

Endo Creative Process

Pre Sale

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Lead

- filter all projects through the vegetable test
- does the project align with our values/goals?

Close the Sale

Proposal

- use bids sketch?
- mention maintenance package

Contract

- duplicate old contract and change names

Project Start

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Phase 1: Research and Planning

- add client to Freshbooks
- send initial payment invoice
- site kickoff meeting to discuss site goals, content, and site map
 - create list of top 3 goals
- send survey about design preferences
- create site map and get it signed off on
 - maybe use 2012 as a "site map" tool
- get access to client's hosting/domain
- if none, suggest DreamPress

Phase 2: Site Design

- create wireframe and get it approved via signature
- hire Chad to create design, or have client choose theme
- get homepage design approved
- get child page design approved

Phase 3: Development

- create static site from design files
- build site mobile first
- integrate with WordPress
- install and configure special functionality plugins
- install a list of standard plugins
 - WordPress SEO, Google Analyticator, Gravity Forms
- customize login screen
- customize dashboard
- follow site creation launch list

Phase 4: Content Integration

- add copy to pages
- add images, videos, and maps
- create forms
- create galleries
- create client as 'Editor' role

Phase 5: Testing and Launch

- test site on multiple browsers and devices
 - should be doing this all throughout the project
- include video user manuals
- include 1 hour of training
 - record and send to client

End of Project

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- send feedback request form
- send thank you card
- check back in 3 months to see if site goals are being achieved
- setup on maintenance plan
 - start monthly backups and updates