

Drupal Website Redesign

**Are you planning to succeed
or succeeding to fail?
It all starts with your RFP.**

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David Minton @DH_David
@DH_Stephen
@DesignHammer



Available tools

- Request for Proposal (RFP)
- Request for Information (RFI)

Your experience with RFPs?



Your experience with RFPs?

- Ready to do first?
- Have done one?
- Have done many?

Overview

- Part 1: Preparation
- Part 2: Resource allocation
- Part 3: RFP elements

Part I: Preparation

A portrait of Benjamin Franklin, showing him from the chest up. He has long, wavy, grey hair and is wearing a light-colored, high-collared coat with a white cravat. The background is dark and textured.

“By failing to prepare,
you are preparing to fail.”

Benjamin Franklin

Planning for success

- Create a short list
- Know your audience
- Identify goals
- Define success
- Define budget range
- Determine timeframe

A large school of small, silvery fish swimming in deep blue water, with several larger, more colorful fish swimming nearby.

Create a short list

How to shorten your list

- Do you want “order takers” or “partners”
- Get referrals
- Meet, in person if possible
- Ask & listen
- Identify priorities
- Consider an RFI

A large outdoor concert audience is seated on a grassy area under a complex, curved metal structure. The audience is diverse in age and appearance, with many people wearing colorful clothing. In the background, a large, modern building with a distinctive, angular facade is visible. The text "Know your audience" is overlaid in white, sans-serif font across the center of the image.

Know your audience

What does your audience want?

- Internet/tech savvy?
- Demographics
- What do your users want from you?
- Why choose to visit your website?
- What do you want from them?



Identify goals: strategy vs tactics

How to identify goals

- What are your organizational goals?
- What website goals support your organizational goals?
- SMART goals (Specific, Measurable, Attainable, Relevant, Time-bound)
- Strategy vs. tactics
- Remember ROI

Tactics

- Focus on user interaction
- Measurable
- Should follow from goals
- Remember ROI
- Don't be trendy

A photograph of Barack Obama, Michelle Obama, and Malia Obama on a stage. Barack Obama is in the center, wearing a dark suit, high-fiving Malia Obama on the right. Michelle Obama is in the middle, wearing a dark dress, also high-fiving Malia. To the left, another man in a dark suit is clapping. The background consists of blue curtains and several American flags. The text "Define success" is overlaid in white, sans-serif font across the center of the image.

Define success

Imagine the end result

- Be specific
- Think in terms of supporting “bottom line”
- How will you measure success?
- Minimal viable product, iterative releases

Possible metrics

- Page views & visits
- Lead capture
- Online orders
- Sharing

Tips: Preparation

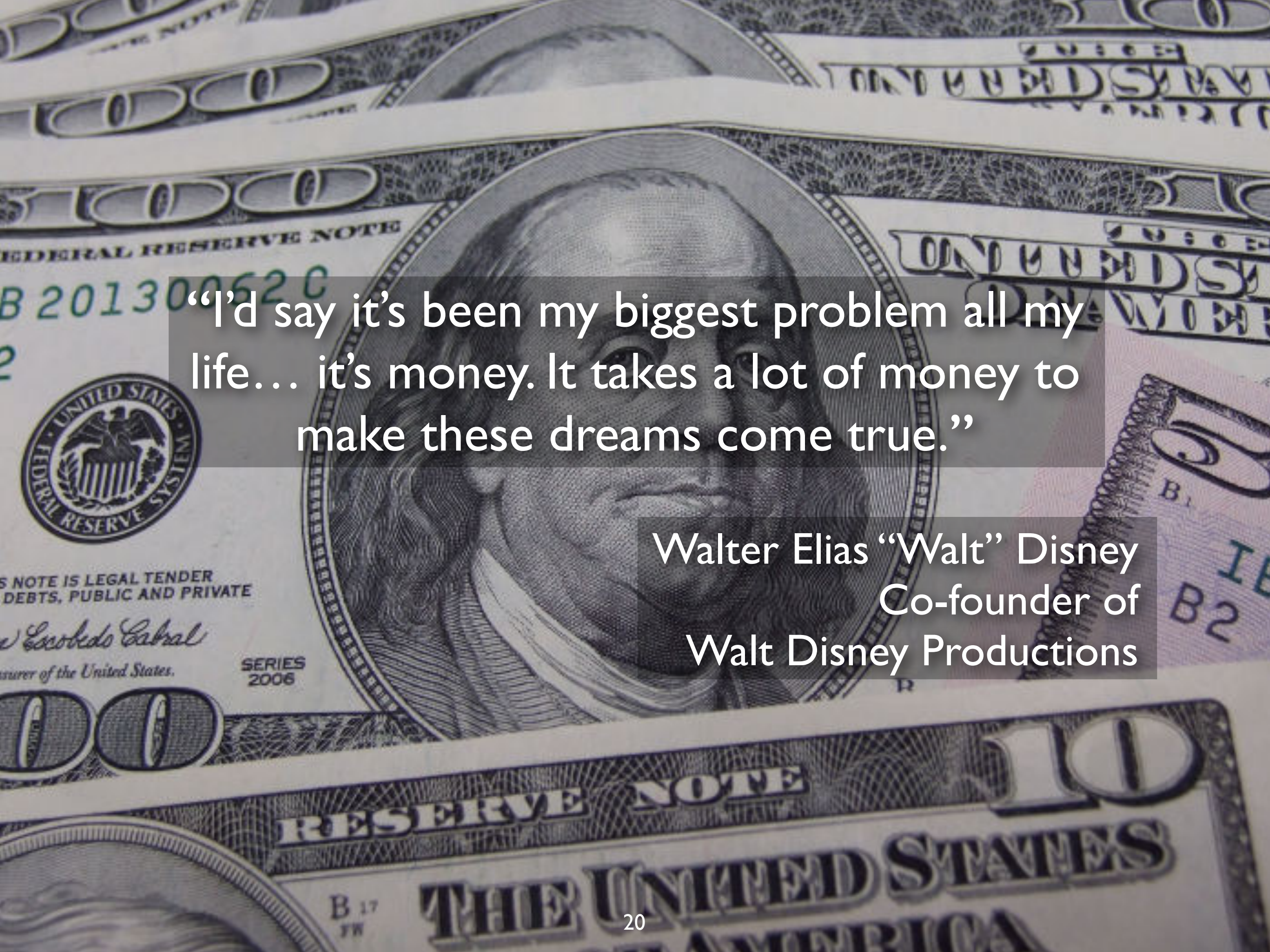
- Clearly define goals
- Define metrics for success
- Don't lose sight of users' needs
- Plan for user feedback to influence later development phases

Define budget range

AMOUNT
\$0.87

561

VOID AFTER 60 DAYS



“I’d say it’s been my biggest problem all my life... it’s money. It takes a lot of money to make these dreams come true.”

Walter Elias “Walt” Disney
Co-founder of
Walt Disney Productions

Budget Considerations:

- Do you have an allocated budget?
- Think in terms of total cost of ownership
- If not paying cash, opportunity costs
- Flexibility of budget/schedule/scope?
- How you measure success

Budget affects:

- Technological approach
- Level of customization
- Level of integration
- Ability to plan for future expansion

Tips: Budgets

- Projects always cost more than expected — plan around Minimum Viable Product needs.
- For context, indicated who created your current website, as well as the development cost, and annual maintenance.



Schedule



“There cannot be a crisis next week. My schedule is already full.”

Heinz Alfred “Henry” Kissinger
US Secretary of State &
Recipient of Noble Peace Prize

Plan time for:

- Deployment
- Design, Development, QA
- Planning content/data migration
- Selection process
- Submission process
- Creating your short list

Tips: Schedules

- Allow enough time to review and compare your short list people
- If you think you have set aside enough time, you probably haven't
- Projects often take 2x3 times longer than you think they should

RFP Fails: Schedule

“The website project is critical for the success of our new product launch, which will be released in five weeks. We propose the following schedule:

Time for firms to draft proposals (1 week)

Time to select firm (2 weeks)

Time to design and develop website (???)

Time to review beta website (2 weeks)”

Part 2: Resource Allocation



Your choices:

- You
- Staff members
- Volunteers/interns
- Freelance/individuals
- Agencies/firms



“Plans are only good intentions unless they immediately degenerate into hard work.”

Peter Drucker
Management Consultant

You?

Pros

- No additional cost
- Readily available

Cons

- Opportunity cost
- Do you have the necessary skills?

Staff?

Pros

- No additional cost
- Readily available

Cons

- Opportunity cost
- Less scalable than freelance or agency

Volunteers and interns?

Pros

- Free or cheap
- Augment internal capabilities

Cons

- Less stable than freelance or agency
- Less scalable than freelance or agency

Freelance and individuals?

Pros

- Less expensive than agency
- Augment internal capabilities

Cons

- Less stable than agency or firm
- Less scalable than agency or firm

Agencies and firms?

Pros

- Stability
- Technical capabilities
- Scalability

Cons

- Most expensive

A narrow, cobblestone street in an old city. The street is paved with irregular, light-colored stone tiles. On the left, a woman in a light green jacket and blue jeans walks towards the camera. In the background, a man in a white shirt and blue jeans stands near a doorway. On the right, a black metal barrier with the word "POLICE" and Hebrew text "משטרה" is visible. The walls are made of rough, weathered stone. The overall scene suggests a busy, historic urban environment.

Who runs the project?

Project management

- Improves efficiency
- Lowers costs
- Reduces chance of failure
- Improves chance of success

Tips: Management

- More decision makers lead to longer and more expensive projects!
- Provide single points of contact for project production workers.



Part 3: Drafting an RFP

RFP Process

- Writing an RFP
- Selecting firms to approach
- Comparing vendors



“If you think it’s expensive to hire a professional to do the job, wait until you hire an amateur.””

Paul Neal “Red” Adair
blowout/oil firefighting pioneer



Vendor information

Without real information, responses are just a guess.

Vendors need to know

- Goals and Metrics for Success
- Functionality
- Constraints
- Schedule
- Budget
- Decision making criteria

Goals and Metrics for Success

- What is your organization trying to achieve?
- What are the obstacles?
- How can technology overcome the obstacles?
- How will you measure success?



Functionality

- Specific functionality
- Public vs. private content
- Third party integration
- Identify Minimum Viable Product (MVP)



Constraints

- Technology requirements
- Hosting requirements
- Security requirements
- Organizational requirements



Schedule

- Timeline for selection process
- Desired start date
- Desired launch date



Budget

- Without a target budget, firms will guess
- What is minimum feature set for allocated budget?
- If you don't know your budget, you aren't ready for an RFP, go for an RFI instead



Selection criteria

- Price?
- Schedule?
- Technical experience?
- Samples of similar work?
- Company infrastructure?
- Geographic location of vendor?



RFP Fails: Budgets

“Pricing must be submitted on a ‘not-to-exceed’ basis. If there is a ‘residual’ amount at the end of the project, CLIENT will retain the difference by not spending the funds. In contrast, if the cost ceiling is exceeded, the vendor is to finish the work at no additional compensation.”

RFP Fails: Requirements

“Proposals must be submitted on a fixed price, fixed schedule basis, based on the project specification. The specification is currently incomplete.

The finished specification will be provided to the winning vendor on the project start date.”

RFP Fails: Requirements

DesignHammer: Is there any critical information necessary for the success of the project that was not included in the RFP?

Prospect: Yes

RFP Fails: Requirements

DesignHammer: Is the 10,000 record figure for the proposed content migration provided in the RFP accurate?

Prospect: No, we don't actually have any idea how many records we need to migrate; we just took a guess.

RFP Fails: Requirements

“We need to integrate the website with a third-party service we have selected. The service is currently developing an API, but has not released it. How much will this cost, and how long will it take?”



Qualification Questions

Comparing apples to apples.

Some questions for vendors

- Sample of past projects & References
- Minimum/average project budgets
- Do you subcontract? If so why?
- Design & development philosophy
- Technological capabilities
- Capacity

Tips: Qualification

- Schedule initial calls or meetings to allow both you and the vendors to pre-qualify each other.
- If you openly publish your RFP, don't be surprised by the number of responses you receive.

Tips: Qualification

- Limit the length. Saves you and the vendors significant time and effort.
- Ask specific questions to better compare vendors.
- Effort required to respond to your RFP should be commensurate with your budget.

RFP Fails: Spec work

“As part of the response to the RFP, proposers must provide an initial draft project plan for achieving the objectives of this project.”

RFP Fails: Spec work

“The proposal must include ‘Design for key pages, including: Home page, Examples of other primary/secondary content pages (including About Us, Events, Media, Our Staff, Our Work, Our Results; Funder/Partner pages, Financial Info, etc...)’”

A photograph of a market stall displaying several metal trays filled with different types of nuts and snacks. In the foreground, a large tray is filled with bright green, round, coated nuts. Behind it, other trays contain orange and brown nuts. A person wearing a black and white striped shirt is partially visible in the background. The scene is brightly lit, suggesting an outdoor market setting.

Vendor Selection

A good decision is based on more than numbers.

Which ones?

- Ask your peers
- Attend conferences (like Drupal GovCon)
- Do web searches
- Review your competitors' websites

How many?

- Does your organization have a minimum bidding requirement?
- Ideally 3–5
- If really unsure, consider Request for Information (RFI) to narrow number

Compare vendors

- Review proposals with vendors through meetings or calls
- Ask for an apples-to-apples comparison if vendor proposals do not line up
- Everything is negotiable

Tips: Selection

- Indicate what type of vendor created the current website.
- Was the current vendor invited to submit an RFP response?
- Why are you seeking a new vendor?

Tips: Selection

- How many vendors have been invited to respond? What types of vendors?
- Most professionals will not provide spec work, but you should ask for samples and/or portfolio.

Tips: Selection

- **You want to select the vendor most qualified to successfully complete the project, not most qualified to win the account!**

RFP Fails: Selection

“Your firm had the best qualifications, but we chose not to hire you since your sales team did not seem enthusiastic enough. Maybe you were tired after driving six hours to present to our leadership team?”

It Doesn't End Here

No website lasts forever.



Conclusion

- Planning is essential
- Understand the pros and cons of resources
- Make the most of RFP process

Special thanks





David Minton
Stephen Pashby

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