

--accent: _____

- Test color contrast for readability

- Ensure colors work on all sections

CONFIGURE HERO AVATAR

- If using initials: Update .avatar-placeholder with initials
- If using photo: Replace with client's photo, optimize size
- Test on mobile and desktop

UPLOAD/PREPARE ADDITIONAL ASSETS

- Resume PDF (if providing download link)
- Client photo/headshot (if using)
- Any project images (if applicable)
- Favicon (use initials or icon)

RESPONSIVE DESIGN CHECK

- Test on mobile (375px width)
- Test on tablet (768px width)
- Test on desktop (1200px+ width)
- All buttons clickable
- Text readable
- Images display correctly
- Navigation works on mobile

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PHASE 7: QUALITY ASSURANCE (Day 6-7)

Time Estimate: 1-2 hours

CONTENT REVIEW

- Spell check entire site
- Grammar check
- No lorem ipsum or placeholder text
- All client names spelled correctly
- All dates accurate
- All companies spelled correctly
- Acronyms explained or consistent
- Tone consistent throughout

LINK TESTING

- All navigation links work
- All anchor links scroll to correct sections
- External links open in new tabs
- Email link works (mailto:)
- LinkedIn link correct
- GitHub link correct (if applicable)

Resume download link works (if applicable)

No broken links

CHATBOT TESTING (Comprehensive)

Chatbot loads properly

Welcome message displays

Suggestion pills work

User can type messages

Send button works

Responses are accurate

No JavaScript errors in console

Test 10+ different questions

Test edge cases (typos, weird questions)

Chatbot handles "I don't know" gracefully

JOB FIT CHECKER TESTING

Textarea accepts paste

Check fit button works

Results display correctly

Score calculation accurate

Strengths list relevant

Gaps list makes sense

Recommendation appropriate

No JavaScript errors

BROWSER TESTING

Chrome (desktop & mobile)

Safari (desktop & mobile)

Firefox

Edge

Looks good on all browsers

PERFORMANCE CHECK

Page loads in < 3 seconds

No console errors

No console warnings

Images optimized

Smooth scroll animations work

No layout shifts on load

ACCESSIBILITY CHECK

Keyboard navigation works

Tab order makes sense

Color contrast sufficient

- Alt text on images (if any)
 - Headings in logical order
-

PHASE 8: DEPLOYMENT (Day 7)

Time Estimate: 30-60 minutes

PREPARE FILES FOR DEPLOYMENT

- index.html finalized
- styles.css finalized
- script.js finalized
- All assets in correct folders
- File structure clean:
/css/styles.css
/js/script.js
/assets/ (if needed)

DOMAIN SETUP (if included in package or client has domain)

- Domain registered: _____
- DNS configured
- SSL certificate installed
- HTTPS working

OR

- Client provided domain/hosting info
- Access credentials received
- Files uploaded to their hosting

DEPLOY TO HOSTING

Hosting option used:

- Netlify (free tier)
- Vercel (free tier)
- GitHub Pages
- Client's hosting
- Other: _____

- Files uploaded
- Site accessible at URL: _____
- All pages/sections work
- Final test on live site

CONFIGURE ANALYTICS (Optional but recommended)

Google Analytics added

Tracking code installed

Events configured (button clicks, chatbot usage)

BACKUP FILES

Copy all files to client's project folder

Create ZIP archive

Store in backup location

Include source files and instructions

PHASE 9: CLIENT DELIVERY & REVIEW (Day 7-8)

Time Estimate: 30 minutes

PREPARE DELIVERY PACKAGE

Live site URL

Admin/access credentials (if applicable)

Source files (ZIP)

Quick start guide

Instructions for updates

Analytics access (if set up)

SEND DRAFT FOR REVIEW

Email template: "Your AI Portfolio is Ready for Review!"

Include:

Live site link

Request for feedback

Revision policy reminder

Timeline for revisions

Contact info for questions

Date sent: _____

CLIENT REVIEWS (Wait for feedback)

Date feedback received: _____

Feedback summary:

Revision requests:

- Content changes: _____
 - Design tweaks: _____
 - Chatbot adjustments: _____
 - Technical issues: _____
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PHASE 10: REVISIONS (Day 8-10)

Time Estimate: 1-3 hours (depending on scope)

ROUND 1 REVISIONS

Date started: _____

Changes made:

- _____
- _____
- _____

Revisions deployed to live site

Client notified

Date sent: _____

ROUND 2 REVISIONS (if included in package)

Date started: _____

Changes made:

- _____
- _____

Revisions deployed

Client notified

Date sent: _____

ADDITIONAL REVISIONS (Executive package only)

[Continue as needed within 30-day window]

PHASE 11: FINAL DELIVERY & HANDOFF (Day 10)

Time Estimate: 30 minutes

CLIENT APPROVES FINAL VERSION

Approval received: Yes, Date: _____

Method: Email Call Other

PROVIDE FINAL DELIVERABLES

- Live site URL confirmed
- Source files delivered (ZIP download link)
- Admin credentials provided
- Analytics access shared
- Documentation provided:
 - How to update content
 - How to share with recruiters
 - Tips for promoting portfolio
 - Troubleshooting guide

SEND COMPLETION EMAIL

Template: "Your AI Portfolio is Complete!"

Include:

- Congratulations message
- Links to all deliverables
- Instructions for sharing with recruiters
- Maintenance options (if offering)
- Request for testimonial
- Referral incentive offer

Date sent: _____

REQUEST TESTIMONIAL

- Email sent asking for testimonial/review
- LinkedIn recommendation requested
- Permission to use as case study: Yes No

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PHASE 12: POST-PROJECT (Day 10+)

Time Estimate: 15 minutes

UPDATE CLIENT DATABASE

- Mark project as complete
- Add client to "past clients" list
- Record testimonial (if received)
- Note any lessons learned

FOLLOW-UP (30 days later)

- Send check-in email
- Ask how job search is going
- Remind about maintenance options
- Ask for referrals

Date sent: _____

- FOLLOW-UP (90 days later)
 - Check if they landed a job
 - Request success story
 - Offer update services

Date sent: _____

- PROJECT RETROSPECTIVE (For your records)

What went well:

What could improve:

Time actual vs estimated:

Estimated: _____ hours

Actual: _____ hours

Notes for next project:

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EMERGENCY CONTACTS & RESOURCES

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Technical Issues:

- Hosting support: _____
- Domain registrar: _____
- Backup location: _____

Client Communication:

- Client email: _____
- Client phone: _____

- Backup contact: _____

Templates:

- Email templates location: _____
 - Contract template: _____
 - Invoice template: _____
- =====

PACKAGE-SPECIFIC NOTES

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STARTER PACKAGE:

- 1 discovery call (60 min)
- 1 round of revisions only
- Basic color scheme (template colors)
- Email support only

PROFESSIONAL PACKAGE (Most Popular):

- 90-min discovery call
- 2 rounds of revisions
- Custom colors
- Priority support
- LinkedIn optimization tips included

EXECUTIVE PACKAGE:

- 2-3 calls (up to 3 hours total)
 - Unlimited revisions (30 days)
 - Premium design & branding
 - Hosting included (1 year)
 - LinkedIn profile rewrite included
 - Resume refresh included
 - White-glove support
- =====

TIME TRACKING

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Phase 1 - Intake & Setup: _____ hours

Phase 2 - Discovery: _____ hours

Phase 3 - Content Creation: _____ hours

Phase 4 - Chatbot Config: _____ hours

Phase 5 - Job Fit Checker: _____ hours

Phase 6 - Design: _____ hours

Phase 7 - QA: _____ hours

Phase 8 - Deployment: _____ hours

Phase 9 - Client Review: _____ hours

Phase 10 - Revisions: _____ hours

Phase 11 - Final Delivery: _____ hours

Phase 12 - Post-Project: _____ hours

TOTAL TIME: _____ hours

EFFECTIVE HOURLY RATE: \$_____ / hour

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PROJECT COMPLETE!

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Date Completed: _____

Client Satisfaction: Excellent Good Needs Improvement

Would work with again: Yes No

Referral potential: High Medium Low