

Defining the Rules of Freelance Web Design

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Recently, a friend and I were discussing contracts and processes for Web design. We'd both acquired new freelance clients the previous weekend, and were now ironing out the details of the contracts we had just signed.

"The whole thing's like a golf game," he surmised, "you can't even go on to the second hole before you've finished the first...and the hardest part is defining the rules."

Indeed, many designers know this scenario all too well. The very first freelance job I took is a perfect example of the pitfalls of working without a methodology. I knew the manager of this particular company quite well, and when he asked me if I'd like to develop a Web site for them, I jumped at the chance. I basically had free reign when it came to concept and design. The only requirement was that I had to incorporate the company's logo and slogan somewhere on the layout. The development of the site went quite smoothly, and I was even paid on time.

Expecting the unexpected

So, what's the problem? The problem has to do with the very nature of the medium -- its ease of change. The company in question advertises products for sale on the site, and after the site was launched I began receiving anywhere from three to six new products each week that needed to be incorporated into the site. Since we had not discussed the terms of maintenance up front, there were questions as to who would perform the maintenance and how it would be coordinated.

In order to relieve myself of the maintenance hassles associated with the site, I attempted to teach an employee of the company how to maintain it himself. However, each time a new problem arose, I had to jump in to solve it. As the time it took to make changes, train their employees, and fix problems added up, I needed to put a firm maintenance contract in place to keep both the client happy, and myself from going nuts.

Even when the rules are established with a client up front, there's always plenty of places where problems can occur. Take, for example, another one of my client engagements. Prior to the start of the project, the client signed a copy of the initial proposal in order to verify that we both agreed on the terms of the engagement. As the project progressed and the many members of the client's team became more aware of the vast possibilities that exist on the Web, the scope began to creep. Their new-found knowledge of and subsequent request for features, such as sound and dynamic content, threatened to double the timeline of the project. However, reigning in a project after significant "scope-creep" has already begun can be an exhausting and tricky process.

In addition, assigning one member of the client team as "point of contact" is essential if the project is expected to meet deadlines. In this case, each member of the team had a different idea of what features the site should include, which caused many headaches for both designer and client. Had a proper methodology been incorporated into the process, requiring both the scope and point of contact to be agreed upon up front, the site would have been produced more efficiently and on time.

Web design as a process

Less than five years ago, the term "Web design methodology" was completely unheard of. Web design itself is still being defined by artists and designers around the world. So, what is the process?

Well, when I ran a search on AltaVista for "Web design methodology," I came up with a mere 14 links. Of course this doesn't mean that only 14 designers are actually using a methodology, but it does mean that few people have taken the time to stop and determine exactly what that methodology is.

If you look at the Web sites of the top design firms around the country, very few even discuss their methodology on their site. Studio Archetype has the clearest definition of methodology on their site, while companies like CKS and Organic don't even mention it. It's clear that there is a very wide range of processes being used by freelancers and corporate designers alike.

In order to help the process flow more smoothly, there are some basic steps that designers and developers can take when contracted to build a Web site. Based on some of my personal experiences with good and bad client engagements, these five phases are key to laying the groundwork for the entire Web design process.

The 5 Phases of Web Design

Phase 1: Define the Scope

Before any work can be done on a site, you need to define the scope of the project. In most cases, this involves information gathering, background research, comparison studies, risk and budget analysis, understanding time constraints, any anticipated maintenance needs (such as updating the site with content), establishing goals and targeting audience. In order to avoid the dreaded "scope-creep" later on, the scope needs to be clearly defined and agreed upon by all parties at the on-set of the project. It is during this phase that a single contact and sign-off person on the client-side needs to be firmly agreed upon. By defining the project's scope, you're on your way to guaranteeing its success.

Phase 2: Planning the Project

In the planning phase, all the original information gathered in Phase 1 needs to be re-evaluated and verified. The architecture of the site needs to be developed, and the framework must be built. Sitemaps and flow charts are common at this stage of the game. Content is developed and prepared to be flowed into the framework of the site. Specific features of the site (such as sound and dynamic content) are firmly defined and approved by your contact person prior to proceeding any further.

Phase 3: Design and Testing

In most cases, the design phase starts before the architecture has been finished. Designers work to add visual representation to the thoughts and ideas presented in the first two phases. By the time the look and feel is established, the entire site is laid out and ready to enter production.

Although this phase can actually occur many times throughout the entire design and development process, it most often takes place both before and after Production and Implementation (see Phase 4). Whether testing is done with a paper prototype of a potential design, a Photoshop mockup, or a fully functional Web site, usability testing is a very important way to ensure that the final product meets both the client's expectations and the users' needs. This phase may include multiple rounds of testing, from formal focus groups or contextual interviewing, to informal audience studies. Testing can check for everything from HTML tagging bugs to typos to programming errors, or just to give feedback on the usability of an interface.

Phase 4: Production and Implementation

The production and implementation phase encompasses the merging of content with the designed layout. All pages are coded, and graphics are produced. Testing takes place to ensure the site performs at its highest level. All of the final pieces are put into place prior to acceptance and launch.

Phase 5: Maintenance and Updates

Once the site has been accepted and launched, it may enter into the realm of a maintenance phase -- where either the client or the developer makes any necessary changes or updates. However, because this phase could actually include all of the other phases (for instance, if the client requests a re-design or additional content), the issue of maintenance and/or changes must be addressed at the very start of the project.

Of course, every client is different; therefore every project has its own needs. This means that every project needs to follow a standard set of guidelines, or risk "project creep," or even worse "budget creep." Since you can't make up a whole new set of rules after the ninth hole, the rules have got to be set in place prior to tee-off. Check back next time as we examine the five phases outlined above in more detail, and offer proven tips for keeping the Web design process running smoothly and efficiently.