



Briefing your web developer

Matching expectations

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Briefing your web developer – how to get the best out of them, and the best value for you!

So you've got the approval to put together a website for your organisation or pet project; you've got the funding, you've got some ideas – now all you need is a web designer or company with the skills and background to translate those into a winning application. How do you find and brief a partner organisation who can – let's face it – make or break your project? How do you find out if they can do what you want, how much they're going to cost, and how well you will work together? Where do you start?

Most good web companies – particularly those specialising in educational, heritage or other non-commercial applications – will welcome the opportunity to talk to you directly, either face to face or on the telephone, and in most cases this really is the best way to get the measure of each other. It will help them to get a feel for your requirements and preferences, and you to see whether they can 'think on their feet' and come up with ideas that are in harmony with your own.

But sometimes it's just not feasible to meet with numerous companies or individuals, or your own procurement rules may forbid it until later in the process. At the very least, you'll want to narrow down the field – and even if you have someone specific in mind, they will be very grateful for some initial guidelines before they speak to you, so they can get a feel for what the project is all about.

This is where the written brief comes in. It's your opportunity to tell the contractor exactly what the project is about, who the audience is, what the budgets and constraints might be, and technology issues, and most critically of all, what your expectations are. For the developer, it's their chance to start thinking about what questions to ask, finding background information for any specialist requirements, and coming up with some initial ideas about the 'look-and-feel' of the screens, the structure of the site, and the simplest way for the user to navigate around it.

So what should the brief consist of? How long should it be, and what should it aim to cover?

Fundamentally, what your designer will need to know is who the application is for, how big and/or complicated it's likely to be (and therefore how long it's going to take to design and build), what content material is available to use in it (and in what formats) and what the technical and regulatory constraints are that need to be taken into consideration. If you have very specific ideas about what should appear on the screens or what the structure of the site should be, say so; if not, make it clear that it's for discussion – your developer will usually have a wealth of experience and ideas to contribute, and it's often much more satisfying and satisfactory to work together to develop these fundamental issues.

A good project brief should be concise but complete, specific about known issues and open about decisions still to be made. Don't be afraid of seeming to 'show your ignorance', and don't be tempted to show off your own technical knowledge! The more information and freedom you give your developer, the better they will be able to work with you to produce an exciting product.

A useful web brief will often consist of the following areas:

1. Executive Summary

Always write this last, after the rest of the document is completed. It should generally consist of no more than one side, and may be a bulleted list summarising the content of the rest of the document. This section can act as a useful checklist; for you, to make sure you've included everything, and for the developer to make sure that their response addresses all your points.

2. Outline and background

A simple, clear outline of what the project is all about; who is commissioning it, what their objectives are, what the project aims to achieve, and any particular requirements or constraints. Be as specific as possible, and don't cop out by attaching a lot of barely relevant internal documents just because they're to hand!

3. Target audience and other stakeholders

Who will be the end users of the application? Be as specific as possible – saying 'everybody' or 'global worldwide audience' is generally not terribly helpful. If it's aimed at a particular age range, curriculum area, interest group etc., define it as closely as you can.

Be aware also of any other interested parties who may not be the actual anticipated and users, but may act as 'gatekeepers' or 'decision makers'

and whose interest may also have to be considered. For example, your target audience may be Key Stage 1 learners, but in order to reach them you will first have to appeal to teachers or parents who will guide them to the project.

Don't forget also who is paying the bill – if you have received funding from a commercial sponsor or outside funding agency, they will also want to ensure that their own interests are addressed!

4. Content and resources

You can have the most wonderful looking web pages in the world, but you still need something to fill them. What will your web resource consist of, and where will the material from the pages be sourced from?

If your application is making use of the assets of a collection or archive, what steps have to be taken to get them into a format to include on the web? If they are solid objects, photography may have to be arranged. If they are photographs or printed documents, they may need to be scanned or digitised. If there is text content, it may need to be digitally captured or re-typed. Have you considered the scale of these tasks? Have the costs been factored in?

If the intention is to originate new text, new materials or interactive programmes, who will write or design them? Will it be you, a third party, or is this a task you are expecting from the developer? If you need illustrative material or third-party resources, who will research the material and ensure that copyright material is obtained?

One of the biggest areas for misunderstanding between client and contractor is in the potential mismatch of expectations. A number of high profile projects have fallen apart when, having agreed prices, timescales, approach etc the developer asks "OK, where's the material?" and the client replies "I thought that's what we were paying you for!". Make sure it's quite clear who is providing what, in what format, where from, and any anticipated difficulties in getting hold of material.

5. Restrictions, regulations, guidelines and legislation

Make sure that your brief includes details of any technical or regulatory restrictions which will apply to the project. For example, many government-funded projects will insist that finished projects must conform to the 'WAI' standards for website accessibility – these worldwide standards ensure that finished applications are accessible to as wide an audience as possible. Similarly, the introduction of the Disability Discrimination Act (DDA) seeks to ensure that users with a wide range of potential disabilities, from physical to visual and perceptual, are not disadvantaged by the techniques and tools employed in your project.

Check whether your own organisation has any rules or guidelines that may be relevant; for example, if there are design constraints to do with presenting the organisation's branding or logo, and whether particular forms of wording or presentation have to be used. Some organisations produce a specific 'style guide' for the production of publicity material or publications, and it is wise to check whether these will apply to the web project also.

6. Technology constraints and opportunities

It's important for the developer to know if there are any particular technology issues that will affect the development; one of the most critical of these is how exactly the application is to be delivered, and where it will be 'housed'. For example, is this a brand new website, or is it a new section or annex to an existing site? Does your organisation have its own web-server, and will the new site be expected to sit on it? If so, what sort of access will the developer be able to have? Many in-house IT departments can be very nervous of outside contractors having 'free run' of their systems, and it's often an advantage to develop an application externally first and only tie it in to an in-house system right at the end, after all testing and verification has been completed.

If you're developing something completely new and don't have a clue about domain name registration, server hosting, email addresses and so on – don't be afraid to say so. All developers will be able to recommend a number of alternatives for this – many will run their own servers which you may be able to use, or will have a third party provider which they are happy to use. But in order to build it into the plan, they need to know up-front.

If you want to use the developed application in different ways – for example, to send out on CD-ROMs or to include on a kiosk in an exhibition – then it's important to know that right from the start. The kinds of technologies that are available on web servers are not always the same as those on desktop or stand-alone PC's, and it may be that different solutions may need to be developed. For example, if you want an application that is heavily reliant on an underlying database, the development approach to deliver this over the world wide web is likely to be very different to that required for a laptop PC.

7. Design ideas and restrictions

One of the most important decisions you will need to make – and the one which most people will think of first – is what sort of visual impact the screen designs will have. Should your screens be 'clean and uncluttered' or 'packed with exciting information waiting to be investigated'? Do you like strong, primary colours to appeal to a young audience, or a more sophisticated look to appeal to the demanding tastes of young adults? Do you want to use an animated 'avatar' as a guide that users can identify

with, or do you want a very high-tech 'console' type approach? You may have some very specific ideas along these lines, or you may be looking for input from the developer.

Once again, it will be very helpful if you can give your thoughts in these directions. Are there particular colour themes that should be used or avoided? Are there certain styles or approaches that would attract you or put you off? One of the most useful things you can do is to have a look around the web for other sites which are aimed at similar user groups to yours, and note down three or four that you particularly like, and a similar number that you particularly dislike, with some brief notes to say what attracts you or puts you off.

Remember also that the design of a site is not just about the way it looks, but also about the way it works. One of the first tasks in a development is to build a detailed structural chart showing how many sections and pages the site will contain, and how they will link together. Which sections are critically important, and should therefore be linked from every screen? Which pages are sub-sections of other pages? How will your menus or links fit in with the content on each page?

Again, you shouldn't feel that you are expected to answer all these questions – that should be the job of the developer in close consultation with you – but if you have any particular thoughts or requirements, this would be a good opportunity to express them.

8. What happens when the project is delivered and the developer goes home?

The huge advantage of the web is that it enables information to be constantly updated, changed and refreshed. Isn't it a shame then that so many web applications are developed and delivered, and then just sit there with the same unchanging content, sometimes for years?

The problem can be to do with funding – you may have been able to scrape together a budget to develop a project, but is there anything left in the pot for changing, updating and adding to it as necessary? And, most critically, who is going to be doing that work?

There are three main alternatives to ensure that you're not left high and dry with 'static' website content:

- (a) build into the initial contract provision for the developer to maintain the website for a certain period of time. This can be hard to allow for, as it must be made very clear from the outset exactly how much time is available to be spent on this task on a daily, weekly or monthly basis, and fees agreed accordingly.
- (b) 'ring fence' a certain amount of the budget so that you can go back to the developer on a casual 'as and when' basis to have changes made. Make sure though that the developer is happy to work in this way, and

be aware that it's likely to be more expensive on an hourly basis than if there is an agreed retainer.

- (c) arrange with the developer a system whereby you or your own staff can update sections of the website as necessary. Over the last couple of years, software tools have become available which mean that this is far easier than it used to be; it should be possible for the developer to build the site in such a way that, using a relatively cheap and easy-to-use editor package, you can make simple changes to text and other content without damaging any of the underlying functionality. The developer should also be able to provide some training or simple instructions to whoever needs to use this – but again, make sure that this requirements is understood and built in from the beginning.

Whichever solution is decided upon, make sure that you have made it clear and built it into the initial project plan so that you're not left high and dry and with no budget to make changes at the end!

9. Expectations and criteria for success

As I hinted above, working successfully with your developer can be a little like a marriage, and the quickest way to matrimonial disharmony is when one or the other side feels their expectations are not being met. It's a little late, once the developer has gone away and produced an application, to say "Didn't I say? You can't use any green!", or "I thought you were going to take all the photographs!" Make it clear right from the outset what you expect in the relationship, and how you will measure whether success has been achieved.

In particular, be aware of how you will work together. In some circumstances, it may be absolutely appropriate to specify a project, and then have nothing more to do with the contractor until the completed application is delivered – though in those circumstances, you'd better be pretty confident that the brief is solid and well-understood! More typically though, you will wish to work closely together, with regular reviews, updates and input from both sides. How much of your time, or that of your staff, will be required for this? Has that been budgeted and allowed for?

Finally, how will you evaluate the appropriateness and suitability of the application for your target audience? Have you built in evaluation stages, feedback from actual users or interested parties, and the opportunity to change things based on their input? Who will arrange for this user testing – you or the developer? If the developer, are you confident that they are suitable and capable for achieving the results you want with users with whom you are probably much more familiar?

At the end of the day, the buck stops with you – it will be your organisation's name that is associated with the application, and you will get the flak if it receives bad reviews or experiences problems later.

Make sure that the brief considers how the application is to be evaluated, who is responsible for it, and how flexible you expect the developer to be in responding to suggested changes. Remember however that just because one test user has a problem or complaint, that doesn't mean their suggestion automatically has to be taken as a solid requirement – it is just one piece of information that should be balanced with other factors in making a final decision.

10. Timescales and budgets

Finally, make sure that your brief is clear about the time available for development, and any critical milestones, dates or events that will be important in the production and delivery. Is your site aiming to coincide with a specific exhibition, anniversary or event? Will you need demonstration versions or visuals to show at internal meetings or for outside funders? An early part of the development process will be to agree with the developer a detailed schedule and set of deliverables, which may well be tied to the release of portions of the budget. Make sure that these issues are made clear here.

The question of budget is sometimes a thorny one. You may be in a competitive tendering situation, and looking for contractors to offer a fixed price or the best value for a given project. If that is the case, then it's all the more important that you are as specific as possible about what is required and what is expected, otherwise you may well find that the company who put in the lowest tender has made certain assumptions about what they have and have not agreed to do for that money.

On the other hand, many projects will have to run on a fixed budget, and in this case it is very useful to also make that clear from the outset. In most cases it is possible to 'cut the coat according to the cloth' if a particular budget value is known; in these circumstances, you should be looking to the developer to let you know EXACTLY what they can achieve and deliver within the budget you have available, and what if anything may fall outside it.

What to expect as a response

By now, it must sound as though you're doing all the work, and there's nothing left for the contractor to do! That's really not the case; by clearly stating what your expectations and constraints are, you are giving the developer a strong framework in which to demonstrate their creative flair and technical strength, their ideas and experience. If you produce a strong brief, you should look for a strong and imaginative response – it's a good way to sort the wheat from the chaff, as anyone who then doesn't produce a comprehensive and exciting proposal can be discarded quite quickly.

It can be useful to set a limit on the number of pages for the developer's response, or even a framework to ensure that they cover all the points, but don't be too restrictive as this can stifle the creativity of the proposal. If your brief covers all the points outlined above, there should be no reason why the developer's response should not address them all and explain how they can be achieved, or offer suggestions for even more exciting solutions!

If it's important for you to see design visuals or structural flowcharts, then say so. Be aware though that producing specific visuals is very time consuming and is best done at a slightly later stage of the project, after you and your chosen contractor have had time to assess each other's priorities. It may be far more useful at the proposal stage to ask for case studies or examples of designs and layouts which have been developed for other similar projects.

Finally, I come back to the point I made right at the beginning; there's only so much that you can learn or impart with formal documents, and if possible you should always try to speak directly to potential candidates. It's obviously a waste of your time and theirs to drag in dozens of potential contractors, but if you have a shortlist of two or three, try to at least speak to them – you'll get a much better feel of whether you're on the same wavelength, and how you're going to work together through the life of a project.

So once you've found your perfect partner, you're all set! I described the working relationship as a little like a marriage, so let me finish with a suitably matrimonial blessing:

“May your time together be exciting, harmonious and productive – and may all your problems be little ones!”

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