

SHELTER

CMS Re-platforming Delivery Plan

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MANIFESTO

Purpose of this document

This document aims to provide details of the implementation plan, delivery and ongoing costs for the setup and integration of Shelter's new web delivery platform and associated tools.

Document scope

The document includes details of the following;

- Scope
- Release and project plan
- Delivery methodology and approach
- Project costs
- Product costs
- Support and maintenance costs
- Continuous Improvement recommendations

Recommendation

In summary, we are recommending the following:

- Deliver the content authoring and publishing workflows (infrastructure) and components, media and asset management (front end) as tandem development sprints to deliver a first release
- Develop an integration roadmap
- Start with the 'Large Space' contract on Contentful
- Ongoing change management and support
 - The Shelter development team would lead on all incident management, maintenance and bug fix of the product post release
 - Potential for a 3 month hypercare/consultancy agreement post launch while the product and team embed. To be agreed and procured separately
 - Choose strategic projects to work with as partners
- The role of the Shelter development team in the development sprints needs to be decided by Shelter balancing the ROI

Assumptions

The detail within this project plan is based on the following assumptions:

- The CMS choice is Contentful
- We adopt the architectural approach described in the solution design we have provided
- The front-end experience of the site is as per the current site

This plan is subject to change based on the outcomes of backlog validation and prioritisation, technical delivery dependencies and other constraints or dependencies, as yet unknown.

Scope

Principles

Shelter do not intend to change the front-end design of the website, with the exception of some specific features that they wish to optimise. These make up no more than 20% of the total site.

Ahead of engaging Manifesto, the Shelter project team carried out a series of stakeholder workshops and provided a list of **epics and user stories** to Manifesto to form the basis of the required scope. These have since been validated with Shelter stakeholders through a series of workshops and a final list of these has been provided as an appendix to form the basis of the estimates in this proposal.

The technical approach describes one built on **atomic design and development principles**. Shelter also have a strategy for their internal teams to work with the Manifesto development team during the project and then manage and maintain the site ongoing. These principles have informed our approach to delivery and the scope.

Requirements

Manifesto have provided a cost breakdown based on fulfilling the following high-level deliverables;

- Initial pattern library and tooling set up/definition and overall approach (**React methodology and approach**)
- Improvements to preview and method for getting content from API (tech spike)
- Creation of building blocks - headings, forms, buttons, colours etc
- Using building blocks for modules
- Building modules in to pages/templates
- Work to make compatible across browsers and devices
- Tracking
- Finesse for speed, SEO, accessibility
- Initial (Contentful) product, environment, hosting setup including deployment/testing methodology etc. for workflow, site and content
- Definition of how content modules are managed
- Modelling of core content types
- Media/asset management
- Creation of workflows/review/scheduling capability
- Taxonomy and localisation
- Build out of display capability - without front end components
- User and permission setup
- Form builder
- Integration framework - and initial integration work
- Set up of Gatsby and React framework
- Automated tests
- Play back and planning meetings
- UAT / Bug fix
- Contingency

The following documents and assumptions provide a view of the scope that sits beneath this and has been analysed to form the basis of the estimations for this project.

- The **Epics** below form the backlog to be delivered through the programme. This project seeks to create a representation of all the requirements outlined in **release 1**.
- The document; **Shelter product backlog** provides a breakdown of the **user stories** that sit beneath the epics and formed the basis of our estimates.
- A full pattern library analysis has been carried out. Please refer to **component tree.xls and component-tree.pdf** for detail.

During the backlog and technical readiness phase we will focus on prioritisation, refinement and adding acceptance criteria. During this phase we'll see the components outlined in the pattern library form the basis of the acceptance criteria on the relevant user stories. Therefore, joining up the front end and editorial requirements.

The backlog will then be refined at each of the project stages and on a weekly basis as part of the backlog management and product review sessions. The exact nature and fidelity will be matched to the overall resource availability and prioritised by the Product Owner.

It's proposed that the Shelter development team deliver release 2 and having established an integration framework as part of release 1, a roadmap be developed for the ongoing integrations.

	Content authoring	Content publishing workflows	Component, media and asset management	Integration
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<p>Release 1</p>	<ul style="list-style-type: none"> ▪ Content types ▪ Related content taxonomy ▪ Regional taxonomy ▪ Authoring permissions ▪ Content editing ▪ Content preview ▪ Content sorting ▪ Tagging ▪ WYSIWYG ▪ Resources library ▪ Bespoke URLs ▪ Metadata management ▪ Content manageable navigation ▪ Community tooling ▪ Video upload ▪ Segmented content 	<ul style="list-style-type: none"> ▪ Publishing workflow management ▪ Module, asset and page management ▪ Version control ▪ CMS field validation ▪ Content review dates ▪ Audit log ▪ Notifications ▪ Preview links ▪ Curated content ▪ Redirect management 	<ul style="list-style-type: none"> ▪ Media management ▪ Page templates ▪ Modules ▪ UX/pattern library ▪ Content/media search ▪ Forms ▪ CTAs ▪ IA management ▪ IA driven related content ▪ URL reference management ▪ Advanced search ▪ Geo-location 	<ul style="list-style-type: none"> ▪ Integration framework ▪ Initial integration
<p>Release 2</p>		<ul style="list-style-type: none"> ▪ Content scheduling ▪ A/B testing ▪ User authentication ▪ Multi-site ▪ Regional content 		
	<p>Content authoring</p>	<p>Content publishing workflows</p>	<p>Component, media and asset management</p>	<p>Integration</p>

Roadmap

- CRM integration
- DAM integration
- API integration
- Analytics integration
- QA integration
- Contact preferences integration
- Social integration
- Personalisation engine integration
- Email marketing integration
- Event integration
- Post code lookup integration
- e-commerce integration
- User surveys
- Data reporting
- Cookie control
- Appeal code integration
- Content evaluation tool integration
- YouTube integration
- WebChat integration

Project Approach and Phases

We have a tried and tested framework for the development of digital engagement platforms as per the scope of Shelter. The following outlines the project phases, high level description of activities and deliverables as well as key team members and expertise involved.

Roles and Responsibilities

Shelter have the following expectations of Manifesto for the delivery of this project:

- Manifesto retain ultimate responsibility for the quality of the code base
- Manifesto will own the co-ordination of the proceeding UAT period
- Shelter will take over ownership of the code base once it has been released to production

Development team collaboration

Shelter have an internal development team who will take on the running, maintenance and ongoing development of the platform following the delivery of the project. It's therefore important for the long-term success of the project that they are involved in the process to ensure a smooth transition.

There are a few different forms this could take – we have outlined below two options, and the pros and cons of each.

Hands Off Consultancy

A number of days are allocated for a senior Manifesto development resource to walk Shelter development resources through the code base and consult with them on key architectural decisions. These days would be more heavily weighted towards the beginning and end of the project. Furthermore, the code base will be made available to the Shelter development team at the end of every sprint for immersion separately from Manifesto. This approach however does not have the option of the Shelter team contributing any code to the project until the end of the UAT period and the product has been accepted by Shelter.

Pros	Cons
<ul style="list-style-type: none">• Manifesto project resource is dedicated to delivery• Shelter development team get ongoing exposure to code base and are involved in making key architectural choices• Easier to manage from a commercial and contractual position	<ul style="list-style-type: none">• Shelter development team make no direct contribution to codebase• Shelter could be more reliant on Manifesto at the immediate end of the project for ongoing consultancy/support• Onboarding time for Shelter development team at the end of the project is likely to take longer

Integrated Development Resource

Member(s) of Shelter’s development team are integrated into the Manifesto team as direct resources, under the Manifesto project lead, either statically throughout the project or ramping up over the course of the project. They contribute project work to the codebase directly, which is reviewed and integrated by Manifesto resource, who have ultimate responsibility for the quality of the codebase.

We’re recommending we adopt a ‘ramp up’ approach; where they play a consultative role throughout the project, leading on the technical approach and architectural decisions and then ramp up to a more hands-on role from sprint 4.

A lead member of the Shelter development team attends workshops and meetings as part of phase 1 and 2. They contribute to, and approve the definition of the technical approach and technical acceptance criteria.

Sprints 1 – 3: Attend planning and demos, contributing to the decisions made about the approach for user stories. Ad hoc consultancy during sprints.

Sprints 4 – 7: Technical on-boarding during sprint 4, picking up stories as part of the scrum team sprint 6 and 7 through to UAT and launch.

Estimated days per week/sprint:

- Kick off – 1 day
- Backlog and tech readiness – 2 days
- Sprints 1 -3 – 1.5 days
- Sprints 4 – 7 to launch – x2 FTE (suggestion from Shelter team)

This option gives maximum exposure to the Shelter developers, involving them directly in the delivery of the project, which means that they will be able to take ownership of the code base from day 1 of project handover much easier. Furthermore, there are potential efficiencies to project scope or speed.

It does however increase Manifesto senior development resource overhead for the project needed to validate and guarantee work undertaken by Shelter development resources. It also opens up significantly more risk around the delivery of the project as Manifesto will be working on the project with resources that they have no experience of working with or direct management control.

Pros	Cons
<ul style="list-style-type: none">• Handover to Shelter ownership of code is much smoother and the team are motivated• Long term viability of project is enhanced as Shelter resources are able to be more productive on the codebase from day 1 of handover• Potential for enhancements either to project scope or project cost	<ul style="list-style-type: none">• Significant uptick required for Manifesto senior resource to validate and guarantee Shelter contributions• More risk to project and higher commercial implications• Less guarantees (time, cost, scope) can be made by Manifesto due to the uncertainty of the skills of the Shelter team

Impact on Project Cost/ Scope

In the integrated development resource approach, there are potential positive and negative impacts to the delivery of the project.

With additional Shelter development resource on the project, it could transpire that either the scope that can be delivered is able to increase, or that the total amount of time to deliver the scope as stated will decrease, which would result in a cost saving.

Similarly, this approach could have a negative impact and Manifesto could incur delays and/or increased costs to their plan (i.e. through additional coaching, needs to refactor code).

At present, it's not possible to reflect this in the estimate as it is dependent on the quality and ability to integrate into the Manifesto team of the Shelter development resource. As such, Manifesto has put forward estimates and costs based on assumptions that their teams are delivering the product with the intention of providing Shelter with some degree of certainty and commitment to the delivery of the project.

Kick off and planning

Led by the Manifesto and Shelter Project Managers, we will kick off the project by bringing our team together internally and then for a meeting with you.

From this we'll validate:

- A shared vision for the project
- Project ways of working
- End to end delivery plan with milestones agreed including:
 - End stage, next stage
 - Release/s

Backlog and Technical Readiness

During the blueprint phase, we have made some key decisions about the scope and approach for the project. During an initial phase of backlog and technical readiness, we'll run a series of workshops and 1-2-1 sessions to work into the next level of detail on the following;

- Backlog prioritisation and refinement
 - A working session for the development team and product owner to review the backlog of user stories in detail, prioritise and flesh out any technical spikes/ risks to be prioritised
- Technical solution architecture
- Test strategy
- Procurement and licencing of products

Development sprints

We're proposing the CMS and front-end components be developed in tandem through a shared backlog and delivery team. Together we'd work through two-week iterations called 'Sprints' that deliver an evolving working product at the end of each cycle.

The activities during this phase would comprise:



- A backlog (requirements) management meeting to prioritise features to take into development and agree acceptance criteria (functional specification)
- A planning session for each sprint
- A demo for each sprint
- Iterative development and deployment
- Testing, including functional and visual, to an agreed browser/device list
- Deployment to a pre-live environment during initial build phase
- Deployments to the live environment, as agreed with the product owner

Pre-migration UAT

At the end of each sprint, we will provide access to the developed and tested features on a staging environment for the Shelter team to review, test and feedback. A proportion of time would be attributed to each sprint to allow for tweaks to the features following testing and feedback.

A short pre-migration UAT phase is then proposed to ensure all products and integrations work seamlessly.

A full, end to end UAT phase and release would then be coordinated. This will be procured separately.

Handover and training

Editorial training

We will provide CMS editorial guidance as part of our regular sprint reviews. CMS editorial guidelines would also be built into the CMS (built into acceptance criteria). We advise a 'train the trainer' approach. With this approach, Manifesto would train a super user at Shelter, who would then train a wider editorial team.

Developer training

Manifesto will provide guidance to the development team at Shelter on the implementation including the technical architecture, approach to coding standards and any custom features.

It's assumed that any specialist product knowledge or training required would be arranged by Shelter.

The developer training approach is then subject to the chosen development team collaboration model.

Hands off consultancy

A lead developer would be involved in the review of the architectural recommendations. This would be a facilitated meeting to feedback on iterations and confirm the final solution.

A 1-2-1 session with the Manifesto development team would be held following each sprint review meeting.

A final wrap up would be carried out at the end of UAT.

Integrated development resource

A lead developer would be involved in the review of the architectural recommendations. This would be a facilitated meeting to feedback on iterations and confirm the final solution.

A 1-2-1 session with the Manifesto development team would be held following each sprint review meeting where the Shelter development team have not yet started working on the code base.

It's assumed the Shelter development team will join at sprint 4. At this stage, a more detailed, practical onboarding will be facilitated by a lead developer at Manifesto. Any further training would assume to be delivered as part of the Scrum team process.

Acceptance and warranty

Shelter will be requested to formally accept the work completed at the following stages:

- Shelter will be provided with access to the product on a staging server. Following every sprint review meeting documented user stories and acceptance criteria that have been deemed to meet the definition of done will be shared with a request that Shelter confirm each requirement meets the criteria and is deemed 'accepted'
- At the end of UAT, Shelter will be requested to confirm that the product is 'accepted' and therefore should be confirmed to release to production
- Confirmation of a release production is considered the final stage of acceptance

Based on the assumption (outlined in the roles and responsibilities section of this document) that Manifesto fulfil a lead role in managing peer review and code quality the Warranty clauses as outlined in the Agile Framework agreement (clause 12) between both parties would stand.

At such a time that the Shelter development team deploy code to environments, without peer review from Manifesto, all Warranties would become invalidated.

Timeframes

Manifesto are not aware of any business-critical launch dates, Shelter have however requested that limited to no activity take place during December and that the majority of UAT and end to end testing be completed following the migration project being delivered internally.

We have therefore provided a delivery option that matches the size and complexity of the work but are also based on our knowledge of your goals, business and audience needs.

The approach should be considered a first step towards defining a roadmap, subject to prioritisation and more detailed planning with Shelter.

Based on the estimates we have developed an initial milestone plan as below with an end to end delivery plan of 23 weeks. This would be further refined with you throughout the project.

- Kick-off: 1 week
- Requirements deep dive and prioritisation: 1 week
- Sprint 0: 1 week
- Sprints: 14 (Seven x2 week development sprints)

- **Pre-migration End to End review: 1 week**
- UAT: 4 weeks (post migration. Excluded from this project)
- Code Freeze: 1 week (post migration. Excluded from this project)
- Release: 1 week (post migration. Excluded from this project)

Product Costs

The table below provides an overview of annual licencing costs for the recommended toolsets.

Product	Description of service	Cost (monthly)
Contentful CMS	<ul style="list-style-type: none"> • 4 roles • 48 Content Types • 50,000 records • 10 free users 	£670 (£8,049/ year*)
Netlify Continuous integration, CDN, data capture		£330
Bitbucket	Assume existing tools/licences can be used.	-
Jira	Assumes 50 users - \$7/ user/ month (prices reduce at 101 users plus).	£267/ month*
	Total monthly cost (approx.)	£1,267
	Total annual cost (approx.)	£15,204

* Price converted from USD (\$)

Implementation costs

The costs below reflect an estimate to deliver:

- The scope as outlined in this document
- Manifesto taking responsibility for technical leadership and code quality
- An estimate for what it would take for Manifesto to deliver the full scope of the project, as well as engaging and onboarding the Shelter development team (with two costs being provided depending on the model selected)
- The assumption of a follow up UAT phase being led by Manifesto (contracted separately)

In order to provide Shelter with an estimate of reasonable confidence to complete the desired scope of work, Manifesto have chosen to estimate and cost of the project as if their team were delivering the full scope.

As such, we are proposing the project be contracted as **time and materials**. This means that should the engagement of the Shelter team introduce efficiencies in the delivery, you will only be charged for the time used.

Summary – Hands off consultancy model

SUMMARY

Kick off	3	£2,700.00
Solution and dev prep	14	£11,460.00
Delivery	157	£125,580.00
Onboarding and training	12.5	£10,250.00
Test	24	£17,280.00
Project and technical management	42.5	£35,840.00
	TOTAL	£203,110.00

Summary – Integrated development model

The costs below reflect a higher figure due to the additional peer review and code quality work that would be required from a technical lead (at Manifesto) to assure the work of the Shelter development team (as well as the Manifesto developers) to meet the requests to own the overall code and product quality.

An estimate of + or - 15-20% variance of the delivery time below could be used as an assumption for considering the impact of the Shelter development team joining.

SUMMARY

Kick off	3	£2,700.00
Solution and dev prep	14	£11,460.00
Delivery	157	£125,580.00
Onboarding and training	19	£16,300.00
Test	24	£17,280.00
Project and technical management	42.5	£35,840.00
	TOTAL	£209,160.00

Breakdown – Hands off consultancy model

See spreadsheet breakdown provided for details of epics mapped to line items.

DESCRIPTION	DAYS	ROLE	RATE	DISC	TOTAL
Kick off					
Internal kick off meeting	1	Workshop	£1,000.00	£900.00	£900.00
Client kick off inc vision validation and planning	2	Workshop	£1,000.00	£900.00	£1,800.00
				TOTAL	£2,700.00
Solution and dev prep					
Backlog immersion workshop	2	Workshop	£900.00	£820.00	£1,640.00
Licencing and product set up	1	PM	£1,000.00	£900.00	£900.00
Test strategy	1	Test Manager	£800.00	£720.00	£720.00
Business analysis/UX	10	BA/UX	£900.00	£820.00	£8,200.00
				TOTAL	£11,460.00

Delivery

React Methodolgy - Initial pattern library and tooling set up/discussion and overall approach. Improvements to preview and method for getting content from API	8	Tech Lead	£1,000.00	£900.00	£7,200.00
Contentful product and environment set up, hosting setup including deployment/testing methodology etc. for workflow, site and content, IA management, IA driven related content. URL reference management, geo-location	12	Lead Developer	£900.00	£820.00	£9,840.00
Pattern Library creation of building blocks - headings, forms, buttons, colours etc	4	FED	£800.00	£720.00	£2,880.00
Using building blocks for modules	12	FED	£800.00	£720.00	£8,640.00
Building modules in to pages/templates	12	FED	£800.00	£720.00	£8,640.00
Work to make compatible across browsers and get responsive working well	7	FED	£800.00	£720.00	£5,040.00
Tracking	3	FED	£800.00	£720.00	£2,160.00
Finnese for speed, SEO, accessibility etc and bug fix	8	FED	£800.00	£720.00	£5,760.00
Definition of how content modules are managed (around 20)	4	Lead developer	£1,000.00	£900.00	£3,600.00
Modelling of core content types	15	Senior Developer	£900.00	£820.00	£12,300.00
Media/asset management	3	Senior Developer	£900.00	£820.00	£2,460.00
Creation of workflows/review/scheduling capability	8	Senior Developer	£900.00	£820.00	£6,560.00
Taxonomy and localisation	6	Senior Developer	£900.00	£820.00	£4,920.00
Build out of display capability - without front end components	6	Senior Developer	£900.00	£820.00	£4,920.00

User and permission setup	3	Senior Developer	£900.00	£820.00	£2,460.00
Form builder	8	Senior Developer	£900.00	£820.00	£6,560.00
Integration framework - and initial integration work	15	Senior Developer	£900.00	£820.00	£12,300.00
Set up of Gatsby and React framework	5	Senior Developer	£900.00	£820.00	£4,100.00
Automated tests	5	Senior Developer	£900.00	£820.00	£4,100.00
Play back and planning meetings	6	Team	£1,000.00	£900.00	£5,400.00
Contingency (1 day per sprint)	7	Developer	£900.00	£820.00	£5,740.00
				TOTAL	£125,580.00

Onboarding and training

Content author training	4	Product lead	£900.00	£820.00	£3,280.00
Developer briefing and consultancy	6.5	Senior Developer	£900.00	£820.00	£5,330.00
Developer handover	2	Senior Developer	£900.00	£820.00	£1,640.00
				TOTAL	£10,250.00

Test

Testing/QA	24	Tester	£800.00	£720.00	£17,280.00
				TOTAL	£17,280.00

Project and management

Director oversight	5.5	Director	£1,250.00	£1,000.00	£5,500.00
Project manager / Account Director	37	Project Manager	£900.00	£820.00	£30,340.00

TOTAL TOTAL £35,840.00

Breakdown – Integrated team model

See spreadsheet breakdown provided for details of epics mapped to line items.

DESCRIPTION	DAYS	ROLE	RATE	DISC	TOTAL
Kick off					
Internal kick off meeting	1	Workshop	£1,000.00	£900.00	£900.00
Client kick off inc vision validation and planning	2	Workshop	£1,000.00	£900.00	£1,800.00
				TOTAL	£2,700.00
Solution and dev prep					
Backlog immersion workshop	2	Workshop	£900.00	£820.00	£1,640.00
Licencing and product set up	1	PM	£1,000.00	£900.00	£900.00
Test strategy	1	Test Manager	£800.00	£720.00	£720.00
Business analysis/UX	10	BA/UX	£900.00	£820.00	£8,200.00
				TOTAL	£11,460.00
Delivery					
React Methodolgy - Initial pattern library and tooling set up/discussion and overall approach. Improvements to preview and method for getting content from API	8	Tech Lead	£1,000.00	£900.00	£7,200.00
Contentful product and environment set up, hosting setup including deployment/testing methodology etc. for workflow, site and content, IA management, IA driven related content. URL reference management, geo-location	12	Senior Developer	£900.00	£820.00	£9,840.00
Pattern Library creation of building blocks - headings, forms, buttons, colours etc	4	FED	£800.00	£720.00	£2,880.00
Using building blocks for modules	12	FED	£800.00	£720.00	£8,640.00
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Work to make compatible across browsers and get responsive working well	7	FED	£800.00	£720.00	£5,040.00
Tracking	3	FED	£800.00	£720.00	£2,160.00
Finnese for speed, SEO, accessibility etc and bug fix	8	FED	£800.00	£720.00	£5,760.00
Definition of how content modules are managed (around 20)	4	Lead developer	£1,000.00	£900.00	£3,600.00
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Automated tests	5	Senior Developer	£900.00	£820.00	£4,100.00
Play back and planning meetings	6	Team	£1,000.00	£900.00	£5,400.00
Contingency (1 day per sprint)	7	Developer	£900.00	£820.00	£5,740.00

TOTAL £125,580.00

Onboarding and training

Content author training	4	Product lead	£900.00	£820.00	£3,280.00
Developer training and onboarding	5	Senior Developer	£900.00	£820.00	£4,100.00
Peer review and coding quality validation (Shelter)	9	Tech lead	£1,000.00	£900.00	£8,100.00
Developer handover	1	Senior Developer	£900.00	£820.00	£820.00
				TOTAL	£16,300.00

Test

Testing/QA	24	Tester	£800.00	£720.00	£17,280.00
				TOTAL	£17,280.00

Project and management

Director oversight	5.5	Director	£1,250.00	£1,000.00	£5,500.00
Project manager / Account Director	37	Project Manager	£900.00	£820.00	£30,340.00
			TOTAL	TOTAL	£35,840.00

LET'S CHANGE THINGS TOGETHER

We look forward to hearing from you.

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