HOPE YOU ARE AS EXCITED AS WE ARE?

PROJECT ONBOARDING FORM

V2.3
Client Preparation

The aim of this document is to explain to clients what will happen when working with our trainees. It will show what the trainees can deliver and the steps they will be following.

- Welcome from the founder
- Who you are
- The ideal type of projects
- The steps to creating your site
- What we need from you and when
- Tips on providing content
- Do’s and Don’ts
- What happens after the project?
- FAQs
- Agreement
- Big Thank You
Welcome from the Founder

As a young designer learning the trials and tribulations of web design, I often found it difficult to find projects that would take me up and above what I already learnt. Many times I would take on projects that turned into nightmares and actually made me question my choice of career.

What we are offering is access to your own web professional in training to complete a website for you for free. In return, we ask that you read this guide carefully and help make the project a success.

It is our hope that this document will help our trainees and you find the best fit and give both parties the best opportunity for a successful project.

We prepared this document so you can understand your part and what our trainees will be providing and when.

If you have any questions regarding the process, or this document, feel free to email us on info@webcoursesbangkok.com

Looking forward to growing your project together!
Who You Are

We are looking for small businesses and charities who have a small project based around selling a service or product.

If you have a complex large project then we recommend contacting an agency so that you will have experienced teams able to focus their attention on your project.

Our instructors and trainees are looking for patient clients who are willing to put in the time to support the project in a quick and efficient manner. If this project is not that important, then again, we recommend working with an agency who has the resources to devote to you when you need it.

The trainees will need to communicate to you 2-3 times per week if not more so, we need you to be able to do skype or in-person meetings on a regular basis. This helps the project run smoother and helps you steer the project how you want.

The ideal project for this course is 5-10 page website with a product/service listing section and some sort of sales form / contact form. E-commerce sites will be too much work for such a short period, and not feasible.

If you can answer yes to the following questions then we will be happy to take on your project:

- I have a small project I need to get finished within the next 2-3 months
- I can have the branding and content ready within the next month
- I am willing to take advice on design and development ideas from my designer
- I am the one making the decisions and not a committee of people
- I will answer emails quickly so that the project can move forward smoothly
- Committed to quality and getting the best result for the project

If you are looking for a web designer for an ongoing relationship this will be a huge plus. Our trainees are taught how to continually support and work with their clients as their business grows.
Ideal Type of Projects

Here are some examples of previous projects by our trainees (take a look, if you feel your project is similar then we can discuss moving forward and assigning you a trainee to build your site)

Netgradesuisse.com - business website for a Swiss financial company

Needeed.org - a charity website that helps professionals and charities connect
The Steps to Creating Your Site

*(design idea, this can be like a trail)*

A quality web design project normally takes **4-8 weeks** so please have your content ready before you start the project if possible. So let's take a look at the steps your designer will be taking you through:

1. **Requirements meeting** - you will meet with your designer so they can understand your business and requirements for the site.

2. **Rough Proposal** - your designer will then digest the information and send you a rough proposal of what they will do and by when.

3. **Full Proposal** - once you agree on the rough details they will prepare a full proposal with all the fine details and terms of the project.

4. **User Experience** - you will meet with your designer who will ask you questions about your business aims and target audience. The output of this is some rough sketches and ideas for the layout and flow of the site.

5. **Content Collection** - your designer will send you some wireframes, these are simple designs showing the layout and flow of your site. Think of them like architecture drawings of the house before you build. From here, you will work together to collect all the content to go on each page.

6. **Design Phase** - now the chef has his/her ingredients they can start the design. Here, we will need your logo, fonts and colour scheme. If you do not have this yet we can help support you in creating a new brand.

7. **Development** - here your designer will start to create the website and they will send you a live link to check-up on their progress.

8. **Quality Assurance** - your designer is given a 30 point checklist to go through when the site is almost complete. The pre-going live checklist looks at things like how the site looks on different browsers, devices and even includes things like backup and security for you. This all comes with the support of your designer’s instructor.

9. **Going Live** - once you are happy with the site we will then request your hosting and domain details (name of the site and where you save it). Your designer will
put the site live and then complete the checklist to make sure everything is running as it should.

10. **Training** - you will receive 1-2 hours training on how to manage the site yourself.

11. **Ongoing Support** - If you want to update, upgrade or change things then you can discuss an ongoing maintenance contract with your designer on a paid per hour basis or per project.
What We Need from You and When

The important reason for these stages is so you can see the step-by-step process of your project. From you, as the client, your designer will ask you to sign off on each stage, this helps things move forward and your designer feels confident they are doing the right job.

<table>
<thead>
<tr>
<th>YOU (THE CLIENT)</th>
<th>STAGE</th>
<th>YOUR DESIGNER</th>
</tr>
</thead>
<tbody>
<tr>
<td>A clear idea of the project and some examples of websites that you like.</td>
<td>Kick Off</td>
<td>At this stage they will just ask you lots of questions to find out the design and functionality requirements</td>
</tr>
<tr>
<td>You will give a folder for each page and just put the text, images, audio and or video in there for that page.</td>
<td>UX Meeting 1 week</td>
<td>Your designer will send you some examples of how to collect your content.</td>
</tr>
<tr>
<td><strong>Feedback</strong> is the most important thing your designer will need at this stage. They will send you a link where you can actually give feedback directly, as comments, onto the wireframes.</td>
<td>UX Designs 2 weeks</td>
<td>The designer will then create a wireframe and send it to you.</td>
</tr>
<tr>
<td>Before your designer can start in the visual design they will need the <strong>content</strong> for your project ready. They will also need your logo, fonts and colour scheme.</td>
<td>UI Designs 2-4 weeks</td>
<td>Your designer will send you some files (JPG) of the designs. They will need your feedback within 1-2 days so they can make the changes and move onto development quickly.</td>
</tr>
<tr>
<td><strong>Feedback</strong> is the main requirement from you at this stage.</td>
<td>Development 4-6 weeks</td>
<td>The designer will send you a live link so you can see their progress. They will be asking you to give feedback on a page by page basis.</td>
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Please provide Domain and hosting details, we recommend using [siteground.com](http://siteground.com)

[Google Analytics](https://analytics.google.com) details or you can just email the designer your gmail login and they can do this for you.

Your designer will then put your site live and they will add Google Analytics so you can track who is visiting your website.

If you need things like email setting up please ask your designer to do this for you as a separate (paid) service.
**Tips on Providing Content**

What does a chef need once he has all his tools? He needs content! Content is the main thing we need for a website project to succeed, without it you will get a substandard and unfinished project.

The content comes from you, you know your business and have direct access to the pictures, words, videos and even audio that pertains to your business.

It is not the job of your designer to provide content. If you are unable to provide the content in a timely fashion we will have to re-assign the trainee to another project and your project will need to be completed by an external designer.

So how do you collect content? Well firstly you will receive this from your designer:

<table>
<thead>
<tr>
<th>Website</th>
<th>Page</th>
<th>Section</th>
<th>What we need</th>
<th>Type of Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ranity</td>
<td>Home page</td>
<td>Customer’s testimonial</td>
<td>A customer’s quote (now we use Carl’s quote)</td>
<td>text</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Special Offers Section</td>
<td>Sub text describing “Special Offers”</td>
<td>text</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Latest</td>
<td>Sub text describing “The Latest”</td>
<td>text</td>
</tr>
<tr>
<td></td>
<td>About</td>
<td>Founder section</td>
<td>Kyaw’s big image</td>
<td>Image at least 1790 x 626 px</td>
</tr>
</tbody>
</table>

The easiest way to deliver the content is to sign-up and use Dropbox and create a folder and share it with your designer. Inside that folder create a subfolder for each of your pages and put in the content just for that page.
So in summary:

1. You and your designer have a UX meeting to decide what content is needed for your project
2. You will receive a spreadsheet showing all the content you need to provide and in what format
3. You create a Dropbox/Google Drive folder and share it with your designer
4. Start adding all the content for each page and ticking off the content on the spreadsheet as you complete it.
**Do’s and Don’ts**

Here are some great tips on how to get the best out of your project. Remember that building a site is a lot of work for your web designer so with these do's and don’ts you will certainly get the best out of your project.

<table>
<thead>
<tr>
<th>DO's</th>
<th>DON'Ts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Have a Clear Idea of what you Want</strong></td>
<td><strong>Try to Rush The Process</strong></td>
</tr>
<tr>
<td>Imagine going into a restaurant and ordering “food.” You will probably not get what you want, so when working with the designer have a clear idea of the purpose of the website and how you need it to work.</td>
<td>Be patient and understanding that your designer is still learning, he/she is new to the process of designing websites and while they are completing your project they are also in workshops for over 5 hours, 4 days a week with 2 hours of homework.</td>
</tr>
<tr>
<td><strong>Insist on Seeing Work in Progress</strong></td>
<td><strong>Ask for Multiple Designs</strong></td>
</tr>
<tr>
<td>The best way to steer a car is to always have your hands on the wheel, so ask your designer for updates. They should be in constant contact with you so you can steer them in the right direction.</td>
<td>Your designer is taught a process that you arrive at the best design rather than trying a scatter gun method of seeing which is best. By giving them a clear brief and examples of what you want, you will get a better result on time.</td>
</tr>
<tr>
<td><strong>Ask your Designer to Explain Why</strong></td>
<td><strong>Expect your Designer to Write Content or Find Images</strong></td>
</tr>
<tr>
<td>As your designer shows you designs and ideas ask them to explain why. This will push them to explain and help them learn more about the reasoning behind their choices and they will hopefully surprise you with their creative ideas.</td>
<td>It is vital you supply the content in an efficient and clear manner. If you ever hear yourself saying “just find pictures on Google” or “Copy the text from this other site” then you know you’re not doing your job as the client properly. Take the time to guide your designer and give them the content to build you the site.</td>
</tr>
<tr>
<td><strong>Give Instant Feedback</strong></td>
<td><strong>Make Demands or Change your Mind</strong></td>
</tr>
<tr>
<td>Now we have Facebook messenger, line, slack, gmail chat and email it should be easy for you to give quick and concise feedback to your designer. Do not expect them to know what you know so take the time to explain.</td>
<td>The designer is giving you a free website and it is important to respect that they have a set period of time, they are beginners and they are learning. So please don’t demand extras or change your mind halfway through the project. It is far better to complete a project on time with</td>
</tr>
<tr>
<td>Use Nimbus Screenshot</td>
<td>Expect Too Much</td>
</tr>
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<td>-----------------------</td>
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<tr>
<td>This is a tool for chrome (download here) to allow you to take a screenshot of the website and then draw on it to give feedback. This stops the whole “move the thing on the left up a bit”, it is easy and quick to give feedback.</td>
<td>As we mentioned these are beginners and they are often learning the skills to complete your project as they are doing them. Be kind and understanding as you are helping them start a new career. Remember when you were a beginner!</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Have your Hosting Details Ready</th>
<th>Use Cheap Nasty Hosting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hosting is where your website will live, we recommend siteground.com and for $4 to $8 per month you will have an excellent service. Once you sign up they will send all the login details to your email; forward this to your designer.</td>
<td>It is not worth the effort to use a cheaper hosting company that has sub-standard support or a unique managing system that your designer will struggle with.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enjoy the Process</th>
<th>Try to do Everything at Once</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seeing your website come to life is a great feeling so enjoy working with your designer and work as a team to get the best out of the project.</td>
<td>If you do want a complex site then allow your designer to do a phase 1 style site that is mainly an information / brochure site to something bigger later. Often our clients keep on their designer so we hope you will create a long lasting relationship.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Recommend your designer</th>
<th>Expect Multiple Languages</th>
</tr>
</thead>
<tbody>
<tr>
<td>We hope that you not only gain a wonderful website out of this; we hope that you enjoy the process of working with your designer so please do recommend them for other projects if you have any.</td>
<td>Due to time constraints your designer will only be able to supply the website in English (or other agreed language). Once the project is complete you can then request the designer to add multiple languages.</td>
</tr>
</tbody>
</table>
What happens after the project?

“A website is never finished” - Carl Heaton 2016

That is true to a certain degree, you will need to constantly update and improve your website and now that you have a WordPress website you will be able to do this yourself. For changes and new functionality we hope that you will have created a close relationship with your designer so he or she can assist you.

After your training you will be able to login and update your website yourself. You will have your own logins and the website will be yours entirely.

You may need ongoing support so keep in touch with your designer and they will be happy to help.

If you are happy with the project please be kind enough to give your designer a testimonial for their portfolio and even recommend them if you have the opportunity.

We recommend our designers keep in touch with all their clients on a regular basis to help them find more potential projects so if you do need any updates and changes these will be paid projects so you can work out the details with your designer directly.

If you feel you need some extra support from the designer’s instructors you can contact info@webcoursesbangkok.com
Agreement

The aim of this section is to simply make it clear what you are expected to do as the client and what your designer will deliver and by when. This is not a legal binding document, instead it is aimed at being a clear agreement between you and your designer from our Web Professional Course.

Please check the points you agree to, if you are willing to agree to all the points please sign the agreement below along with your designer.

- I agree to give the designer as much information as needed to allow them to complete the project within 1-2 months.

- I agree to work with the designer to create a detailed set of wireframes (page layouts and plans) to assist in the planning stage of the project.

- I agree to answer emails/messages within 24 hours to keep constant communication during the project.

- I will give feedback at all stages and once happy will sign off on the stage.

- I will not change my mind on the design or development phase once I have signed off on it to allow the project to continue moving forward.

- I will provide the designer with all the relevant branding materials including my logo / fonts in an editable format. For logos PSD/PDF/AI and fonts TFF/OTF

- I will provide the designer with WordPress compatible hosting (e.g. SiteGround) and a relevant domain name

- I will do my best to make this project a fun learning experience and help the designer in anyway I can so we both get the best outcome.

Date: / / 

Print Client Name:

Signature:
Big Thank You

We want to thank you for being interested in helping our trainees start a new career. A portfolio is the most important weapon in a web designer’s arsenal and this project will mean a great deal to them.

We hope it will make a big difference to you and your business also.

From everyone at the WCB team we thank you for your interest in the Web Professionals program and we hope you and your web designer create more amazing projects.

Lastly if you know of anyone who may also benefit from this program please let them know about this opportunity for a free website by a trainee professional web designer.

Carl Heaton - Founder