



Stage 1: Kick-off

Assigning the project team. Reviewing business requirements, project goals, and high-level timeline. Establishing project points of contact, process, and getting to know the client / team.

WHAT WE DO

- Project Scheduling & Budgeting
- Team Scheduling
- Team Download
- Basecamp Setup
- Confluence & JIRA Setup
- Determine Communication Channels
- Address Any Immediate Questions
- Establish Next Steps for Discovery

WHAT YOU GET

- Meet Your Project Manager
- Meet the Department Leads
- Meet your Project Team
- Walk Through Our Process
- Determine Key Points of Contact
- RACI - Role & Responsibilities
- Basecamp Introduction & Walkthrough
- Login Access
- Key Contacts & Billing Information Sheet
- Discovery Meeting Invites
- Client Homework Sheet** (Stage 2)



Stage 2: Discovery

Gathering and finalizing requirements and goals for your project. Discuss project timeline and key milestones. Learning and understanding the problems to be solved.

WHAT WE DO

- Goal Definitions & Success Criteria
- Requirements Gathering
- Gather System Access & Client Credentials
 - Existing Servers
 - Content Management System (CMS)
 - Analytics
 - Asset Libraries
 - Network / Hosting /VPN
- Gather Information About:
 - Brand Guidelines
 - Sales Collateral
 - Marketing Materials
 - Who is Handling Content
- Follow-up Discovery Meetings (if applicable)

WHAT YOU GET

- Stakeholder Interviews That May Focus On:**
 - Business Background
 - Place in Market
 - Goals & Objectives
 - Current Challenges
 - What Problems are Solving?
 - What Problems are We Really Solving?
 - What's Worked in the Past?
 - What Hasn't Worked?
 - Everything There is to know About Your Industry
 - Who's Your Audience?
 - Key Performance Indicators (KPIs)
 - Time Drivers & Constraints
- Creative Questionnaire**



Stage 3: Research & Strategy

Defining and closing gaps in knowledge through investigation and research of behaviors, needs, and motivations. Understanding competitive landscapes, markets, industries, and informing an effective project strategy.

WHAT WE DO

- Market Research
- Competitive & SWOT Analysis
- User Research
- Search & Awareness Audit
- Online Visibility Audit
- Content Auditing & Inventory
- CMS / System Audit
- Usability Testing
- Research & Inspiration for Creative & Design
- Creative Requirements
- Technical Requirements
- Internal Review & Consensus of Blueprint

WHAT YOU GET

- Research Blueprint Which May Include:**
 - Keyword Research
 - SWOT & Market Analysis
 - Competitive / Environmental Analysis
 - Target Market & Channel Verification
 - Content Audit & Analysis
 - Voice & Tone Guidelines
 - Traffic & Performance Analysis
 - Social Audit
 - User Interviews / Surveys
 - Customer Analysis
 - Personas & Drivers
 - Internal Analysis
 - Usability Analysis
 - Navigation Tests / Card Sorting



Stage 4: Planning & Content

Marrying the results of the Discovery and Research stages into a cohesive project plan. Refining the functional requirements for the Design and Development stages.

WHAT WE DO

- Product Definition & Detailed Functional Requirements
- Information Architecture (IA)
- User Experience (UX) Design
- Storytelling & Content Development
- Technical Planning & Technology Recommendations
- Technical Requirements Documentation
- Staging & Production Deployment Plan
- Systems Architecture Documentation
- User & Usability Testing
- Content Management Strategy & Governance
- Visibility & Cross-Channel Content Strategy
- Communication Strategy
- Campaign Planning (if applicable)
- Content Personalization Plan (if applicable)
- Development & Production Schedule
- Refine Project Timeline

WHAT YOU GET

- Measurement & Goal-Tracking Plan**
- Detailed Production Schedule & Timeline**
- Digital Footprint & Visibility Strategy**
- Technical Brief** for approvals
- Scope Documentation** (which may include)
 - IA / Content Models / Data Schemas
 - Sitemap / Screen Tree / Taxonomies
 - UI Template Structure
 - UMLs / Process Flows
 - Goal Funnels & Journey Maps
 - User Stories / Use Cases
 - Functional Requirement Docs (FRDs)
 - Documented Wireframes & Prototyping
 - User / Usability Testing Results
- Writing Style & Content Guidelines**
 - Content Strategy & Page Goals Doc
 - Keyword Research / SEO & Meta Data Plan
 - Content Outline & Inventory
 - Copy Editing / Writing (if applicable)
 - Content Loading / Migration Plan
 - Content Calendar
- RACI** - Role & Responsibilities



Stage 5: Designs & Assets

Applying the learnings from Discovery, Research, and Planning into a high-fidelity visual representation of the end product.

WHAT WE DO

- Develop Creative Brief
- Explore Creative Concepts & Directions
- Moodboard & Visual Guides
- Asset Strategy
- Asset Gathering (existing assets)
- Asset Creation / Production
- Production Designs
- Responsive / Adaptive Designs
- Accessibility Verification (if applicable)
- Develop Product Testing & UAT Plan

WHAT YOU GET

- Creative Brief for Approvals
- Presentation of Creative Concepts
- Rounds of Revisions (as scoped)
- Presentation of Revisions
- Final Creative Presentation for Approvals
- Annotated Design Comps
- Other Design Artifacts (when applicable)
 - Brand Guidelines
 - Style Guide / UI Kit
 - Video Storyboards
 - Hi-Fi Prototypes / Motion Comps
 - Photography Retouching
 - Print-ready Design Files
- Vendor Recommendations (if applicable)
- All Supporting Creative Assets Required for Implementation
- Approved Native Design Files (PSDs, AI, MP4s, etc)
- Design Acceptance Document** for Approval



Stage 6: Development

Implementing the approved functionality from the Discovery, Research, Planning and Design stages. Internal quality assurance testing and verification of feature completion.

WHAT WE DO

- Setup of Environments (Dev / Staging / Prod)
- Server / Environment Configuration
- Application / Framework Setup
- Framework Configuration
- Backend / Server-Side Programming
- Front-end / Presentation Layer Development
- Third-party Systems Integrations (if applicable)
- Data Migration / Content Loading / Population
- Meta Data Implementation
- Content Formatting
- Visual & Functional Testing
- Security Testing (if applicable)
- Load Testing (if applicable)
- Internal QA & Defect Resolution
- Analytics / Dashboard Configuration
- Regular Deployments to Staging Environment

WHAT YOU GET

- Deployment Schedule & Release Plan
- Weekly Progress Reports
- Access to Alpha-level Staging Environment
- Testing and Feature Completion Reports
- Hour & Budget Reports (if applicable)



Stage 7: User Acceptance Testing (UAT)

Reviewing the functionality of the product with the customer against the established acceptance criteria in a testing environment. Reporting and resolution on any discrepancies.

WHAT WE DO

- Functional Testing
- Device Testing
- Visual Testing
- Security Testing (if applicable)
- Load Testing (if applicable)
- Accessibility Testing (if applicable)
- Defect Triage & Resolution
- Schedule & Risk Management
- Regular Deployments to Staging Environment

WHAT YOU GET

- Access to Beta-Level Staging Environment
- Product / CMS Training (as applicable)
- Feature & Testing Plan
- Login Access to Ticketing System
- Ticketing Process: Training & Tutorial
- Ability to Report Defects
- Defect Resolution Reports
- Updated Timeline (as applicable)



Stage 8: Launch

Accepting the product as final and complete, according to specifications, and ready for release to its intended audience.

WHAT WE DO

- Production Deployment Schedule & Plan
- Emergency Rollback Plan (if applicable)
- Deployment to Production Environment
- Functional Testing
- Device Testing
- Security Testing (if applicable)
- Load Testing (if applicable)
- Real-time Defect Resolution
- Verify Production Environment Integrity
- Verify Analytics & Goal Tracking

WHAT YOU GET

- Access to Stable Production Environment
- Product Acceptance Document** for Approval
- Finalized Product Documentation
 - Login & Access Information
 - Environment Configurations / Variables
 - Instructions / Other Documentation
- Your New & Completed Product!



Stage 9: Warranty & Support

Limited ongoing support of the product post Launch. This includes defect resolution and security / vulnerability updates.

WHAT WE DO

- Explain Critical / Non-Critical Warranty Support & Timing of Resolution
- Explain Bug Fixes vs. New Feature Requests
- Explain Duration of Support & Warranty Period
- Prioritize Incoming Warranty Tickets
- Recommend / Implement Critical Security Updates & Patches
- Route New Feature Requests for Review & Estimations

WHAT YOU GET

- Warranty & Support Kickoff Meeting
- Emergency Communication Plan
- Access to Ticket Backlog (Bugs / Features)
- Proactive Suggestions for Security & Stability Updates (as needed)
- Strategic Options for Ongoing Digital Strategy & Product Evolution