

# Scope & Execute a Drupal Project Without a Hitch

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WITH ETIENNE ENGASSER & JIGAR MEHTA



Our **expertise**, your digital DNA | [evolvingweb.ca](http://evolvingweb.ca) | [@evolvingweb](https://twitter.com/evolvingweb)



evolvingweb.ca

- Located in **Montréal**
- Small team of ~10 Drupalers
- Drupal specialists
- Drupal Training
- Drupal community

# Our Clients





# Etienne Engasser

PROJECT MANAGER



<profile>

- Project manager
- French
- Developer background
- 5+ years of experience
- Drupal since 2015

</profile>



# Jigar Mehta

FULL-STACK DEVELOPER

[Jigarius](#) on Drupal.org, LinkedIn, etc.

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<profile data-dev="true">
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- 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!

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LET'S TALK ABOUT OUR PAIN

# Bad communication



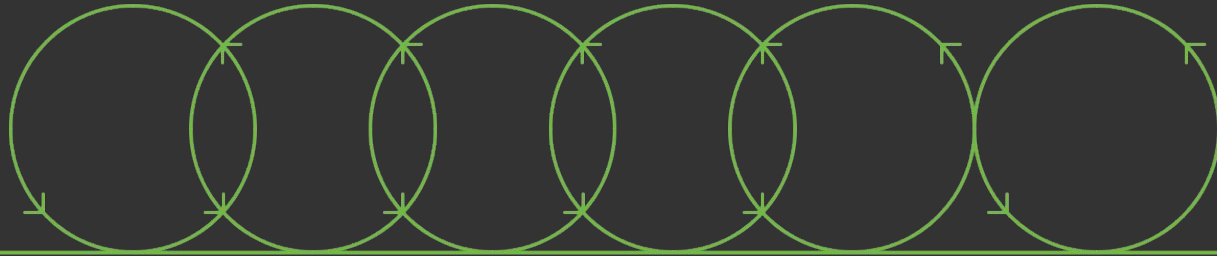
HOW PROCESSES SOMETIMES LOOK LIKE

**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**

TRUST YOUR DEVS

**They have the most  
technical knowledge**



# 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

PLAN AHEAD

**There will be problems**  
**Always have a plan B**



IMPORTANCE OF THE COMMUNICATION

# **Building the Babel Tower?**

# Importance of communication

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- **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!**

IMPROVE YOUR COMMUNICATION

**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.

# Avoid huge blocks of text

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*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

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- 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.**

SCOPING A PROJECT

**The right questions  
to ask**

# Why?

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- 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?

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- 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?

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- 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?

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- 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?

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- 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?

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- 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

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- 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?

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## 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.*

— The American Heritage Dictionary, Second  
College Edition, 1985

**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

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## 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

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You have to **control the project** to meet the **target**.



SO TELL ME...

**What is the definition  
of a good *estimate*?**

# A good estimate is a range

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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)

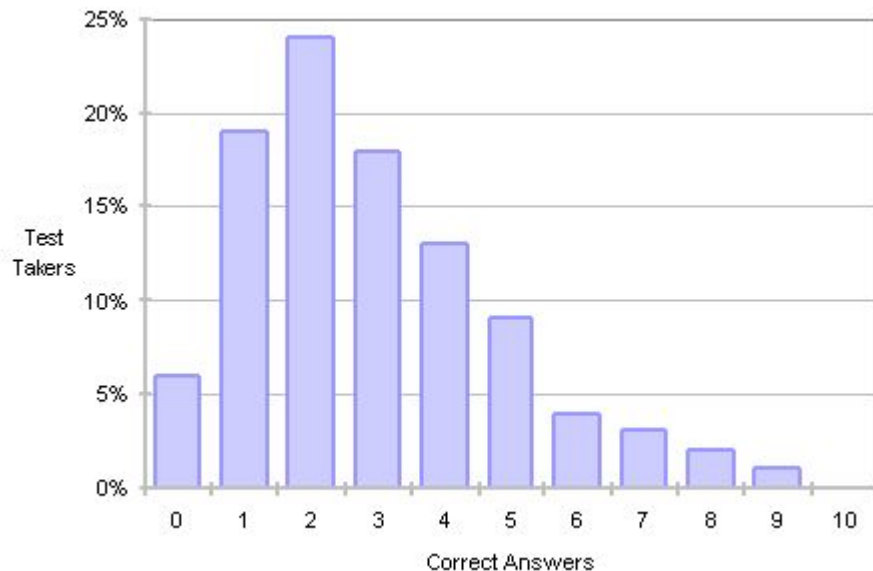
# What is a good estimate?

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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

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## 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

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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.**

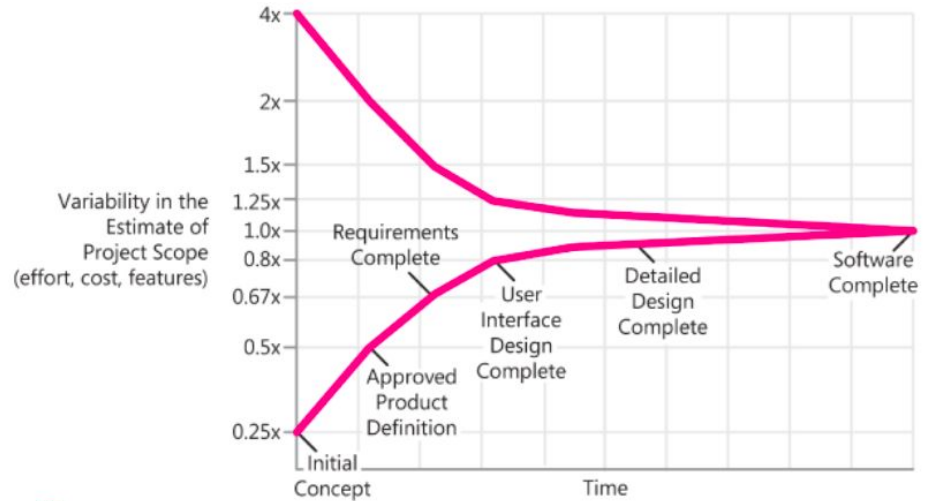
**“A good estimate is an estimate that provides a **clear enough view** of the project reality to the project leadership to make good decisions about how **to control the project** to hit its target.”**

— Software Estimation, Steve McConnell

# The cone of uncertainty

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- 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

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- **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



# Test & Document

Ensure a good quality

- **Document** your project
  - Document every issue
  - Comment your code
  - Log your time
- **Build, review, demo** and repeat!
- Do as much **QA** as possible





## Ready? **Launch!**

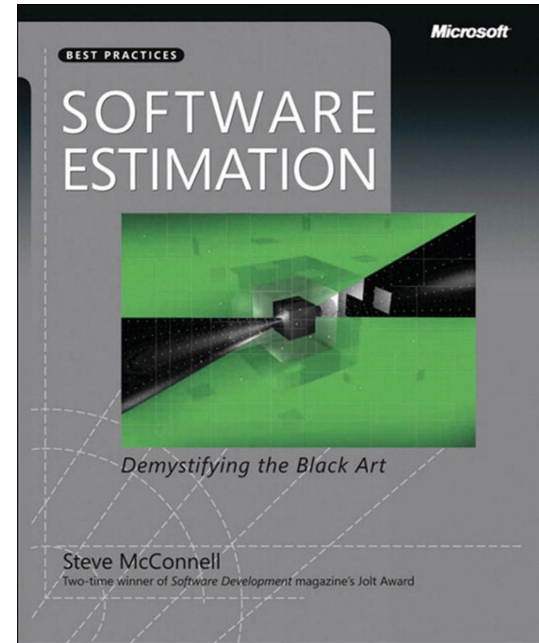
Plan ahead for  
a smooth launch

- 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!

# To learn more

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- “How to bake a cake”  
by **Danielle Lyrette**  
<http://bit.ly/2EORNI6>
- “Software estimation: Demystifying the Black Art”  
by **Steve McConnell**
- “Estimations, a science not an art”  
by **Andy Kucharski**  
<http://bit.ly/2EtdLkz>





# Thank you!

ANY QUESTIONS?



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# Upcoming Drupal Trainings

**MAY 7-11, IN-PERSON**

**Drupal 8 Training in Princeton NJ**

**FEB 5-8, ONLINE**

**Drupal 8 Module Development**

**FEB 20-23, ONLINE**

**Migrate to Drupal 8**

**MARCH 1-2, ONLINE**

**Drupal 8 Site Building**

**MARCH 12-15, ONLINE**

**Drupal 8 Theming**

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