
Principles of an Effective Web Team

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Becoming a Web Team

Getting Started

WordPress provides a great foundation for web developers looking to work freelance or build a small team.

Challenges will arise as a company matures and needs to begin managing growth.

Dealing with problems is often reactive, and the trajectory of your team will be influenced by these decisions.

One must be prepared to react.

principle:

a fundamental, primary, or general law or truth from which others are derived (*English*)

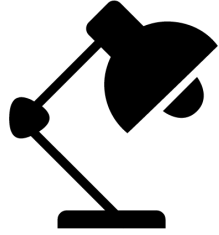
Why Principles?

1. Principles provide a foundation for strategic thinking.
 2. Principles serve as guidelines for making decisions in the moment.
 3. Principles act as a measuring stick for evaluation after the fact.
 4. Principles make our approach clear to the entire team, allowing all to participate and contribute.
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**A principle is
discovered rather
than created.**

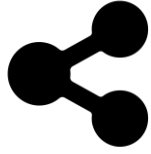
Seven Principles for a Web Team



Understand

Know your Projects.
Know your Clients.
Know Yourself.

Strive to know and understand the identities, history, mission, capabilities, priorities, and goals involved with your work.



Engage

Everyone involved in a project needs to be involved in the project.

Teams are contextual, built to actively engage anyone who can or should contribute to an undertaking at a given moment.



Empower

Be an enabler.

Choose tools, processes and practices that empower the team to work flexibly, independently, and confidently.





Communicate

Miss no opportunity to interact.

Communicate clearly, openly and constantly on the full breadth of your work.

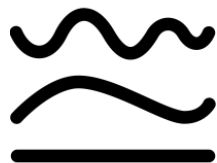




Act

Do it now, refine it later.

Be biased towards action rather than incessant planning, individual initiative rather than top-down direction, creativity rather than perfection.



Simplify

Entropy happens.
Reduce your exposure.

Strive for simplicity in the products we create and the processes we use to create them, aiming for stable, repeatable, and learnable solutions.





Grow

Observe. Assess. Improve.

Create and seize opportunities to experiment, to learn and to teach.

Principles in Action

Product Challenge: Choosing A Website Platform

Choosing a Website Platform

After building sites as a dev team of one, increasing workload and project scope required additional staff.

Previous custom CMS became impractical.

Made decision in 2009 to move to an off-the-shelf system more compatible with an evolving team.

CHALLENGES

- Growing team needs to be able to work together more efficiently
 - Clients expecting better CMS functionality
 - Custom CMS becoming less and less stable and cannot be extended
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Solution: WordPress!

We considered several options (WordPress, Drupal, Joomla, Expression Engine, DotNetNuke) and ultimately settled on ... WordPress! We built our first WordPress site in 2009.



UNDERSTAND

- *Clients:* Client-base needs reliable but simple CMS
- *Company:* Front-end customization is key to our identity
- *Team:* Works with existing stack expertise



ACT

- Short learning curve/low risk
- Rapid system set up and CMS
- Theme structure allows one developer to take lead
- Off-the-shelf themes permit rapid deployment (theoretically)



SIMPLIFY

- Support by core WP team and developer community
- Quality, widely-available documentation
- Opportunity to build a reusable skeleton theme

Process Challenge: Working with Off-the-Shelf Themes

Working with Off-the-Shelf Themes

While mainly a custom shop, some clients are looking for a cheaper, faster, simpler solution.

Such clients tend to need more ongoing maintenance and marketing support, and have growth potential.

Ongoing client relationships help mitigate work pipeline ebbs and flows.

CHALLENGES

- Identity as a boutique shop conflicts with prefab solutions
 - Standard project workflows are oriented towards custom development
 - Config options vary widely from theme-to-theme
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Solution: Multiple Systems, Evolving Process

We've experimented with several approaches, including a multi-purpose theme (*Bridge*), a page builder plugin (*Elementor*), a custom WP multisite implementation, and non-WordPress hosted solutions (*Shopify*).



UNDERSTAND

- *Clients*: What are their core business needs?
- *Projects*: Some workflow steps change, others become doubly important
- *Company*: Bespoke without building from scratch



ENAGE

- Bringing in the client earlier and more often
- Increased design/dev collaboration and adjusted roles
- Supplement staff with specific expertise



GROW

- Build workflow alternatives depending on solution
- Expand design strategies beyond standard tools
- Ongoing search for new tools

Crisis Challenge: Taking Over a Floundering Project

Taking Over a Floundering Project

We provided audience analysis and IA services to a client to inform its own internal redesign project.

Client reported later it was having trouble with execution and facing an impossible deadline.

We had an interest in seeing the project complete successfully.

CHALLENGES

- Project had little direction
 - Client team lacked expertise in key areas
 - Technology platform and tools were substandard or nonexistent
 - Deadline was being driven by major calendar events and frustrated internal constituencies
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Solution: 'Winston Wolfe' It

We took over project leadership, and after an assessment merged our team with theirs to bring the site to timely and successful launch, and have rolled out subsequent iterations.



UNDERSTAND

- *Client:* Began with deep understanding of project goals, users and client
- *Project:* Assessment of project status, players and challenges
- *Company:* Assess what we can provide given the above and our existing workload



COMMUNICATE

- Face-to-face to understand situation/set expectations
- Regular and one-off meets with critical parties (core team, IT, executive board, 3rd party vendors)
- Daily stand ups with developer and access to communications tools



EMPOWER

- Coordinate improvement of client IT infrastructure
- Create staging environment train on Git and provide access to project repo
- Establish quality assurance workflow and tools

Other Day-to-Day Uses

Communicate	Dev Team Tools: Git, Vagrant, Trello, Slack, Google Sheets, etc.
Simplify, Empower	DevOps: host sites using consistent configuration
Understand	Workflow Meetings: priorities, milestones, standups, failures
Simplify, Grow	Starter Theme: evolves with each project
Understand, Grow	Knowledge Sharing: team expertise presentations
Empower, Communicate	Knowledge Management: client/project info; documentation base
Engage, Grow	ManageWP: frame ongoing services
Act, Simplify	QA Checklists: processes for testing and refinements
Act, Empower	A Dev Team Project Approach: hero + standups + swarm
Engage, Empower	Flexible Team: full-time, part-time, freelance, contract, client

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**“Those are my principles,
and if you don't like them...
well, I have others.”**

- Groucho Marx

For More Information

Don't take my word for it, come up with your own principles.

Other Questions

Do similar principles hold for a larger organization?

How do principles relate to a mission statement?

Can/should a small agency team do Agile?

Further Reading

- [10 Principles of Agile](#)
 - [How to Build an Award Winning Design Team](#)
 - [Amazon Leadership Principles](#)
 - [Being Winston Wolfe](#)
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Thanks!

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