Digital project creation: A checklist of best practices and recommended capabilities

Document purpose

This document provides support for those who are new to, not specialist in, or who just want a helpful reminder about delivering new digital projects. It's a simple checklist including useful links across three phases: Discover, Design, Deliver.

Intended audience

This guide is intended for people who are new to the digital industry, or for people who may have to engage industry talent and are seeking guidance on things to consider when writing a brief or engaging a team.

Learning goals

You'll be better informed for your next digital engagement and be able to ask appropriate questions to your chosen partners. We also hope you take the time to explore additional reading in the links included throughout this document.

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Discover

Initial briefing document

The majority of digital projects start with a project brief. Sometimes clients or sponsors may opt to co-create the brief with your team - that's okay there are plenty of templates to hand.

Strategic considerations

It's important to agree on key scope parameters and desired strategic outcomes, often referred to as the project definition, additionally we also consider:

- Intended audience
- Business objectives
- Brand objectives
- Competitor analysis

Technical basics

Check with your client regarding established systems and tools so that you align with constraints or opportunities for the project:

- Content management system
- Project dependencies
- Internal IT guidelines
- Regulatory considerations

Refinement sessions

Regular collaborations that help teams understand scope, and bring people together on a journey of co-creation as you begin to define your solution.

- Present your work
- Challenge as a team
- Agree actions & owners

Discovery phase outputs

The Discovery phase concludes with agreements regarding fundamental aspects of the project. The exact format and method of capture will vary by client and personal style, see the links below for example documents.

- Agreed scope & deliverables
- Assumptions & risks
- Roles & responsibilities

- Listed project dependencies
- Anticipated project budget
- Timing plan

Key outcome: agreement on 'Design' scope

Design

Experience design

Experience design is the practice of designing digital products with a focus placed on the quality of the user experience. It involves things like content that has been tested and aligned to the original business objectives. Also consider:

- Content audit
- Content strategy
- User research
- Creation of personas
- Creation of wireframes
- Brand audit
- Logo & font exploration
- Colour palette exploration
- Low-fidelity user testing

Refinement sessions

Regular sessions that help teams understand scope, and bring people together on a journey of co-creation as you aim to deliver the end solution.

- Present your work
- Challenge as a team
- Agree actions & owners

Requirements gathering

This phase can (and should) happen alongside the design efforts, so that teams work through ideas, blockers and solutions together. Requirements gathering concludes with your agreed scope for build.

- Content creation estimates
- Design accessibility testing
- Development estimates
- Quality assurance planning
- Acceptance criteria
- Alignment with IT teams
- Analytics strategy
- Analytics provider

Key outcome: agreement 'Delivery' scope

Deliver

Digital delivery

Technologists and code engineers work alongside experience design to build per the acceptance criteria. This involves frequent and iterative usability testing to ensure you're building what's right for the end user.

- User Acceptance Testing (UAT)
- Release plan
- Smoke testing
- Approval for go-live
- Analytics integration
- Recurring meeting cadence

Ready to launch

When digital delivery fulfills the acceptance criteria, your project is near to go-live. A 'soft launch' (usually middle of the week) with a small group of users can help to iron out any anomalies; this is often called bug squashing and is managed by the QA team or nominated representative.

- Release date & time
- Soft launch regions
- Failover plan
- Maintenance schedule
- Reporting cadence

GO-LIVE

Further reading and resources

Broader delivery topics

Innovation Foundations by Udemy

The basics of agile project delivery

An introduction to design thinking

Tools and templates

Tool: Trello

Template: Status report

Template: Work plan

Learning associations

APMG: Management courses

PMP: Project management training

Developed by the HCA in collaboration with:

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