

# SCOPING DIGITAL PROJECTS AS A NON-DEVELOPER

Jay Hoppie  
CEO, Alpha Particle

[JAY@ALPHAPARTICLE.COM](mailto:JAY@ALPHAPARTICLE.COM)



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[HTTP://ALPHAPARTICLE.COM](http://ALPHAPARTICLE.COM)

# THE IMPORTANCE OF PROJECT SCOPING

- Informs and protects all stakeholders
- Allows you to accurately charge for your work
- Is essential for prioritizing features

JAY@ALPHAPARTICLE.COM



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# WHAT WE WILL BE COVERING

**INITIAL CLIENT COMMUNICATION**

**EXAMPLES OF INFORMATION ARCHITECTURE**

**DECOMPOSITION OF PROJECT COMPONENTS**

**WHAT TO DO WHEN SOMETHING GOES AWRY & OTHER TIPS**

**JAY@ALPHAPARTICLE.COM**



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**DISCOVERY**

**IS**

**A SERVICE**

[JAY@ALPHAPARTICLE.COM](mailto:JAY@ALPHAPARTICLE.COM)



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# INITIAL CLIENT COMMUNICATION

- Discuss goals of project — all decisions made by any stakeholders should support the project goals.
- Make it clear that the client should not assume any functionality will be present in the final project that was not discussed beforehand.
- Establish any major project limitations, such as cost, launch date, or stakeholder review process.
- Agree on necessary IA documents
- Document all decisions

JAY@ALPHAPARTICLE.COM



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**AT ALL TIMES COMMUNICATE  
CLEARLY AND WITH CONFIDENCE**

[JAY@ALPHAPARTICLE.COM](mailto:JAY@ALPHAPARTICLE.COM)



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# INFORMATION ARCHITECTURE

- User Flows
- Site Map
- Content Matrix
- Wireframes
- Feature Descriptions
- User Stories

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# DECOMPOSITION INTO COMPONENT PARTS

Scoping and prioritizing individual components of a project. By breaking a project into smaller parts, we can more accurately gauge the time needed to complete a component and the risk associated with that component.

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# DECOMPOSITION INTO COMPONENT PARTS

- Granularity is important, both in terms of component size and unit of estimation
- Ideally components will be of a size that all stakeholders can easily grasp as a discrete and important portion of the project. Examples include page templates, navigation, and third-party integrations
- Small, discrete features can be grouped in feature sets
- Each component can be estimated individually, both in terms of build time needed and risk



# THINGS TO CONSIDER WHEN SCOPING

- Front-end functionality vs controlling logic
- Patterns & connectivity
- Static vs dynamic content
- Third-party integrations



# OTHER THINGS TO CONSIDER

- Supported environments (browsers, devices, screen sizes)
- Quality Assurance & staging environments
- Deployment & Hosting
- Data migration
- Content development & entry
- Stock imagery & other design components
- User setup & training
- Stakeholder review
- Ad providers



# PRESENTATION OF SCOPE

- Share the scope and supporting documentation with the client.
- Discuss prioritization & dependency
- Avoid structuring projects as fixed bid



# WHAT HAPPENS WHEN THINGS GO WRONG

- If a component takes longer to build than estimated, the most important thing to do is establish the cause of the difference. Stakeholders are much more accepting of changes in scope or cost if they understand what happened.
- In addition to the cause, share your plan to address this issue. This may include a change order, revised timeline, or a revised scope.
- Maintaining your position as an expert is important.
- Avoid frequent scope changes.



# OTHER TIPS

- Honesty is the best policy
- Estimate your estimation time
- You are not 'figuring it out' - you are researching
- Avoid the terms 'easy' or 'hard', use language that describes resources
- Avoid structuring projects as fixed bid
- Be willing to refund or reallocate fees if completed early
- Aggressively identify any ambiguity or red flags
- Deny all attempts at scope creep, but document if it does occur
- Require a design review
- Large contracts are great, but can inhibit accurate estimation
- Always account for a Phase II



# QUESTIONS?

[https://twitter.com/jay\\_hoppie](https://twitter.com/jay_hoppie)

[jay@alphaparticle.com](mailto:jay@alphaparticle.com)

JAY@ALPHAPARTICLE.COM



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[HTTP://ALPHAPARTICLE.COM](http://alphaparticle.com)