This is a Book About Product Ownership

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These are the Chapters

This is A Book About Being a Product Owner

We've worked with many great Product Owners over the years at Daggerhart Lab. Prior to working here, some of us have been Product Owners, as well. Throughout this time, we've amassed a great deal of information, skills, and experience. As a technology agency that supports and participates in the open source community, sharing is one of our main tenets. That's how we ended up putting together this eBook about Product Ownership!

From the basics of Product Ownership to digging into the who, how, and when of both hiring and firing a Dev Agency we did our best to cover the gamut.

Dig in now or download for later, either way, we hope this helps you get all that you need from the next dev agency you hire!

First things first, let's go over what an Agile product development environment is, starting with the role of an Agile Product Owner. Our aim is to help those moving their careers in a Product Owner direction, learning about Agile work environments, and for client Product Owners stepping into uncharted territory. Our intention is for you to better understand what to expect when working with an Agile development agency on a website or web application project.

One of our core values is to truly be in partnership with our clients. Providing useful information and education is paramount to creating that cohesive relationship. For us, we feel anyone running an Agile work environment should really understand the importance of true partnership in creating the best outcome…that's uhhh, kind of the whole Agile thing!

We recommend you read on to chapter 2: *An Agency's Expectations Of a Product Owner*. It reviews the general functions for Product Ownership as well as terms such as "sprints," "project roadmaps," and "product backlogs." Knowing these definitions and their functions within product development will definitely come in handy while learning about Agile.

What does Agile mean?

Agile is a Product Owner and Project Management methodology originally made and adapted by a group of 17 developers in 2000. It was created to make software development more efficient and communication stronger across all stakeholders. Instead of delivering the entire end product at once, you deliver smaller pieces of the project in gradual, well-organized steps. This goes from the beginning through the end cycles of development, implementation, and delivery. This enables you to prioritize the work into separate projects, providing the opportunity for peer and client review throughout development. By delivering projects in steps, often called "stories," you are able to constantly improve the product throughout development. It also gives all stakeholders concrete and active goals that are easy to track and adapt.

There are numerous sub-methodologies, or frameworks, of Agile, and Daggerhart Labs practices what is called Scrum. While Scrum is an Agile framework, it is also a real live person. The individual who leads the developers and drives the sprints that complete stories is also called the Scrum. The scrum wrangler and Product Owner work side by side to cooperatively balance the needs and work of both the stakeholders and the dev team.

Agile Product Owners

A Product Owner will provide precise roadmaps, and clear communication on all backlog items and subsequent sprints so they may trust the Scrum to work independently while staying on track with the business objectives. We say they go “side-by-side” because their roles function as a way to “push” for the best interest of the client and development teams. For example, a Product Owner might come with client feedback about a requested feature. If a Scrum feels the feature hurts other aspects of the product or that it is outside of the initial project scope, they may “push back.” Their “pushbacks” aren’t about ego, these are for the purpose of creating what is absolutely best for the client. Their friction feeds the energy that builds a strong client-to-agency relationship. It also aids the promise of delivering the strongest website or web application in both functionality and delivery.

More About Scrum

As we mentioned, this is the framework of Agile that our company uses. We have found this to be the strongest way to support collaborative communication across all stakeholders. In short, Scrum leads development teams through the many often-changing updates and project needs. When you work in an Agile Scrum environment, consistent changes during a project life cycle are expected more well-received. Agile Scrum allows for more accurate estimates which helps meet the project goals for functionality, budget, and timeline. All of this efficiency and clear communication on goals and expectations work in conjunction to deliver high-caliber products.

Regardless of title (Scrum, Product Owner, Project Manager) when someone is moving into any of these roles in an Agile environment, their responsibilities ride the same line: to work for what they think is the highest priority, but to also be open to approaching the blockers that prevent them from getting there. The nature of Agile is to have agility in your way of thinking and in how you work collaboratively to produce the best results.

Benefits of the Agile Workflow

We believe the benefits of an Agile Scrum workflow are vast, to say the least. The risk reduction that comes from delivering gradual, consistent, and well-planned out stories is monumental. When the precedence is set to provide ultimate client satisfaction, receiving feedback from them while working toward a common end goal only furthers that ability. For example, if you’re building something that has 100 pieces and the client doesn’t like 98 of them, it sure would be a bummer to have to retrofit all 98 of those pieces at once. This is especially true because it would likely spill over into the other bits.

This creates a lot of extra, and often unnecessarily difficult, work. With Agile, we can get all "100 pieces" correct as we go, feeding the strength of the end product immensely. In effect, all internal agency teams benefit greatly in an Agile Scrum environment. All are empowered to make requests for changes and updates to the backlog based on client and user feedback. All voices have room in Agile Scrum.

From a client perspective, they have attributed working with agencies that utilize an Agile Scrum environment to feeling exponentially more well-received. When they have feedback and requests, there is dedicated time for this to be discussed.

A Look at The Daggerhart Lab Agile-Agile Workflow

Agile is always Agile at its core. However, it can and does change to fit an agency's workflow with different pieces being used to match specific priorities. The common terms to describe the phases of an Agile workflow are, in order; conception, inception, iteration, release, and retirement. While most of this is fairly self-explanatory by the nature of each phase's name, we will explain a bit further.

Here's a general breakdown of the typical Agile development flow:

- **Conception:** Creating the vision, the plan, the backlog, and planning your first sprints.
- **Inception:** The plans and goals are all constructed as they pertain to the business and product objectives. Now you're building out development teams and assigning sprints based on that knowledge.
- **Iteration:** You are now working on items off of your backlog and into the sprints
- **Release:** Sprints are completed and the work is being reviewed and arduously tested before moving into another sprint. Any items to address that come from this phase are added to the backlog. This also includes a Retrospective, a revisitation of the work you've completed. During a "retro" the team will talk about how work can be finished more smoothly next time and what was done well to ensure we continue using the best methods.
  Repeat the first four steps until the product is perfect
- **Retirement:** The product has been fully developed, implemented, and launched.

During a typical Sprint, developers focus on a single set of tasks for the duration. If you are given 10 tasks, those 10 tasks are the only thing you are working on so as to meet the next set of goals. This is where you can see how Daggerhart Labs differs in our approach to Agile. We find that the strongest end product comes from a symbiotic relationship with our clients and across our internal teams.

We are not interested in "churn and burn" client funnels, we want to get into the trenches with our clients. Discussing where their business is hurting, and figuring out how to make that better through technology. Ultimately, we want to help our clients make more money. To us, that means removing some rigidity within the Agile scope so we are able to adapt with greater dexterity when a client has a need.

Agile Sprints

During our sprints, we use a more open communication style that encourages our Project Managers and Product Owners to collaborate. This helps when adding less pressing tasks into a sprint with the anticipation that another more important one may arise. For example, if a sprint has 10 tasks, there will be 7 that are very important to finish. The other 3 that would be nice to complete but could be pushed, should the client have more pressing requests. While Agile supports consistent communication and feedback throughout product development, we felt like Agile could be a bit more Agile.

What it boils down to is the mission of our company. "We hope to build a better, sustainable, and more equitable web development company. We achieve transparency through fairness, treat everyone with respect, and approach our work with thoughtful curiosity." To truly accomplish this, we needed to create more room for collaborative space between the client and ourselves. As project priorities can change and grow so much in its life cycle, there needs to be room for this.

Some agencies approach their pitch and plan a lot more like a demand than an offering of partnership. "This is what we are going to do." We will let you know what we are capable of doing, by understanding your technical priorities. We can certainly have an idea of what you need based on our professional experience, but upon listening to your true needs and values, that could completely change. We'd rather listen first and build from there. This is why we chose a more flexible Agile flow as it supports more collaboration, and is both more enjoyable and more efficient.

See If Agile Is For You

If you have a project started that needs help or if you've got a web application or website you need to develop, we encourage you to work with an Agile agency to get the best return on your investment. There is incredible value in partnering with a strong and collaborative Agile agency.

How To Create Your Own Added Value

It's important to understand your role as a Product Owner whether you've worked in tech for 20 years or are the Director of IT at a University. When you think of the role of a "Product Owner," it is often associated with those who work internally for technology, engineering, and software agencies. However, when you hire an agency to develop a product, you become a Product Owner as well - so this chapter is all about helping you be a great Product Owner. For those who work as Product Owners, are working toward a career as a PO, or are just curious: read on!

In your role, you may be put in charge of technology projects you were formerly unfamiliar with. For example, a University Provost leading a software project to support a department's individual student research efforts for years to come. Maybe they've been exclusively working inside academia for over 25 years and haven't yet taken on a project of this nature. No one blames them for not knowing how to go about software product development. So, we'd love to help others who find themselves in similar positions or anyone breaking into Product Ownership. Doing this job well helps everyone involved in development by providing cohesive communication, shared goals, and a clear vision.

Below are a few definitions to help those learning about the role. These terms will also help you understand the different aspects and expectations of the Product Owner. We'll cover everything through a product's development, implementation, and overall life cycle.

Product Owner Definitions:

1.) What are project roadmaps?

Project roadmaps are comprehensive and multifaceted documents imparting the strategies that outline all project development steps. This includes all plans, goals, product outcomes, and the overall vision. These are often visual documents that allow for easily identifiable objectives and metrics.

2.) What is a product backlog?

The product backlog is the definitive point of supply for all aspects of product development and growth. This includes notes and agendas for structural changes, bug fixes, adding new features, and really any sub-project of development. Your backlog functions as a master checklist for every aspect of product development through any and all cycles. A well-managed product backlog keeps important and continuous details from slipping through the cracks.

3.) What are sprints?

The function of a sprint is very in line with the athletic term of running a short focused distance very quickly. Within product development, a sprint is a well-planned and focused time period designed to achieve a specific goal. During a sprint, the target is the only thing being aimed at. The work will be laid out in detail, and changes to that plan cannot occur during the sprint. To swing it back to running terms, it’s comparable to suddenly throwing unexpected hurdles onto the track during a race. You would definitely throw them off. Once a sprint is completed, updates and changes to the work can be added to the backlog for future sprints.

4.) What is a Product Owner?

A Product Owner is the creator, holder, and keeper of the product development vision and delivery. They have many roles contained in their position as they are the “point person” for all aspects of product development. This means they are the liaison between all teams; developers, marketing, customers, management - literally all stakeholders. They must be well-versed in all facets of the project with a prominent understanding of each team’s deeper level of skill and importance. This way, a Product Owner can most effectively build teams and prioritize all phases and sprints of product development. This involves everything from pre-production, production, and growth, through to the end of the cycle. They set clear goals for all teams to understand, lay out the product road maps, and ensure all of that is aligned with the business’s objectives.

What To Expect As A Product Owner

Get Familiar With Product Roadmaps

So, what should you expect in your role as a Product Owner? A comparative way to think about it is that a Product Owner is similar to being a symphony director. (We promise this will make sense.) With their conductor and musicians, they're bringing the composer's vision to life. They communicate with all of the musicians about when they need to have songs performance-ready, set rehearsal schedules, and ensure marketing departments know every aspect of forthcoming performances. Equally, they surely care about ticket sales and how the audience receives the performance.

In many ways, you can compare the role of a Product Owner to nearly any creative industry's professional director position. There is always someone who owns the whole of the creation and subsequently directs and communicates for and between all teams and stakeholders. Understanding this concept at its core is a great foundation to grasping the wide array of expectations. It will also provide guidance for the broad intellectual and emotional skill sets that are necessary.

Product Owners and Communication

As is true for most things in life, clear communication is particularly key to being a successful Product Owner. Creating roadmaps with precise imagery and language that all agency and client teams can follow is extremely important. This way, stakeholders at all levels have tangible goals they can track. These straightforward and well-designed visual roadmaps help manage expectations during the whole of the product development process. They keep all team members prepared for their next steps, which keeps the project moving smoothly all around.

Having these clear goals laid out facilitates the people that create material to do their best work, from the developers to the marketing team. That way, they can appropriately assign the best person to each role during the process.

Ready for another analogy? This time we'll use a sports comparison! A football team has a head coach, then different positions have their own coaches. The head coach calls a play,but the offensive coach might make the choice of who runs that play. A Product Owner will lay out a goal and expectation. The development team lead might select a specific UX designer who has more experience with that particular kind of product to meet the goal.

Product Owners are Team Leaders

This is all a detailed way of explaining that the expectation of a Product Owner is to be a solid team builder. They are to be a goal driver, schedule creator, and expectation setters for all. All of that is combined to deliver the product as promised - when promised.

When hiring an agency to develop a website or a web application, you'll often be provided with a roadmap from their Project Manager. Understanding what kind of roadmaps the agency utilizes and how to read them is another opportunity to affirm a transparent and cohesive partnership. Gantt Charts and Burn-down charts can provide beautiful visuals to follow and some larger-scale clients do require them. However, Daggerhart Labs chooses a slightly different route.

Our experienced project management team found over their years in the industry that maintaining visual graphs and charts would eat away at a project's budget. Prioritizing what is best for our client in regards to producing the strongest product means reserving the budget for what is most important - developing that product. As a result, we rely on the backlog served by JIRA, which is the Agile Project Management tool we use. It visually represents the overall workflow and goals, as well as making it so you can track the work expected in a sprint.

How Is Being A Better Product Owner Useful To Your Business?

Money. A strong Product Owner helps keep a project from going over budget as well as holding true to the vision and subsequently opening the clients' earning funnel.

You accomplish this with:

- A well-managed product backlog
- Developers prepared for their sprints
- Clients knowing when they're expected to review
- The marketing department completes test market data on time
- Implementation goals being met
- Launching on schedule
- Product expansion is proceeding as desired and customers responding as hoped to the product

As a client taking on a web development project, it's important to find out what an agency expects of you. This includes everything from billing to communication structure, and the tools that they use to track progress. You'll need to familiarize yourself with their in-house project management software and be comfortable doing video and screen share calls. Be sure to align with their communication needs so all goals can remain on track. Once again, doing this effectively is another step in preventing budget overages. This also aids in sticking to the expected launch date and producing the desired product results. As the client Product Owner, like the University Provost example at the top of this chapter, you are an essential member of the overall team and the success of the product. We know that understanding this role more closely will lead to greater gains on all sides of the project.

Enjoy Being A Product Owner!

With this broad understanding of the expectations and role of a Product Owner, we know you can take on any project and build a stronger and more successful relationship with your agency. It is an extremely important duty in product development. Understanding the 'how' and 'why' will help you end up with the exact product you and your clients need.

What Tech Skills Should a Product Owner Have?

Understanding the progress of the website or web application development from a technical standpoint can make quite a difference. This is especially true if you are the Product Owner. Throughout our careers, we've all worked with clients who have felt left in the dark by previous dev companies. In most cases, this was due to there being no established way of reviewing the work being done. As a result, these clients could not truly understand the progress made or value of the development.

In our opinion, transparency offers a far stronger development process and successful delivery. We welcome consistent and organized feedback, which is a large part of why we use the Agile methodology. That said, the development company you're working with also has a responsibility to ensure you're getting the training you need to successfully run and manage your website. While you're preparing for launch, it's imperative to have extensive training on the product before the handoff.

If you're not sure of what to ask your dev company for when it comes to training and preparation throughout the development process and beyond delivery - this chapter is for you!

Backend Website Training For Product Owners

There are nuances specific to developing on any platform, like Drupal, WordPress, or Shopify, for example. However, there are ways to ensure you're getting the general and specific training you need to successfully own your website or web application.

Start by making sure you're aware of all of the integrations, plug-ins, or modules being used on your website. You and your team should feel confident with managing them and checking if/when they need to be updated.

As a Product Owner, ask "What's special about this CMS and what should I know about using it?" You should be provided thorough training on all aspects of the CMS you will be utilizing. This should also entail intricate details of what aspects *you should not touch* and are only to be used by developers. In some cases, a development team might retain solo access to certain things to protect the client from making any serious and costly mistakes with their website. In other cases, this isn't possible due to the nature of the client's needs, so it's best to be aware of what not to touch in these instances.

Technical Product Owner Training

Below, we'll dig into more specifics about what kind of training Daggerhart Lab believes every Product Owner will benefit from.

SEO Management

Whether you'll be handling your own SEO or hiring a specialist, ensuring you know how to access and understand some basic aspects of your SEO is imperative. SEO has a very broad spectrum of utility, so it's important to understand that these are general SEO basics. During the discovery and requirements gathering phase of development, any deeper SEO requirements will be discussed and a specific plan will be put in place for the platform being used.

We believe that having access to and functioning knowledge of the following are a great place to start.

- **Access to:** Google Analytics
- **Understanding of:** How to check your bounce rate once the site has launched, your site load speed, and the performance and health of the site.
- **Access to:** Metadata, Alt Text, & Accessibility
- **Understanding of**: How to add Tile Tags and Meta Descriptions when creating a new page, how to access and create effective alt image tags and alt link text, and how to use header tags correctly.

User Management

Ensuring you know how to add, remove and manage users is very valuable. Whether you're onboarding a staff member or an external team, they will need access to the website to complete their work. Equally, it is inevitable that some staff will leave, so it's important you know how to remove their website access; you may also need to move on to a new development, SEO, or marketing company, which requires removing access affiliated with vendors who are no longer relevant.

For a quick checklist of user management tasks that would be beneficial to have, we've created a bullet list below.

- Adding and removing admins
- Assigning roles and permissions for internal users
- Creating user roles for external agencies (SEO/Marketing)

Content Management

There are many distinctions between platforms on how to create and manage the content on your website. That said, no aspect of this should be a mystery.

We believe a Product Owner should be able to do the following:

- Create, edit, delete, and publish content as necessary.
- For WordPress, understand how to add and properly use taxonomy and terms.
- For Drupal, have a working knowledge of the content setup and establish a content workflow from creation to publishing.

Product Evolution

It goes without saying that as a Product Owner, you're thinking of ways your site or app can evolve. This means thinking mindfully about the direction your website is growing. So, as a Product Owner, are you looking into new features and integrations that will improve productivity and/or conversions? Before implementing anything new, ask yourself - does it fit the future vision? Understanding your technology and your business will help answer this question.

Another essential task of a Product Owner is ensuring they understand the technology of their developed technology. A major part of this is creating workflows and processes for updating and maintaining the website or web application. Get your hands dirty with your team to ensure the flow and processes work for the technology and technologists. Creating these with well-defined documentation will be crucial to your product's evolution.

Tech-Savvy Product Owner or Partner to Product Owner

If you don't consider yourself a "tech-savvy" or Technical Product Owner, do you have someone on your team who is? It's very common to have a Product Owner who has not been involved with technical projects previously. If there's anyone from your team that has more technical experience, having them partner with you can be tremendously helpful.

If you're unclear about what to ask in order to find someone internally with a bit more tech know-how than yourself, below are a few things to consider.

Do they have experience with some or any of the following?

- Logging into testing environments and following technical testing instructions.
- For WordPress: Experience with managing and updating plug-ins as necessary.
- For Shopify: Understanding of how their payment gateway is plugged in and being able to be able to download and process orders.
- For Drupal: Understanding of user and content management.

Having someone with any working knowledge of the items listed above will help you accomplish the more intricate technical work of a Product Owner with much greater ease.

Complex Training For Intricate Integrations

If it was made clear at the onset of a project that there would be certain accessibility you needed to specific features - be sure to have that access and thorough training. In short, don't get invoiced for work you planned to do with your own internal resources.

This is true for any level of website or web application development, though it is particularly true of large, custom, and intricate projects. So, if there is a feature of the site that doesn't fall under the above categories, such as something that was made custom like a content approval flow, you should have a complete utility of this feature. This means documentation on how to use those systems and features will be crucial to your success. In other words, be sure you're not left in the dark at any point.

Enjoy Successful and Technically Sound Product Ownership

With the right training and documentation, seemingly any Product Owner can become a more technical one. The onus of this lies on both the shoulders of the development company working on the website or web application, as well as the Product Owner.

Utilizing the above guidance will, at the very least, prepare less technical Product Owners with some basic knowledge and tools for getting the best development outcome.

How Product Owners Can Save Money

In many cases, agencies have built-in billable hours for massive requirements gathering costing upwards of $42,000 in discovery time. This can definitely make sense for certain types of development projects and/or for the way different agencies approach Agile. For Daggerhart Lab, we often do things a bit differently in an effort to cut project costs. We enjoy seeking new avenues of efficiency and establishing strong, cohesive client connections.

We aim to prepare Product Owners to approach an agency with the ability to do some solid requirements gathering. Doing so ahead of time has the potential to save you tens of thousands of dollars. In this chapter, our focus is to provide actionable steps to complete the lion's share of discovery and requirements gathering in a way that an Agile agency, such as ours, can easily work with and adapt. The goal is to save time, save money, and effectively develop a stronger product.

Below we'll break down the steps for requirements gathering and subsequent "user stories." If you find there are terms unfamiliar to you, we can help with that! Sharing information and concepts is kind of our jam. These former chapters go over many of these terms and concepts regarding Product Owners and Agile development in detail. We suggest starting there or revisiting "An Agency's Expectations Of a Product Owner" and "Exploring A More Agile - Agile" if you're not sure what something means.

You might already know a bit about what a user story is, so let's dive deeper into what creates a truly effective user story.

What is Requirements Gathering?

This crucial phase of development involves discovering every aspect of the user's needs for the product. This involves keeping all stakeholders and the mission of the product top of mind. To understand every aspect of necessary functionality that the product may require, you create what are called "user stories."

What is a User Story in Agile Development?

When we are writing user stories (often stories, for short) we work to ideate every single person who would touch the product - everyone from heavy users to the lightest. We also explore all facets of what they might try to do with the product, including how any part of that may affect other aspects of performance. With this, we're able to evaluate much of the anticipated functionality while building out project frameworks, teams, and the backlog.

For this chapter, we will use an example project of developing a University marketing site. The marketing site for this made-up University example is designed to encourage new students to enroll, and as a way to promote and encourage the current students (plus alumni)to participate in more University activities.

Detailed User Stories Will Bolster Product Development

Some of the first stories we'd build would be based on things like who the current student body is. We'd evaluate where they come from as well as their income, class, race, gender, and age range. This might include whether they're straight out of high school or later in life adult students/post-military, or whether there are any trends regarding where current college recruitment efforts are strongest or weakest. This would involve activities students and alumni are participating in (or not) and what marketing is currently working or failing. We might also look at when enrollment has been up and down and if there are particular majors that have higher enrollment than others.

I think the point is clear, this research needs to be thorough.

Every one of these answers creates a story that directs development. Without stories, one of the biggest issues product development faces is spending time working on a difficult problem that then causes other complications like a domino effect… but not the cool kind. With cohesive stories, issues are broken down in a way that allows the developers to come up with optimized solutions and informed workflows.

Improve Requirements Gathering

Improve Client to Agency Relationships

At Daggerhart Lab, we use all phases of development to build and affirm our client relationships. We've found that doing so is especially vital in foundational phases such as requirements gathering. We work to ensure we're building a mutual understanding of the product as a whole across all stakeholders while we write stories, create project frameworks, and build out the backlog. Product Owners should share and build their stories with their stakeholders to be sure every available voice is heard before establishing an agency relationship. In doing so, they empower us as an agency to build off of an incredible foundation with them.

It's also a way to have inherent and inclusive team-building right out of the gate. This way, you know all the stakeholders on the project are being heard. Bear in mind as a Product Owner, you are building stories to work with an Agile agency. There should be an understanding that the stories may need to grow and/or be reshaped as we begin to understand all the necessary functionalities. You can create amazing stories with your stakeholders but as a Product Owner, you will likely be gathering or adapting requirements throughout the lifespan of development. Might as well get a head start, here's how.

Research is Paramount

Don't be afraid of doing a ton of research (we certainly aren't).; not just "a lot," we really do mean a ton of research. But that research can take many different forms. You can watch TedTalks and YouTube videos from highly esteemed tech conferences or simply Google your heart out. It can involve reading heaps of books, blogs, and industry magazines, talking with friends, colleagues, and clients as well as diving into some abstract and hands-on concepting. Think of it this way - you wouldn't write an instructional manual on how to build a tent if you'd never built a tent or even watched someone do so before, right?

If that's true, then you shouldn't try to write the user story without doing your due diligence, either. Think back to the "University Marketing Site" example we used earlier. If your job is to build something like the University example, the first thing we'd suggest doing is research. You may be an authority on the product you are aiming to develop, but it's best to put that aside. You can glean a tremendous amount when you approach your research as if this is entirely new to you, just as it may be for others.

Research and Discovery Is Crucial For Development

Sticking with the University website example, go play with as many university and collegiate websites as possible. These should range from the best websites to the worst and you should take extensive notes on what works for you (and what doesn't). Explore what doesn't work well for you, what seems to be missing, and what feels excessive. Examine how you found their University website to see how their marketing is working. Appraise if there is a common user experience or design that seems to have the strongest engagement.

Keep asking questions:

- How can you tell their student and alumni base is engaged?
- What would you keep or change about functionality?
- What technology and content are performing best?
- Between smaller schools and larger Universities, are there trends in the web platform used?
    - For example, we've found that small schools use WordPress and larger Universities use Drupal.
- Do they have active blogs, newsletters, activity calendars, and ways to sign up for activities?
- Can you easily share information from their website to email and social media?
- What seems to be trending to be the future for University websites?
- What are the demo and psychographics of who and how people have been engaging with University websites throughout their existence?
- How has the product evolved since the mid 90's when University websites were rare compared to now?

Use Demographic Research As a Guide

You may have a specific demographic you're aiming for, but you can still look into another demographic's information and behavior. Research sociological, psychological, and physical behaviors as they relate to the product you are developing. No stone should go unturned - it's the only way to legitimately write effective user stories that lead to solid development flow and an incredible product. The more research you do, the more effective (and honest) your user stories can and will be. You will save a tremendous amount of time and money with the ability to best evaluate the needs and functionality of the product. This process allows you to put yourself in your user's mindset while creating requirements and stories for the development process.

Be Flexible and Tend To Your Stories Often

The nature of an Agile agency is to move through projects with agility (wild, right?), and that always involves being flexible. You may do incredible research and write some amazing stories that present groundbreaking functionality needs. But that doesn't always mean that the exact story or desired functionality is truly what is best for the product, the developers, or the end-users. You will need to be flexible about that story until all stakeholders are in agreement. As the Product Owner, you will also find points where you're the one requesting story adjustments based on your own emerging discoveries. We recommend revisiting your stories as they develop. This empowers approaching an Agile agency with the strongest requirements gathering completed as possible.

How Does One Story Affect Another in Agile Development?

So you worked with every level of stakeholder along the way as you wrote out user stories, but did you go back and see what could have affected one story from another? For example, say you wrote a user story that displays the end-to-end behavior of the ideal alumni. Their behavior goes from a passive site user to a fully engaged promoter. They love not only attending alumni events that financially help the school, but they share the events on their social media and successfully encourage other alumni to attend. You wrote out every possible story for how they could go about liking and sharing alumni events from your event calendar. But, maybe you forgot one aspect of functionality in this story and find out a feature isn't ADA accessible.

Imagine this coming up amid a different phase of user development as a bump in the road. This could have been avoided had it been fleshed out during requirements gathering. It's a lot easier and more cost-effective to edit a story than it is to retrofit the development (especially if the product has already completed many sprints). This is another reminder that while your stories should be well-founded and researched, they should not be written in stone so much as a pencil with plenty of erasers and sharpeners handy.

Create End-to-End User Stories

We started touching more on a specific user story above, which brings us to the important detail of writing end-to-end exhaustive and testable user stories. I mentioned above the example of a user who ideally uses and relies on our event calendar and shares them on social media. You have to dig a whole lot deeper into the user and the user experience than that. Find this user history and cornerstones, and write a story with a beginning, arch, and resolution. Go deep, and ask yourself every possible question imaginable about this user and their behavior.

As we said…keep asking questions:

- How did they discover their university's alumni calendar?
- What are their other areas of interest?
- How old are they?
- When did they graduate?
- What was their major?
- What activities did they engage in while they were a student?
- Where do they live?
- Are they using PC or Mac products?
- What activities are they posting the most on their social media?
- What social media platforms are they using?
- What are their likes on social media?
- What kind of followers/audience do they have?
- How many likes do they average?
- Where do they hang out when they aren't online?
- How long do they stay on your website?
- What is their behavior when using the university website from when they enter to when they leave - do they search right away, or do they surf activities first, are there common activities they're most attracted to?

User Stories Bring Development to Life

An effective user story should provide a completely rounded-out vision that guides a concept from being an intangible idea into one that has functionality specked out for development. Yes, a story may need to change a bit as others are cultivated. However, you are now prepared with all the details needed to react appropriately from story to story without losing the foundational importance of the product and the user's demographics, psychographics, and overall details. It is more efficient to adjust stories as development progresses when you can more accurately predict user behavior based on well-researched and fully detailed end-to-end user stories.

Testing, Testing, Testing

Testing is a major part of the Agile development process. When you are writing stories, think of ways the stories can be tested.

- Can "cheap" prototyping be done?
- Does a certain number of sprints need to be completed for there to be enough to test?
- How can testing be done and who will do it?
- What is the first thing that can be tested, and how will that affect further development?

Every action causes a reaction, right? Keep that in mind and prepare yourself with parachutes for any sized leap.

You're On Your Way To Solid Requirements Gathering!

As the Product Owner, if you're able to implement these ideas for strong requirements gathering, we believe you can enter into a solid relationship with any Agile agency. Being backed by a strong foundation that saves time and money on discovery and has thoroughly researched stories helps everyone and bolsters the product immensely. It is a win-win for all stakeholders, which is ultimately the responsibility of the Product Owner.

If you're a Product Owner who resonates with this chapter, we'd love to work with you! We are always excited to learn about opportunities to develop new websites and web applications with driven clients.

Requirements Gathering For Learning Management Systems

Online Instructors, Teachers & Coaches

With the way 2020 - 2022 has gone and keeps going, it's obvious businesses will need to continue functioning more digitally forever. Many professionals are thinking about ways of expanding their teaching, coaching, and other instructing services online. In particular, many are looking for ways to utilize a Learning Management System (LMS). Whether you're working to set up online tutoring services, dance classes, personal coaching, or anything in between, there's a lot that goes into developing a profitable product.

Beyond a brilliant idea, there's plenty to be considered, particularly how you'll operate and monetize your business. Sometimes it helps to work with a business consultant before seeking a development agency like ours. It's a great way to start getting your ducks in a row.

Monetize Your Learning Management System

We'll help you get started with requirements gathering by exploring some main aspects that need to be considered. Sometimes, it's easy to get excited about the concept when you have a great idea and skip over the nitty-gritty. Don't get us wrong, being enthusiastic is strongly encouraged! We're just going to help guide that energy in the right direction.

1.) External Business Research:

Have you looked into other businesses that offer the same or similar services online? This is a great way to understand the competition. It's also an excellent way to really break down what you do and don't want for your business. You'll probably find some sites with cumbersome or flashy design features that won't serve the utility of your product. Others might be doing an incredible job with design and features, but the product offerings fell short or the content wasn't very clear. Your research will also help lock down the demographics you know you're aiming for.

Evaluating the marketing being used by similar businesses, and what is or isn't working for them, can also be fruitful. We're not suggesting stealing anyone's ideas. The goal is to truly have an in-depth understanding of the world you're entering and how you wish to affect it.

2.) Internal Business Research:

It’s advisable to ask yourself every question related to your potential business that you can possibly come up with. For example, how often will you need to update content and how will you get content onto the site? D you intend on having multiple back-end users with varying levels of access? How will you create content, and what kind of content does your target audience prefer (like video or in-depth written content with imagery)? What will your role be in the business? Are you solely an instructor who intends to hire employees to handle your tech, admin, and marketing? Do you need a DIY system that you alone will maintain? What’s your plan for growth so you can ensure your product has the legs to grow? Will your services be purchasable as one-offs, subscriptions, packages, or some combination?

As soon as you begin asking yourself these questions, they will inevitably unfurl more questions and answers as you go. (Which is good.)

3.) Agile User Stories:

In agile development, we use “stories” to help formulate the scenarios for how we expect specific people within target demographics to engage with the product being created. Once you’ve done the plethora of research recommended above, you’ll be all the more prepared to create said stories. These help determine how the product is designed and constructed, so it’s in line with the demographics you’re focused on. This helps ensure your clients have the product they want, need, will actively use, and then promote to others.

How To Launch a Successful Learning Management System

All of the research and work you’ve done to create this product will also be helpful when it comes to a successful product launch. With the stories you’ve created, you have also honed in on the exact people you’re going to be marketing to. Use this to your advantage when working with a performance marketing agency. The number of billable hours you can save by having this in-depth information has great value both monetarily speaking and in regards to efficiency. Once well-established branding is set in place and the product is created, marketing will be the difference between a successful product and a failed one. You can have the best product ever made, but if no one can find it or they don’t feel compelled to check it out, then it won’t matter.

If you have a strong marketing campaign while launching your well-thought-out and developed product, you need to be prepared. It's highly advisable to prepare for your product launch to be successful so you have the bandwidth to support it.

The Quality of Online Learning with an LMS Matters

Part of the impetus for writing this chapter comes from a personal experience for me, the writer. Recently, I was seeing non-stop ads for this online workout program. I get it, we're two years (+) into the pandemic and many still can't go back to gyms. So, I didn't think much of it but admit it got to me and I almost clicked many times.

There seemed to be no target as a number of my friends across different demographics were all getting these ads. Apart from being a human, it didn't seem like there was any particular focused demographic. The people I saw posting about it were from all different ages, backgrounds, locations, and interests. As mentioned, some of my pals bit the bait and attempted to engage with the ad. However, they reported that the website crashed for half of them and others never got through to the purchasing section because the instructions were incredibly convoluted.

It was apparent that this company spent quite a lot of money on its marketing but did not prepare for it to be quite so successful. Unless they can retroactively outfit their website exceptionally fast, I don't think they'll be successful. Pushing mass amounts of potential customers to your site and not being able to handle it is a rough start. Equally, to do so without proper direction to finish the sale was a major loss. The online reviews were immediately brutal, and the Facebook comments were….woof, very Facebooky, ie: incredibly harsh.

In other words, plan and research well, target your marketing appropriately, and prepare yourself to be as successful as you intend to be.

Make Money Instructing, Teaching, or Coaching Online

When you're launching an online business, whether you're doing personal training videos, providing life and business coaching services, or launching a teaching platform, you are now a Product Owner. The best thing you can do is learn everything there is about being a Product Owner to secure your place at the digital table.

Preparing Product Owners for Delivery

When entering into a new professional relationship with an agency, we always encourage Product Owners to learn as much as they can about the ceremonies and processes that happen throughout development. The goal in doing so is to establish communication and an overall understanding that is beneficial to all parties involved. This is particularly important for the sake of the clients and their budgets. A prepared Product Owner helps an Agile agency (like ours!) better serve their needs. Developing a solid product with a smooth delivery takes effort and awareness from all ends. This is exactly what we're writing for.

As a Product Owner, doing research is something you are already intimately familiar with and is a great skill to use when preparing yourself and your stakeholders for product development. We'll break down what we at Daggerhart Lab suggest doing from the first to last step of development. These processes have provided us with great success, fulfilled clients, and products we, and our clients, can be proud of.

Getting Mentally Prepared as a Product Owner

Learn The Agency's Process

To apply skillful and consistent communication that lends to successful product delivery, grasping what the overall process and ceremonies will look like is crucial. We suggest gaining an understanding of the specific Agile development flow employed by the agency you'll be working with. In some cases, you may be able to find this information on the company's website or in a welcome packet they provide. For example, our website features a number of blogs that speak to our specific processes and expectations of a Product Owner. If that information isn't readily available, we definitely recommend having a conversation with the agency Project Manager you'll be working with to get yourself prepared.

As you prep, do some research about general Agile methodology (if you're unfamiliar) so you are able to ask the right questions regarding their specific Agile flow. This way, you can make sure you've got a comprehensive understanding of the "big picture" for guiding your stakeholders through successful product development that meets all of their needs. This also corresponds with creating an equitable partnership with the agency doing the development. Having a unified understanding of what to expect will save your project time and money, as well as drive home the best product development with smooth delivery.

The Product Owner needs to Get Their Stakeholders Ready

Learn The Agency's Expectations

An important part of the "big picture" is ensuring your stakeholders have a clear understanding of each expectation throughout development. Not a single what/where/when/how should be missed. Be sure they are ready and equipped throughout every stage, providing a unified voice between them, and the agency.

Think about all of your stakeholders, talk with them, and assess what they need. Ask questions about the people who will be using the product we develop and gauge how much technical assistance and training they will need. Who will be making the general updates? Are there stakeholders that need more handholding to deliver their feedback with a strict turnaround time? Is there an SOP (standard operating procedure) for delivering feedback that they need? Is the schedule for feedback and revisions clear to everyone?

Does anyone have a hard time articulating their ideas? Really dig into these conversations with your stakeholders. Do your best to gather and anticipate their needs so you can provide the most clear-cut expectations for them. Preparing yourself and your stakeholders well will definitely help affirm that their needs and ideas are being heard. This will also conserve on billable hours toward the project.

An Example of how Our Agile Agency sets Expectations

At Daggerhart Lab, we have very straightforward expectations. We stick to our sprint schedules and subsequent product delivery, we require quick feedback during reviews and revisions. Your solid communication as the Product Owner between all stakeholders and the agency is a potent tool. While we will undoubtedly be a part of conversations that involve all stakeholders throughout the lifespan of development, we do not need to be involved in every conversation with all stakeholders. If all are prepared with the resources they need to provide effective feedback, it should be no problem. We have found this to be the most efficient and comprehensive approach when it comes to honest and fruitful evaluations.

A Product Owner Should Know Every Step

Learn The Agency's Ceremonies and Processes

Another crucial measure to take in preparing yourself and your stakeholders is to learn what process the agency you're hiring adheres to. Knowing their ceremonies and protocols step by step will provide a massive benefit to everyone involved in the product's development. Below, we'll break down the Daggerhart Lab ceremonies one by one, including descriptions of each phase. Some agencies may add/remove some of these steps or approach them differently. However, this will certainly provide a solid foundation for any Product Owner engaging with an Agile agency.

- **Discovery**

  It's important to start things off by diving deep into the research so you have a solid look at the big picture. We will conscientiously discuss your needs and wants for the website and/or web application to be developed. From there, we do extensive research to establish precisely what we can deliver with the budget you have available. Sometimes budget constraints can present challenges that seem tough to get around, but we genuinely enjoy the opportunity to find ingenuitive ways to get the job done within budget. Extensive research and discovery on the part of both the client Product Owner and ourselves make this all the more possible.
- **Kick-off**

  Kick-offs usually start with general introductions and everyone getting to know each other and their role in the product's development. From there you often move to the backlog, discussing the breadth of the project down to each stage of deliverables. Once everyone is aware of the teams and roles throughout the project, the directions for expected participation and the overall communication plan are laid out. This boils everything down from when/how to communicate as a whole, to when/how testing will take place. We recommend wrapping these meetings with an overall review of key touchpoints, next steps, and action items.
- **Backlog Refinement**

  Sprint by sprint, you will need to go back into the backlog and assess your stories. Some of the larger stories should be broken down into smaller ones. Ambiguous items within stories will be ironed out upon new discoveries. Estimations on stories will sometimes be updated and rearranged on the timeline, and new criteria for success may be outlined. Keeping your backlog tightly managed is essential for smooth development.

- **Estimation Poker**

  This process is also known as "planning poker" or "scrum poker". The method for estimation poker begins with the product owner reading a user story that will reveal technology for development. The team will individually write their estimation of required time to complete this development on a card of their own. These cards remain face down where no one can see the other's estimation so as to avoid influencing independent thought. Once everyone is done, the cards are revealed and the reason for each member's varying estimations is discussed in detail. From here, sometimes teams do another round of cards and discussion if it's called for. The end goal is to focalize the estimation time to an agreed-upon range. In the case of a disbursed all remote work environment like ours, it's a bit more of an open conversation on Zoom and/or Slack. The lead developer will often get what they refer to as "a gut check" on an estimate and then we'll dig deeper.
- **Stand-ups**

  These meetings are very quick and to the point, usually about 15 minutes. For us, the size of the project will determine whether we are doing daily or weekly stand-up meetings. This ensures time is not improperly used that would be better spent in development. There are three main questions asked in these quick meetings: 1.) What has been accomplished since the last stand-up; 2.) What will be completed next; 3.) What barriers are keeping you from completing your work? These stand-ups keep teams unified, prevent important details from getting lost, and assists the Product Owner in refining the backlog.
- **Demos**

  A Demo happens at the end of a sprint and is when developers demo[nstrate] what they've built or are building. The purpose of this is not to try and impress other teams, managers, or stakeholders. This is to openly evaluate what is working and not working. This process is especially helpful in bug discovery, in particular as it relates to other feature development and how they interact. This is yet another step that helps keep a solid backlog and examine whether the estimations are on point.

- **Retrospectives**

  At the completion of a sprint and demonstration comes the time to evaluate and plan. Agile retrospectives generally ask three questions: 1.) What worked well and what ideas did we not otherwise cover? 2.) Getting ideas on the table during a time when they can be examined by the team. 3.) What do we want to do differently? What do we want to try or look into? This gives teams an opportunity to discuss successes and pain points so sprints can be adjusted accordingly.
- **Finally…**

  Start all over again until all sprints are completed and the product is delivered.

You're Primed for Strong Product Ownership and a Smooth Project

A prepared Product Owner will get a team through to a solid final delivery that everyone can be proud of. If you're ready for and embodying the ceremonies and processes of the Agile agency you're working with, this should serve as a cornerstone to developing an incredible product. You will establish well-earned trust from your teams and be able to commit to trusting them, as well. Equally, all stakeholders will be heard and happy which again only ever supports the development of a formidable product.

We hope you are able to use these resources and develop amazing products!

Beyond Phase 1: The Project Delivery

Before you can think beyond project delivery into iteration and support, Phase 1 has to be wrapped up neatly. Phase 1 of a development project is the fundamental stage that delivers the initial product and gets the foundation done. It's essential to prioritize the most critical work in accordance with what can be completed on budget and on time, whether you're building a new website or doing an overhaul to your organization or University's technology infrastructure. This is called the MVP, or minimum viable product, a term familiar to every Product Owner. At the onset of every project, we evaluate the client's greatest needs to determine which tasks take precedence so we have a solid base to build from.

From here, we can determine what is possible given the client's budget and timeline. This involves prioritizing "the needs" and fitting in as many of "the wants" as possible. It is essential for the success of Phase 2 to keep a strong backlog of any of "the wants" that were not attainable while completing this initial product delivery in Phase 1. This is because Phase 2 is somewhat of an ongoing stage in the client-to-agency relationship. It involves iteration and support of the website or web application as the business and technology evolve.

You can go further in-depth on the subject of a proper and prosperous Phase 1 product delivery in our previous chapter, "Preparing Product Owners For Project Delivery". Phase 2 is when you can move forward to making deeper-level improvements and providing support as the product goes live. At this point, more of the broad natural user interactions can be evaluated. We'll dig deeper into this below.

Product Ownership in Phase 2: Iteration and Support

When a Product Owner has completed delivery of Phase 1, the time for a sigh of relief is pretty brief. Feedback through raw and uncultivated user experiences that are no longer filtered through testing pipelines can be revealing. This is true no matter how astute your user stories and testing were during initial development.

These are most often matters that can be overcome with another budget and a new timeline. For example, you may have page editors using the software now that find a feature is not customizable in the way they were expecting and/or needing. There may also be theming or performance issues cropping up and can be adjusted now that the product is live, or feature requests from novice to expert client users. This is why Phase 2 of product development is for the purpose of iteration and support.

You've Got Your Product, What's Next?

Time to make your product even better! As a Product Owner, you should have a well-fleshed-out backlog full of items for the Phase 2 iteration. Keep in mind, it's not that the initial product delivery falls short in any way. The initial product delivery was meant to get the absolute best and most significant development done with the available budget.

The need to get a client's website live and of viable use to their client base is the most vital. A core intention behind developing a website and/or web application is to act as an additional arm of the business that opens more pathways to revenue.

Thinking of ways to constantly build upon your existing product is central to amplifying the financial prosperity of your business. One would be hard-pressed to name a lucrative business that chose to remain precisely the same without developing its offerings. For instance, in the time it takes to read this chapter, Nike will have released a pair of self-drying shoes and Apple will have launched a new store on the moon. Okay, that's absolutely not true - but it's believable due to their massive success and growth rate. The point is that a complacent company fades away. Growth and development are essential to remaining necessary, relevant, and financially viable.

Phase 2 is For Product Growth

Phase 2 will be about more than simply approaching the elusive "wants" from the backlog after completing Phase 1. A Product Owner should also seek out additional ways to consistently strengthen the product and revenue stream from it. This means your particular web commodity will require attention, analysis, and growth for the duration of its lifespan. Other than a Product Owner's role in keeping a solid backlog of "the wants" for development tasks to make Phase 2 approachable, there is an expectation and a need to go deeper than that. To make sure we're offering valuable support, we acutely listen to the client. This enables the uncovering of current or potential issues that couldn't be completed in Phase 1.

For example, Daggerhart Lab recently worked with a client that was using QuickBooks for their bookkeeping. However, any payments made through their high-volume website were being manually entered into QuickBooks. That is valuable and expensive time for a company to use that can definitely be better spent elsewhere. Getting their website updated and functioning properly for their client base to use was the priority. This was accomplished in Phase 1. With the new and improved web platform launched, it was time to address the issue of manually entering all payment data from the website into QuickBooks.

This encompasses the philosophy of iteration and support to a T. We identified an issue not so detrimental to their company that all business would have to stop before being addressed. Rather, it would add tremendous value to our client in the long run. If you can help identify inefficiencies costing the client money instead of producing money, you're doing Phase 2 right.

How Do You *Continue* Making The Product Better?

There are many things you can do to ensure your product remains pertinent and reliable to your potential clients and current user base. Broadly speaking, as technology advances, so can the functionality of most websites or web applications. Think about how often you get pinged by your computer, cellphone, and/or tablet to update your applications and software - sometimes these are minor bug fixes, and sometimes they are massive feature renovations due to technological breakthroughs. There are many angles to keeping an eye on advancements in technology as they relate to your website or web application, but the nucleus to this is remaining a student of your industry. For example, if you're a Product Owner for a WordPress website, we recommend keeping up with WordPress forums, blogs, Reddit etc… spaces that discuss updates, upgrades, and new plug-ins that become available.

Equally, it is wise to keep tabs on when themes, features, plug-ins, and more are becoming irrelevant. Getting ahead of something that may no longer be supported or that can no longer support a necessary function of your product is of great importance. This will help guide some aspects of iteration and support that may have gone under the radar until something broke. Paying attention to these details and client pain points that can be addressed with technological aid is something that should be done throughout the product life cycle, not just at the beginning of Phase 2. Stay ahead of the issues and you stay ahead of the potential to lose money or cost your clients money. You don't have to get ready if you stay ready.

Make Sure Your Product is Evergreen

Along with keeping close tabs on technology important to your product, there is the ever-important anthropological task of studying human interaction with your website or web application. At our agency, we can do regular audits to track and understand usage patterns, client successes, and pain points. We track analytics for many different behaviors, listen to and value user/client feedback, and passively study consistent user experiences.

This is precisely what the agencies who developed the applications on your phone and computer do. This is why some of those updates, such as bug fixes, are hardly noticeable. Other updates leave you completely awestruck with a renewed excitement for the product altogether. Phase 2 is all about finding ways to grow. This includes small changes that subtly and consistently improve user experiences and increase the financial funnel of the product. Equally, sometimes changes blow people's minds with revolutionary amendments - and everything in between.

How Much Should You Spend On a Website?

Honestly, there is no single answer to the question that this chapter's title poses. There really isn't a baseline for what a website <i>should</i> cost. What matters the most is what you're getting from the website and whether it can meet your business goals. A solid website with good content, SEO, and accessibility can cost $5,000 at dev agencies serving smaller-scale businesses. For medium to large businesses, depending on their technological needs, the website can cost well into the 6 figures. The thing is, both websites will serve the business that owns them exactly as they need. This is to say it's - more about a client's needs rather than a standard dollar amount.

How to Assess Website Costs

Determining what your business "should" spend on a website will take some close evaluation of your company's needs and plans for growth. Below, we'll go over a few things that can help you dig into how to establish the scale of your website should be. This will be greatly informed by evaluating what your website needs to be able to produce.

Calculate Current and Competitor Marketing Costs

You may not be able to directly ask your competitors where and how they are spending their marketing money. You can, however, make some educated guesses based on what you see them producing. Here are a number of things to consider when you look at the online presence of your biggest industry competitors. Check out the businesses that show up on pages one and two with the keyword Google searches you're aiming for. For example, a roofing company in Boise, ID would search "Roof replacement, Boise, Idaho" and "Roof Repair, Boise, Idaho". When you search for the keywords you want to be found with, do your competitors pop up with Google Ads?

1. **Keyword Research:** You can search for the value of certain keywords using this free tool from WordStream to see what they may have approximately spent on those keywords. The real cost will depend on how aggressive of a plan they have, so if you're seeing their ads consistently pop up for a lot of expensive keywords across many regions, they have likely spent a good amount.
   **This is not a paid sponsor ad for WordStream, our team just thinks it's a handy and easy tool to use for novice keyword research.*

2. **Social Media:**
   - Are their social media profiles updated regularly with solid content?
   - Do they have paid/sponsored posts on Facebook, Instagram, or other socials?
3. **Website Functionality:**
   - How complex is their website and what does the complexity of the site do to serve their potential customers?
     - For example, are there a lot of "bells and whistles" such as pop-up chat features, geolocation, and online ordering integrations that work smoothly? If yes, that's money well spent.
   - Conversely, for the same type of goods and services as above: is there a way to receive immediate assistance from the business? Can you efficiently and accurately order, then check out from their website without issue? Can you book appointments or consultations with ease? If not, that's not money well spent.
4. **Website Design:**
   - How modern is their website? Whether you are fairly new to the idea of a website for your business or not, you can still tell when one is out of date.
     - Does the design look modern, or does it look like it could have been made in the mid-2010s? Hard to believe it, but that was 10 years ago now.
     - If you feel like you don't have the eye for it, you can test this by using the Wayback Machine. Drop their URL into this website and it will show you a timeline of the website's existence. You can click through the years to see how often they are updating and modernizing their website.
   - Is the website responsive? You can test this by expanding and shrinking your browser window back and forth - do the pictures and webpages adjust to the screen size accordingly? They ought to, as all modern websites do this when utilizing Google's SEO and user experience best practices.
5. **Content Updates:**
   - Does their website have space for content to be regularly updated?
     - This will include pages such as a blog page, a news page, and/or a testimonials page.

6. **User Design/UX:**
    - How easy is it to get what you need from their website?
    - Does it have a good User Experience? If so, take note of what would work well for the user experience you wish to provide.
7. **Website Integrations:**
    - Does the website appear to have a lot of integrations?
    - As previously mentioned, these can be (but are not limited to) a newsletter sign-up, a real-time calendar for making appointments, geolocation API, or service request forms.

If they're doing all of the listed items above, and doing them well, it's safe to guess they are spending a good amount on marketing. Based on your research, it is good to look into what standard pricing for this technology is. Then it's time to start reaching out for pitches from agencies. We wrote a chapter about the process of finding the right dev company for your business's needs. It's coming up next!

Evaluate Business Expenditures

It's a good idea to approach this in a few different ways. Assess whether you are evaluating your business's budgets and expenditures in order to…

1. See where you can make room for the cost of a new website.
2. Determine if your business requires a brick-and-mortar anymore, or if you can move to a fully digital and online experience.
3. Some combination of the two above to glean what specific aspects of your business should be transitioned online while keeping your brick-and-mortar, to both save and make more money.

Budget For The Website You Need

We've all heard the expression "you have to spend money to make money." As cliche as it may be to say, it doesn't make it any less true. That being said, we do not personally believe in pushing a business to spend money that they shouldn't or can't.

If you have specific needs for a website that can be met with an initial phase of development, do that! Go with a dev company that can find ways to help get you online and make money. This will help with your ability to budget for the next phase of development and growth.

What we do not recommend, however, is sacrificing quality and longevity just to get your business online. Quality over quantity is very real when it comes to having a website that will truly serve you. We wouldn't recommend bringing a Tonka truck to a worksite, and the same should apply to your website.

A common belief is that a website should cost a fraction of your total income. For example, traditional car dealerships spend at least 50% of their revenue on marketing to be able to differentiate themselves from other dealerships. When it comes to having a website, you're on a similarly competitive plane. If you're not willing or able to pay a percentage of your revenue to ensure people come to you and not your competitors, you may miss some great opportunities to capture business.

Boost Business With The Right Website

How your business is presented online matters for so many reasons. From establishing trust to making sales - it's all vital. So, it's about getting the right website, not just any website, and this chapter is meant to help you determine the budget needed to accomplish this. Discovering what is most important to your business goals will inform what should be budgeted for and prioritized when it comes to building your website.

Lastly, remember that the creation of your website should be supported by a well-established plan for how it will make you money and continue to support your business. Ensuring your website and marketing are well baked into your business's overall budget with a mindset of growth and company expansion is crucial.

We've written a couple of chapters about how to safely leave a dev company when they can't deliver anymore. So, how do you find the right dev company moving forward? Apart from some of the common things we all tend to do (like looking at a company's LinkedIn, Glassdoor, and Google reviews), there are some greater steps you can take to ensure a more symbiotic relationship.

5 Tips For a Healthy Tech Partnership

In this chapter, we'll go into the nitty gritty including tips that are specific to vetting your next dev company. We will touch on some of this advice in the coming chapter, "Warning Signs The Agency Relationship Is Off The Rails", as well.

1.) Transparency:

This is important for both you and them. It's important that they are taking obvious steps to show you that they are being transparent and honest with their processes and capabilities. Equally, it's important that you are totally forthright about your needs and expectations. This enables them to properly assess if they can meet your project and business obligations. It's also important that you have an upfront conversation about ownership of all aspects of the project. Dev environments, domain ownership, and any intellectual property affiliated with the product should be clear and well laid out.

2.) RFPs (Request For Proposal) Are Your Friend:

Putting out a request for proposals is a great way to meet with multiple dev companies and really examine which ones check all of your boxes. It's a solid way to see the quality of their work and take a peek into their passion and drive. You can also get a firm gauge of their ability to deliver what you need, on budget, and on time. Ultimately, it's a way to ask yourself if they have the personality, skills, and design-savvy you need.

3.) Understanding Value:

It's important to remember that value is not solely about who can charge you the least. It's also not just about who's got the biggest or most recognizable name brand, either. When we talk about value, we ask - what's the worth of their work? Are they invested in the success of your business? Do they have case studies showing how they've benefited companies like yours (even if it's not specific to your field)? In their pitch for you, did they bring up questions and/or ideas that are helpful to the root of your project and business needs? A true technology partner is the goal!

4.) Do You Like Them?

I know this might sound silly, but it's a totally fair question and important to feel out. More than anything, this is about a gut feeling. You will be spending a lot of collaborative time together, it's best to ensure you're really on the same team. Below are some ways to help figure that out!

Ask yourself questions, such as:

- Do you understand and feel comfortable with their style of communication?
- Will you be able to communicate the way you need to?
- Do your ideals line up?
- Is there a potential for a difficult relationship due to certain beliefs?
- Do you have a compatible drive and work ethic?
- Are they going to be able to keep up with the pace you need?
- Would you hire them as an employee of your own company?
- Hiring an agency is like hiring a whole new wing of employees, do you feel you can trust them with your technology?

5.) Post-Launch Support Is Key

Has the potential dev company that you're vetting laid out a clear plan for support once the product has launched? Whether you have internal teams that will be doing the lion's share or not, it is essential that the company that built your product set clear expectations for how you can anticipate their support. There are a number of things to pay attention to and ask about in regard to their support services. For example, ensure they have a clear support process for you to follow. Find out what their support covers and get the costs affiliated with support.

Great Tech Partnerships, Great Products Made

We hope this brief guide helps you create lasting and valuable relationships with the tech company you partner with next!

The Value of a Quality Assurance (QA) Team in Tech

Is paying for QA useful to a Product Owner? In short, yes.

Whether this question comes from an internal team member or the client, the inquiry of what value quality assurance (QA) brings to the table in a development environment is common. "Can't/don't the developers check their work?" "Could that be added to the project manager's duties?" are popular and understandable. However, those things are already happening. Sometimes it takes another set of eyes with a different mindset to catch everything that needs to be caught. There is tremendous worth in having work that is double, and triple-checked – just like authors work with a team of editors, creative directors work with numerous designers, and manufacturing facilities have supervisors.

QA Has High Return On Investment (ROI)

You will feel the perks and financial benefits of QA when it's done effectively and efficiently, almost immediately. Create solid standard operating procedures (**SOPs**) and clear **communication guidelines**. These will aid the overall workflow and are great ways to ensure your QA services are a success.

SOP: This is generally documentation of a roadmap clearly outlining how all teams interact with QA, and vice versa. This documentation will include the order in which specific steps are to be followed, as well as how acceptance criteria* and testing instructions will be produced.
**Acceptance criteria is the explanation for how the feature being tested should work/what the expected outcome is.*

Communication Guidelines: These are a part of the SOP that outlines the communication workflow and specific language to be used. This can change on a project-by-project basis depending on many factors. They can also be as simple as "use pass/fail language with detailed notes per fail, nothing extra required if passing." This way, QA, the project manager, and the devs are all giving and receiving unified communication. This helps with efficiency because there is no room (or less) for misinterpretation and working on something in vain.

Benefits of Quality Assurance (QA)

You've heard the expression "don't ask for permission, ask for forgiveness," right? With QA, you're aiming for quite the opposite. Good QA helps to avoid fixing issues retroactively and instead helps address them proactively. This benefits the agency and the client tremendously. It saves on the project budget, improves internal team and client relationships, as well as strengthening the user experience. We'll go into further detail below about the ways QA will have a strong ROI for your development agency.

Save On Project Budget with QA

If there's one thing everyone wants to improve upon, it's the bottom line. If you're wondering how adding a team to the project saves money, that's precisely why we're here! QA is extremely important and should be done thoroughly, so the schedule and budget should reflect this. The cost of QA doing their job well will cost a lot less than a client finding a bug. The price tag both literally and figuratively of having a client or a user discover a bug or even simple type-o is a high one compared to an internal development team member finding it in production.

This is certainly not to say a Project Manager or Developer isn't capable of catching many things on their own. Sometimes, you need another outside perspective. We've all stared into a fridge without being able to find something until the next person finds it immediately, right? We are human, after all. In the end, it's far more budget-friendly to fix things progressively than face a potential domino effect on other features.

Improve Client Relationships with QA

Apart from delivering a project on time and within budget, you can further improve client trust with solid QA. A part of keeping a product delivery on track is your team catching the smallest details before the client does. Sometimes the QA process will reveal a major bug, and sometimes QA will uncover a singular missing space between paragraphs. No matter how big or small, catching it before the client or the end-user is vital to building trust. This helps your agency build a strong relationship that is beneficial to both parties. It also makes the project more enjoyable to be a part of as a whole.

Create a Better User Experience (UX) with QA

While it is incredibly important to build trust with your clients, building trust with your user base is what will make or break a product. People need to be able to use the product as expected and for it to work so well that they promote it to others. Adding QA to the process helps build that trust with your user base. This is because you're delivering a product that has been thoroughly vetted and subsequently works smoothly because QA is coming from a technical perspective and the mindset of the intended user base. This creates a strong foundation that will provide security for your internal teams, the client, and the end-users.

Use QA to Improve Your Agency

We hope the advantages are clear when it comes to a solid QA team, SOPs, and communication guidelines in place. We added QA to our company a few months into our opening and it has added so much value to our agency. We hope you'll consider the same for yours!

Warning Signs That Your Agency Relationship Is Off The Rails

We've all seen shows like "Kitchen Nightmares", "Extreme Makeover: Home Edition" or even movies like the 90's classic "Little Giants." That's because everybody loves agood fixer-upper story. That said, most of us don't love being on the end that needs the mending, especially when it comes to an important agency relationship.

It's costly to have your project and client relationship go off the rails, and building and developing complex websites and web applications can make that especially expensive. Situations where you're trying to rescue a client from a pricey project collapse happen in many of our careers.

While it might feel good to show up and help clients in need, a number of challenges show up, too. Trust-building with a client who has recently been burned can be tough, and only more so if they've gone through a good chunk of the budget to finish the project already. The project timeline has almost always also suffered. In fact, being on "rescue teams" for clients has happened so often in all of our careers that we have a chapter on that specific topic called "How To Help Clients Who've Been Beat Up" coming up.

So, the question arose - how can we help clients out before they get to the point of needing rescue? We decided to write about what clients can do to identify these potential issues in the moment, so they can be addressed before a detrimental domino effect.

Identify Why a Project or Agency Relationship Is Off

One of the major themes we've found in our shared experiences with "client rescues" is a client not being able to express that they're unhappy or simply waiting for things to get better. Similar to a blog we wrote about over apologizing, the time for being passive has passed. So, what are some clear signs that your project is starting to go off the rails?

Logistical Issues To Watch Out For

Do You Feel Threatened?

Do you feel almost threatened by their pitch or when they tell you about a necessary update? If you get a proposal that says you have to do everything all at once for one giant lump sum or it's not even worth doing the project, ask why. This might be a sign you're being oversold. In our opinion, a good agency will help you prioritize what you need to do first in the best interest of your business goals, budget, and project timeline.

If the agency you're working with is consistently doing any of the following, you've got a red flag.

- Missing deadlines without talking to you
- Missing deadlines and offering the same recycled/generic reasons as to why
- Providing unclear work change orders

They might have found a way for your company to pay for their mistakes. If you, as the client, have held up your end of the bargain by delivering all of your assets, and are communicating needs and feedback on time, they should, too.

Are They Trustworthy?

We believe transparency around budget and deadlines is healthy, but if you're not feeling trust in your agency, be cautious about revealing your full budget. For instance, if/when your company has a marketing budget that needs to be used before the end of the quarter, don't let the agencies pitching to you know that. An opportunistic agency could hand your company a mediocre product. They could also lock you into something that frequently needs (paid) maintenance. Some maintenance is expected, but frequently fixing things that should be functioning autonomously is another red flag.

Get a Second Opinion

This could read like a list of ways to find distrust in an agency, but that's not the intention. Everyone makes mistakes, things happen, we just wish to help people find proactive ways to identify helpful warning signs. It's far easier to address issues in the moment than it is retroactively.

How To Ensure You're With the Right Agency

Shop around to multiple agencies

For just about all things in life, big and little decisions, most of us get at least a second opinion. The same applies to technology. It's important to get a sense of the overall impact by looking at the cost and timeline. Understanding what it will take to accomplish the business goal at hand from different perspectives goes a long way.

- Point blank, exploring other options will help you find a better client-to-agency relationship as a whole. Much like taking several cars on test drives, the same is true for choosing a development agency. It's important to thoroughly vet an agency before contracts are signed.
- It's a nice way to dip your toe in the water with the agency you might work with. You will see how they operate as a company, communicate as a team, and whether it's compatible with your company.
- Often, opening up an RFP is great because it helps you dig deeper into the product you're aiming to develop and gain a greater understanding of the scope that needs to be addressed. Equally, you'll dive into deeper details around the product lifespan that will require more research and discovery.

Check your billing often

Again, ask the agency to justify billing and request line items. Having someone in billing that is savvy about what the spend should be is crucial. That said, all teams involved should have an understanding of what you're spending/charging throughout the process. This will ensure hours are allocated appropriately and the budget is maintained. Nobody likes a "money surprise" unless it's winning the lottery, or finding $20 in an old pair of pants.

Evaluate Your ROI (Return On Investment)

Are you making money on the product? Make sure there are solid metrics set in place for tracking how the product is meeting intended goals. Is this an issue you can address internally, or is this something to do with the technology built? If you're unable to address issues internally, it's time to evaluate the product relevancy and your relationship with the agency.

Find An Agency The Works For You

If this article even helps just one client from ending up in a tough and costly agency relationship or with a product that does not serve their needs - we'll be so happy.

When To Sever Ties With a Development Company

In a previous chapter, "Warning Signs The Agency Relationship Is Off The Rails," we focused on helping clients identify if potential costly issues with their agency relationship are arising. In this chapter, we'll be diving into tips for identifying when it's time to move on to a new development company, and how to do that safely and successfully.

Is it odd that we are a development company teaching clients how to fire dev companies? Not in our opinion! If you've skipped ahead to read our chapter called "How To Help Clients Who've Been Beat Up," it outlines the challenges dev companies experience when another has failed their client. Throughout all of our careers, we've encountered clients that have really been put through the wringer. It's heartbreaking to hear about the money and resources that these folks have lost. Our goal is to help others avoid the same - or worse.

Confirming It's Time To Find A New Dev Company

First and foremost, trust your gut.

You'll need more than a gut feeling to sever a contract and move on without losing progress or money, though. Below, we share a few signs that can help you identify when it's time, including our opinion of the safest practices. *(Note: This is not legal advice regarding contract law.)*

Throughout the lifespan of your relationship, we suggest keeping an eye on the items listed below. While creating this, it became apparent that it boils down to one main theme - honesty and transparency, or lack thereof. Should you as a client find yourself in any number of these situations, we recommend looking for another dev company.

1. **Promises & Deliverables:** If you've reached a point in the project where you are not receiving the technology promised, dig into why. Often, this is a result of poor research and discovery before promising on deliverables. This can account for months of work, money, and resources spent toward a product that the dev company can't finish. If they can finish it, you might not be getting what you initially set out for. In our opinion, that's just not right. Dev companies should only promise what they're capable of. You wouldn't order and pay for a T-Bone steak and be happy to receive a black bean burger, right?

2. **Updates & Progress:** Are you receiving regular updates and feedback about the progress of your dev project? If so, great! However, do those updates allow you to observe real, tangible progress? Are you being asked to do any testing that allows you to physically use the product? If no, not so great! Are deadlines often missed with the same explanation as to why over and over? Or worse yet, no explanation at all? This is another sign you are not getting accurate updates on the project's progress. Even if the development company is facing something outside of their control, it's on them to communicate openly.
3. **Billing & Blame:** Are you being billed for change requests on items that should have been in the original estimate? For example, encountering an issue with the use of an app or plug-in that you were told would work, but obviously wasn't tested and is broken. Another example would be a situation where the dev agency doesn't mention important or required system-wide updates until you're backed into a corner on how to move forward.
4. **Overestimating & Charging:** In the aforementioned chapter regarding "warning signs", we talked about the importance of getting line items for charges to evaluate what you're paying for and getting a second or third opinion on the work. Here's why: If multiple agencies say they can do the same work in half the time for half the cost, the current dev company is clearly overestimating and overcharging. The beauty of getting estimates from other companies is you might *also* discover your current development company is charging you proper rates! *Win/win*.
5. **Unresponsive & Uncommunicative:** If your dev company has stopped responding within your agreed-upon time frame, or at all, that's a red flag. We mentioned getting regular feedback and updates earlier, but if you're not even getting email responses, that's a bigger issue. If they're unwilling to set a communication plan and standards at the beginning of a project, that's a red flag. There's no reason for a client to be in the dark at any point.
6. **Iteration & Growth:** Is your dev company offering suggestions on how your product can grow and help your business make more money? Maintenance is great and totally necessary, but iteration and improvement are what are necessary for long-term and sustained growth. We believe a dev company should be thinking about how to ensure your product and design remain relevant, profitable, and lasting. Maybe even cutting-edge!

In our opinion, we as development agencies are supposed to be true partners to our clients. If an agency is doing any of the things listed above, that isn't a partnership, that's bill collecting.

Protect Yourself Before Firing Your Dev Company

If it happens that you discover you need to move on from the development company you're working with, there are a number of things to do to protect yourself. It would be incredibly unfortunate if you were to lose any of your intellectual property - let alone any time or money spent working toward your product - only not to own any of it.

The following list is an overview of the items we think are most important to complete before moving on. Our next chapter will be exponentially more detailed and is designed to guide you through each step of the process.

1. **Know Your Contract:** When setting up a contract, it's best to ensure you have ownership of everything. This is especially true of your domain name, hosting server, and development branches. If you don't own the dev environment, you risk losing all development progress or paying dearly to retrieve it. Before moving away from the dev company, go over your contracts with a fine-toothed comb. Know exactly what you own and/or control so you can realistically evaluate any risk.
2. **Have Another Agency Lined Up:** To keep the project moving efficiently and to avoid losing too much money or time, find a new agency. This can be a very delicate dance, be sure that you're doing everything quietly and legally within any contractual confines.
3. **Employ Agency Advice:** Where possible, work with the new agency you're hiring so you understand every detail of what needs to get transitioned. They can help you evaluate specifics of what you need to ask about as you transition from the former company, like ensuring the new dev agency can gain admin access to your platform and dev branches safely and legally. They can help guide you through this based on their needs for completing the work. As mentioned, our next chapter will cover the above list in detail as it is a topic deserving of a section all unto itself!

How To Sever Ties With Your Dev Agency

Keep your side of the street clean, even if theirs is dirty. This can be hard - and sometimes very hard. However, adding an emotional charge to a situation like this has the potential of creating fodder for a blowout. Below are a few ways our team recommends to avoid a difficult legal dispute about handing over any intellectual property.

1. **Be Cool:** Do your best to sever ties with total professionalism, even if it means doing a bit of acting. Life's a stage, especially when you have to pretend you're cool with something you're not - but it's worth it.
2. **Be Swift:** No matter how bad you might want to tell someone off, avoid it. This might feel redundant, but it's worth saying. It can be attractive to want to go down a laundry list of reasons you have to move away from a development company if the relationship has spoiled. However, it's a lot easier to keep your cool if you keep it brief.
3. **Be Thorough:** While it is important to move forward without dragging, it's also important not to miss any important details. You don't want to find yourself reaching out to a company you had to release to ask for a favor months later, it might be hard or impossible to receive, not even for any reasons of potential resentment, but simply because the work may no longer exist.

Sometimes Moving On Is For The Best

It can be hard to move on, especially if you've been with an agency for a long time. This can be true even if you barely got a chance to really become established before things went sour. Both can sting in their own ways, so we hope the agency you deserve is waiting on the other side!

Do You Know How To Fire a Development Company, Safely?

Has your company simply outgrown the resources or abilities of the current development company you're working with? Have they performed in a way that is not conducive to your business and/or the way you prefer to interact professionally? If you've discovered it's time to sever ties, there are important things to do while taking steps in this direction.

A company makes changes for many reasons, and this can include switching up vendors, technology, staffing, and more. This is particularly true as it relates to technology because it is ever-evolving and so is our reliance on it.

Learn How To Protect Your Company Before Firing a Dev Company

In order to keep your business running at the pace it needs to, having a smooth transition away from one dev company to another is crucial. Thoroughly investigating the control, ownership, and management of all of your digital assets is essential before moving on. This is true no matter how long you've been tied to a dev company.

Save Your Project By Protecting Your Digital Property

Below we will outline what we believe are the most important aspects of collecting and protecting your technology.

Have a Technical Product Owner

Having a tech-savvy Product Owner can go a long way for many reasons related to product development. This gives your company a source of truth based on a foundation tied directly to your business and technology goals. Equally, a product owner who understands the technical direction is imperative to get things back on track once you've moved onto a new development company. This can be a contractor or your new agency.

Take Over All Service & Integration Payments

Look at every aspect of billing related to the dev team you've been working with. Check for integrations and/or services that are essential to keeping your technology and business running. If they're paying for anything, you'll need to make sure you can transition those accounts over without anything getting shut down or turned off. This can be anything from simple newsletter services to an integration that would shut down your ability to process sales. This can also include Customer Resource Management systems, paid newsletter services, shopping cart integrations, etc.

Own Your Digital & Intangible Property

This Should Include...

1. Code Repository

The code repository is fundamental for keeping the project moving and to avoid halting any aspect of business. This is where the source code, development documentation, web pages, and more are archived throughout a product's development and lifespan. Without this, it's like throwing away the map *and* the supplies in the middle of a hike. Locking down this cornerstone of your technology before moving on is essential to keeping development and maintenance in full swing.

2. Benefits of the Agile Workflow

Owning and having full administrative access to all development, production, and testing environments is also crucial to continued development. Ensure all login credentials are secured or changed and that any users or IP addresses are blocked or removed. This isn't to assume the development company you're moving away from would do anything insidious. It is just a good security practice. Equally, this is just another step that will keep development moving along and your technology running smoothly.

3. CI/CD Pipelines

Your CI/CD pipeline, which stands for "continuous integration" and "continuous deployment", should be in your ownership. This is essentially an instruction manual for keeping development rolling and releasing work. The CI/CD pipeline is documentation that outlines the process for when something is ready to be released for production. The code and the method for how this happens should be documented and accessible to the new development team you'll be working with for a smooth transition.

4. URL and Domain

This one might seem obvious, however, it can't hurt to cross all of your t's and dot all of your i's. There can be protocols or aspects of the initial contract when the project was kicking off that made it so the dev company purchased and maintained the URL and domain. So be sure to check that you will have full ownership of these before you sever ties. Otherwise, this could turn into a difficult and costly turn of events should you need to purchase a new URL and/or domain. Worst-case scenario, this could even lead to issues with branding and marketing depending on how unique a URL name is or how expensive the URL was.

5. Third Party Integrations

It's not just the domain and URL you should ensure you own, but any and all third-party integrations being utilized, as well. This applies to anything from simple plug-ins, to API data, and really any time the website has to talk to an external service that is paid for and requires logins. It is essential to have sole proprietorship over these, including billing. There are times when a project is being launched that the development company will bake in certain third-party integrations into your payments. As previously mentioned, it will be important to ensure you've taken over all control and payment of those accounts so nothing suddenly stops working, or any data is lost.

Transition To A New Dev Company

By following the steps above, you should be able to transition to a new dev company and keep your technology and subsequent business moving without error.

How We Help Clients Who've Been Beat Up

Sadly, it's pretty common for agencies like ours to onboard clients who come to us so beat up, it feels like we should be playing the Sarah McLachlan ASPCA song. When we hear some of these stories (like websites taking three times as long as promised while squeezing clients for money that they don't have or feeling as though their business is practically being held hostage), it reminds us why we chose to run our company the way we do.

The foul play of manipulative people in this and other industries can make it hard to establish the trust of a new client. Point blank, we have to ***learn*** how to ***earn*** the trust of clients instead of assuming it's inherent to the client-agency relationship. This chapter will discuss some of the ways we engage in a thoughtful and intentional client relationship.

Earn Your Client's Trust

Listen with empathy to what has happened in the past and ensure you have the bandwidth to show up earnestly where others could not or chose not to. Most of the time, clients will open up on their own about where other agencies have fallen short for them. However, sometimes they'll simply say they've been beaten up without giving much detail. Professionally and with consent, find out more about what happened with as much detail as they're comfortable offering up.

There are certainly levels of professionalism that many of us adhere to inherently. However, there are things you may say or do with positive intentions that may trigger distrust in the client. How will you know how to avoid those unless you've put in the work to learn about their previous experiences? Your agency might not find out under the best circumstances otherwise. So, digging deep at the top of the sale and the subsequent project is strongly recommended.

Show Your Worth and Show it Often

Part of why we are an agile agency is so we have the opportunity to show the client and stakeholders progress on the website or web application that we're developing on a frequent and consistent basis.

This is helpful to the client for a number of reasons, including:

1. Showing the client that we're making progress week over week.
2. Giving the client a regular opportunity to provide feedback that they will see turned into actionable items.
3. Catching issues as efficiently and early as possible. This way we avoid an unfortunate domino effect on development that ends up being costly to the schedule and budget.

Prioritize The Best Bang For Their Buck

It's important to ensure you're not promising more than your agency can really deliver.

Truly listening to your clients and putting together an honest budget for the scope of work they need is essential. When you do, it will be very apparent what is accomplishable, and what might need reconsideration to honor their budget. Remember - you're the agency, so you're the expert who should be able to offer up well-rounded explanations as to what aspects of development are most important to move forward with.

This means that sometimes saying "no" to a client's desires can actually help foster more trust. Be willing to say "no" to requests that you know will not help push their company in the right direction. This is a positive thing! It helps reiterate that you're not taking advantage of them. It shows you're working as their partner and ensuring they get the product they need with the budget they have available.

Follow Through On Client Promises

Tied closely to not overpromising, it's also important to follow through on everything that was promised at the onset. For example, we recently had a client come to us with a somewhat limited budget. They had also just taken quite a metaphorical beating from their former dev agency. Their site had just enough in place to get them off the ground, but it was not performant, and their conversions were low. Their SEO was fairly solid as they had made a concerted effort to bulk up their blog and website content. They really wanted to ensure none of that was lost while we upgraded their site to Shopify, and we were able to deliver.

This same client really needed an improvement on their site conversions to improve overall sales, particularly their underperforming direct online sales. This was another reason we chose Shopify: we know the shopping experience on this platform is top-notch without breaking the bank. We are happy to report that our client's sales process has improved very well and their website conversions are continuing to grow. In fact, they made their money back on the cost of the custom eCommerce website within one month of launching.

Be A True Technical and Business Partner

This is honestly just about employing integrity, transparency, and putting in the work. If their website and the business behind the website do not require something, like app development, then don't push them to do that. If they're trying to cut corners on things that may hurt overall business goals, guide them toward the best decision. Not only are you providing a more genuine and honorable service to them, but you may also be setting yourself up for further/continued work. A shady agency can always find a new client to burn and churn. An agency with integrity will find clients who will grow with them and help them grow in return.

It's a business 101 kind of thing: it's twice as financially sound for a company to keep a client than to constantly have to find and sign new ones. So, be sure to listen to your clients, earn their trust and deliver a solid product time after time - it benefits all parties involved!

That Was A Book About Being a Product Owner

That's all we have this time around. We hope you gleaned some new things from it! Have feedback? We're here for it! Hit our contact page, we'd love to hear from you.