Scope & Execute a Drupal Project Without a Hitch

WITH ETIENNE ENGASSER & JIGAR MEHTA
- Located in Montréal
- Small team of ~10 Drupalers
- Drupal specialists
- Drupal Training
- Drupal community

evolvingweb.ca
Our Clients

- Linux Foundation
- Tourisme Québec
- WD Western Digital
- Québec Original
- Canada
- Princeton University Press
- Travelocity
- CRN
- CCA
- Trent University
- EDC
- McGill
Etienne Engasser

PROJECT MANAGER

● Project manager
● French
● Developer background
● 5+ years of experience
● Drupal since 2015
Jigar Mehta
FULL-STACK DEVELOPER
Jigarius on Drupal.org, LinkedIn, etc.

<profile data-dev="true">
  ● Full-stack developer
  ● PHP since 2008
  ● Drupal since 2013
  ● Learning Python
  ● BBA (Marketing Honors)
  ● Ran a web shop for 3 years
  ● Speak 6 languages & learning 2 more... Polyglot?
  ● Can solve the Rubik’s cube!
</profile>
LET’S TALK ABOUT OUR PAIN

Bad communication
HOW PROCESSES SOMETIMES LOOK LIKE

Chaotic
HOW WE WANT OUR PROJECTS TO BE

Smooth
DON'T PANIC!

What you can improve

1. **Identify** the parties involved in a project
2. Ensure good **communication**
3. Ask the right **questions** to scope a project
4. **Estimate** properly
5. See beyond scoping: **execution & deployment**
WHO’S INVOLVED IN A DRUPAL PROJECT?

Identify the parties
The Client

“I want a website!”

- Identify the type of client you’re dealing with
- Help the client identify their goals and needs
- Reach agreements. Avoid conflicts!
SET CLIENT EXPECTATIONS

Rome can’t be built in a day
The Developers

“The PHP Ninjas”

- They are passionate
- They want to build things which they can be proud of
- They care about minor details
- Get to know your team
They have the most technical knowledge

TRUST YOUR DEVS
Project Manager

“Communication facilitator”

- **Intermediary** between the client & your team
- **Translates** the requirements to all the parties
- **Responsible** to make sure that the project
  - is defined clearly
  - is executed smoothly
  - is launched without problems
There will be problems
Always have a plan B
IMPORTANCE OF THE COMMUNICATION

Building the Babel Tower?
Importance of communication

- **No room for guessing**
- Avoid having to rewrite code or redo a feature
- Prevent delays and loss of money
- A satisfied client is the best form of publicity one can get

Don’t blame anyone, if there is miscommunication...

It’s not the client’s or the developers’ fault, it’s *yours*!
When in Rome, speak as Romans do!
The poutine example

“We want a poutine!”

Maintain an acceptable level of detail:

- What size?
- Vegetarian or with meat?
- When do you want it?

Make sure everybody understands the requirements.
We would like a new website that is responsive, with a new information architecture, retrieving our client database from our CRM but only our professional clients. We would also like to display and sell our products in an e-commerce section with PayPal and it needs to be the first result on Google. The data would come from our current website. Oh and it needs to be in English and French and we need a contact form!

Website revamp:

- New architecture
- Data from current site
- Bilingual: French & English
- SEO is very important
- E-commerce with PayPal
- Connexion with a CRM to retrieve professional clients
Improve your communication

- Limit points of contact
- Communication channels
- Documentation
- Demo and approval procedure
- Don’t overcommunicate
- Tackle “barriers of communication”

Avoid undocumented verbal conversations about important things.

Users stories are very appreciated by developers.
The right questions to ask
Why?

● Why do you want a website?
● Find out the goal of the project

“We want the person to see our services and contact us”

“We want to enable our clients to consult our catalog online”

“We want them to be able to buy our products online”
When?

- When do you need it?
- It’s about **timeline & budget**
- Confirm what’s more flexible?
  - Timeline?
  - Budget?

More time implies better quality.

Make sure the timeline makes sense, given the estimated project duration.

You are the expert!
So provide guidance.
Who?

- Who is the website for?
- Who in your team is going to build it?
- Who is going to manage the content?
- Who is going to maintain it?

Make sure the target is defined clearly.

Build personas if needed.
How?

- How will it work?
- Define the **features** that are required
- Build user stories with clear definition

Front-end: Search, contact form, shopping cart.

Back-end: Connexion to a CRM, e-commerce management, file management, user permissions...

User story: As an admin, I can manage all articles.
What?

- It’s about **content & design**
- What is your content going to be?
- What is going to look like?
- What responsibility will be allocated to whom?

What kind of content will you have? Text? Images? Videos?

Try to identify as many content types as possible.
Where?

- Where the website is going to be **hosted**?
- Where is the content coming from? Any **migrations**?
- From where (which region) is the site’s target audience?

Hosting requirements?
Backup and support requirements?

Other special needs like mirrors, load balancing, CDN?

Is there an existing website?
Is there an existing database?
Scoping guidelines

- Analyze the existing website.
- Do not hesitate to clarify!
- **Involve your dev team** to ensure everything are doable.
- Never make false promises.
- No is also an answer.

- Confirm the requirements with the client
- **Plan for the future:** identify any future feature or evolution that the client has in mind
Having asked the right questions

It’s time to estimate
What is an estimation?

Dictionary definition:

1. A tentative evaluation or rough calculation.
2. A preliminary calculation of the cost of a project.
3. A judgment based upon one’s impressions and opinions.


Are you really asked for a “preliminary” or “tentative” calculation?

You are often asked for a commitment than an estimation.

Make sure you set expectations when discussing “estimation” with a client.
“Estimations on software projects interplay with business targets, commitments and control”

— Software Estimation, Steve McConnell
Estimate, Targets & Commitments

The estimation (The devs)
- A **prediction** of how long it will take and cost

The target (The client)
- A desired **objective**
- A target is not always achievable

The commitment (The project manager)
- A **promise**
- It doesn’t have to be the same as the estimate
“After all, the process is called Estimation not Exactimation”

— Phillip Armour
Project control

You have to control the project to meet the target.

- Staff not ready when planned
- Requirements removed
- Requirements added or redefined
- Staff less-experienced
- Staff diverted on other projects
SO TELL ME...

What is the definition of a good estimate?
A good estimate is a range

A good estimate is an estimate where you feel **90% confident** enough that the **range** you provide is correct.

Examples from a study (10 questions):

- What is the surface temperature of the Sun?
- Total volume of the Great Lakes?

— Quiz extract from Software Estimation by Steve McConnell (Microsoft Press, 2006)
What is a good estimate?

Results over 600 people:

- Only 2% score 8+ correct answers
- No perfect score
- Most of the results are between 1 and 3 correct answers

That’s why when you feel 90% confident, you’re rather 30% confident.
To provide a good estimate, should I overestimate or underestimate?
Cons

Overestimation

- Your devs are going to use the extra-time for something else or procrastinate

Underestimation

- Planning errors
- Developers usually estimate 20 to 30% lower than their actual effort
- Not enough time for essential tasks
Find a good compromise

Late-project dynamics make the project worse than nominal:

- Bugs
- Dirty quick fixes
- Delays
- Apologies

Never provide an underestimate. Make sure you’re having enough padding to prevent variations.

When given the option of a shorter average schedule with higher variability or a longer average schedule with lower variability, 80% of executives will choose the second option.
“A good estimate is an estimate that provides a clear enough view of the project reality to the project leadership to make good decisions about how to control the project to hit its target.”

— Software Estimation, Steve McConnell
The cone of uncertainty

- Estimate a project is not an easy task
- The more information you have the easier it is going to be
- Never make promises when the project is too uncertain
- Try to break down the project into separate phases
When estimating, don’t forget

- **Setup**
  - Setup, Build, Installations, Onboarding, Kick-off
- **Maintenance**
  - Updates, Upgrades, Deployments, Configuration
- **Non-software**
  - Vacations, holidays, sick, DrupalCamps
- **Management**
  - Stand-up and status meeting, contract review...
LET’S JUMP TO THE EXECUTION

Ready? Set... Go!
Useful tips

Avoid problems along the way

- Think Agile
  - Break down your project into phases / sprints
- Have regular meetings
  - With your team
  - With the client
- Define responsibilities
- Raise flags about blockers ASAP
● Document your project
  ○ Document every issue
  ○ Comment your code
  ○ Log your time
● Build, review, demo and repeat!
● Do as much QA as possible

Test & Document

Ensure a good quality
Determine launch-specific variables in advance:
- Content entry and testing
- Domain and hosting
- 3rd party services, credentials and licenses
- Legal and software license

● Post-launch monitoring
● Maintenance contract and beyond
● And beer for celebration!

Ready? Launch!

Plan ahead for a smooth launch
To learn more

- “How to bake a cake” by Danielle Lyrette
  http://bit.ly/2E0RNI6

- “Software estimation: Demystifying the Black Art” by Steve McConnell

- “Estimations, a science not an art” by Andy Kucharski
Thank you!

ANY QUESTIONS?

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Drupal 8 Training in Princeton NJ

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Drupal 8 Module Development

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MARCH 1-2, ONLINE
Drupal 8 Site Building

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