Hello.

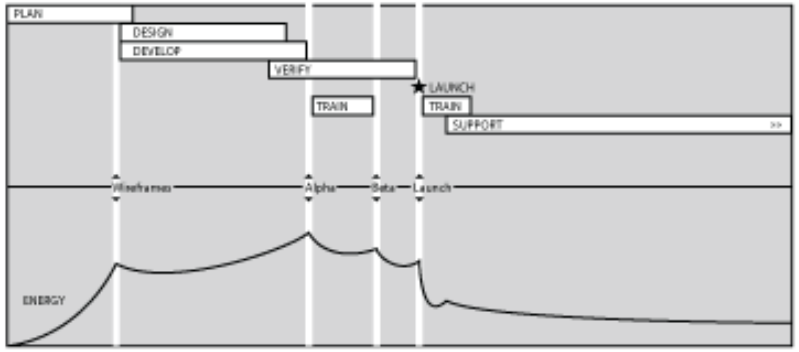
My name is _____

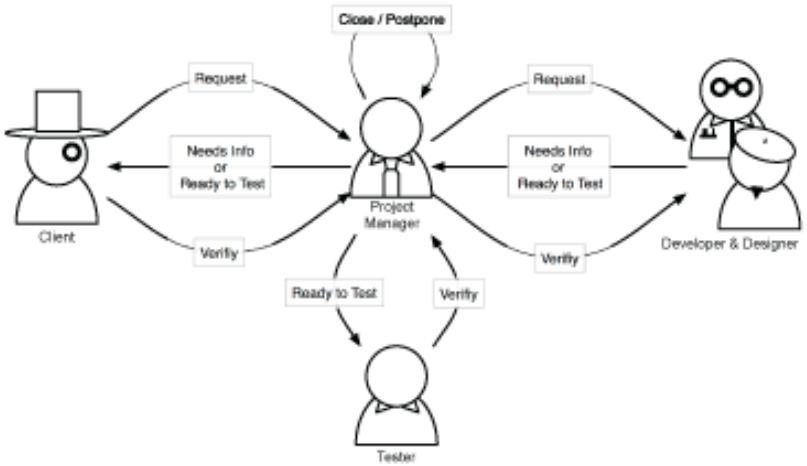
Friday
6

process

DRUPALCON ★ DC
MARCH 4-7, 2009

process $op hook_magic() process?





A DRUPAL PROCESS

*Asterisks denote a client deliverable
Shaded items denote major milestones

- STRATEGIC BRIEF
- KICK-OFF MEETING
- *COMPETITIVE ANALYSIS
- CONTENT TYPES DELIVERED
- *CONTENT TYPE APPROVAL
- SITE MAP DELIVERED
- *SITE MAP APPROVAL
- WIREFRAMES DELIVERED
- *WIREFRAMES APPROVED
  DESIGN ASSETS DELIVERED

Left branch:

- PROTOTYPE BUILD STARTS
- CONTENT INPUT
- CUSTOM CODE (AS NEEDED)
- PROTOTYPE BUILD COMPLETE
- THEMING
- PRESENT ALPHA
- *ALPHA FEEDBACK (UAT) — LAST OPPORTUNITY FOR FEATURE REQUESTS
- PRESENT BETA — FEATURE FREEZE
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- LAUNCH
- TRAINING MANUAL
- TRAINING

Right branch:

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- *CREATIVE BRIEF FEEDBACK
- HOMEPAGE DESIGNS DELIVERED
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- *FINAL DESIGN FEEDBACK
- FINAL DESIGN

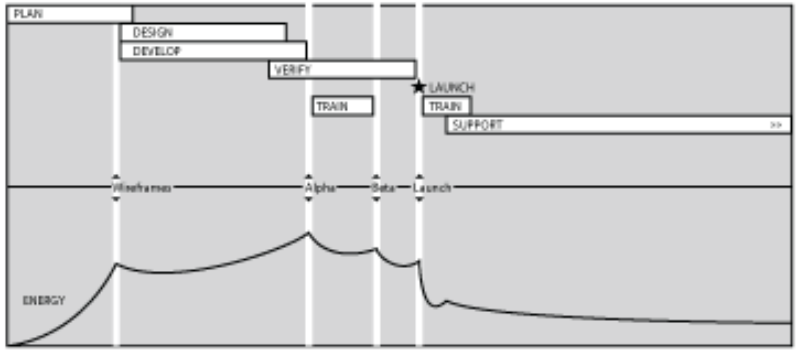
(hey - that slide had a lot on it)

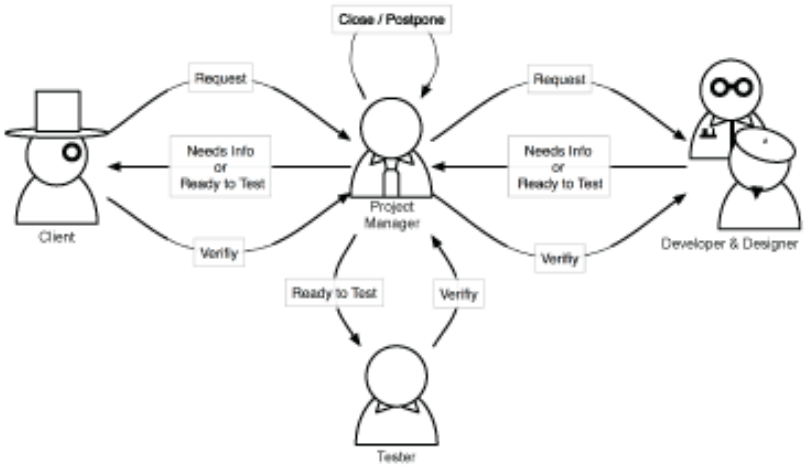
before we understand that

process

context

(pressures, people, and projects)





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(yes – we will cover that in detail)

reason

context

understand, evaluate, improve

so, here's that context:

I'm Drew Gorton

1996

website

changed my life

(although I didn't know it at the time)

1998

web stuff @ insurance company

1999

. com programmer

2001

GORTON STUDIOS

and we create websites

GORTON
STUDIOS
WEBSITES THAT WORK

We take projects that start with:

Client: We have an idea about our website.

Us: Great, we do websites. What's your idea?

Client: Well, we want an X.

Us: Really? Why?

Client: Well, because we want to do Y.

Us: Oh, well, that probably means we ought to build Z.

Client: Z! That's a great idea! Let's do it!

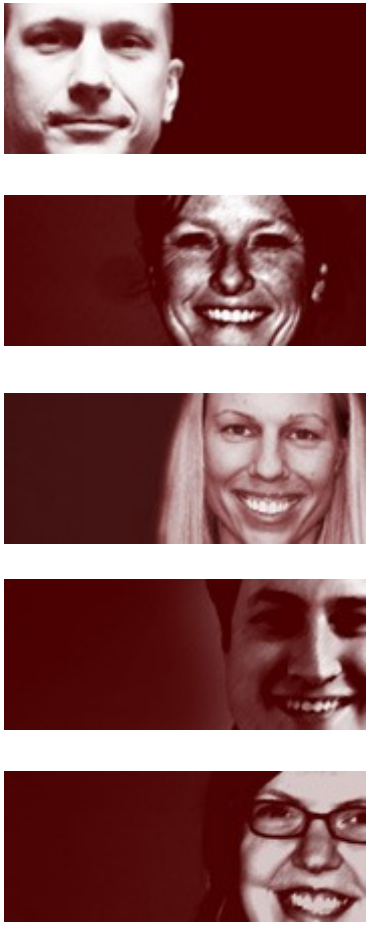
Solve for Z,

Where X = jargon (e.g. Web 2.0)

and Y = increase sales, or
reach new audiences, or
provide better service, or
automate processes, or...

all of the above

so all day, every day, for 10+ years,
I've been building websites.

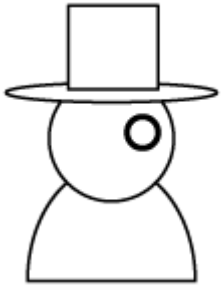


context

Language of 'clients'

Spectrum of web deliverables

You = different context?



client | designer | developer | project manager

or someone else entirely

process still applies

Understand, Evaluate, Improve

lots of projects

lots of opportunities to learn

2004

(we think)

4.4

Drupal

a few 4.5

several 4.6

bunch of 4.7

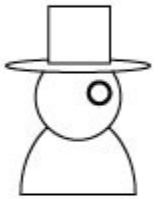
(that was 2006)

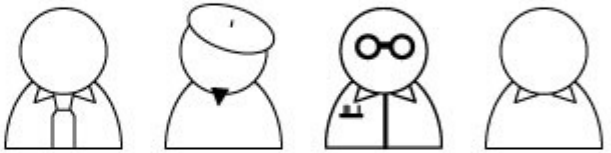
became what we do

Drupal WORKS

GORTON

GORTON STUDIOS





WEBSITES THAT WORK

Drupal

Drupal WORKS

Three Axioms:

ONE

!Drupal ≠ Bad Website

TWO

Drupal ≠ Good Website

THREE

Drupal + Good*(Idea + Plan + Execution)

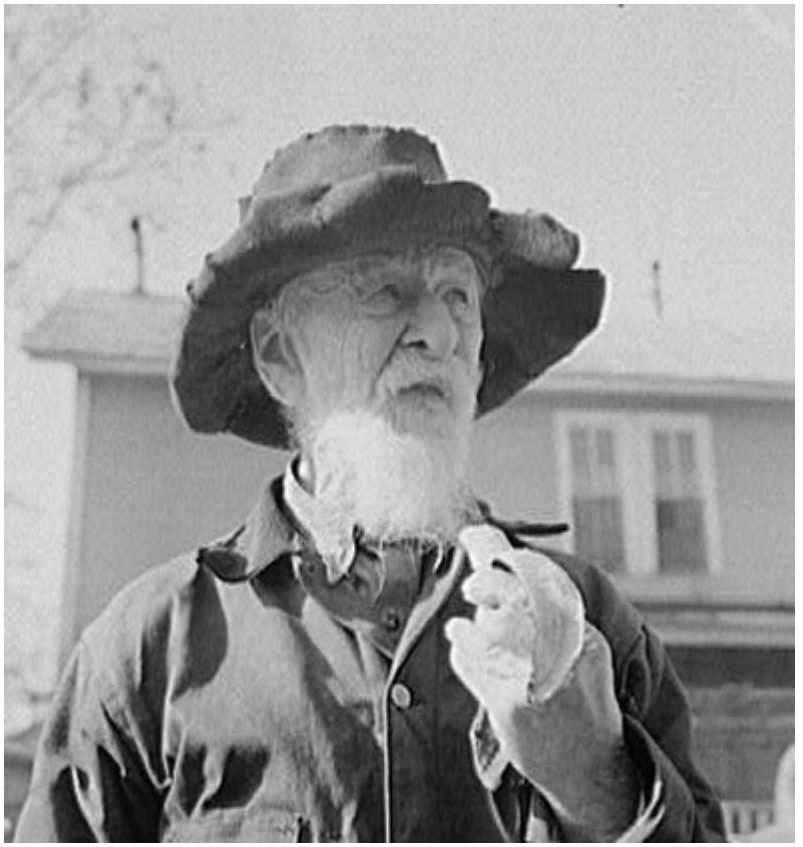
is better than

!Drupal + Good*(Idea + Plan + Execution)

which I don't care to debate

because it's an Axiom.

And it's True.



(we will have about 10 minutes for questions and discussion at the end)

(and I'd like to see this conversation continue)

AXIOM THREE

Drupal + Good*(Idea + Plan + Execution)
>
!Drupal + Good*(Idea + Plan + Execution)

deconstructed

Drupal = Free
http://drupal.org/project/drupal

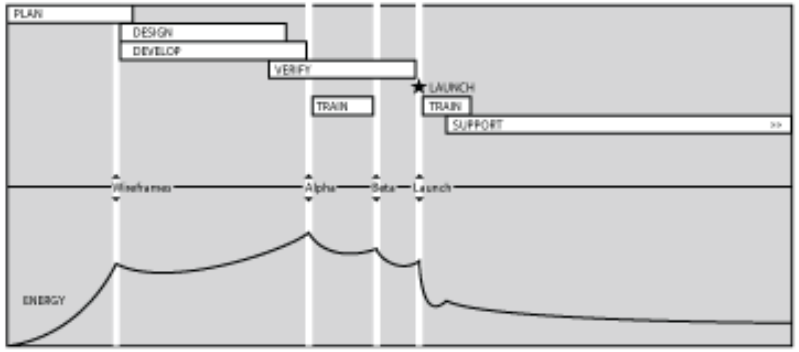
Good Idea = Free
(but not downloadable)

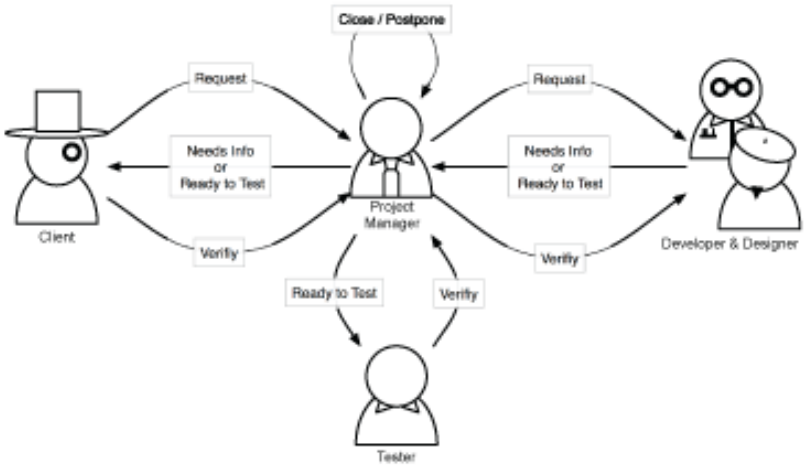
Good Plan + Good Execution =

process

which brings us back to

Friday
6





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Drupal Process = Web Process

Plan

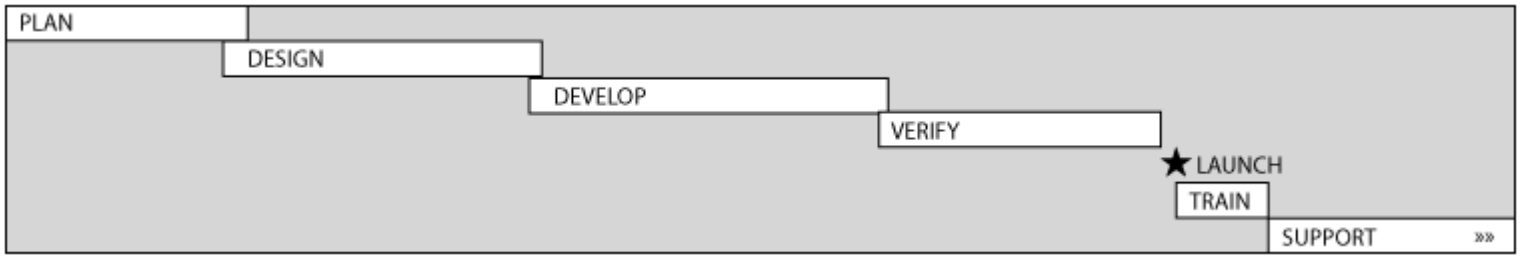
Design

Develop

Verify

Train

Support


PLAN
DESIGN
DEVELOP
VERIFY
LAUNCH
TRAIN
SUPPORT
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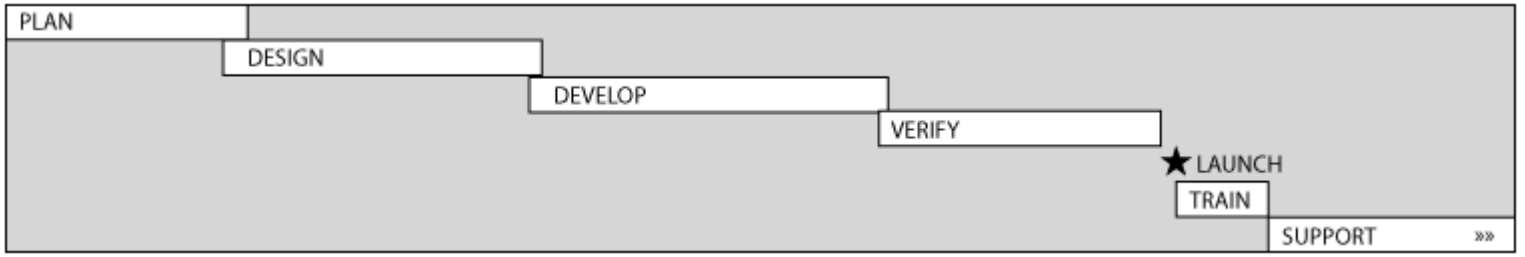
PLAN
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VERIFY
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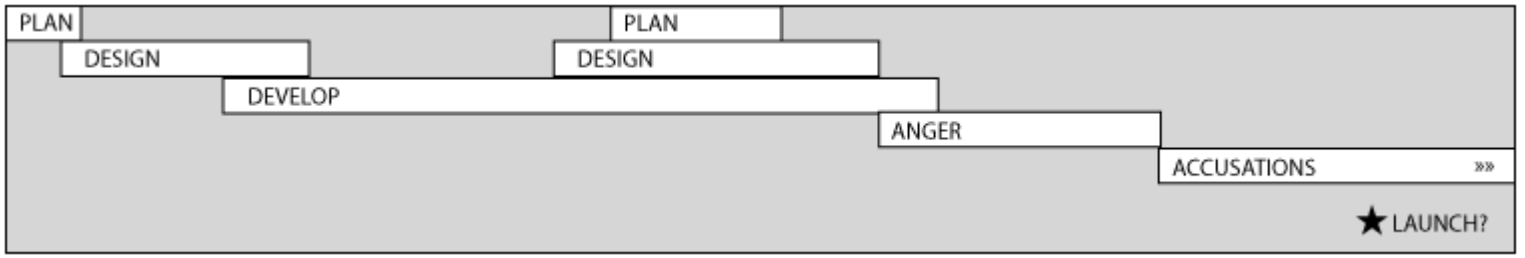
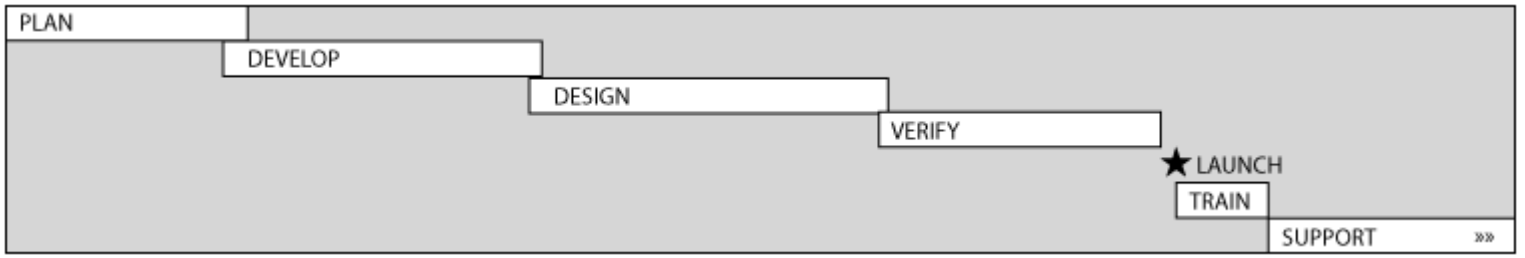
TRAIN
SUPPORT »»


PLAN
DESIGN
DEVELOP
PLAN
DESIGN
ANGER
ACCUSATIONS »»
LAUNCH?

“Skip Intro”

Long-Term Degradation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VERIFY
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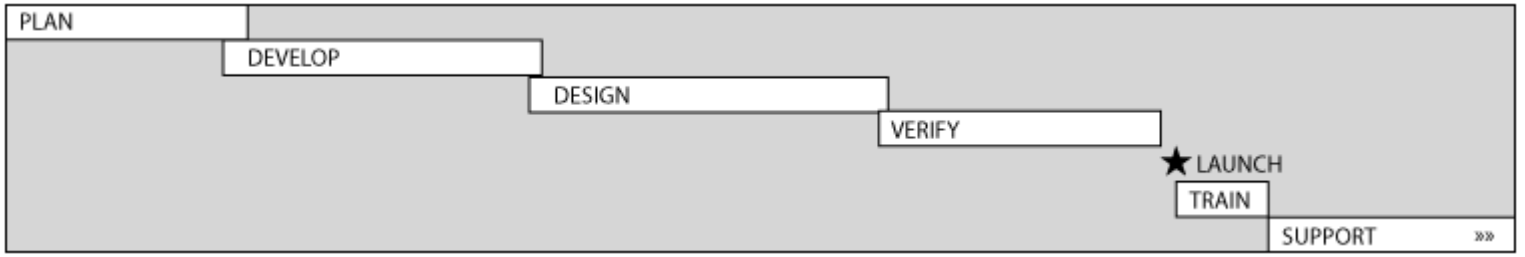
SUPPORT »»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VERIFY
LAUNCH
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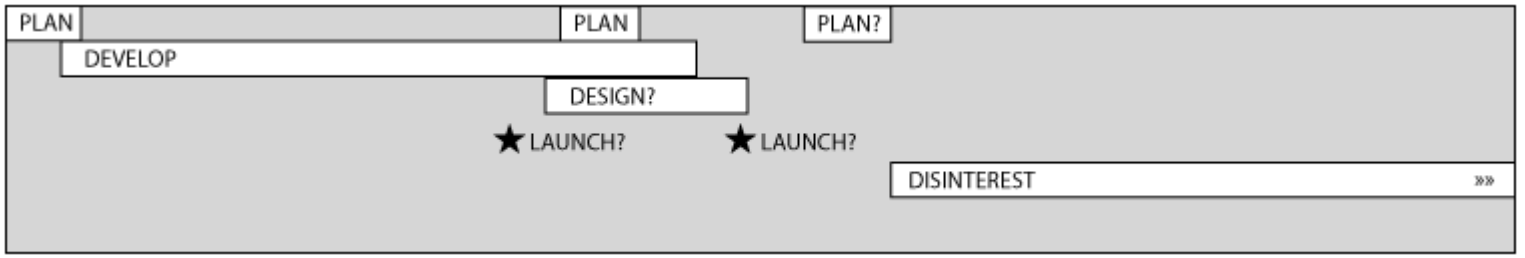
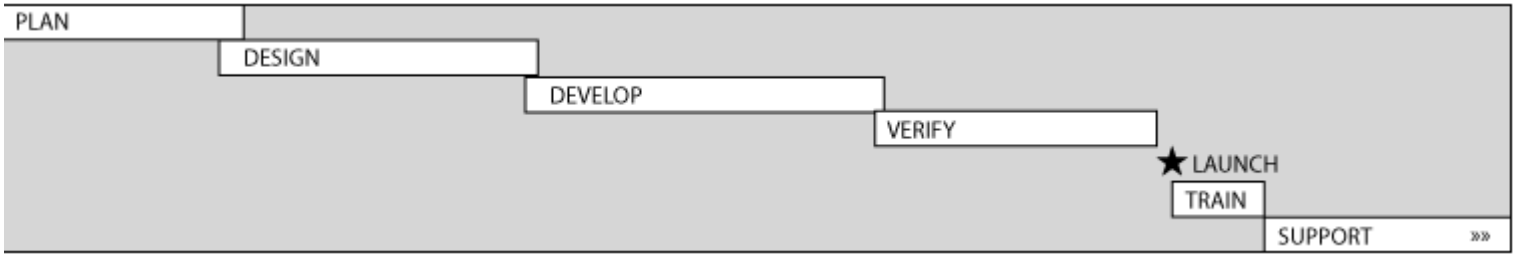
SUPPORT »»


PLAN
PLAN
PLAN?
DEVELOP
DESIGN?
LAUNCH?
LAUNCH?
DISINTEREST »»

Boxy / Clunky

Long-Term Disinterest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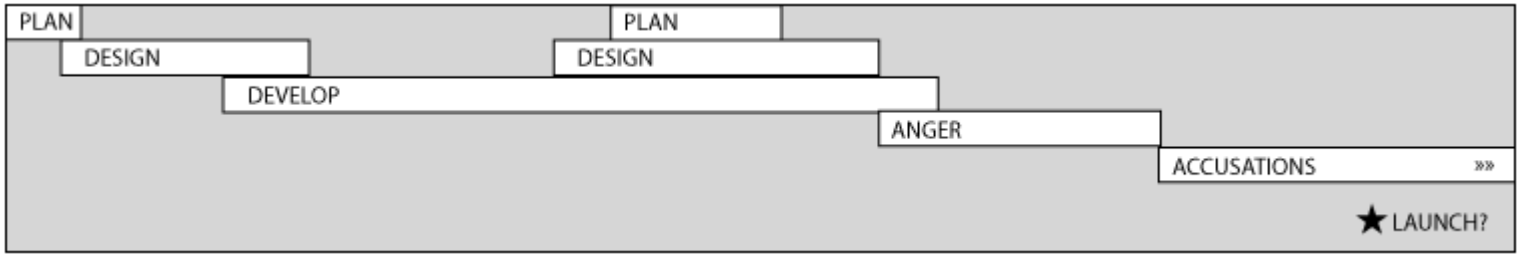
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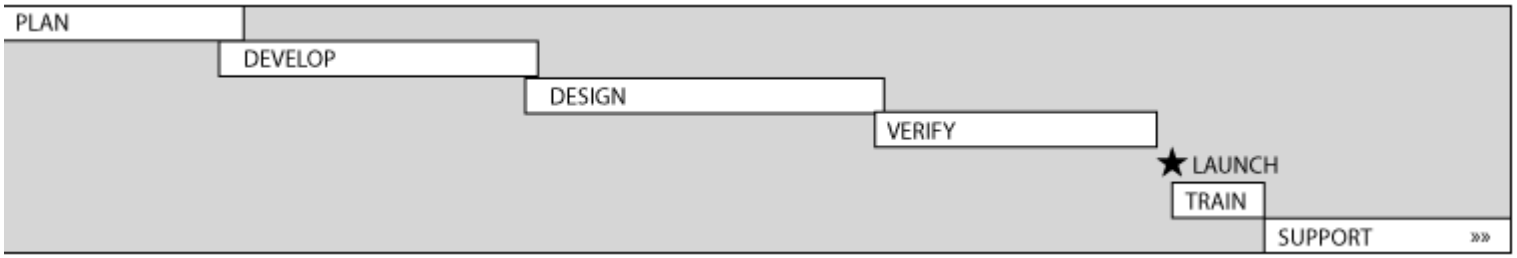
PLAN
DESIGN
DEVELOP
ANGER
ACCUSATIONS »»
LAUNCH?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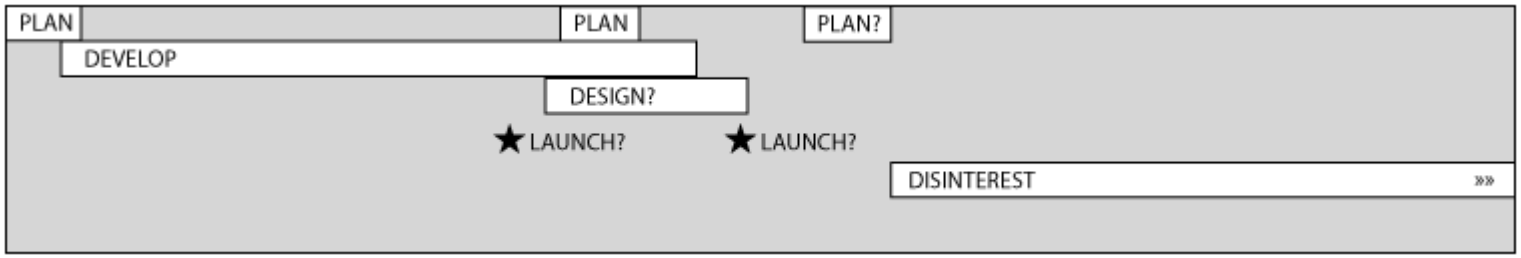
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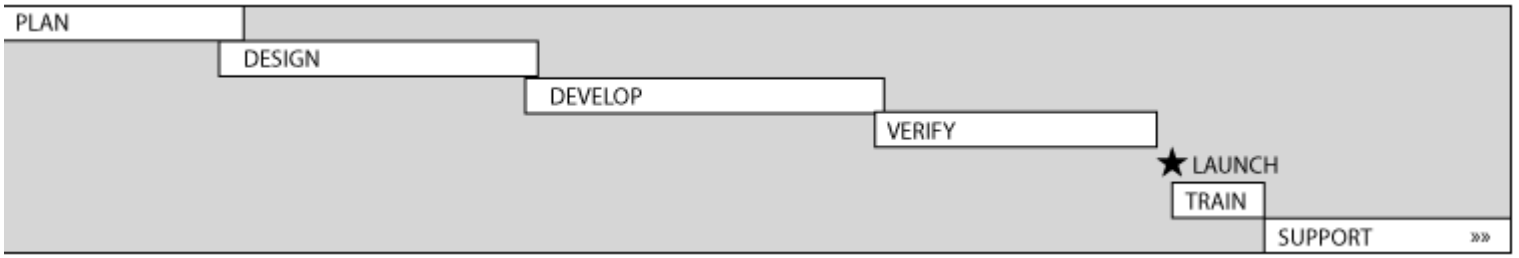
PLAN?
DEVELOP
DESIGN?
LAUNCH?
LAUNCH?
DISINTEREST »»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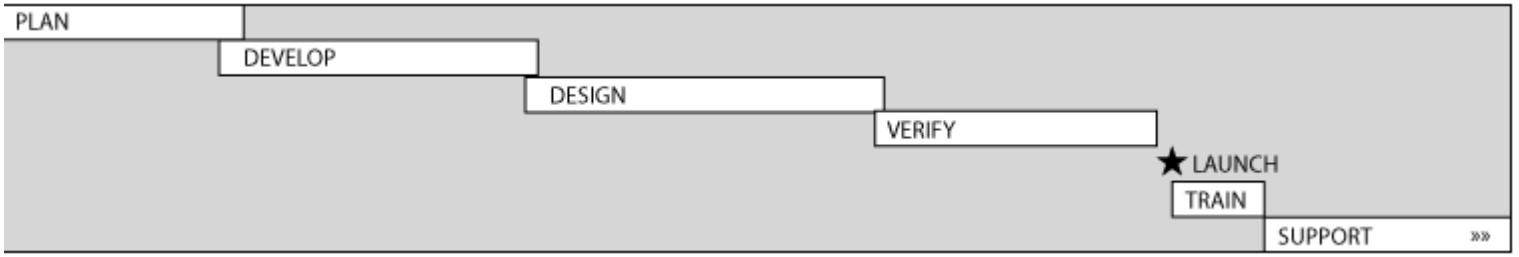
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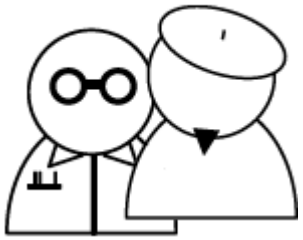
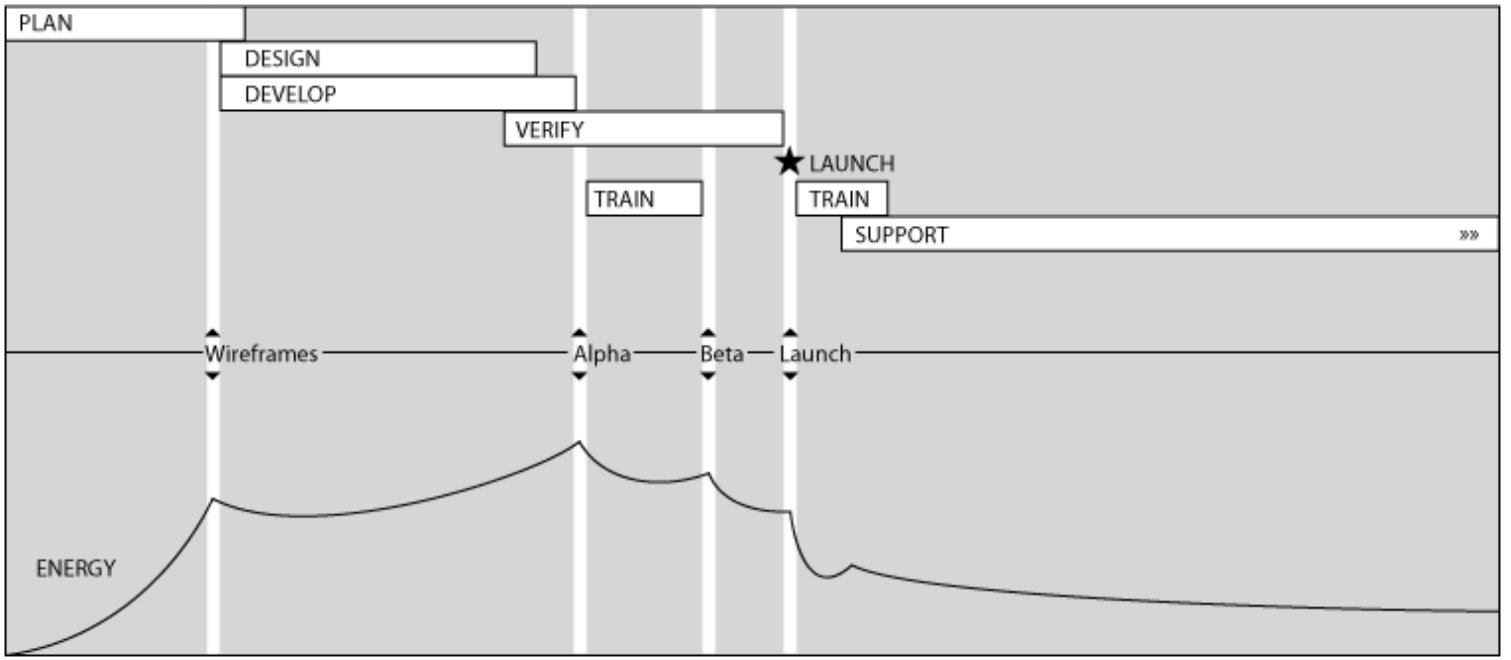


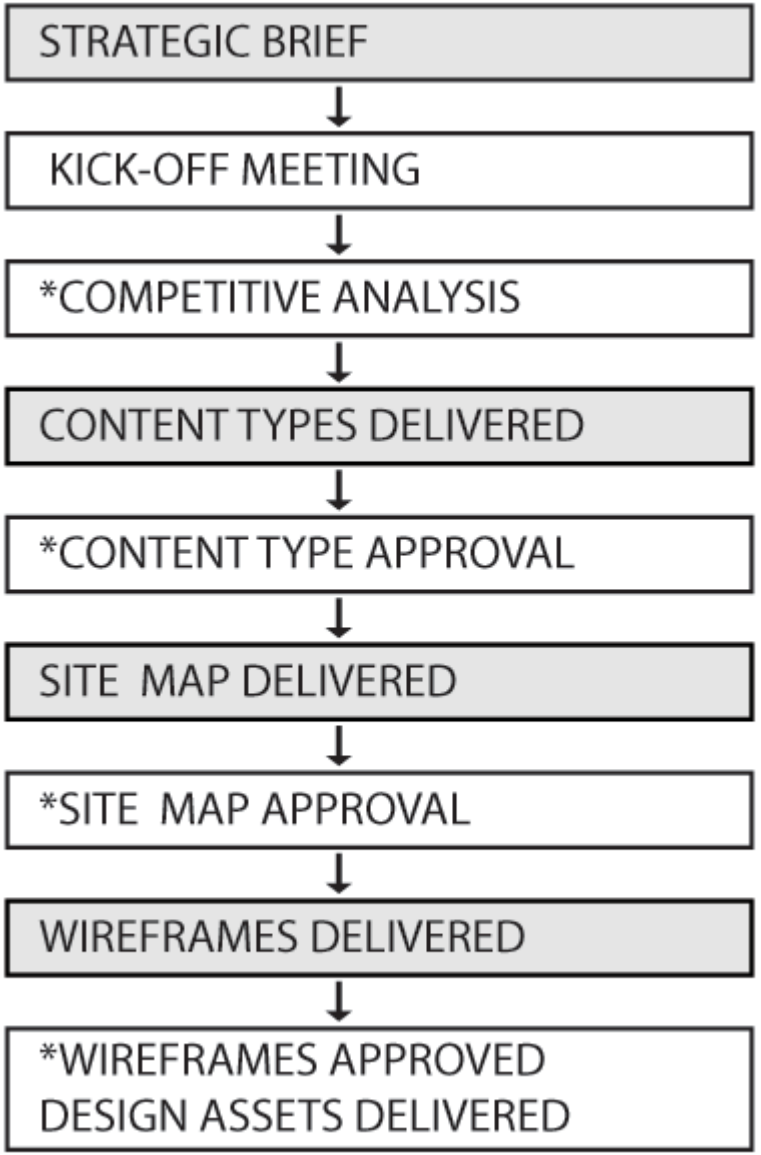

PLAN
DESIGN
DEVELOP
VERIFY
LAUNCH
TRAIN
TRAIN
SUPPORT »»
Wireframes
Alpha
Beta
Launch
ENERGY

Educate.

Organize.

Advocate.

Wellstone Action!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*SITE MAP APPROVAL
WIREFRAMES DELIVERED
*WIREFRAMES APPROVED
DESIGN ASSETS DELIVERED

Strategic Brief

By: Account Exec

For: All

Approved By: Client Lead

- Introduce the organization
- Big picture goals
- Ongoing reference

“Wellstone Action is a national center for training and leadership development for the progressive movement. Founded in January 2003, Wellstone Action’s mission is to honor the legacy of Paul and Sheila Wellstone by continuing their work through training, educating, mobilizing and organizing a network of progressive individuals and organizations. It's audiences include members, program alumni, people trained by the organization, donors and potential donors, individuals seeking training on grassroots organizing, advocates for specific causes and people who identify with the Progressive Movement and its causes...”

Kick-Off Meeting

Led By:
Project Manager

Attended By:
All Client Stakeholders,
Account Exec,
Wireframe Lead (UX person)

Optionally Attended By:
Prototype Lead (Developer/Configurer),
Creative Lead (Designer/UX person),
Verification Lear (Detail Person)

- Introduce teams
- Build anticipation/excitement
- Recap the project goals
- Encourage client stakeholders to talk
- Project Team should talk no more than 20 - 25% of the time.
- Success:
  - Dialog among client stakeholders
  - Agreement on priorities
  - Discover new wrinkles
  - Start to build trust

Competitive Analysis

http://en.wikipedia.org/wiki/Competitor_analysis

Done By:
All Client Stakeholders

Content Types

Who: PM or Wireframer

Approved By: Client PM

(show PDF for more)

- Ingredients for site
- CCK types

Program
A parent page for any training event.
Title, Header image (optional), Additional images (display in gallery form), Body, Related Audiences, Org (Action vs. Action Fund, optional), Related Content (audience, toolkit), Featured Alumni, Keyword tagging

Training Event
Appropriate for all training events and any other events you may have. Time will appear on single-day events, but not on multi-day.
Title, Location (not required / mapped if available), Date, Time, Featured Trainer(s), Org (Action vs. Action Fund, optional), Related Content (audience, program, blogs), Sign-Up URL (multiple)

Alum Profile
A way to highlight specific alumni. They will be random on refresh for each program.
Associated program, Picture, Pull quote (appears on teaser view), Story (appears when Read more is clicked)

Audience
A way to view content by “self-identifying” audiences, including:
Alumni, Campaign Workers, Candidates, Citizen Activists,

...

Site Map

Who:
Wireframe Lead

Reviewed By:
Project Manager

Approved By:
Client PM

(Show PDF)

Wireframes

Who:
Wireframe Lead

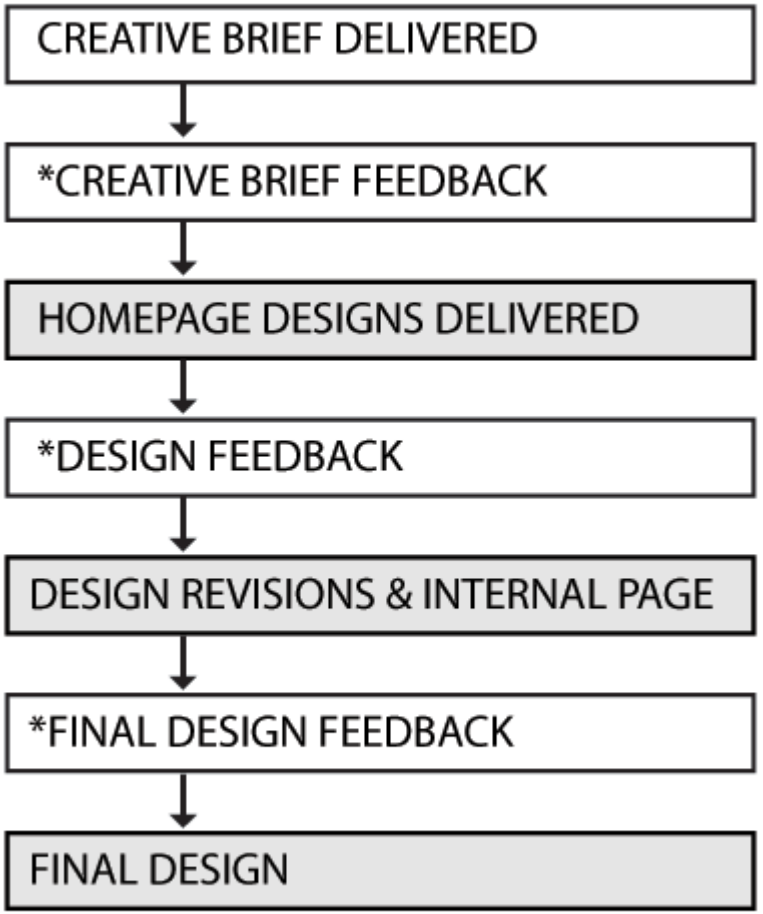
Reviewed By:
Project Manager,
Design Lead,
Development Lead

Approved By:
Client PM

(Show PDF)

Wireframe for Wellstone Action homepage

Wireframes for various Wellstone Action internal pages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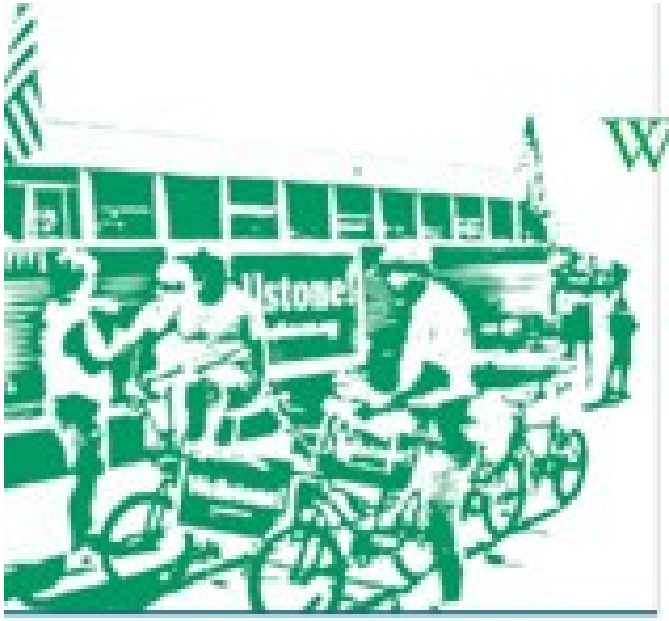
DESIGN REVISIONS & INTERNAL PAGE
*FINAL DESIGN FEEDBACK
FINAL DESIGN

Creative Brief

Who:
Design Lead

Approved By:
Project Manager,
Client PM

(Show PDF)



Educate. Organize.
Advocate.

Wellstone Action!

Main Audience

Program Alumni and people interested in your programs & resources. They vary widely in age and economic bracket, but they share an interest in progressive causes. Put simply, your audience wants to make peoples' lives better.

Competition

None. Must be a pretty good niche!

What's Unique?

You train progressives in a way that unites all three aspects of politics—policy, politics, and organizing.

Key Objectives

(1) Give visitors the tools to make a difference

(2) Encourage involvement in Wellstone Action.

(3) Convey a strong identity that honors Wellstone's legacy, but has a life and character of its own.

Design Direction

Progressive.

Bold.

Clean & Clear.

Needs

The site needs to be flexible—ready for regular updates and successive growth.

This creative brief is a summary of your site's goals—who it should speak to and how it should look.

This language will provide our aesthetic roadmap, ensuring that we are all on the same page in terms of design goals.

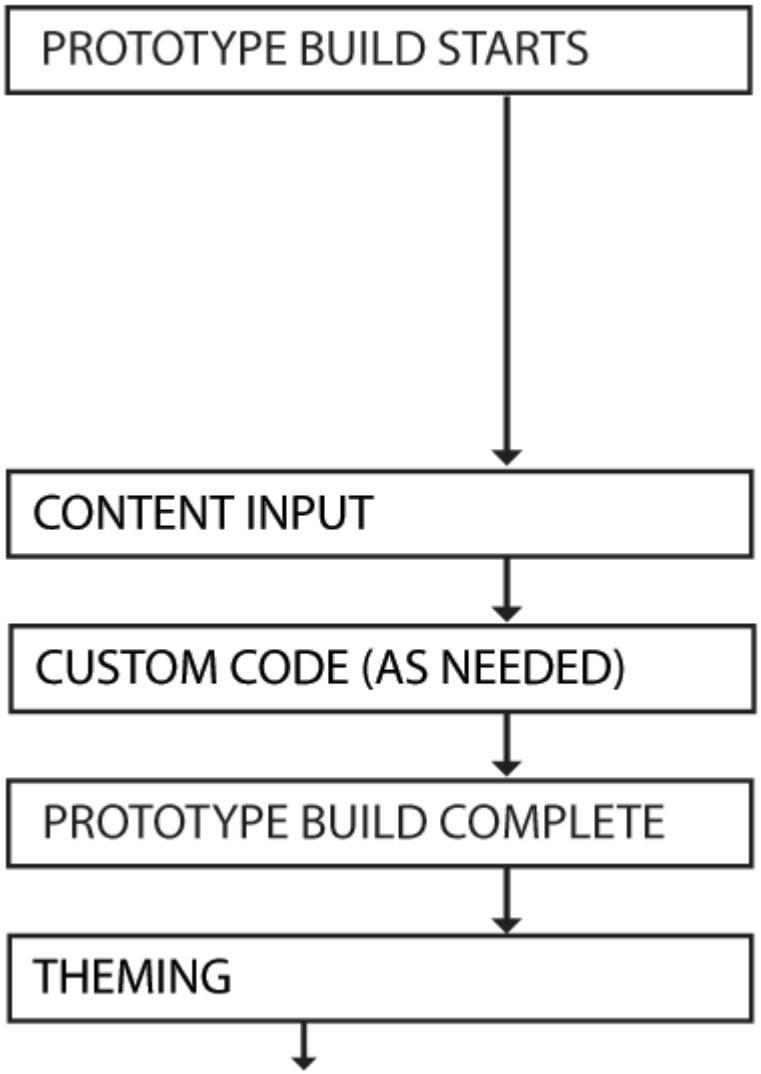
Design Process

Who:
Design Lead,
Design Team

Approved By:
Project Manager,
Client PM

Homepage Design Concepts (3 Shown)

Final Homepage Design (intervening iteration not shown)


PROTOTYPE BUILD STARTS
CONTENT INPUT
CUSTOM CODE (AS NEEDED)
PROTOTYPE BUILD COMPLETE
THEMING

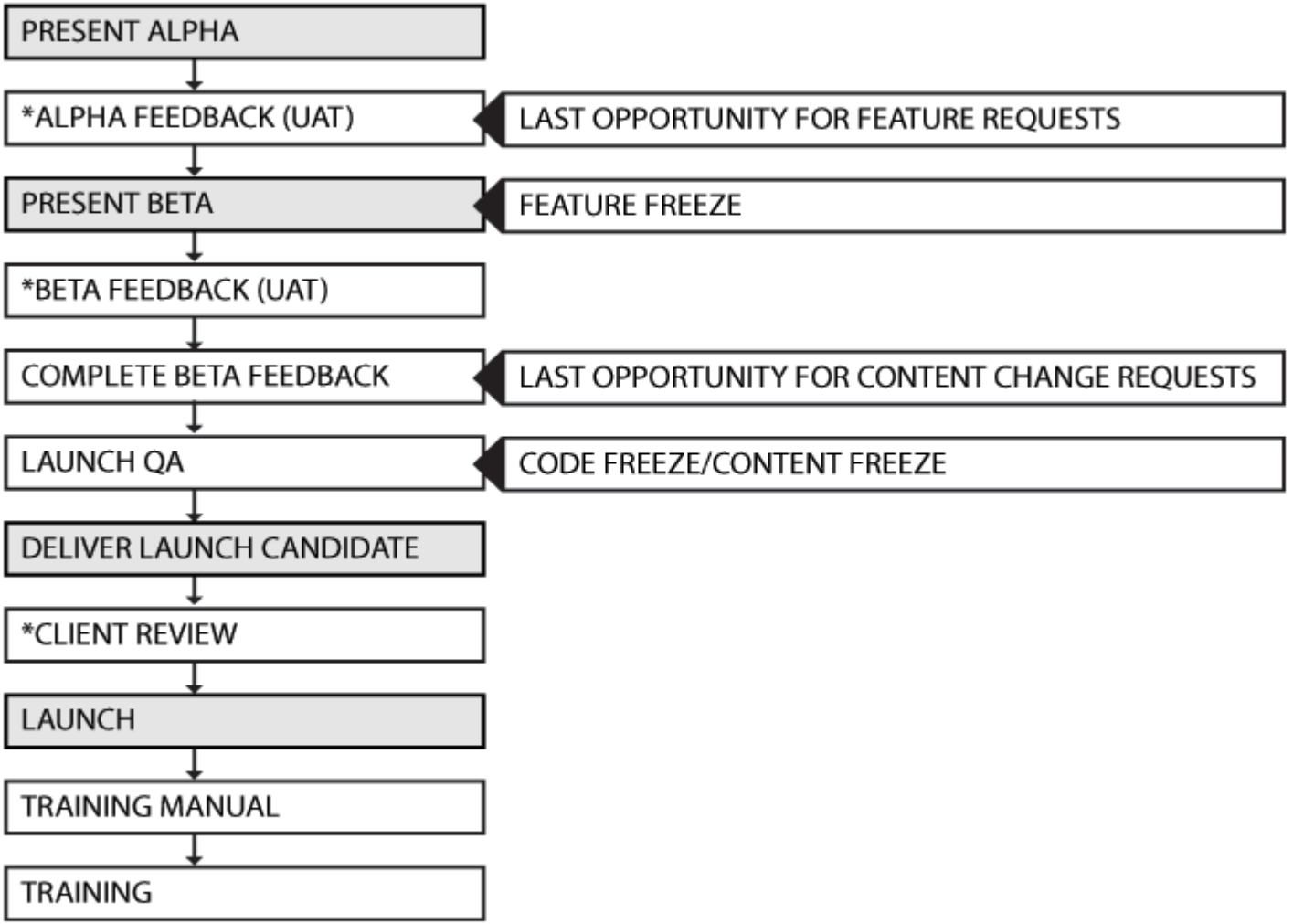
Prototype Build

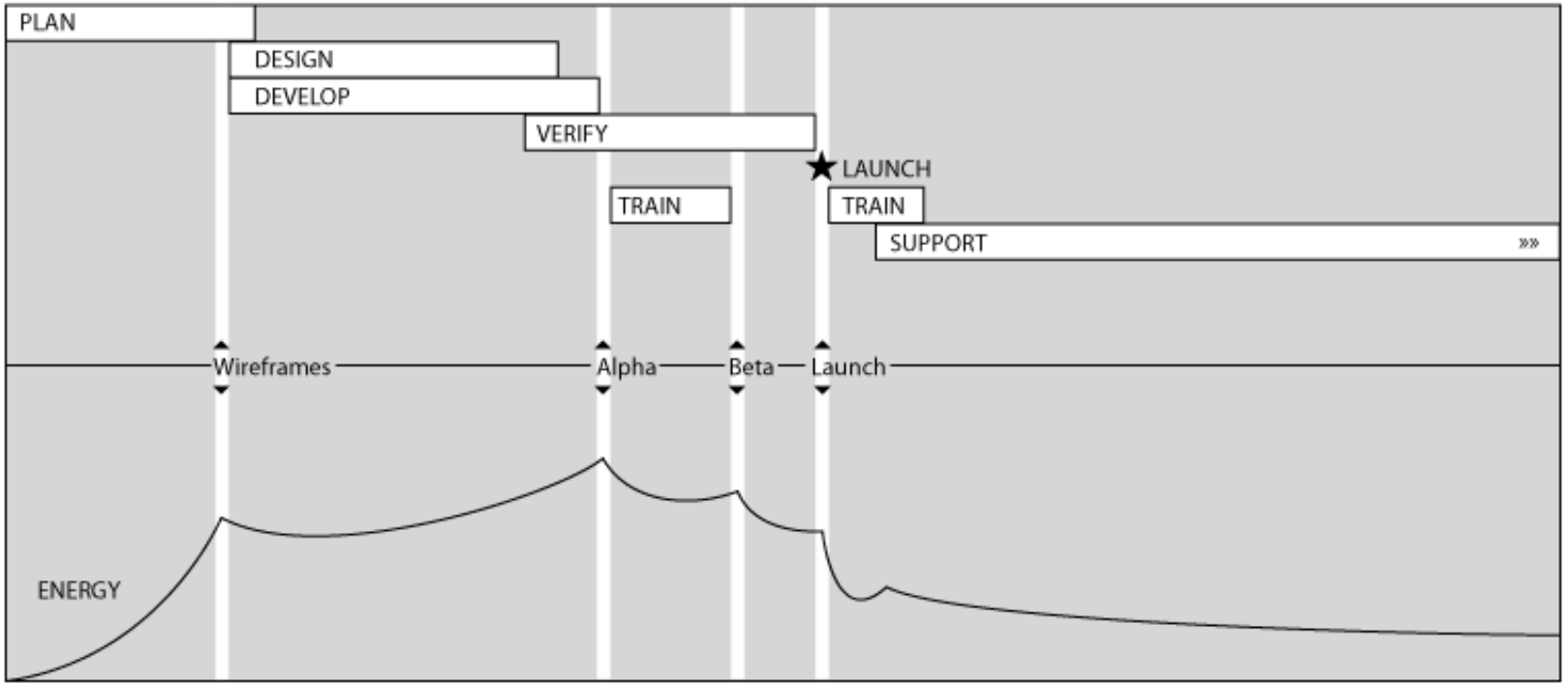
Who:
Development Lead,
Development Team

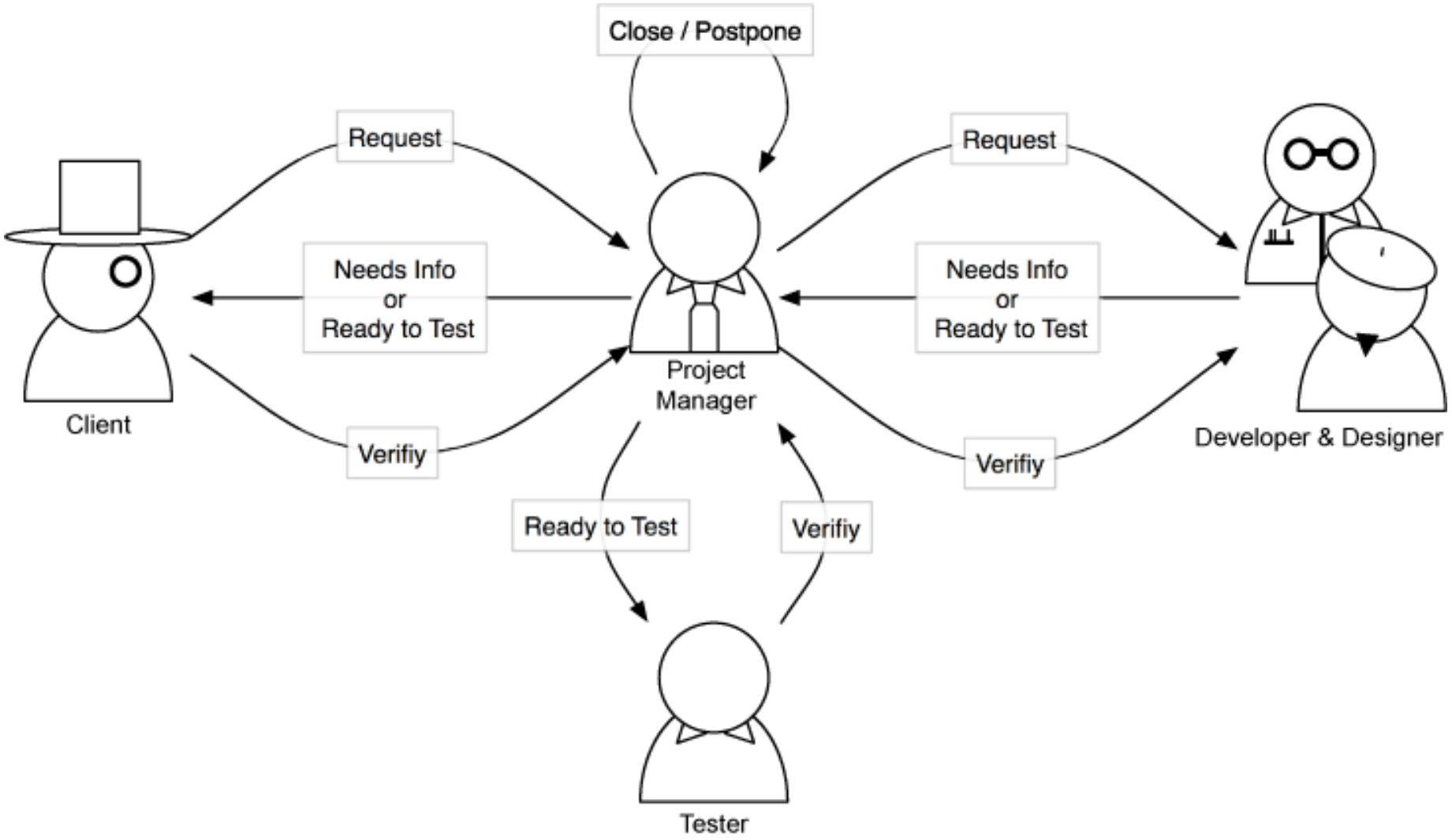
Approved By:
Project Manager
(Internal Only)

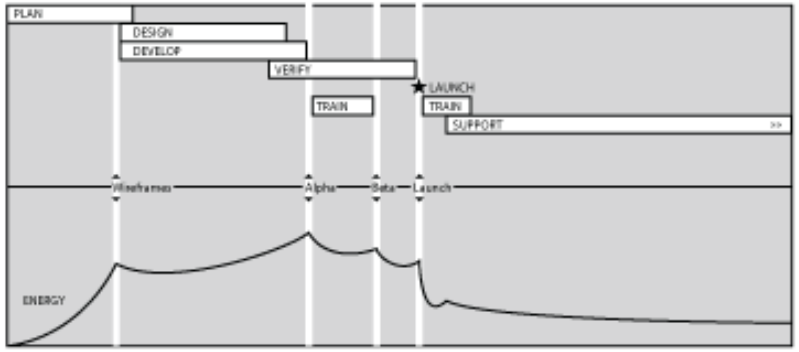
Kept Honest By:
Verification

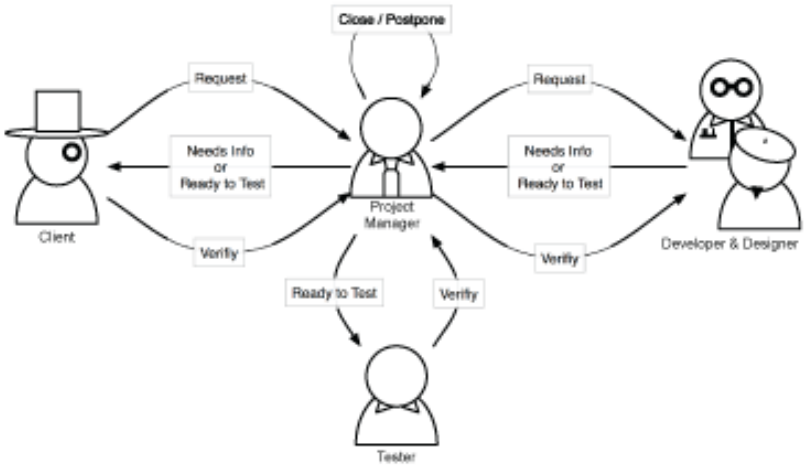
- Site Skeleton
  - Drupal core
  - Contrib Favorites
  - Minimalist theme (Yahoo YUI Reset + Drupal Restoration)
  - Database snapshot
- Content Types built
- Wireframes dissected for views
- Historical – 4.7
  - Zen Theme + Acquia Drupal?
- Actual Content Entry
  - Verification
  - Training
- “Prototype”


PRESENT ALPHA
*ALPHA FEEDBACK (UAT)
LAST OPPORTUNITY FOR FEATURE REQUESTS
PRESENT BETA
FEATURE FREEZE
*BETA FEEDBACK (UAT)
COMPLETE BETA FEEDBACK
LAST OPPORTUNITY FOR CONTENT CHANGE REQUESTS
LAUNCH QA
CODE FREEZE/CONTENT FREEZE
DELIVER LAUNCH CANDIDATE
*CLIENT REVIEW
LAUNCH
TRAINING MANUAL
TRAINING


PLAN
DESIGN
DEVELOP
VERIFY
LAUNCH
TRAIN
TRAIN
SUPPORT
»
Wireframes
Alpha
Beta
Launch
ENERGY


Close / Postpone
Request
Request
Needs Info
or
Ready to Test
Needs Info
or
Ready to Test
Client
Project
Manager
Developer & Designer
Verifiy
Verifiy
Ready to Test
Verifiy
Tester





A DRUPAL PROCESS

*Asterisks denote a client deliverable
Shaded items denote major milestones

- STRATEGIC BRIEF
- KICK-OFF MEETING
- *COMPETITIVE ANALYSIS
- CONTENT TYPES DELIVERED
- *CONTENT TYPE APPROVAL
- SITE MAP DELIVERED
- *SITE MAP APPROVAL
- WIREFRAMES DELIVERED
- *WIREFRAMES APPROVED
  DESIGN ASSETS DELIVERED

Left branch:

- PROTOTYPE BUILD STARTS
- CONTENT INPUT
- CUSTOM CODE (AS NEEDED)
- PROTOTYPE BUILD COMPLETE
- THEMING
- PRESENT ALPHA
- *ALPHA FEEDBACK (UAT) — LAST OPPORTUNITY FOR FEATURE REQUESTS
- PRESENT BETA — FEATURE FREEZE
- *BETA FEEDBACK (UAT)
- COMPLETE BETA FEEDBACK — LAST OPPORTUNITY FOR CONTENT CHANGE REQUESTS
- LAUNCH QA — CODE FREEZE/CONTENT FREEZE
- DELIVER LAUNCH CANDIDATE
- *CLIENT REVIEW
- LAUNCH
- TRAINING MANUAL
- TRAINING

Right branch:

- CREATIVE BRIEF DELIVERED
- *CREATIVE BRIEF FEEDBACK
- HOMEPAGE DESIGNS DELIVERED
- *DESIGN FEEDBACK
- DESIGN REVISIONS & INTERNAL PAGE
- *FINAL DESIGN FEEDBACK
- FINAL DESIGN

Making this a Conversation

#drupalprocess on twitter (today especially)
Blog your process & insights
drupal.org/node/
groups.drupal.org/projectManagement
Your Insights & Suggestions