ENGINESS

**Guide to
Achieving Success on
Your Website Project**

This guide explores how to ensure success on your next web project, and how to avoid having your CMS (content management system) implementation become a rescue project (we'll get to what that is in a minute).

We cover everything from early vendor selection to feature creep, scope creep, handling change requests, and other tips on keeping your project on time and on budget.

Questions? Let us know: info@enginess.io

Who are We?

Enginess is a Toronto-based digital consultancy. We shape strategies for business processes and deliver solutions that enhance customer experience, improve efficiencies, generate new market opportunities, and redefine value creation for industries.

We consult, analyze, and design user experiences that exemplify your business requirements, user needs, and industry demands. We also perform implementation, focusing on system and information architecture, usability and programming, all with an eye to achieving better business outcomes.

Over the past 17 years, we've built a strong reputation for consistently delivering high-quality customer service, and for our ability to handle complex digital strategy and development assignments.

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Ε   The Enterprise. Futured.

What is a "Rescue Project"?

How many times have you heard about, or been part of, a project where an enterprise decided to carry out a new website implementation in-house, only to need to call in a vendor halfway through the project when it was realized they didn't have the required resources?

Or perhaps an existing vendor (say, a digital agency specializing in SEO) was tasked with a large-scale CMS implementation, despite not truly have the capacity or expertise to do it, and halfway through the project it needed to be handed off to another provider.

> "Rescue projects" are web projects that need to be rescued by a new vendor partway through implementation.

It should go without saying that this is **not where you want to be**.

First, it's time consuming – far more so than if one company handles the work from the start.

Second, it's expensive. Not only because, as a client, you're in a poor position to negotiate, but also because it's hard to come into a project halfway through and pick up the pieces. And that extra challenge will cost you.

Finally, the end result is rarely something anyone is happy with. More often than not, it's a hodge-podge system that achieves the original objectives but has a host of underlying problems, such as:

- Inability to scale effectively

- Poorly constructed backend systems (that are difficult to fix)

- Some (or perhaps most) non-core features are either missing or poorly implemented

- A disjointed user experience

- A lack of expertise, as both staff and agencies struggle with project churn

All in all, while it is certainly possible to stage an effective project rescue, it's far better to avoid needing one in the first place.

And the first step to avoiding becoming a rescue project is picking the right vendor from the start.
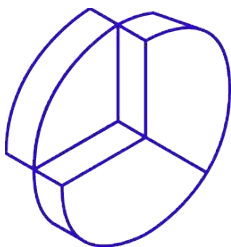
Fact: 84% of digital transformation projects end in failure.

Source: Smart Insights

The Golden Rules of CMS Vendor Selection

With hundreds, if not thousands, of potential vendors in the marketplace, vendor selection is an understandably intimidating undertaking. Fortunately, there are some golden rules that can help you narrow down the search.

Rule 1: Hire a vendor who knows and understands content management systems

This seems like a no-brainer; 'duh, of course, I'm going to hire an expert!' we hear you saying.

However, many CMS providers are not CMS experts at all, but rather agencies that offer a jack-of-all-trades approach to digital services. Sure, they can offer you a CMS – but they also run your ad buying platforms, your SEO, your social media optimizations, your app store listing, and probably make great coffee too.

Of course, some of these companies are fantastic and truly can do everything. However, for something as integral to your company's day-to-day operations as a CMS, we strongly recommend you consult an expert.
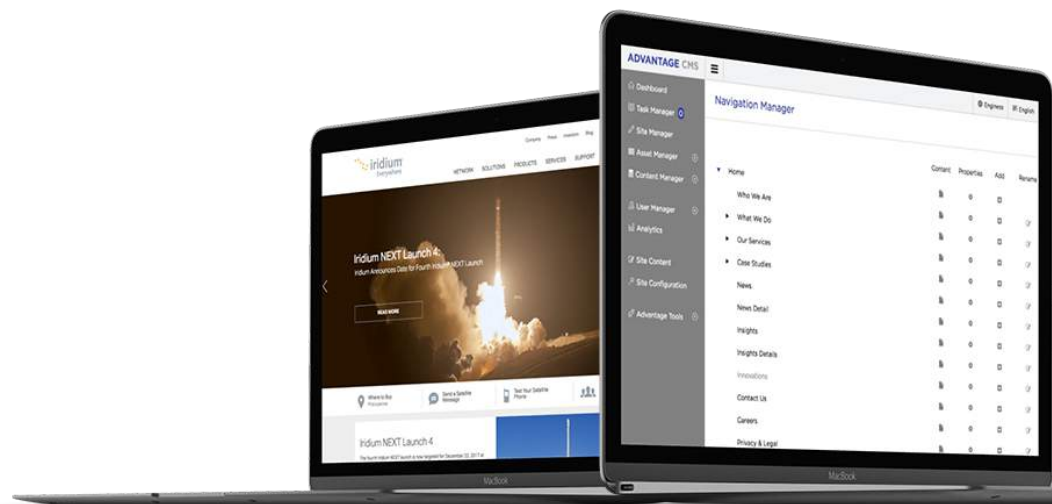
Rule 2: Hire a vendor who knows and understands your business

Not all CMS providers are specialists in every field. It's just not possible.

We recommend working with a vendor who has some experience in your vertical. Most industries have specific and unique requirements. Projects tend to run smoother when vendors have a clear understanding of the industry requirements and nuances before they start.

Of course, there are some exceptions to this – a shoe company, for example, likely has many of the same requirements as a mattress company. So if you find an otherwise perfect vendor who just doesn't have the exact experience in your sector, then it's likely not a make-or-break scenario. But it's worth checking out the vendor's other clients and case studies to whittle down your list early on.

The vendor should also have analysts on staff prepared to sit down with your stakeholders and truly understand the business's goals, operational workflows, and project objectives before getting started. This, paired with vertical experience, is a key factor for success on CMS projects.
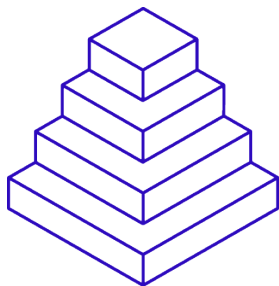
Fact: 40% of new website/CMS projects do not achieve success.

Source: Smart Insights

Rule 3: Get buy-in for your new CMS from *everyone*

A recent study found that the single biggest barrier to a CMS implementation is corporate culture and politics. A CMS project is seven times more likely to fail for these reasons than because of inadequate features.

What this means is it is absolutely essential to get every single stakeholder – from content managers to executives – to participate in discussions about what they want from a CMS early.

While this scope gathering is a time consuming and oftentimes emotionally exhausting process, extra legwork here will pay off in the long run.

Early buy-in:

• Reduces the potential for nasty budgetary changes down the line

• Helps reduce change requests (and gives you a better platform to deny them)

• Increases the organizational support for the project

• Gives ownership (avoiding project churn should things turn south)

"It is absolutely essential to get every stakeholder to participate in discussions *as early as possible* about what they expect from a CMS."

Rule 4: Before you start looking, know what you're looking for

This is an extension of the previous rule. After you've chatted with everyone to determine what they want from a CMS, filter that feedback and distill it down to exactly what each user group is looking for.

You can likely guess much of this ahead of time, but going through the process means you don't miss any key requirements. It also means you can quickly narrow your search for a vendor if some of your stakeholders have edge-case needs (e.g. a bank's legal department might require audit trail capabilities from their CMS – a feature not offered by all CMS platforms).
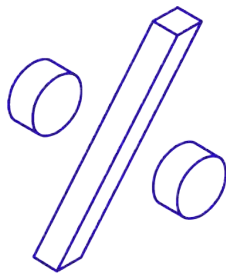
Fact: Nearly 50% of mobile app projects do not achieve success.

Source: Smart Insights

Two Pitfalls of Vendor Selection

Of course, vendor selection is as much about what you don't do as what you do. Here are the two most common pitfalls we see clients stumble into:

1. Picking a vendor just because you've worked with them before

There is definitely a home-field advantage when it comes to suppliers. It's easier for a company to work with someone they have before, they usually know (and like) the people involved, and there's a lot less paperwork.
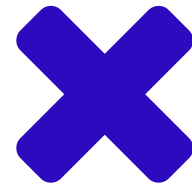
However, for a CMS, this can create problems down the line. Choosing an existing supplier for familiarity rather than credentials means you may not be using a CMS expert. It also means you're willing to compromise the long-term benefits of your project for the short term convenience of "the devil you know".

Combined, these factors often result in rescue projects, as the supplier is unable to deliver the solution a client needs, and the CMS being built isn't going to satisfy stakeholder requirements (which were bent in the first place to make the existing vendor a viable option).

So, while existing vendors should certainly be considered, don't attribute greater value to the benefit of having already worked with you.

2. Focusing on the what a CMS does, not how it does it

It's easy to read 'publish content at the tap of a finger' and get excited, assuming the workflow is flawless. The problem with this approach to CMS features is that there is a wide variety of workflows across content management systems to achieve the same feature.

For example, one CMS might require five different screens to process one piece of content, whereas another might only require one. One CMS might need at least two approvals as a default setting, whereas others might not need any approvals at all.

The challenge is sorting out exactly what your organization needs, given how it currently works, and then matching existing workflows to those of a CMS.

> It's easy to focus on features, but it's workflows that are going to make or break your CMS experience.

Scope Creep

Scope creep is a firm fixture of the software development landscape, and a leading cause of projects needing to be rescued.

What is scope creep? Scope creep is simply the process of expanding the requirements of a project after it has started. The habit of incrementally adding requirements to a project in progress is a firm fixture in the software development world, and a leading cause of projects failing or needing to be rescued.

Few things will make a project exceed its time, budget, and resource allotment quicker than allowing scope creep.

Here we look at a couple small habits you can use to keep your projects from growing beyond their allotment and keep everything running smoothly.

Scope creep is the process of new requirements being incrementally added to a project after it's started, pushing it beyond its original scope.

Scope creep is rarely nefarious

One thing to remember is that scope creep, while frustrating, is rarely done intentionally.

Sometimes scope creep can be seen as being brought on by clients who are trying to get more out of their project than what was agreed upon, or done by the development team to squeeze more money out of the client whose project they won with an unrealistically low bid.

> Remember: Scope creep is rarely intentional.

Our experience is that, more often than not, it's the result of a miscommunication over what's included (or not included) in a project, or a client not recognizing the level of effort required for changes being requested (e.g. asking for what the client thinks is a small change but in fact is a big one).

Here's how you can reduce scope creep:

**1. Consult with stakeholders *early***

Scope creep is often the result of people realizing there was more to their idea than they originally considered and then trying to include these new unrealized aspects into the project while it's progressing.

This is natural, with ideas coming to us at any time - and for many it's easier to see the opportunities in a project once you can engage with it directly, rather than just the idea. But these small requests will add up, and over time will hobble your project.

Getting early stakeholder consultation will help you avoid that. The first part of getting stakeholder buy-in is to identify all of the stakeholders involved. Projects often impact people that aren't directly involved, and recognizing who they are, and getting their input, will help you uncover important questions that weren't asked or answered.

One key user we often see excluded from planning sessions is the end-user. When projects are driven by singular teams focused on one goal, they can forget to take into account how their project impacts the rest of the business.

Taking the time to recognize all the stakeholders and engaging them at the start of the project will help mitigate some of the common pitfalls that require a project to be rescued.
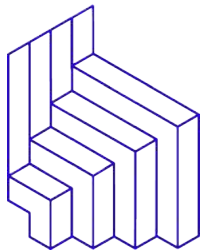
Fact: Offshore IT projects have the lowest rate of success, at only 30%

Source: Smart Insights

2. Clearly articulate agreed-upon project requirements and responsibilities

Whether working with an agency or running a project internally, explicitly setting the requirements and expectations is key to having accountability. Once you have engaged all the stakeholders, developed a clear scope and functional specification for the project, and set timelines and budgets, you should assemble it all into a central document that will be your guiding authority during and after this project.

The charter will help everyone understand the problems the project is solving, how it is getting solved, by who and when. This document can vary in detail, depending on if this is a project managed in-house or by an agency, but having an agreed-upon list of requirements and expectations become invaluable later on if you need to say 'no' to someone, letting you refer back to the roadmap.

> An agreed-upon list of features and requirements is an invaluable part of any CMS project.
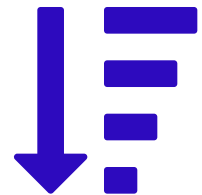
3. Transparent Project Management

Good project management isn't only about keeping things moving – it's also about keeping everyone up to date on a project's status. Transparent project management is the best way to keep everyone on the same page.

When you're upfront and clear regarding your project's status (for both the good and bad), there's more trust in your ability to deliver, and more respect when you say 'no' to the inevitable change requests.

4. Plan for the inevitable

Of course, even if you do your best and follow the above habits, there is always going to be some scope creep. Some of it is going to be caused by changing requirements due to new ideas coming to the fore, or simply a new goal for what the project needs to achieve.

The best approach to accommodate these changes is to plan for them – add in extra time at each stage for 1-2 small creeps sneaking through. At Enginess, we ask clients to set aside a 10% contingency to cover these.

This flexibility is essential when presented with a change you can't refuse (or one that's going to significantly improve the project).

Instead of trying to develop strategies to keep the project on track, like cutting or de-prioritize other items, stretching a timeline or trying to free up budget, you'll be able to accommodate the change without everything else falling like dominos.

Tip: There is always going to
be some degree of scope creep
— so be prepared for it.

5. Other techniques for staying on track

Of course, there are several things that the project lead and team can do to keep the project on track:

- Be ready to say "no" to both good and bad ideas. There are surely some good ideas coming in, but if it's a critical element that needs to be changed, be wary of over-committing. Weigh the benefit of the new idea against the drawback of changing budget and timelines.

- Develop a process to manage change requests. No ad hoc emails flying around with subject lines like 'can we just add...'. Everything needs to be formally documented with proper functional specifications and wireframes (where applicable).

- Provide weekly updates on the project, highlighting any concerns you have or foresee as they come up.

Tip: Develop a process to manage your change requests to ensure everything is formally documented.

Final Thoughts

You'll be assured your project will be in need of rescuing by having a team that doesn't have a list of requirements, accommodates every single change requested, and never says No.

Fortunately, you can improve the chances of your project being a success by planning upfront.

By consulting with all stakeholders during the requirements phase, creating and distributing a shared vision, and getting everyone to buy into the execution you've outlined, you will build clarity over what the project is going to achieve and how you're going to get there.

As the project unfolds, providing transparent project management and regular updates means that stakeholders can be sure they're happy with the progress.

Finally, a firm change request process, and highlighting potential threats and problems early, gives you as much agility as possible to adapt the project to changing specifications as the final deliverable emerges.
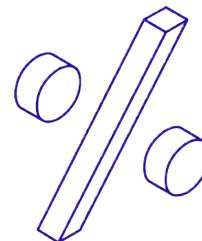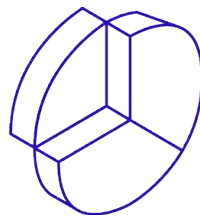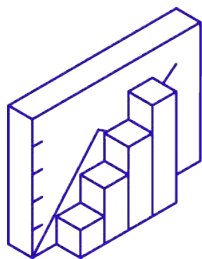
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We hope you've enjoyed this guide, and that it equips you with valuable information you as you embark on your CMS project.

If you want to speak about your project, we would be glad to help in any way we can.

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