{handbooks}

CLIENT HANDBOOK

v1.2

WORDPRESS

WORKING WITH HUMAN MADE

THE SALES PROCESS

POST DELIVERY

Human Made

Contents

BUILDING OPEN RELATIONSHIPS

We're just as passionate about open software as we are about honest and open relationships.

With partners, clients and each other, we believe that the best work can often be traced back to solid foundations between people.

We've put this handbook together to demonstrate **how we work** and how we build some of the world's most recognised websites on **WordPress**. For transparency, we also share our entire **sales process**; from the first touchpoint to **post-delivery**.

Below: Our last company retreat in Sri Lanka (2019)

WHY HUMAN MADE

Experienced: We've successfully built and managed several WordPress sites with hundreds of millions of monthly page views. There are very few people in the world with our level of experience when it comes to scaling WordPress.

Extensive knowledge: We apply our deep level of knowledge and experience to extend and consolidate the capabilities of WordPress as an enterprise CMS and digital experience platform. At all times we build to meet the key criteria of robust, professionally built applications with a focus on security, extensibility, and maintainability.

Respected: We are very active in the WordPress community and are highly respected worldwide for our community standing. We speak at, sponsor, and organise multiple WordCamps including world respected events like WordCamp London and WordCamp Europe, both of which have 500–3,000 attendees.

Open: We actively contribute to open source projects across a range of disciplines. We've also written and published white papers, and organised events, for both the WordPress developer and remote work communities.

Global: We have bases in the UK (Matlock, Derbyshire), USA (Delaware, with an office in NYC), and Australia (Brisbane, Queensland), and we hire the best WordPress developers in the world, regardless of their location. In practice this means we employ some of the world's most respected professionals in the WordPress industry.

Recognised: We've been awarded Clutch's Top 1000 Global 2018 and have been ranked in the Top WordPress Development Companies.

Human: We have a people-first approach to everything we do and we understand that every one of us is human. And we're motivated by setting up the best possible relationships we can between each other and with you to allow our team to do the most valuable work for you.

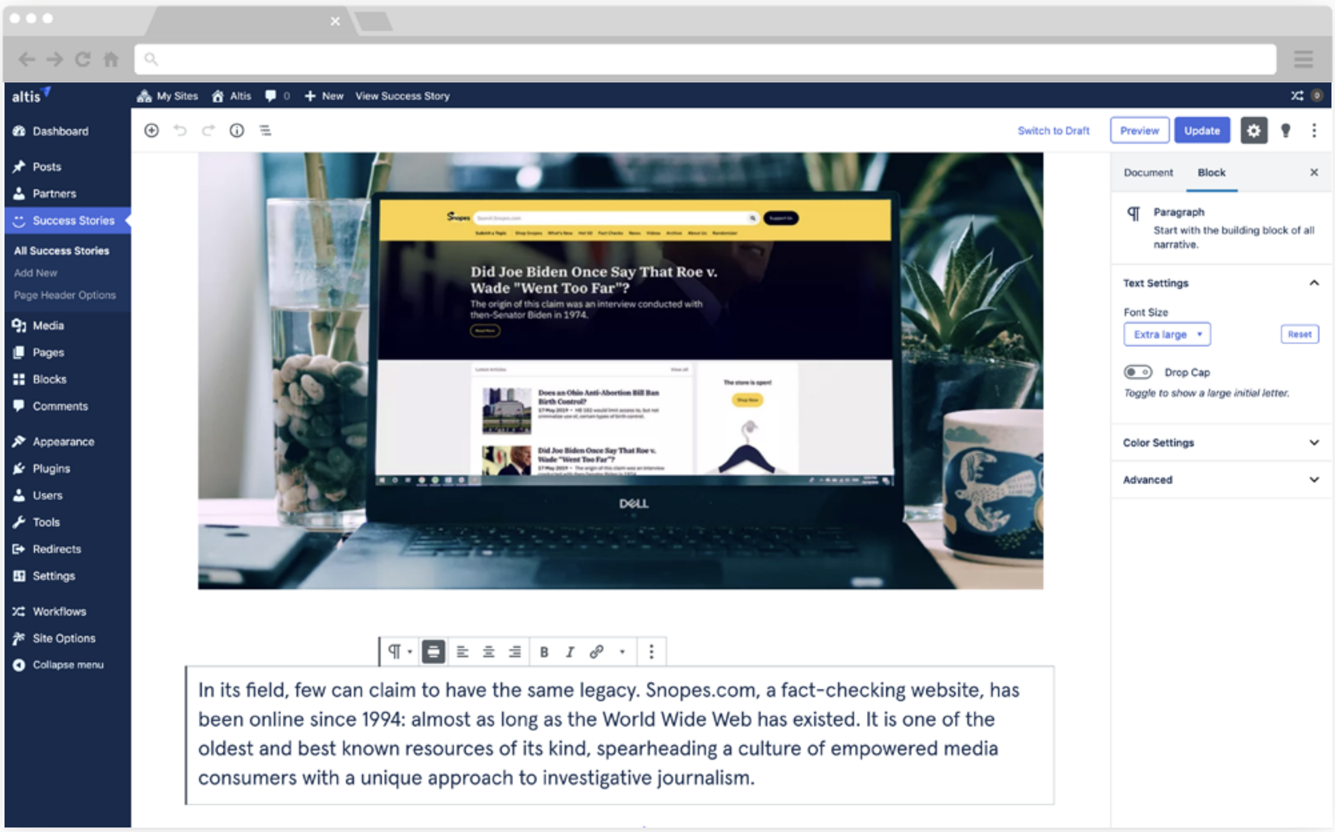
WORDPRESS

An open source solution
powering over 34% of the web.

WHAT IS WORDPRESS?

WordPress is a free, open source content management system (CMS) written in the PHP and JavaScript languages. It powers more than 34% of the web and is actively developed by a voluntary community.

The WordPress software is distinct from WordPress.com, which is a consumer-level service for WordPress sites owned and operated by Automattic. The WordPress software is a highly flexible and customisable open codebase, using modern technologies. It has been instrumental in the development of online platforms for huge brands such as News UK, TechCrunch, and USA Today.



WHY IS WORDPRESS SO VALUABLE?

As an open source project, WordPress benefits greatly from a widely distributed developer community working to improve the software. New features, performance improvements, and security patches are constantly being worked on, and a frequent release cycle (every 3–4 months) ensures improvements are always available. WordPress also has a strong commitment to backwards compatibility, ensuring that costly migrations to the latest versions are not required.

WordPress' ecosystem also includes a huge community of users and its popularity means many people are already familiar with the interface, reducing the time required to onboard new users.

From Microsoft to TechCrunch: Why these tech giants have moved to WordPress – download our white paper

Human Made are one of WordPress' leading contributors to the WordPress project, and our team include several representatives on the security team as well as core committers to the codebase. Our in-depth knowledge of the software and active role in the community allows us to prepare for new releases long before they happen, ensuring a smooth upgrade for our clients.

WORDPRESS COMPARED TO OTHER CMSs

Open source

Unlike most enterprise CMSs, WordPress is open source software: it can be used by anyone for free. Open source software benefits from continuous improvement by anyone in the world, encouraging multiple and diverse approaches and perspectives to common problems. The open nature of its codebase makes WordPress one of the most-reviewed pieces of software in the world.

Secure

WordPress' codebase is regularly audited by a large community of expert volunteers and professionals. Unlike closed source software, WordPress is publically reviewed by thousands of developers worldwide, significantly limiting security issues. Our team includes members of the WordPress core security team who regularly contribute fixes for security issues and audit new code before it's merged with WordPress.

Extensible

WordPress is designed to be extended. It natively supports the use of plugins and themes, and it facilitates infinite extensibility through a vast number of internal and external APIs.

It does so without ever raising the need to directly edit its core software – ensuring a future-proof, secure and updatable, yet highly flexible application stack and robust content management to power end-to-end enterprise solutions.

REST API

WordPress, like many other CMSs, is monolithic. It provides everything you need to run a website and can be extended further with third-party plugins and themes. But the web has moved beyond the monolithic CMS.

Today, WordPress can act as a central hub, consuming and aggregating content and data from other tools and services and in-turn exposing its own content and data via APIs.

The WordPress REST API – available in the core software and extendible via plugins – allows organisations to use WordPress as a 'headless' CMS. Exposing WordPress content and data as JSON via a standardised RESTful API unlocks your data and enables an explosion in the number and complexity of integrations.

Backwards compatible

Despite undergoing constant changes, WordPress has long believed in building backwards-compatible solutions. Plugins that were written for WordPress 3.6 often work in WordPress 4.8 without any modification. While WordPress core does deprecate parts of its codebase, the project informs developers well ahead of time of any such changes, so issues can be mitigated.

Popular

WordPress powers over 34% of the top 10 million websites. This means you likely visit a WordPress site on a regular basis. Some of the biggest brands in the world use WordPress: News UK, Wired, Airbnb, and USA Today are just a few. Its wide usage is a testament to WordPress' flexibility.

WORDPRESS PUBLISHING WORKFLOW

WordPress has been designed and developed with a seamless publishing workflow in mind. Enterprise platforms invariably manage dozens, if not hundreds of people who are a part of these processes to one degree or another. Some of these collaborators will contribute to the platform, while others are regular authors. Some will be editing content directly on the site, while others have larger administrative responsibilities.

WordPress solves this out of the box with roles created to give individuals granular levels of access and only as much access as they need, no more and no less.

User roles: capabilities are key

WordPress has a variety of default roles that are key to enabling and restricting user access. Their corresponding capabilities are also crucial and are what make the roles such a powerful asset. Capabilities define the way that different users can interact with the backend of your site, ensuring a high level of security and a fluid workflow.

Super admin
Has full access to a network of sites.

Admin
Has full access to one or more individual sites.

Editor
Can publish/edit content and the content of other users.

Author
Can publish/edit his/her own content.

Contributor
Can create/edit content, but cannot publish.

Subscriber
Can read member only content and edit personal profile.

At Human Made we work closely with you to help refine your processes and further customize these roles and capabilities around your unique specifications.

*Left: These basic roles and capabilities baked into WordPress provide a basis for **understanding publishing needs**.*

Status control

Managing the people involved in your publishing process is just one part of the process. Once all of these players are interacting fluidly on the platform, they also need to be able to communicate effectively among themselves. Is a piece of content awaiting optimization or translation? Does an author need someone else's approval before publishing? How do you track the status of your content at any given time?

Post, or content, statuses are also a native feature in WordPress and can be further extended to meet specific requirements. Post statuses work in close conjunction with user roles to streamline workflows and provide a clear level of communication for teams.

Publish
Pushes content live to the public.

Schedule
Set content to publish at specific dates and times.

Draft
For works in progress, can be previewed.

Pending review
Make sure content gets validated and set specific publishing privileges before it goes live.

Private
Only viewable to administrators.

Trash
Clean your posts, trash will auto-delete after 30 days.

Auto-Draft
A safeguard feature to make sure no work is lost.

Revisions
Refer back to a previous draft, or recuperate an auto-saved version of your work.

*Left: User roles and capabilities, content statuses and revisions, are the basis for a **productive publishing workflow**.*

BUILDING ON WORDPRESS: STRUCTURE AND ARCHITECTURE

WordPress offers a robust information architecture that enables content to be structured and displayed seamlessly; as well as powerful APIs for interfacing with third-party services, pulling and pushing content to other sites or applications.

Building blocks

WordPress' content types and taxonomies are a powerful way to structure content for specific purposes, helping to guide and organise online workflows.

Content types

- Allow us to distinguish different types of content
- Have unique menu items for accessing each in the admin
- Have unique identifiers in the database
- Can be queried separately from one another

WordPress has **two main content types:**

PAGES

- Considered "static" content
- Typically used for landing pages
- Can be hierarchical

POSTS

- Considered "chronological" content
- Typically used for news content
- Non hierarchical
- Use taxonomies to structure

Any number of custom content types can be created to fulfill various site requirements.

Some typical examples:

- **Products**
- **Events**
- **Portfolio**
- **Press**

In addition to posts and pages, other types of content are also treated as post types in WordPress:

Attachments: any media uploaded to the site (jpg, gif, pdf, etc).

Revisions: previous versions of a post, page or custom post type are tracked, with the possibility of viewing/ restoring previous versions.

Navigation menus: any number of front-end navigation menus can be created, these are also identified as post types.

Taxonomies

Taxonomies are what help us describe our content by giving it structure. By default WordPress offers several taxonomies:

Categories: are hierarchical. Typically used to create a broad organization of posts.

Tags: are not hierarchical. Typically used to drill down further, creating relationships and groups of similar post types based on content within a given post.

Post formats: additional meta information that can be used to define posts and affect their display (cannot be customised).

Custom taxonomies can also be created as needed to organise one or more content types. This keeps them separate, and therefore linkable and searchable, from other taxonomies.

Themes and templates

Themes

A theme is comprised of a number of files used to create the look of a WordPress site. They help to change the display of content on the front-end, and the have specific characteristics.

- Ideally, **little to no content is associated with the theme** itself, so that a site may change themes without affecting its content.
- A theme provides **pre-defined style and form** but also allows users with the correct level of access an amount of autonomy to customise certain elements.
- A theme can affect both the front and backend display.
- Themes can also **extend the features and functionality of WordPress**, (although this is typically best left to plugins).
- Themes contain templates, and can also contain style sheets, theme functions and controls, JavaScript libraries, images, assets and fonts.

Child themes are used to create one or more variations of a base theme, then referred to as the parent. Both need to be present and associated with the site, although only the child theme is activated. A child theme inherits all of the style and functionality of the parent and can override the elements specific to its needs. This is an effective tool for providing subtle changes over a network of sites.

Templates

Templates are a powerful way to control how your content is displayed. Technically, they're PHP files contained within the theme and provide the architecture for displaying content on the front-end of your website.

Default templates are a useful way to automatically display any set number of pages on a website. Custom pages are used when we want to create variations on how certain pages are displayed.

Whereas most templates simply sit in the theme folder and are called upon automatically, pages and any custom post types defined with page attributes can allow a user to choose a specific template from the admin while creating or modifying a page.

WORDPRESS COMMUNITY

Human Made has a long history of contributing to open source projects and in particular, WordPress.

We're involved in the WordPress project across several multi-disciplinary teams, including but not limited to:

- ✓ organising **WordPress meetups and events** across the globe
- ✓ **translating** WordPress into multiple languages
- ✓ reviewing the **accessibility of the system**
- ✓ delivering **technical workshops and presentations**
- ✓ writing **software documentation**
- ✓ **sponsoring** WordPress events and meetups around the world
- ✓ **building features** and fixing bugs

Our involvement with the WordPress project feeds back positively into our organisation in a range of ways; we're a globally recognised agency within the WordPress ecosystem, and our developers are some of the most experienced and well-respected WordPress engineers.

One of the many reasons we encourage our team to contribute is because it gives them a deep level of understanding into how WordPress works; knowledge we're then able to feed back to you, and into your projects.

WordCamps

WordCamps are local, informal, community-organised events that are put together by WordPress users. Everyone from casual users to core developers participate, share ideas, and get to know each other.

WordCamps can cover a variety of topics. Depending on the size and reach of an event, talks may range from how to use WordPress more effectively, plugin and theme development, advanced techniques and security, to SEO, marketing, business strategy, and even legal topics.

Our involvement in the wider WordPress community and project means we regularly attend, organise, speak and contribute to WordCamps all around the world.

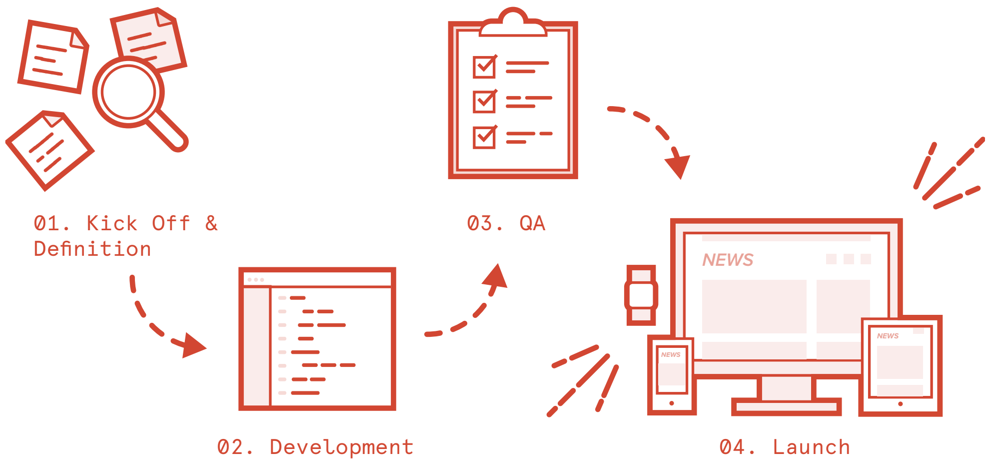
We also love to invite and introduce our clients to the WordPress community, and if you'd like to participate in any WordCamps that are local to you, please talk this over with your Project Manager. Read more about [WordCamps and find a map] to locate an upcoming event close to you.

Below: Noel Tock, Partner and CGO at Human Made, chosen to speak on future trends in the industry at WordCamp Europe 2018, one of the largest WordPress conferences in the world

WORKING WITH HUMAN MADE

Our processes help us produce high-quality, solution-driven work.

1/PROCESSES



AGENCY WORKFLOW

Effective communication is the foundation of any successful business and the key to positive business relationships, both for distributed and office-based teams. Every aspect of our development process is designed to create transparency and support communication, both internally and with our clients.

Regardless of the scope of work or the duration of our engagement, there are fundamental similarities across each and every project we work on.

Kick-off and definition

Kick off and Definition are critical to the establishment of a project and its workflow. This is usually a two-week block of time during which we lay our foundation of understanding for the project by assessing stakeholder needs with members of the development team.

As we identify key requirements and their associated development tasks, we catalogue them in GitHub (or the project management tool of choice) as our backlog. This backlog will serve as our roadmap for the remainder of the project. However, it is *just that*. The path to the best end product will inevitably evolve, either as the result of new knowledge or changing stakeholder needs. While we will use the backlog as our foundation, it is always open to revision.

Development

Once development begins on your project, cycles will be planned around two week sprints. These sprints not only define a consistent heartbeat for software delivery, they also provide the framework for a rigorous communication strategy, which acts as the lifeblood of each project.

Each sprint and its associated work is defined in a Sprint Planning meeting. During these meetings the entire team (when possible) gathers to review the remaining issues in the backlog initiated during kick off. Midway through the sprint, we conduct a mid-sprint review to ensure development is on track, and conclude the sprint with a Sprint Review.

It is important to note that, as Agile and asynchronous teams, daily communication is critical to our operation. This communication is supported by Slack, an internal blogging tool known as P2, and daily stand up meetings. Daily stand up meetings are conducted either in real time or asynchronously, depending on the team structure and time zone spread.

QA

We pride ourselves on delivering our stakeholders high-quality code; we follow proven coding standards and apply rigorous code review.

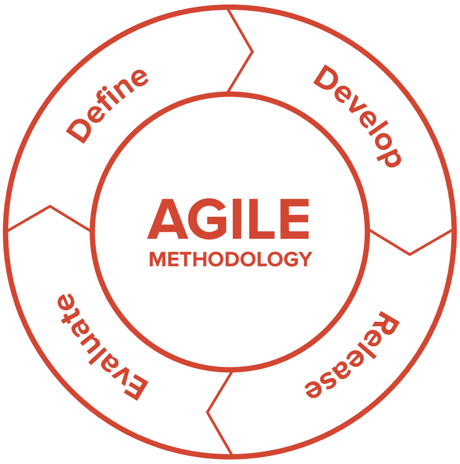
We work in small, succinct blocks of code, all of which are extensively reviewed by another member of the Human Made team before being merged (for code submitted by clients, reviews must be undertaken by an engineer from Human Made). These reviews are undergone to check the logic of the code and identify coding errors from the original engineer; they don’t test functionality, potential performance, or security problems.

Launch and beyond

Leading up to launch, our Development Team will work closely with your hosting provider to ensure that the hosting environment is prepared to support the new site.

Once launch is complete, it’s possible for you to continue working with Human Made on a tiered or full time retainer basis. This relationship allows us to continue working on features that may have arisen during the project, or to provide ongoing support to you and your team.

AGILE METHODOLOGY



Agile methodology relies on a high level of flexibility and interactivity, and demands consistent communication. We invite all of our clients to participate in this process to facilitate the best possible outcomes. Below is a basic outline detailing what you can expect when implementing this project management framework, as well as some of the most frequently used terms.

Scrum

Scrum is the name of the specific Agile methodology we use. It's a process driven methodology and values transparency and communication. There are set roles within a Scrum team and set processes which are briefly outlined below.

The Product Owner (PO) — is responsible for identifying the needs of the product, where the best possible value can be delivered and driving the priority of what gets built in an incremental way, adding value to each iteration.

The Scrum Master (SM) — bridges the delivery team and the Product Owner, and is largely responsible for empowering the team to deliver the sprint goals. They are primarily focused on smoothing the way for the Development Team to deliver.

The Development Team is the team charged with delivering the outcomes of the project. The team may be all software developers, but could also include designers and testers, depending on the needs of the project.

Project Organisation

User Stories

As part of organising the project, the project's requirements are documented in the form of user stories. These stories are short simple descriptions of individual requirements told from the perspective of the user. Each user story will be created as an issue/ticket in the project management software selected for the project. A user story can be applied to tickets for individual features, but can also describe larger features; these tickets are referred to as epics.

As the project progresses, user stories are ordered in the backlog and as they rise in priority they are groomed and fleshed out with written acceptance criteria. The criteria indicate how the feature/software needs to work in order to have met the definition of done and be recognised as 'complete'. Acceptance criteria is also the means by which QA can test user stories.

A sprint (or iteration) is the basic unit for development. It's timeboxed, which means it has a restricted unit of time and can act as a subproject within the wider development project.

Product backlog, sprint backlog

The **Product Backlog** is an ordered list of all the features that need to be included in the project, it is a dynamic list, responsive to the evolving needs of the project. The Product Owner is responsible for organising and prioritising user stories and issues in the Product Backlog, ensuring that they are clear, succinct and have clearly documented acceptance criteria. This enables the Development Team to have all the relevant information they need to deliver a specific feature before development begins.

The **Sprint Backlog** is the smaller list of stories taken from the top of the Product Backlog that has been committed to by the Development Team and designated to be completed in the sprint.

Communication

Transparency and collaboration are fundamental to the Scrum process; as is the focus on process improvement through constant communication. One of the ways we achieve this is through regular meetings.

The **Daily Stand-up** is the most frequent meeting and lasts a maximum of 15 minutes. It generally asks each team member a series of three questions. It aims to identify blockers, leverage the group to be able to deal with them and improve sprint velocity.

The **Backlog Grooming** meeting establishes the priorities – for delivery or review – at the end of each sprint, as determined by the Product Owner. This meeting is also an opportunity for the Development Team to gain clarity about individual issues to facilitate their delivery of a specific feature. The frequency of these meetings depends on the length of the sprints; they usually occur once per sprint, but this can be more often if many user stories need to be broken down further.

Backlog Grooming also involves **estimating the relative effort required to complete an issue.** It’s not uncommon at this point to send issues back to the Product Owner to be broken into smaller chunks if they require more effort than can be delivered within a sprint.

The **Sprint Planning** meeting establishes the timeline of delivery for groomed and estimated issues. This can involve breaking issues up further and into smaller subtasks so they can be tackled by multiple team members simultaneously. Sprint planning happens once per sprint and the ideal is to be planning more than one sprint ahead.

The **Sprint Review** (sometimes called a showcase) happens at the end of a sprint and is used to demonstrate to stakeholders what has been completed in the most recent sprint.

The **Sprint Retrospective** happens once per sprint and is an opportunity for the entire team to come together and evaluate what went well and what needs improvement. The aim is to produce a set of action items for the team to help them increase the efficiency of succeeding sprints.

Time tracking

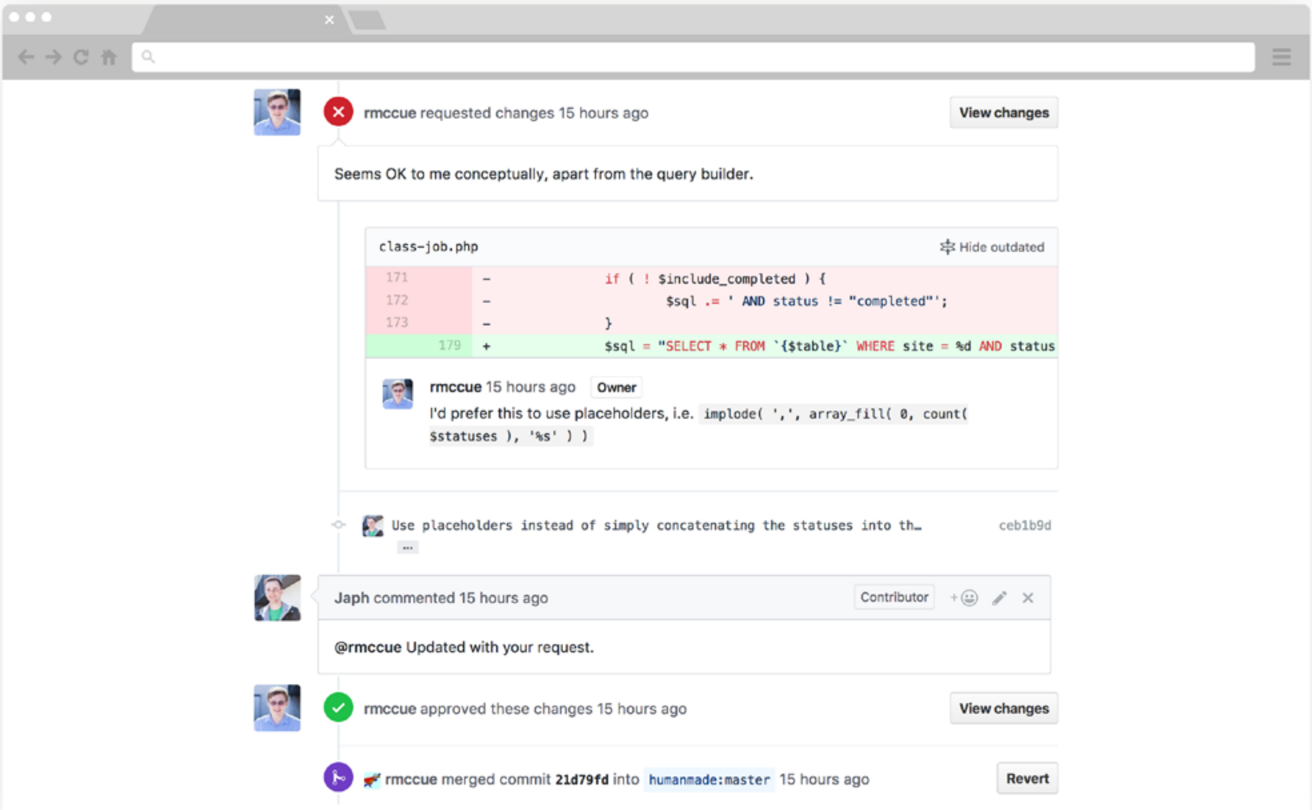
Time tracking forms the basis of our billing process and enables us to keep logs of days worked by the team. These can then be added to your invoice according to pre-established agreements.

QA AND CODE REVIEW

Our development process uses the Feature Branches model, where any change to the code is done on a branch (copy) of the code, then submitted as a pull request (request for change). All code must be submitted via pull requests, enforcing mandatory code review and creating an audit trail for all changes. Any branches which can be pushed onto a live server are locked and can only be updated via this process.

Automated testing is used to avoid code and functionality errors. When used, automated testing is applied during the pull request process, and if tests fail, code is blocked from being accepted. For functionality testing, a staging environment is provided. This allows functionality to be tested by the client before being pushed into a production environment. Staging environments still require code review, and are intended only for functionality testing. Staging environments should not be used for preparing content changes to the production site.

Below: example of code review



TOOLS

Finding the right balance of communication tools is a delicate task for any organisation. As a distributed organisation with a strong focus on asynchronous work, it is a topic we have considered carefully and regularly revisit.

It is easy for remote teams to rely almost entirely on tools in lieu of interpersonal communication. We place a high value on building and maintaining relationships through real time connection, both internally and with our clients.

Our experience has led us to create a minimal but powerful toolkit, which can be expanded when necessary to best suit project requirements.

Slack is a robust chat tool that serves as the foundation for our organisational communication. For each new project, a chat room is created to serve as a home base for the project. Slack is the place where all day-to-day conversations around a project happen; whether it's to ask or answer questions about features, deliver daily stand ups, share notes, or schedule impromptu meetings. At least one member of the stakeholder team must be part of this chat room in order to facilitate conversation on the client side.

GitHub is our project management tool of choice. It's ideally suited for issue tracking, collaborative programming, and version control. Each project is associated with a unique repository. As with Slack, at least one member of the stakeholder team will be required to have access to GitHub. At the beginning of the project, a set of issues will be created which represent the Product Backlog.

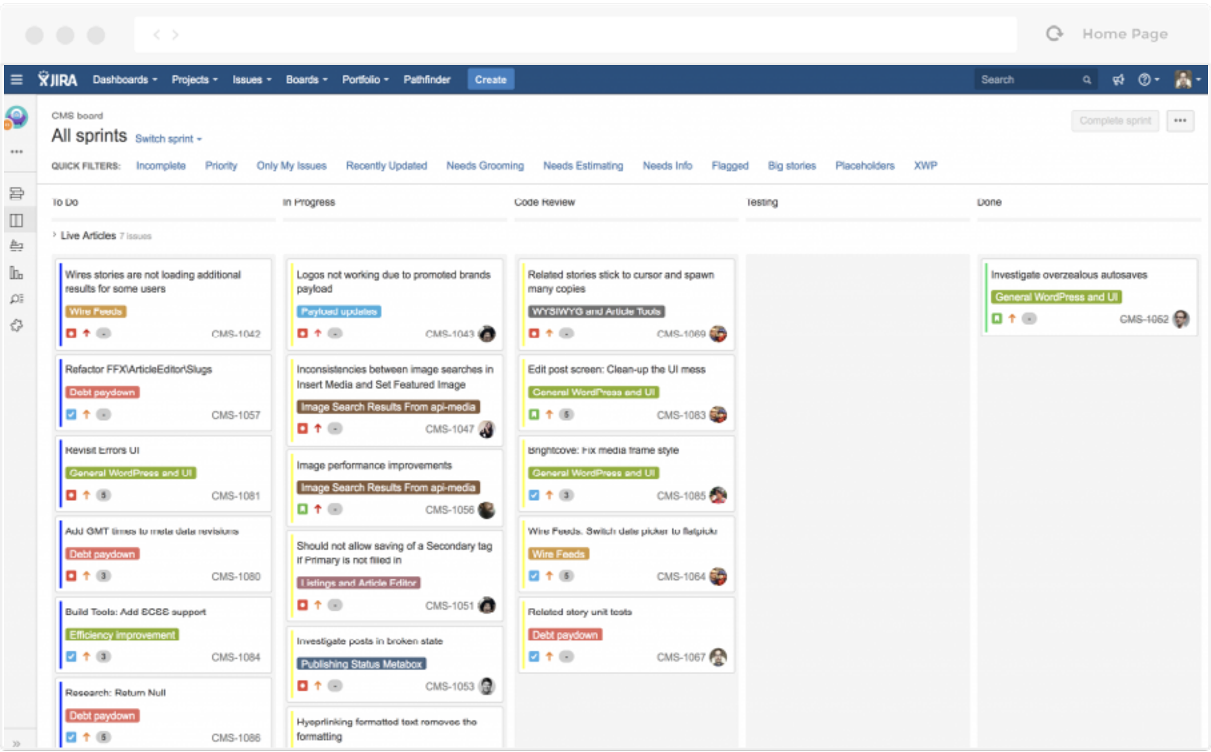
As issues progress through the workflow, they move through a series of queues that will be outlined in the GitHub Boards extension:

- **Product Backlog**
- **Sprint Backlog**
- **In Development**
- **Code Review**
- **QA**
- **Closed**, when an issue is approved

These queues can be customised

to suit specific project needs. As tickets move through the queue, our team will tag the key stakeholder in messages as necessary and submit the ticket for approval when the feature is complete. As the project progresses, new tickets will be created to address emergent issues and will be added to the Product Backlog.

Below: A full sprint process on project management tool, Jira



DISTRIBUTED WORKFLOWS

One of the things that sets us apart as an agency, is our capacity to hire the best people regardless of location. As a fully distributed company our people are based in various locations around the globe, which means we invest a huge amount in their ability and commitment to work in a self-directed way and to deliver for us, and for you.

Communication

We've been operating remotely since 2010, and have a lot of experience with various communication tools. We understand the value of 'immediate communication' and provide a specific set of tools to help facilitate this virtually. These include, but are not limited to, Slack for asynchronous communication, and Zoom or Google Hangouts for video conferencing.

A significant portion of this communication will be addressed by your assigned Project Manager. Project Managers will reach out to set up regular reporting meetings that work with your schedule, and adhere to your reporting requirements.

We strongly recommend that your team members participate in these communication arenas too. Despite not being able to see each other in person, we've found it possible to engender an engaging sense of team membership using these tools.

Meeting in person

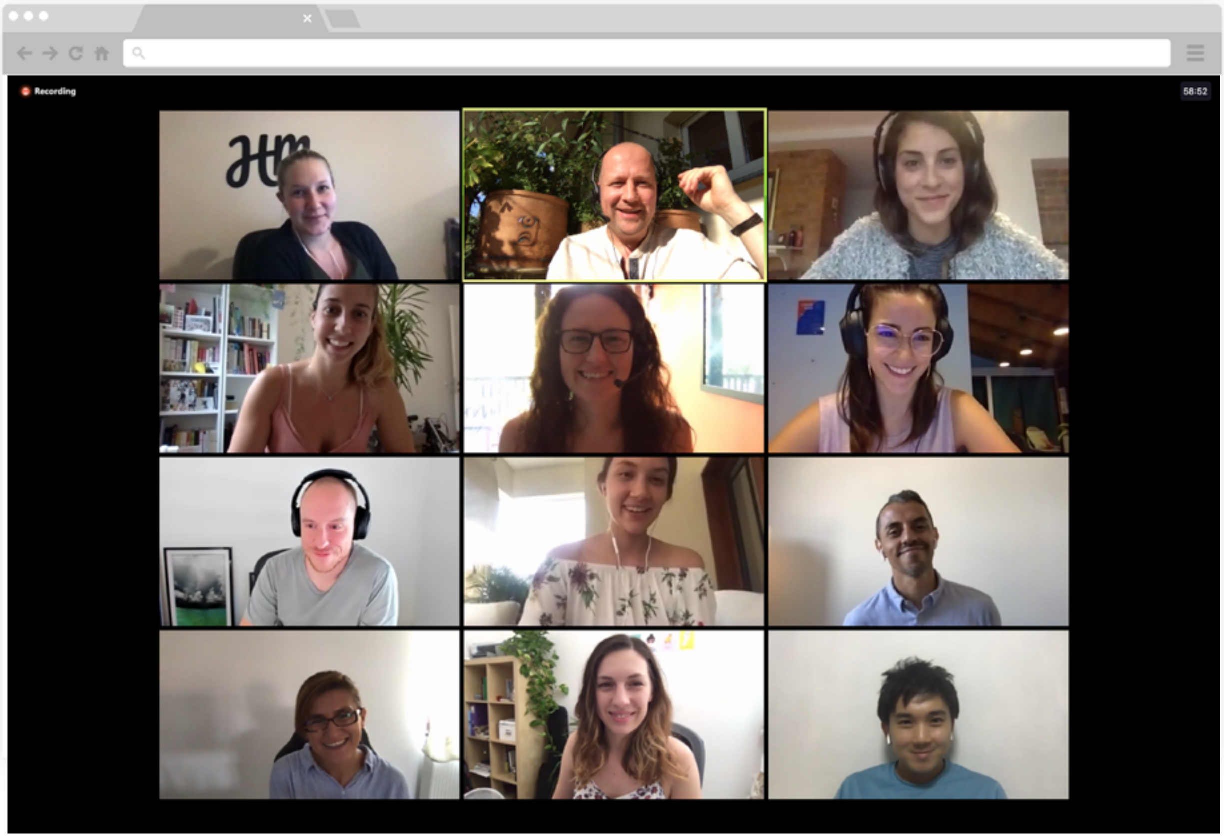
While we have a proven record of operating successfully in a distributed environment, we appreciate the impact of having teams meet face-to-face. This could be beneficial in the early stages of establishing a project and we're able to schedule time for our team to join clients on-site if required.

We also encourage our team members to meet at local WordPress events and conferences. This gives everyone the opportunity to have face-to-face time with different members of the team, helping to solidify professional relationships and improve communication across individuals in the organisation.

Team assembly

We assemble teams for projects based on a variety of factors. We take into consideration complementary time zones, the necessary skill-set required to complete the work, and the particular needs of the project. We will work internally with the Project Manager assigned to the project to assemble the best team to complete the work required to the highest standard.

Below:
A virtual Human Made team meeting



Dealing with urgency

We appreciate that from time to time issues may arise that need urgent attention. Here is the path to take to alert us to urgent issues, and to escalate them when necessary.

1. If it's a **code related issue, raise a ticket** in the issue tracker including all the relevant details. Give it a succinct, but specific title clearly identifying the issue.
2. **Reach out to the Project Manager** via Slack and let them know that this issue requires urgent attention. You should always **send them a link to the issue**.
3. If your **Project Manager is unavailable, reach out to the Development Lead via Slack**, and/or the Development Team.
4. If the issue remains unresolved **escalate the issue to the Account Manager.**

Contact details for all of the above will have been supplied at the point of signing the contract.

HUMAN HOUSEKEEPING

As a distributed team, we invest a huge amount of trust in our team member's ability to commit to work in a self-directed way. But as with any team, there may be times when things arise which challenge our ability to deliver. Here are some of the ways we handle these situations.

Sick days

There may be occasions when people fall ill and are unable to work. Our team are charged with alerting their Project Manager as soon as possible, and the Project Manager will, in turn, keep you up-to-date. If there needs to be a reallocation of resources to cover an extended illness, the Project Manager will work through that with you to deliver the desired result.

Annual and Public Holiday Leave

Human Made allows team members a generous annual leave allowance, and all team members are free to take public holiday breaks relative to their local provisions. One of the roles of the Project Manager is to keep track of the resource allocation for your team and the impact leave will have on the project. They'll communicate that with adequate notice according to the communication program developed at the start of the project.

Team rotation

A demanding project with a long time commitment may risk burning out team members. We take steps to avoid this as far as possible, both for the sake of the team member, and the project. One of the ways we manage this is to give team members the opportunity to rotate off onto other projects, if they feel the need to do so, after a six month period. Before it happens, we will discuss this with you and take the steps to mitigate any impact on the velocity of the project.

Trialists

From time to time, as Human Made continues to grow as a company, we'll ask our clients if we may trial a prospective employee on a project. We've found trials to be an invaluable tool that helps us assess an individual's ability within the development process, their capacity to work remotely, their communication and participation skills, as well as their cultural fit in our team.

Trials typically last 30–40 hours, and may be completed on a full-time basis, or across a number of weeks, depending on the individual's availability. Bringing on a trialist shouldn't impact the velocity of your project. Once we've agreed to bring a prospective employee onto the project as a trialist, we will introduce them to the client and include them in all meetings moving forward; they'll also be given access to all the tools required to contribute to the project. We do not charge clients for a trialists time on a project; unless their trial succeeds and we make an arrangement to onboard them as a new team member.

WordCamps

WordCamp participation is fundamental to our work. As contributors and core committers to the WordPress project, we're relied upon to speak, organise and attend WordPress events.

Very often there'll be travel time, and time in lieu taken for WordCamp attendance. Where this is going to affect your project, our Project Managers will communicate the requisite adjustments to the schedule with at least a sprint's notice.

Below: ***Mike Little****, co-founding developer of the WordPress project and a WordPress Engineer at Human Made, giving a presentation at WordCamp Europe 2016*

2/BEST PRACTICES

As we embark on the process of establishing your project and getting things underway there are some key areas we need to deeply understand. This will help us serve both the delivery and communication needs of your project to the best of our ability.

We can either have a conversation to go through these questions, or we can put together documentation if you'd prefer.

COLLABORATION

As we start preparing to get to work on the project, we'll begin putting together a team. This usually consists of a Project Manager, a Lead Developer and other Development Team members as required. As that team develops, and when the needs and scope of the project become clearer, we'll introduce those people to you.

It's important that we understand who we'll be interacting with most often from your side, and how they fit into the project. It'll also become crucial to know who we should speak to if we have issues we need to raise, risks that need reporting, or things we need to escalate.

Your team structure

You'll likely be aware by now that Human Made is a fully distributed company, with team members working from different locations all over the world. Having an understanding of how your team is set up and how they work, is important for us too.

To better understand this, we'll usually want to know:

- Is your team remote or based on-site?
- What time zones do they work in?
- How does the team we'll be working with at your end usually function?
- What is a measure of success for your team?

We'd love to hear how your team is structured and the ways in which they work best. This **helps us work better together** knowing the differences and similarities between our structures, and the different approaches we may take. We can also plan how best to navigate the differences to complement each other and do our best work, together.

Your goals

Once we understand what your goals are, we'll do everything in our power to assist you in reaching them. As well as your business and technical goals, it's important we understand **the problem you're trying to solve.**

Your reporting needs

As well as your own goals, we'll understand you'll have certain processes unique to you. For fluidity, we'll ask you to let us know how you'd prefer for us to communicate our progress to you and support your reporting back to your organisation.

Your current publishing process

No doubt you already have a website that has processes in place for publishing content. You may be a media publisher with daily updates to your site, or a site owner with less regular content updates. Whichever kind of site we're building for you, it will help us to have a solid understanding of how your processes currently run. It will also be helpful to know how you hope our work with you will update and improve your current publishing process.

SUBMITTING AN ISSUE

As the process of building your project develops, and as quality assurance and testing are implemented into the process, there's no question there will be times when you need to raise issues and bugs relative to the work. It is important to have a structure in place to manage those bugs, and some basic information delivered with each one.

If you need to raise an issue here's what the process should look like:

1. Create an issue/bug in the PM tool we're using for this project (Github, Jira, Basecamp, or Other).
2. Give it a succinct, but specific title identifying the issue.
3. In the issue description, clearly outline the steps taken to recreate the issue, the URL of the page you were on where you first encountered the issue, the environment you're in (develop, test, production, etc.) and the expected behaviour in contrast to the behaviour you observed. If you can, include a screenshot too.

Completing a bug ticket in this way will really help identify issues early and reduce the amount of back and forth required to get to the finer details and solve the problem.

We also kindly ask that when you are reporting an issue, you bring us the problem, not the solution. There are so many factors that go into creating your site; the tools we're using, the unit tests, the custom configuration and plugins we're creating, that it may well be that the approach we take may be different to what you'd expect, or what your developers may do. Or the issue that's been identified may be symptomatic of something else. Raise the issue early, outline the problem it's causing, and leave us to find the solution.

We've got this, we'll work it out for you.

ACCESSIBILITY

Accessibility creates a web that can be used by everyone. It not only helps you deliver content to a wider group of people — almost 18% in the UK and 12% of people in the US have disabilities which impair their use of the web — but correct semantic use of HTML, CSS and JavaScript will make your website more robust and better prepared for future technologies. And making a website more accessible makes it more easy to read for search engines like Google.

Above ***Rian Rietveld,*** *Senior Accessibility Consultant at Level Level and winner of the Heroes of Accessibility award in 2016 for her contributions to the WordPress project*

What is web accessibility?

Web accessibility is the degree to which a website is usable by as many people as possible. Depending on whether it's a governmental or public service, a different set of legal requirements will apply and the WCAG 2 AA could be a strict requirement. To check the requirements in your country of business please see this overview of requirements per country.

You may even need additional special requirements, like a Read Speaker for low-literate visitors; although most people, like blind users, have their own equipment to read and use a website. If the site is built according to WCAG 2 AA standards, then no special options need to be added.

Anyone using the website could benefit from its accessibility, but certain people will require it in order to be able to interact with your site.

What is WCAG 2 AA?

The W3C developed standards for web accessibility WCAG, and we are are at version 2 right now.

There are 3 levels,

- A (basic),
- AA (the global standard)
- and AAA (for dedicated applications).

We aim for WCAG 2 AA.

What about the WordPress dashboard?

The functionality we build in the backend (admin) will be as accessible as possible, but we can not ensure that the admin is fully accessible. For this, we depend on the accessibility of WordPress core itself, which is currently a work in progress.

What are the benefits of an accessible website?

An accessibility website can be hugely positive to your business and your brand, and help you reach new users and/or customers.

- Google is deaf and blind, everything you do for a11y is good for SEO
- 20% of all users will have a better experience using the site
- The site will be protected against accessibility violation lawsuits worldwide
- The site is more robust and sustainable

Planning an accessible website? Things to consider.

- If an **external designer** is hired, we can provide guidelines on how to meet accessibility rules at the start of the project and support them during their work. Designs will be reviewed by us before they are signed off by the client.
- Some **plugins have accessibility issues**. We can find alternatives for you, build the functionality in-house or help the plugin author fix the issues.
- If **external developers are hired,** we provide guidelines on how to meet accessibility standards at the start of the project and will support developers throughout the continuation of the project as well. The code, as it's output to the frontend of the website, will be reviewed by us during development.

If needed we will provide **content guidelines** and support on how to safeguard the accessibility of the content.

ADMIN & LICENSING

Admin

From the start of the project we'd need to clarify if there are any areas within the project, or account management areas, that are subject to approval. On a project level this could mean points where design needs to be approved by other departments and team members, it could also mean (if we're integrating into an existing project) what your code review process looks like. At an account level we'd love to know what you need from us regarding timing of invoice submissions in order to minimise delays around approval for payments, statements of work, billing etc.

Licensing

One of the reasons we work almost exclusively with WordPress, and quite possibly a reason you too have chosen to work with WordPress for this project, is due to the fact WordPress is open source software. Effectively, the license WordPress is issued under allows us to use it and modify it in any way we deem fit for your project, and assuming we distribute our derivative works of WordPress, we do so with the same license.

All our code (background IP) is licensed under the General Public License, which means you will have the right to reuse and modify any code supplied by us provided that the license remains intact.

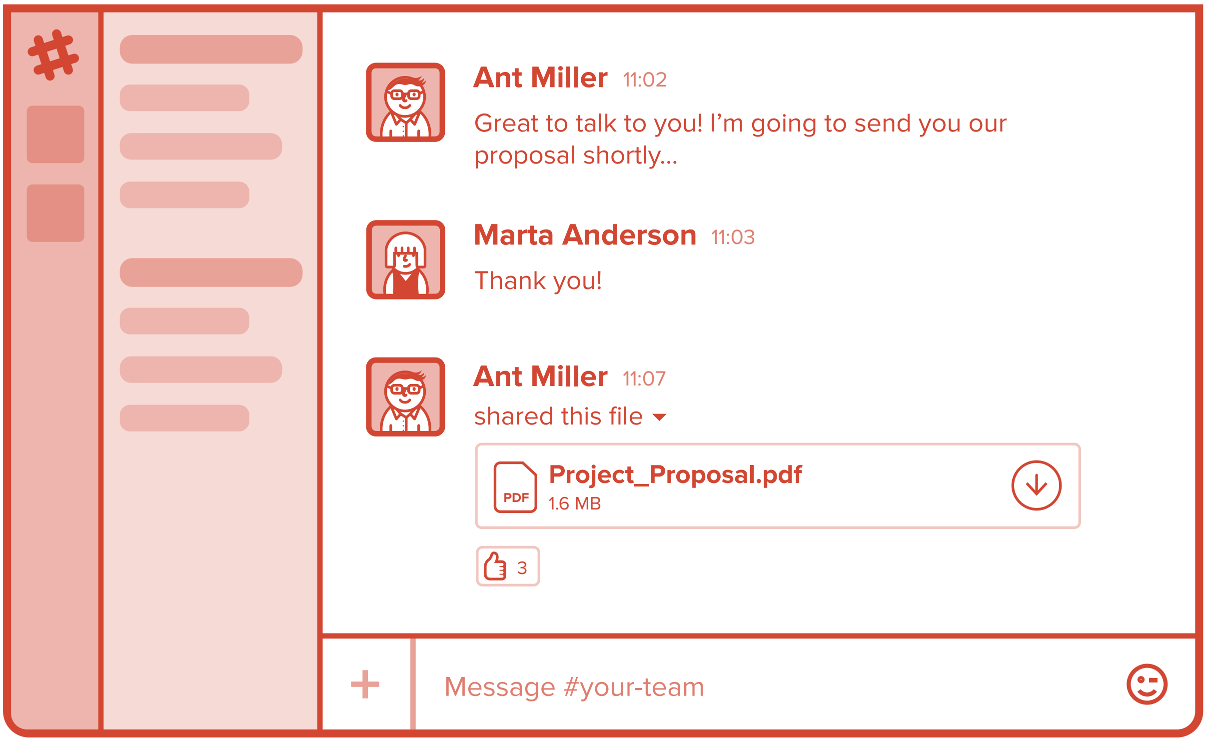
Any code we produce specifically for you is produced under 'work for hire' and is the property and copyright of your organisation as the client. However, as derivative works of the core WordPress project which is GPL licensed, any further distribution of code we produce for you will be covered by the provisions of the GPL.

As a requisite of working with us, we do require that you, as the client, assign to Human Made a license to use and access the code that we produce for you under the terms of the GPL. If our professional opinion is that such code may be of benefit to the open source community we would strongly recommend that you also participate in ongoing development of WordPress by also allowing a release of it under the GPL. Human Made can help support that release.

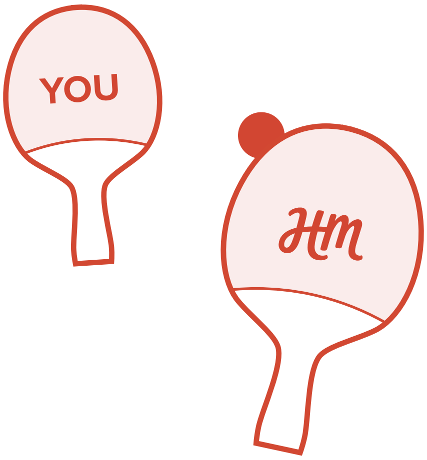
Finally, as the client, you will have ownership of all media assets produced during the project.

THE SALES PROCESS

A journey together; from the initial presentation to the project kick-off.



SETTING UP THE RELATIONSHIP



The people responsible for setting up a relationship between a client and the company at Human Made, are not motivated to get the most sales or the most profit; but **to set up the best possible relationship between client and agency** to allow our team to do the best possible work, and for you to get the most value.

Secondly, the sales team aren't just the sales team, they're your account managers too. The people you first meet when talking to us about possibly working together will be with you for the long haul. The conversation takes as long as we both need it to take, although it also can move as fast as you need it to (within limits) if your need is urgent.

A typical sales process for us may well start with a recommendation or referral, and we are very fortunate that a vast majority of our clients will come to us in this way. This usually means they have a fairly good idea of who we are, what we offer, and how we work. Such a referral-based introduction is often not very formal, and we'll usually respond with an email the same day to set up a call.

A note on calls

We default to using zoom.us as our video conferencing tool; it scales well, which is important to us and is robust and stable. If we set up a Zoom call it'll be free and pretty straightforward for you to dial in or join by clicking a web URL. We're not dogmatic about this though (in fact we're not dogmatic about much, as you'll see). If you'd rather use UberConference, Blue Jeans, PowWowNow, Skype, Google Hangouts, or Lync we can do that too. Even a phone call works. And if you're in one of the cities where we have people available to meet you, we'd love to come and meet you for a face to face chat.

Those initial conversations are usually about two things: finding out what you need, and discovering whether our two teams are a good fit.

Your needs

We really need to get a handle on the scope of what you want so we can be certain we're the right team for the job. There are 'soft limits' to what we can do – we're a WordPress development team so a Drupal build isn't something we can do for you. However, there are some technologies around the edges of WordPress we are strong in, such as React JavaScript, and the AWS hosting stack, so we can help if those things are needed.

We don't specialise in design. But, if you need UX (user experience) or IA (information architecture) work to turn your very elegant branding and visual designs into workable website specifications we can help with that. Similarly, setting up a content strategy could be something we can advise on and we can provide accessibility consulting should this be a requirement.

A good fit

We have a relatively flat team structure, with development staff being generally of a senior level and most being full-stack generalists. So because of that, we expect our team to engage with your people directly. We're also fully distributed and work remotely but the majority of the people working with you will be in the same (or very close) time zones. We don't, however, make on-site visits except for very specific activities. This is an arrangement we're very adept at making work well across a very wide range of clients, but it does take some getting used to.

We want to be able to make a real difference to your site or service, so we expect to be given responsibility for delivering key functionality. While we have in the past (and occasionally still do) provided developers as resources in larger teams, we'd usually take on technical design authority for a project and lead the architecture.

We'd also typically include a Project Manager and a Lead Developer in the conversation at the early stages. Ideally these will both be people who are available to take on projects in the time frame you're looking at and will be a good fit for this work. We can then start to get into the detail of the way we can structure a project (timescales, roles and responsibilities, methodologies) and what architectural approaches we should be considering.

PROJECT PROPOSAL

Once the conversation has reached a point where we are both comfortable that we can deliver a solution to your needs, we'll send a proposal. The level of detail in a proposal will reflect the stage we've reached in the conversation and will match your organisation's need for detail, and will depend on how clear your needs are.

All proposals give outline indicative costs. This won't be a surprise though – we talk about the budgets we work with early in the process and we appreciate transparency both ways when talking about money. A proposal is a tool to support communication between us, you, and your stakeholders.

The following sections will be included:

- A **concise summary** of the project to be delivered with a specific identification of the key business problem being solved.
- A **one-page overview** of the team makeup and roles and responsibilities of the key people in your organisation and ours.
- An **overview of the project process** describing the stages of the project; the key tasks, and who would be involved at each stage. We'll make clear not only what we'll be doing and delivering, but also the commitment we'll need from you – as a development team we are very dependent on high-quality and fidelity design output, and we'll make clear what we mean by that here.
- A **timeline**. You need to know when things will happen, so a clear timeline will help. Our Agile methodology means that these tend to be defined sprint by sprint, and the team will adapt objectives as we move forward.
- **Budgets**. We deliver development services, including project management and sometimes additional

consultancy, based on Time and Materials costs, at the 'per day' level of granularity. Other services, including infrastructure setup and ongoing provision, and site audits in cases where we are taking on an extant site, are defined as fixed cost items, either recurring or one-off. We're totally transparent about this.

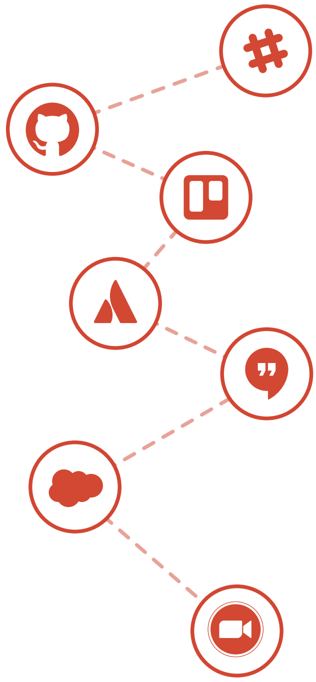
We may additionally include the following in a proposal, if it's going to be useful to you:

- **Team Biographies** for selected members of the team.
- **Case studies** for similar clients and/or features we've delivered before.
- **Project Breakdown** — a more detailed deep dive into the specific components of the project that may include key features you need, or processes we'll need to go through. At this level of detail the content here will be very specific to our planned relationship, so it's very hard to give a generic definition. However, we can say it'll typically be written up by developers and project managers likely to be working on your project.

We would hope to move from a proposal to an agreement to proceed with a project, so contractual agreements and/or a statement of work can follow. However, that's not always the next step, and it's not at all unusual to have a further face-to-face meeting before you make your final decision on who you'll be working with.

CLIENT ON-BOARDING

One of the most important things we can do together to support the project is to properly onboard you to our tools and processes. This is factored into the project timeline and happens prior to the project kick-off. Our aim is that we'll get to a clear shared understanding of goals and priorities for an engagement.



Our go-to tools

These are the most used, and most important tools, in our suite.

- Client Handbook
- Slack for daily communication including 1:1 calls between members of the team
- Github for issue management
- p2 (internal private blog) for documentation and high level discussions
- Zoom.us for video calls
- Google Suite (Calendar, Docs, Drive)

We also have another series of tools which we use more flexibly, and can adapt to suit your needs.

- Basecamp
- Atlassian suite (Jira, Confluence)
- Trello
- Google Hangouts/Skype as a Zoom alternative

We'll also take you through defining roles within the team and our project and people management processes. Some of our most regular processes are;

- Daily/weekly meetings
- Scrum ceremonies (backlog grooming, sprint planning, sprint reviews)
- Asynchronous communication
- Task management responsibilities
- Code review and code deployment

PROJECT KICK-OFF

The first step of the project is to get your team and ours together for a kick-off meeting, where we establish lines of communication, set project roles and give the team a vision of how the project will move forward.

Here's a theoretical list of actions, tasks and elements that will take place during this time:

Discovery phase

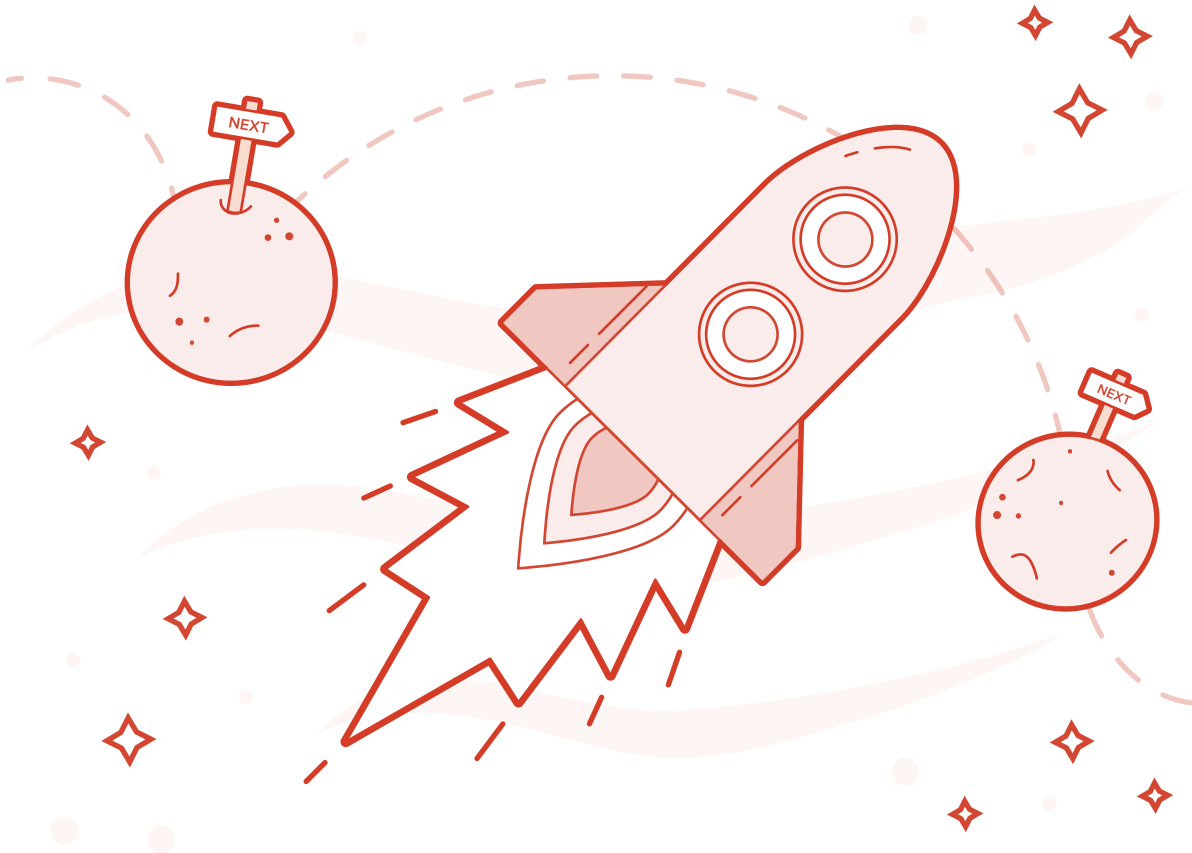
- Kick-off: vision & requirements
- Insights on existing data / analytics / surveys etc.
- Personae
- User journeys
- Design mood board: a scrapbook of design ideas we want to explore and UI elements we like
- Technical requirements review — Q&A

Here's a list of actionable items we intend to carry out at this stage:

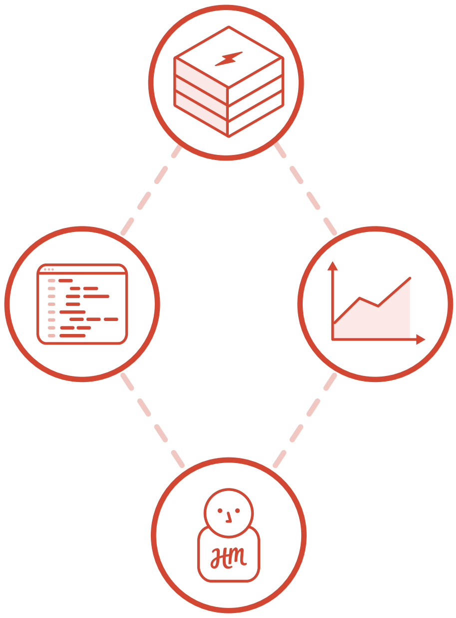
- Clarify and document technical requirements — create a project technical specification
- Wireframes (Sketch/InVision)
- High fidelity designs for some of the template pages and other elements (Sketch/InVision)
- Design system / UI Kit for the blocks (Sketch/Zeplin)

POST DELIVERY

Maintaining the health of your project.



MAINTENANCE



Code review

With a code review seat, our engineers will review code written by external developers to ensure code quality and aid in preventing security vulnerabilities. Security and coding standards are important to Human Made, as is education. Code reviews also act as a way of distributing knowledge with others in a constructive, beneficial way.

Retainers

Ongoing work retainers will be covered in the next section of the handbook, but this is also typically encompassed in a maintenance agreement.

TALK TO US ABOUT YOUR NEXT PROJECT.

We've been helping develop WordPress, and building some of the largest websites with it, since 2010. Get in touch with us to find out how we can help you build your future.

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