

lunarstorm

Example Project - Lunarstorm Workflow

For: Aidan Gillis

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Date: Dec 9/2021

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Executive Summary

Overview

The following document is a project outline for Aidan Gillis as a road map to plan and budget for the Example Project - Lunarstorm Workflow project recently discussed with Lunarstorm Technologies Inc.

It includes a Summary of Tasks that contains the individual list of items required to complete the project, in detail. The details include the estimated time to complete the list of tasks as well as implementation notes intended to inform you the client of important information or requirements needed to complete the project. The project outline includes an About Us outlining Lunarstorm Technologies Inc. fifteen years of experience in Web Design, Software Design & Information Technology Services. The project outline includes a case study of our most recent large project for review. Finally attached is a standard Confidentiality and Payment Terms Agreement. By communicating all these elements we mutually ensure the successful completion of the overall project.

Goals

Create a visually stunning, easy to use website with excellent performance. Utilize organic SEO best practices to grow Google search rankings and boost business.

Roadmap

- Planning and Framework
- Website Content
- Website Enhancements
- Search Engine Optimization
- Audit and Launch

Budget & Timing

Promise Date:

Total Estimated Time: 57 hours

Hourly Rate: \$ [REDACTED] / Hour

Estimated Project Labour Cost: \$ [REDACTED]

*Additional Hardware Cost: \$1.00

*Additional Software Cost: \$1.00

*Additional Hosting Cost: \$1.00

Total Estimated Project Cost: \$ [REDACTED]

Taxes Not Included

***NOTE:** Lunarstorm Technologies Inc. does not purchase hardware or software directly for the client. All hardware and software required to complete this project are purchased directly by Aidan Gillis to ensure warranty, ownership and cost savings. Lunarstorm provides the following information to ensure you are presented with the full scope of the project cost outside of the services provided by Lunarstorm Technologies Inc. If Aidan Gillis does not have a supplier for hardware or software, Lunarstorm will work with you to ensure you are set up with industry leading suppliers of your choice. Lunarstorm Technologies Inc. provides a premium high security hosting service only for clients utilizing our Web or Software services.

About Us

Lunarstorm Technologies Inc. is a leading provider of technology solutions to Canadian businesses. Owned and operated in Canada, Lunarstorm Technologies Inc. faces the same business challenges your company does and understands what is needed to run a successful business.

On top of custom software, web design, and organic search engine optimization, our services include a fully managed IT computer service compliment that not only functions as your virtual IT staff; onsite or remote, but also as project managers to guarantee the successful integration of current and future technologies into your business. Through Lunarstorm designed processes your business will benefit from unmatched standards in technical development, networking, data storage, data security, business computer setup, repair, disaster recovery and most importantly fanatical client support. Lunarstorm adds better business value!

Each business client we setup and manage defines the quality and integrity of our work. That's why we put so much stock into each one of our projects, regardless of size or scope. We want to partner with you to guarantee our mutual business success whether it be virtual IT staffing; software design & development, both custom and industry specific or business level web design.

Partnering with Lunarstorm Technologies Inc. can ensure your company a cost-effective solution that results in a quality end product reducing your cost of doing business and increasing your bottom-line. Be confident that your investment with us will deliver a high return. With over two decades of experience Lunarstorm Technologies Inc. has built an extensive portfolio which we feel speaks to our quality and level of expertise. Working with a variety of clients, ranging from one-person operations to large nationwide corporations, our experiences have spanned many sectors including; Industrial, Commercial, Financial Services, Legal, Logistics, Education, Government, and Healthcare in addition to many others.

Today Lunarstorm Technologies Inc. consists of a comprehensive team of professionals with diverse backgrounds which allows us to not only meet your IT demands but also provide your company with premium business level custom software and high-quality web design with search engine optimization. We are looking forward to working with you!

Summary of Tasks - 57h

Stage 1: Planning & Framework

Planning & Meeting (2h)

Implementation Checklist

- Phone and Emails
- Internal Team Meeting
 - 1) Establish desired business demographic to reach
 - Who are we trying to reach?
 - What can we do to improve that?
 - Is there old data that we can utilize?
 - 2) Establish Pros and Cons of Competitor Designs
 - What do we like from their competitors?
 - What can be recycled? What can be improved?
 - 3) Establish a Specification for Website Navigation
 - What is to be included in the header?
 - What is to be included in the footer?
 - Where are we trying to get users to?
 - 4) Establish a Content Strategy
 - Based on competitors or substitutes, what content should be included?
 - Is there a common targeting approach among competitors that we should avoid falling into?
 - 5) Establish a Design Strategy
 - Discuss overall colour scheme, visuals required, video if applicable
 - 6) Establish a Wish/Want/Need List for Custom Website Features
 - Custom features, while generally necessary to elevate a site, are time-consuming and require developers. A rigorous cost-benefit analysis for each proposed custom feature helps ensure Lunarstorm keeps the project on-time and on-budget.
- Client Meeting
 - An executive summary of the Team's findings.
 - This is an opportunity for feedback and to find a happy middle ground on Lunarstorm's areas of concern (if any).

Implementation Notes

This purpose of this stage is to achieve an aligned vision of the website, its strategy and execution before utilizing any project hours.

WordPress Environment (1h)

Implementation Checklist

- Set up staging area
- Set up WordPress database
- Upload WordPress files
- Install WordPress
- Disable comments & pingbacks by default
- Install Lunarstorm Europa plugin
- Remove default image links (/wp-admin/options.php - image_default_link_type:none)
- Set up permalink settings
- Install Lunarstorm Europa complementary plugins
 - Yoast SEO
 - Wordfence Security
 - Revolution Slider
 - Contact Form 7 or Ninja Forms
- Setup Post SMTP
 - To be used for overriding all outgoing emails consistently

Implementation Notes

WordPress is the framework we will use to build the website. Before anything else, we have to set up a fresh installation of WordPress with all of the settings, plugins and security that meet our best practice standards.

- If the client is not hosting with Lunarstorm, client must provide access to ftp and domain management areas via email or other means before work can begin.

Europa Framework & Theming (6h)

Implementation Checklist

- Header Development
- Colour Scheme
- Footer Development
- Menu Navigation Setup
- Website Font Pallet
- Layout Config Desktop
- Layout Config Mobile
- Layout Config Tablet
- Component Design
 - Style of:
 - Buttons, Modals, Forms, Pagination, Breadcrumbs, Tables, Navs

Implementation Notes

Before developing individual pages, Lunarstorm will setup their Europa framework and begin setting the website theme. In order for Lunarstorm to begin this process the client is to provide:

- Client to provide marketing or branding material including company logo, colours, fonts and other marketing assets relevant to the project via cloud file system.
- Client to provide at least 3 images to be used for mockup purposes while the site is in development.

Note: If client is providing their own website mockups, design time is still needed by Lunarstorm as there are various web standards and best practices that can not be translated via pdf or ai files.

Lunarstorm Website Review (0h)

Implementation Checklist

- Team Meeting to discuss current website concept, layout, and visuals
- Aidan Gillis to provide detailed requests/edits

Stage 2: Website Content

Client Meeting (First Major Revision) (1h)

Implementation Checklist

- Setup Client Meeting
- Share client dropbox link via email
- Get client feedback and/or requests
 - Minor requests to be dealt with immediately, any large requests are to be added to Stage 3 > Client Requested Fixes
- Walkthrough current website layout, navigation, visuals
- Send specific content (copy & image) requests

Custom Features, Extending Europa Framework (4h)

Implementation Checklist

- Custom Europa Blocks, Features, Efficiencies to be entered after client meeting
- Milestone: Audit Project Creep/Scope
 - Align project scope with requested Europa features
 - Ensure that the remaining time allows for appropriate features

Population of Content (6h)

Implementation Checklist

- Work with client to gather documents and place in a cloud file service
- Resize / Edit / Prepare images
- Put text copy & images into appropriate pages
- Populate proper links for each page
- Integration of Google Maps into website
 - This requires a Google account in order for google to associate Google maps to your website for security
- Audit navigation between in-page content (button links, etc.)
- Integration of Contact Information
 - Clients preferred contact for from submissions, etc.
 - Ensure footer content is consistent

Implementation Notes

- Client to provide Lunarstorm with any text for the website in a Word document or PDF. (.doc, .pdf)
- To maintain client ownership of assets, all final stock photography should be purchased and provided by the client. Lunarstorm will provide best practice specifications for file size and format.
- Client to provide details required for contact page.

Note: Population of content does not include items in a product catalog.

Development of Individual Pages (6h)

Implementation Checklist

- Code the frontpage
- Code the single feature page
- Code the single page
- Code the portfolio / gallery page
- Code the post page
- Code the single post page
- Code the posts archive
- Code the contact / map page
- Code the search page
- Create specific helpful 404 page
- Populate sample pages with Latin text & watermarked images

Project Management

Client Communication (2h)

Implementation Checklist

Internal Team Communication (2h)

Implementation Checklist

Stage 3: Website Enhancements

Requested Fixes - [Date Requested] (0h)

Implementation Checklist

- Enter in any request clients have provided in emails, meetings and phone calls

Implementation Notes

This list will be populated after the project starts and client request start coming in. It will help manage deliverables and expectations.

Responsive/Dynamic Framework (2h)

Implementation Checklist

- Develop and implement a responsive framework so content will respond dynamically to various devices, from widescreen desktops to tablets and mobile devices (horizontal and vertical orientation)
- Design adjustments for various devices
- Custom block development for mobile specific features

Lunarstorm Website Review (0h)

Implementation Checklist

- Team Meeting to discuss addition of all content and images
- Aidan Gillis to Lead Website Review
 - High-Level Review by Ownership to confirm progress is heading in the right direction. Conducted at the approximate halfway point of the project cycle.
 - Assignment of concerns to members of the team (if any).

Stage 4: Search Engine Optimization

Google Analytics (1h)

Implementation Checklist

- Check if there is a Pre-Existing Analytics Account
- Request Full Access to Google Analytics
- If No Analytics; Create Analytics Account
- Copy Analytics Code into Website (Titan)
- Test Active Users in Google Analytics

Google Search Console (1.5h)

Implementation Checklist

- Check if there is a Pre-Existing Search Console Account
- Request Access to Search Console Account
- If No Search Console; Create Search Console Account
- Send Domain Verification to Ron
- Verify Access via Console
- Sync Google Search Console with Google Analytics
- Check for Any Site Errors
- Check for Search Traffic (Keywords)

Google Tag Manager (1h)

Implementation Checklist

- Create Google Tag Manager Account
- Create Google Tag Manager Container
- Copy Google Tag Manager Code into Website
- Activate Container - Check for Site Errors
- Enter Testing Mode of Google Tag Manager and Test Website

Google My Business (1.5h)

Implementation Checklist

- Check if there is a Pre-Existing Google My Business Account
- Request Access to Google My Business Account
- If No Account; Claim the Website/Location under Google@ Account
- Scan Google My Business Information and Ensure Validity between Website
- Add Any Missing Information
- Request Client Information if Required

SEO Pages (6h)

Implementation Checklist

- Identify Target Keywords
- Test Target Keywords via Search Traffic
- Test Target Keywords via Google Autocomplete
- Check Target Keywords with Google Search Console
- Update SEO Titles
- Update Meta Descriptions
- Update In-Page Content to Contain Target Keywords
- Ensure Page Readability is Sufficient

SEO Media (3h)

Implementation Checklist

- Identify Media Target Keywords
- Update Media Titles
- Update Media Alt-Text
- Test Google Search with New Target Keywords on Media
- Remove Old Media

Website Setup for Tracking (3h)

Implementation Checklist

- Create Clickable Phone Number Across Entire Site
- Create Call-To-Action Buttons
- Create Thank-you Page if Website has a Form

Tracking Setup (3h)

Implementation Checklist

- Sync Google Analytics and Google Tag Manager with Tracking Code (Ensure they are Speaking to Each Other)
- Create Phone Call Goal in Google Tag Manager
- Create Corresponding Phone Call Goal in Google Analytics
- Create Remainder of Google Analytics Goals (Form Submission, Destination Pages, etc.)
- Ensure Tag Manager is Firing on Appropriate Pages
- Ensure Goal Tracking is Working Appropriately via Google Analytics (1-day lag time)

Stage 5: Audit & Launch

Pre-launch Audit (1h)

Implementation Checklist

- Content check
- Check favicon - Icon in browser tab
- Ensure that content styling is consistent on every page (search, archive, single post, category)
- Ensure that footer includes copyright and link to Lunarstorm
- Ensure that search results are working and styled correctly
- Ensure that CSS styling is properly responsive (mobile, 1024x768, high resolution)
- Ensure that HTML is nicely indented & commented
- Ensure that there are no broken links
- Ensure that Javascript is error free
- Test all required fields in forms
- Ensure that forms send to correct recipient
- Test for all web browsers
 - Internet Explorer, Firefox, Google Chrome, Safari
- Test for Mobile (iPhone / iPad / Android)
- Back up final version of website

Client Audit (0h)

Implementation Checklist

- Send notice for the client to conduct their final audit before pushing live
- Any minor adjustments identified by client

Site Launch (1h)

Implementation Checklist

- Transfer all wordpress files testing server to proper url
- Transfer wordpress database to new url
- Change site URL in wp-admin settings
- Make site indexable by search engines in wp-admin
- Make .htaccess file writeable
- Double-check that nothing on live site is pointing to webdesign.lunarstorm.ca (images, links, etc)
- Rename index.php and wp-admin/index.php on testing server (webdesign.lunarstorm.ca) to avoid confusion
- Email client new wp-login info with a reminder that the testing server (webdesign.lunarstorm.ca) should no longer be used
- Create the Portfolio Piece for Lunarstorm Website

Domain & Hosting

Domain Name and Registrar Configuration (1h)

Implementation Checklist

- Assist client in registering a domain name
- Configure name servers for registrar

Implementation Notes

- Client to provide Lunarstorm with the registrar login credentials

New Customer with Domain and Wordpress Installation in Plesk (1h)

Implementation Checklist

- Create new customer in plesk - ensure create subscription for the customer is selected
- Record in Tackler - Clients - the username and password for the subscription
- Go to newly created subscription - select Wordpress Tab
- Fill in all required information and Install Complementary Lunarstorm Plugins
- Clone WordPress Instance to staging.domain.tld
- Request or setup DNS entry for staging.domain.tld
- Verify Wordpress installation by Logging Into the Backend

Web Hosting (1h)

Implementation Checklist

- Registrar DNS configuration
- +\$25 / month - Hosted Website Services
- Gather all domain-related info (domain registrar identity and contact details, web- and email hosting details, all user accounts) related to existing services.
- Create new domain on Lunarstorm servers, including establishing FTP protocols
- Transfer website content from previous host, as necessary (billed hourly)
- Configure Domain Name System (DNS)
- Confirm performance of website under new hosting arrangements

Implementation Notes

Website hosting includes providing a managed server that is optimized for running a website with an attached relational database, including monthly backups and server maintenance.

References - Web Design

OK Tire Stores Inc.

www.oktire.com

Surrey, British Columbia

Rob Downs

- Development and design of modern looking site
- Site sustains high volumes of visits per month.
- Major organic search engine optimization of entire site.
- Design of specific store area to highlight 350 stores nationwide
- Specific work on mobile friendliness
- Integration of custom software design for Tires and Rims
- Custom GPS store locator built into website

Canada Protection Plan

www.cpp.ca

Toronto, Ontario

Mark Tateishi

- Development and design of modern looking site
- Site sustains high volumes of visits per month
- Major organic search engine optimization of entire site

South City Physiotherapy

southcityphysio.com

Guelph, Ontario

Francine Dore

- Development and design of modern looking site
- Major organic search engine optimization of entire site.

Confidentiality and Payment Terms - Web Design

Both parties hereby agree that any confidential information pertaining to the other which shall be gained while carrying out the requirements of the Services, shall be safeguarded by the party gaining such information in the same manner as it would safeguard its own trade secrets and such confidential information shall be held in trust for the benefit of the other party only. All trade secrets and publicly undisclosed Intellectual Property will be confidential information under this Agreement. Confidential information does not include information that is generally known to the public through no fault of the receiving party as of the date on which the receiving party receives such confidential information. This shall survive the termination of this Agreement. While providing services and based on the functional specifications, Lunarstorm Technologies Inc. may create specific software, tools, platforms or may otherwise use trade secrets in the configuration, implementation, planning of or provision of the services - including in the general architecture and structure thereof. The Client does hereby acknowledge that all Intellectual Property rights in such applications are the property of Lunarstorm Technologies Inc. and that no proprietary rights in, title to or ownership rights of any kind in the Intellectual Property are transferred or assigned to the Client as a result of the services being provided to the Client.

PAYMENT: The total services required for the project are broken down into individual service items listed under the Project Schedule and Task Breakdown. Each service item will be invoiced 100% at time of completion. Please send payment upon receipt of invoice.

PLEASE NOTE: The total cost for this project is only an estimated value. Any additions or changes to this project will be charged as an extra cost. Lunarstorm Technologies Inc. will notify the Client of the extra costs before these additions or changes take place and the Client can decide whether or not to go through with them.