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<!-- AI PORTFOLIO SERVICE - STANDARD WORKFLOW & CHECKLIST -->

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<!-- 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

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

Time Estimate: 30 minutes

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☐ 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)

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

Time Estimate: 1-2 hours

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☐ 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

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: _____

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

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:

EMERGENCY CONTACTS & RESOURCES

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

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

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