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Web Project Template Files

E-consultancy

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1. Introduction

Why are these template files useful?

A question we constantly get asked is where people can find best practice examples of documentation that they can use for their web projects. These questions come from in-house web teams, from agencies and freelancers alike.

There are various places on the web which offer the occasional such document, of variable quality. However, there is nowhere that we know of where you can get all the documents you need. Hence this pack of template files.

So what's included?

We've spent a lot of time over the last eighteen months talking to our subscribers and discovering the tools and techniques they find most effective in helping them manage their web projects. This second release of templates has been informed by their feedback. However we're still keen to keep adding to and improving what's here. Please do contact us (details following) if you have something to contribute or suggest.

In this release we have included the following example files:

- Product or System Description
- Business Requirements Document
- Scope Document
- Statement of Work
- Content Audit
- Usability Factsheets
- Work Breakdown Structure
- Project Team Description
- Responsibility Assignment Matrix
- Effort Estimate
- Risk Response Plan
- Risk Register
- Project Schedule - Waterfall
- Project Plan
- Content Plan
- Site Map
- Functional Specification
- Wireframes
- Technical Specification
- Project Timeline – Agile
- Feature Description
- Features Tracking Matrix
- Burndown Chart
- End of Iteration Review
- Status Report
- RADIO (Risks, Actions, Decisions, Issues, Opportunities) Log
- Change Request
- Change Log
- Test Plan
- Test Case
- Defect Log
- Test Results Log
- Test Approval Sheet
- Pre-publication checklist
- Sign-off certificate
- Lessons Learned – meeting agenda
- Lessons Learned Report
- Post-Implementation Review
- Style Guide
- Maintenance Release Schedule
- Email Marketing Evaluation
- Website Evaluation
- Contract for Web services
- Privacy Policy
- Service Level Agreement
- Website User Agreement

Who created these template files?

In some cases E-consultancy has created the templates. In others we have gone to leading experts in the relevant area and they have provided the files. Details of those people are given where appropriate in the descriptions that follow.

How should these files be used?

This second release of templates includes a much greater range of documentation drawn from several different schools of thought about web best practice. Because of this there are a couple of things you should be aware of:

1. Naming conventions – One man's PID is another man's project management plan. In trying to represent different project methodologies inevitably we've come across contradictions and overlaps in what documents are called and their purpose (particularly project start up documentation). Please bear with us and read the template descriptions below for guidance.
2. Template overload - If you tried to use all of our templates in your next project you would probably drown under a mountain of paperwork, so it's up to you to pick and choose the documents that are most useful to you. Significantly, in this release we include an "Agile Toolkit" which you'll find useful if you're working in a more streamlined and iterative way than traditional project management.

In the following sections we explain more about the files and how they are typically used. However, a big **CAVEAT still applies** – these template files are simply to help frame and guide your thinking, they are not the 'answer' or a complete DIY 'kit'. What is right for you will depend on your particular requirements and project.

What sort of Web Project are these files useful for?

In theory these documents are useful for anyone managing web projects of any size. Our recent research highlighted that even smaller projects that used lite processes such as documenting requirements, using formal change requests, release planning and pre-live testing were more successful than projects that didn't. And a number of our templates are designed to help with these everyday processes.

Undoubtedly some of our document templates are much better suited to larger projects or programmes of iterations. Use your judgement to determine which are best suited to you and your organisations' style of working.

Contact Details

If you have any comments or suggestions for inclusion into future releases please contact E-consultancy ([chris AT e-consultancy.com](mailto:chris@e-consultancy.com) or +44 (0)20 7681 4052).

2. Explanation of each Template File

2.1. Project Definition and start up

2.1.1. Product or System Description

File location \ name:

1. Project definition and start up\E-consultancy-Product or System Description-MSWord.doc

The Product or System description is drafted at the beginning of a project to outline its purpose and objectives. The purpose of this document is to initiate further exploration and to provide a constant point of reference to why the project was initiated in the first place. Particularly critical in the web environment where the shape and delivery of the project are constantly in flux. At this stage there is not necessarily a detailed scope, requirements or business case.

All subsequent features and requirements should pertain to this original description, otherwise they are surplus to delivering the goals of the project.

We'd like to thank Rob Purdie of Important Projects <http://importantprojects.co.uk> for providing this template. Important Projects is a [values-led](#) project management [consulting and training](#) practice focused on helping [social change organisations](#) manage their most important programs, projects and ongoing operations more successfully and effectively.

2.1.2. Scope Statment

File location \ name:

1. Project definition and start up\Scope Statement Template.doc

Once high level requirements have been gathered and a business case agreed the Scope Statement is sometimes used as a "baseline" agreement of exactly what is and isn't included within the remit of the project.

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2.1.3. Statement of Work

File location \ name:

1. Project definition and start up\SOW Template.doc

In traditional PMBOK project management the SOW (Statement of Work) is the document that authorises the project to commence. However, in common practice within web projects at least, the SOW is typically the agency's response to the client brief, ensuring that project scope, objectives and deliverables are commonly understood and agreed, as well as providing an initial estimate of the degree of work involved in delivering the project.

A number of assumptions are made in order to be able to deliver this high level budget estimate and milestone plan, and it is critical that these assumptions are documented in the SOW.

Once approved by the client the SOW acts as the catalyst for the agency to begin defining the project requirements and solution in more detail.

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2.1.4. Usability Factsheets

File location \ name:

Usability -Testing\Information&Design-Usability-Testing.pdf

Usability - Analysis and Design\Information&Design-Scenarios.pdf

Usability - Analysis and Design\Information&Design-CardSorting.pdf

Usability -Testing\Information&Design-Walkthrough.pdf

Usability - Analysis and Design\Information&Design-Contextual-Enquiry.pdf

Usability techniques are very important for successful user-centric design. Pretty much everyone in the web design world now agrees that you have to build a web site which suits its users' needs and requirements rather than 'pushing' something at them that you would like them to see. But how do you go about finding out what your users needs are? The files below should help you determine how best to incorporate usability into the early stages of requirements gathering, site specification and design:

- **What is usability testing?** – Explains when, why and how to conduct usability testing.
- **Scenario modelling** – once you understand who your users are and what their needs are you can begin to build "scenarios" which describe a person's interaction with a system. The file included tells you how.
- **Card Sorting** - Card Sorting is a technique for exploring how people group items, so that you can develop structures that maximize the probability of users being able to find what they want. This is particularly useful for developing the Site Map and navigation. The file included tells you more about how to go about card sorting.
- **Walkthrough** – A walkthrough is a cost-effective technique for testing a user interface, where you get feedback from several people at once on an early paper version of your design. They can be a helpful alternative to formal usability testing where budgets are tight, although obviously a walkthrough has limitations.
- **Contextual Enquiry** - a technique for examining and understanding users and their workplace, tasks, issues and preferences. CE can be used to produce user needs analyses and task analyses. You might use this technique on an existing site, a competitive site, or a prototype. There is also a sample report included.



We'd like to thank Gerry Gaffney, Founder and Director of **Information & Design**, <http://www.infodesign.com.au>, for providing these files. Information & Design is a small usability consultancy based in Melbourne, Australia, providing usability, user experience design and information architecture services. Find out more about Gerry here: <http://www.infodesign.com.au/aboutus/biography.asp>

2.1.5. Business Requirements Document

File location \ name:

1. Project definition and start up\E-consultancy-requirements-document-MSWord.doc

According to our research “**Web Project Management: The practices behind successful web projects – May 2007**” managing requirements is the number one challenge facing web project managers. Not least because (according to 88% of our respondents) requirements are often set knowing that they are likely to change during the course of the project.

However, this does not mean that gathering requirements is a pointless exercise. Quite the opposite. Companies that deal with this issue with the most success ensure that they involve the right people up front in gathering requirements, and have an effective means of prioritising and managing their subsequent delivery. In Agile methods, this takes place via stories or features (templates for which are included in our Agile Toolkit) which are reprioritised at the end of each iteration. In more traditional projects, requirements are gathered using a Business Requirements Document, to which all relevant stakeholder parties contribute and sign up.

One of the major contributory factors to poor requirements management is that the requirements themselves are sub-standard. Nine times out of ten this is because everyone is so excited about the prospect of a new web project that they want to include every pet feature or idea they’ve been storing up, causing your list of requirements to become bloated and unwieldy.

Five top tips to avoid this:

1. Prioritise ruthlessly – if a requirement comes near the bottom of the list is it really a requirement at all?
2. Ask yourself, does each requirement contribute to a specific project objective?
3. Are you articulating a requirement or have you started defining the solution – getting into solution definition at this stage can stifle thinking and cut off more efficient or imaginative ways to achieving your objectives
4. Have you involved the people who really know what the system needs to deliver? Have you thought about asking the customer what they want?
5. Don’t be ambiguous, like SMART objectives, each requirement should be expressed in language (or pictures) that can only have one meaning, and each requirement must be capable of being tested to see if it has been delivered successfully.

Note: the BRD may also form a Schedule to the Contract (see Section 2.9.1)

2.1.6. Content Audit

File location \ name:

1. Project definition and start up\E-consultancy-content-audit-Excel.xls

In their excellent book “Web ReDesign 2.0 – Workflow that works” Kelly Goto and Emily Cotler address the issue of evaluating when to repurpose and when to retire content from a site. These days there are so few organisations building their first ever website from scratch, having the ability to evaluate content objectively is critical.

Although a time consuming task, undertaking this process prior to planning and estimating for content provision (but after requirements gathering) could save you considerable time and creative resource later in the project by providing a clear view of what elements of the existing content can be reutilised or adapted to fit the objectives of the current project.

The only way to do it is to look at each key page and decide which components are necessary to achieving the site’s goals and which are surplus. This simple template provides a framework for documenting your findings.

2.2. Project Planning

2.2.1. Work Breakdown Structure

File location \ name:

2. Project Planning\WBS Template.doc

A WBS (Work Breakdown Structure) also called a Product Breakdown Structure (PBS) under the Prince2 methodology, is a way of organising all the products / deliverables within a project into their component parts, as part of the process of estimating work effort and assigning resource.

The products or outputs of the project are organised in a hierarchical way with their component parts aligned underneath them. Going through this process will often serve to highlight sub-tasks or deliverables that may otherwise have been inadvertently overlooked!

Before documenting your WBS or PBS a clever way to map it out is using the Project Manager's best friend, post-it notes, to organise each item of work in its appropriate grouping.

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2.2.2. Project Team Description

File location \ name:

2. Project Planning\Project Team Description Template.doc

If you're not initiated in the ways of MS Project use this template to document your project team members and their availability during the lifetime of your project.

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2.2.3. Responsibility Assignment Matrix

File location \ name:

2. Project Planning\responsibilitu-assignment-matrix-Excel.xls

The RAM (Responsibility Assignment Matrix) maps each of your deliverables against the required resource, including documenting who is responsible from a review/approver perspective as well as team members that are involved in delivery. The purpose of doing this is to aid resource planning and estimation of work effort.

It's not compulsory but it can be helpful to list each deliverable according to the unique reference within your WBS. The deliverables listed in this template are for illustration purposes only, but give you an idea of the depth of detail you may wish to go to.

Team members are listed across the top of the table and their degree of involvement or responsibility for each deliverable can be selected from a drop down menu (to enable this function please don't overwrite or delete the definitions worksheet that sits behind the main sheet).

- A** Accountable responsible for success or failure of project
- P** Participant active participant
- R** Reviewer reviews output
- I** Input their input is required
- S** Sign-off approver

2.2.4. Effort Estimate

File location \ name:

2. Project Planning\Estimates Template.doc

An estimate for any project is always going to be based on a number of assumptions. It takes experience to be able to estimate accurately, and even then there will be events throughout the lifetime of a project which will threaten your attempts to stay within budget.

This template is designed to provide assistance in this sometimes daunting task. Following on from your WBS, use this spreadsheet to list out each task and input three estimates of the man hours involved ranging from optimistic, to most likely, to pessimistic. The spreadsheet contains a formula which will output a weighted average, biased towards your most likely scenario.

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2.2.5. Risk Register

File location \ name:

2. Project Planning\E-consultancy-risk-register-Excel.doc

Risks threaten your web projects from the very outset. For instance, every assumption you make in the planning phase carries the inherent risk that it is wrong, and has the potential to impact design, delivery, budget and schedule. This is why risks should be brainstormed at the very outset of the project, and a risk register maintained and updated throughout its lifetime.

This template enables you to log and manage your risks throughout the life of the project. Use the drop down menu to score your risks according to the probability of their occurrence and their potential impact to derive a risk score (1 low risk to 25 highest risk), and mitigate these risks accordingly.

Scale of Impact		Probability	
5	Catastrophic	5	Probable
4	Intolerable	4	Highly Possible
3	Undesirable	3	Possible
2	Tolerable	2	Unlikely
1	Inconsequential	1	Impossible

Use the drop down menu to show whether you have completed a risk response (mitigation) plan for each risk.

2.2.6. Risk Response Plan

File location \ name:

2. Project Planning\Risk Response Plan Template.doc

The Risk Response plan captures the outputs of risk analysis, documenting the potential actions that could be taken, as well as the chosen course of action.

There are four potential approaches to each risk;

1. Avoidance – alter your course of action so that the risk is no longer there
2. Transference – transfer the risk to someone else e.g. incorporate penalty clauses into contracts or take out insurance against the occurrence of the risk
3. Mitigation – prevent the risk occurring or reduce its impact
4. Acceptance – don't worry about it because it's of little impact or probability, or because it simply can't be mitigated.

It's worth spending the time up front to evaluate the probability, impact and potential responses to each risk as it will save time and minimise impact if a potential problem becomes a reality. You've already agreed what you're going to do about it.

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2.2.7. Project Schedule – Waterfall

File location / name:

2. Project Planning\E-consultancy-project-plan-MSProject98.mpp

2. Project Planning\E-consultancy-project-plan.html

2. Project Planning\E-consultancy-project-plan.pdf

2. Project Planning\E-consultancy-project-plan.xls

Before you agree to any contract of work it is critical to be able to understand and demonstrate that the scope or requirements of a project can be met within the time and budget available. This is achieved in part through the project plan.

The project plan is also integral to the **contract** – it is one of the schedules to the sample contract included in this pack (see previous section 3.1)

The Project Plan template is provided in 4 different *formats which illustrate the main phases and interdependent tasks for a medium to large project. Using the template you can estimate the time required to complete each phase, refining and adapting your plan as the work is done. The template will also help you understand the interdependencies between tasks both within and across each phase of delivery. For smaller, less complex projects it would be better to strip out much of the detailed tasks and estimate time in terms of more high-level task groups.

**The MS Project one is most complete as it shows all the interdependencies etc. However, if you don't have MSProject then the PDF will show graphically how the tasks link together and the HTML and Excel files list out the actual tasks.*

Notes accompanying these files:

- The project file was created to go with Ashley Friedlein's book "[Web Project Management: Delivering Successful Commercial Web Sites](#)" so the stages are broken down as per the method outlined in the book.

- The project is for a large web project: 7 months long, budget of circa £500,000, core team of 5 + others, circa 20 page templates, with 500+ pages, using a medium-sized Content Management System (CMS) and/or e-commerce engine + basic personalisation
- Resourcing and budget details are not given - the template focuses on tasks, dependencies and indicative timings
- The project contains over 200 tasks concentrating on the Pre-Production and Production phases. The Evaluation phase is not detailed and the Maintenance phase detailed is only a basic example
- The macros in the file are harmless as far as we can be sure - disable them when opening the file if you wish

2.2.8. Project Plan

File location \ name:

2. Project Planning\E-consultancy-project-plan-MSWord.doc

The project plan is a manifesto for how the project is going to be delivered rather than giving any more detail about what is going to be delivered.

- It reiterates the scope and objectives for the project.
- Defines the target audience for the web solution
- Highlights key assumptions, risks and constraints on the project
- Introduces the project team and agrees their responsibilities within the projects
- It talks about how quality will be tested and controlled, and include a high level test plan (see Test Plan template in section 2.6 which should feed into the project plan)
- It talks about how the project will be managed and progress communicated
- Finally it outlines a more detailed budget breakdown and timing plan based on the detailed work of estimation that has already occurred in the planning phase.

Because the project plan acts as a key document in communicating with the team, client and stakeholders about what they can expect from the project process it is critical that this document is both received, read and approved by key parties.

2.3. Solution design

2.3.1. Content Plan

File location \ name:

3. Solution design \E-consultancy-content-plan-Excel.xls

Some site content will be created new, some content will be re-purposed for the web and other content may be syndicated or taken directly into the site as a content feed from a third party supplier.

The content plan details who will be providing the content described in the functional specification. It makes clear who owns the content and any sign off processes behind the supply of content, what format they should provide the content in, who they should provide the content to, how often they will update the content and to what deadlines.

The Content Plan template is provided in Excel and should be used to audit the content and then produce a critical path of what content you need by which date in order to launch the site on time and then ensure content is kept up to date. Late delivery of content will almost certainly have an associated cost/impact on launch/release dates. It is important to keep all content providers aware of their deadlines and responsibilities and the content plan will allow the project manager to track this. The page IDs in the content plan correlate to the site map.

Note: the Content Plan should form a Schedule to the Contract (see Section 3.1). As late, or unfit, content is the main cause for web project delays, agencies are well advised to have their clients, or partners, commit to delivering the agreed content according to such a plan and including this in the contract. Not only does this help protect the agency against content-related delays but there's nothing like a contract to focus the mind of an unruly content provider... If they do not want to commit to delivering the content as set out in a contract then you must wonder why not? Should the content even be there at all if no-one is prepared to commit to delivering and maintaining it properly?

2.3.2. Site Map

File location \ name:

3. Solution design \E-consultancy-site-map-Powerpoint.ppt

A site map shows the main sections and sub-sections of a web site. Therefore, it effectively determines the navigational hierarchy and labelling of the site as well.

There are a number of ways of presenting a site map. The Site Map template attempts to balance the architectural integrity required of a structural representation of a site with the need for visual clarity.

The 3 most common tools for representing site maps are: Powerpoint, Microsoft Org Charts, Visio. The sample included uses Powerpoint as most people have this application and can use it easily to manipulate and distribute (using the copy and paste functions and connectors). There are two simple style options to suit your needs.

Note: the Site Map (with storyboards) is also an important Schedule to the Contract (see Section 2.9.1)

2.3.3. Functional Specification

File location \ name:

3. Solution design \E-consultancy-functional-specification-MSWord.doc

The functional specification is a description of what the content is from a user's perspective. You might call it the 'user experience document'. It is not about why the content works or why it is there, but what exactly does it do? If you were a user coming to the site, how would you describe what the web page does? By producing this document you are creating both a blueprint for client sign-off and reference for the design & construction phase.

The Functional Specification template is a MS Word file and contains an explanation at the start of each section. It would be suitable for medium to large projects containing complex applications. For example, the process flow diagrams and action response tables prevent the omission of critical functionality when briefing technical teams. However, rapid prototyping may be a more efficient development technique and for less complex projects a simplified version of the functional specification may be more suitable.

The functional specification (which defines content and functionality as born of user requirements) and the site map (which defines the navigational architecture) are the two key documents that form the basis for briefing your technical and creative resources. Most importantly, the functional specification should be detailed enough to allow the members of your team to accurately quote the amount of time they will need to implement what is specified. The better the functional specification, the more accurate the budget.

Note: the Functional Specification is an important Schedule to the Contract (see Section 2.9.1)

2.3.4. Wireframes

File location \ name:

3. Solution design \E-consultancy-wireframes-powerpoint.ppt

Wireframes are simple page design representations that contain the content and functional elements of a page (or template) without any graphical elements present. Their purpose is threefold:

- First they are useful in presentations as an outline of the design approach.
- Second they are useful to the development team, in particular the designers at this stage, in defining and refining the elements that need to go on the page.
- Third they are useful to the team in showing the navigational architecture and information flow; that is, how the pages are going to work together to provide the user's interactive experience.

The most important 2 things about such wireframes, however, are:

- They are easy for anyone to create, distribute and manipulate. So they are a great tool for collaborative working and iterative prototyping.
- They are very cost effective. You can rapidly try various approaches without committing yourself to more time and cost intensive activities like actual page design, or working HTML prototypes.

The wireframes template is provided in PowerPoint format and is simple to manipulate and distribute. There is a 'basic' web page template that illustrates a standard layout for global and secondary navigation that could be used as a good starting point for typical content or e-commerce driven site. A useful feature of the template is its ability to highlight the nature of any content appearing on the page (e.g. static, dynamic) to the development team.

To help illustrate how wireframes relate to final page designs (complete with content, graphical elements and images) there are two example wireframes from the original E-consultancy functional specification (NB the site has since changed) presented with the corresponding pages from the resulting live E-consultancy site. Wireframes can be used not just for pages that the site visitor sees, but also for any other interface – the content management admin screens, for example, as shown in the template provided.

Note: the wireframes / storyboards can form a Schedule to the Contract (see Section 2.9.1).

2.3.5. Technical Specification

File location \ name:

3. Solution design\E-consultancy-technical-specification.doc

For project managers, and certainly the programming team, it is important to try and get the technical specification right first time. Whereas many of the other elements can be changed even at a late stage if absolutely necessary, or are subject to interpretation, the technical specification contains only hard facts. A mistake in the technical specification is quite unequivocally a mistake and can cause havoc in a project.

The Technical Specification Content List is a MS Word document that contains a list of the content that you would expect to be detailed within a technical specification. As such the document can be used as a checklist to ensure that the important parts of the technical build are correctly specified during development.

Note: the Technical Specification may also form a Schedule to the Contract (see Section 2.9.1)

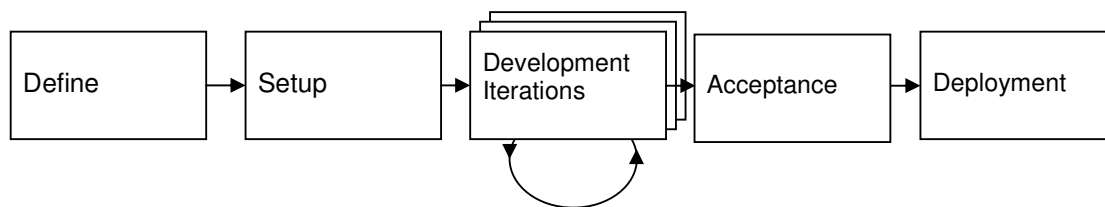
2.4. Agile toolkit

Increasingly web project managers are adopting more iterative Agile approaches to web project management. Which is why agile approaches have become an important tenet of our own Web Project Management training courses.

Agile is a software and project management approach which tends towards the following characteristics:

- Collaborative and communicative working style
- Delivering prioritised features first
- Close team relationships
- Close working environments
- Frequent releases of working code
- Multiple iterations of relatively short ‘time-boxes’
- Testing and correction as part of the ongoing process
- Individuals taking ownership for estimating and delivering their own work
- Continuous involvement of the customer or end user in the development process
- Documentation only when necessary
- Project Manager manages an environment not a process

A typical Agile lifecycle looks something like this.



The upshot of this is that the documentation requirements for an Agile project are much lighter than for traditionally run projects. These templates represent key documents to run an agile iteration. The only additional documentation would typically be:

- Scope definition (see 2.1.3)
- System description (see 2.1.1)
- Project Management Plan or PID (see 2.2.8)
- Risk register (see 2.2.5)
- Status (see 2.5.1)

This short note could not possibly do justice to an explanation of agile processes but if you are interested in attending one of our training sessions please email viv@e-consultancy.com, or see our website's [training channel](#) for more detail. Alternatively for further reading try **Agile Project Management, Jim Highsmith, Addison Wesley, 2002**



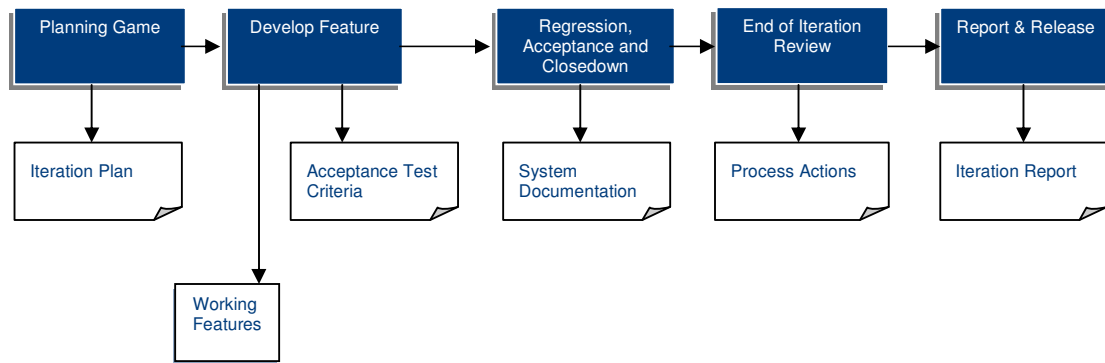
For all these agile templates we'd like to thank **Denis Howlett of Indigo Blue**. IndigoBlue www.indigo-blue.co.uk deliver E-consultancy's web project management training courses. Their programme and project management services enable organisations to significantly improve their ability to deliver IT projects: reducing cost, raising quality and ultimately meeting and exceeding their customers' needs and expectations. Indigo Blue assist organisations in the introduction of Agile management processes, or in the improvement of their existing processes through the pragmatic application of Agile techniques

2.4.1. Project Timeline – Agile

File location \ name:

4. Agile toolkit\Project schedule.xls

A typical agile project schedule will comprise of a series of project planning activities culminating in a programme of frequent iterations. Each iteration delivers the highest priority features or stories (requirements) which will be planned, tested and built in their entirety within the iteration so that the output is working code that has been approved as fit for purpose by the business.



Iteration & Issue Management

The content of the next iteration is only ever completely determined at the end of the last iteration, as this allows for features to be reprioritised according to the changing priorities of the business or in response to other activities within the project. Consequently, agile scheduling is based around high level milestones rather than detailed implementation dates for specific features.

2.4.2. Feature Description

File location \ name:

4. Agile toolkit\Feature Card Template.doc

Feature cards are the Agile equivalent of articulating detailed requirements. A feature (sometimes called a story) describes in plain English what the system has to do. It is written from the user perspective so for instance, a feature might be “The customer must be able to book a trip to any European city including travel and accommodation”.

Working on the “test first” principle, each feature card must also state how the feature will be tested for completion. Once a feature is written it is incorporated in the Features Tracking Matrix where it is prioritised and allocated to an iteration.

2.4.3. Features Tracking Matrix

File location \ name:

4. Agile toolkit\features tracking matrix.xls

The features list, lists everything in priority order. There does not need to be a complete project’s worth of features in order for the project to start; it can start with whatever is at the top of the list. Detailed planning is only ever required for the next increment.

The features list should be continuously updated to ensure that priority features are being delivered first, enabling the business to gain maximum benefit as quickly as possible from the implementation of the project.

2.4.4. Burndown Chart

File location \ name:

4. Agile toolkit\Iteration 2 Burn Down Chart.xls

The burndown chart is a visual representation of what progress is being made on each feature within the iteration to enable the project manager to re-evaluate work estimates.

Use the data sheet to input the estimated man hours for each feature within the iteration and to log how many hours have been spent on that feature on each day of the iteration.

2.4.5. End of Iteration Review

File location \ name:

4. Agile toolkit\end of iteration review.doc

At the end of each iteration an end of iteration review is conducted. As well as highlighting the achievements and lessons learned from the last iteration, to enable future improvements, one of its main functions is to act as a sense check on how well the work effort is being estimated within each iteration e.g. does the iteration contain too many or too few features? Is the overall timing plan realistic when the real velocity of the project team is known?

Armed with this knowledge the project manager is able to plan the next iteration more effectively.

2.5. Project Delivery

2.5.1. Status Report

File location \ name:

5. Project delivery\Project Status Update Template.doc

This template is for a high level status report, ideal for communicating overall progress of the project to senior management.

We'd like to thank Rob Purdie of Important Projects <http://importantprojects.co.uk> for providing this template. Important Projects is a [values-led](#) project management [consulting and training](#) practice focused on helping [social change organisations](#) manage their most important programs, projects and ongoing operations more successfully and effectively.

2.5.2. RADIO (Risks, Actions, Decisions, Issues, Opportunities) Log

File location \ name:

5. Project delivery\RADIO log.xls

This template provides a detailed daily log for the project team containing:

- Risks
- Assumptions
- Decisions
- Issues
- Opportunities

This spreadsheet contains a number of harmless macros which serve as lists for drop down menus for categorising and managing the contents of the spreadsheet.

2.5.3. Change Request

File location \ name:

5. Project delivery\Change Request Template.doc

Even small projects have a higher probability of success if their implementation is preceded by the issue of a formal change request and impact assessment. As well as detailing the nature and reason for the change this template also serves as a useful communication tool between client and agency, documenting the budgetary and timing implications of making changes to the scope of the project. The agency can then request formal approval of this prior to implementing a change, ensuring there is an audit trail when it comes to the budget reconciliation at the end of the project.

We'd like to thank Rob Purdie of Important Projects <http://importantprojects.co.uk> for providing this template. Important Projects is a [values-led](#) project management [consulting and training](#) practice focused on helping [social change organisations](#) manage their most important programs, projects and ongoing operations more successfully and effectively.

2.5.4. Change Log

File location \ name:

5. Project delivery\E-consultancy-change-log-Excel.xls

The purpose of the change log is to allow the Project Manager or change team to monitor the number of change requests incoming, and to manage the resources allocated to carrying out impact assessments according to the priority status of the change.

It also serves as a complete document of the number of change requests that occur within the project, as well as whether it has been decided to implement them. This is a useful piece of information for the Post Implementation Review, highlighting the efficiency (or otherwise) of the team in defining requirements up front.

Once again, this spreadsheet contains some harmless macros to assist with filling in the form.

2.6. Testing

There are various forms of testing that you can carry out. The most common for web sites being:

- **User Acceptance Testing (UAT).** This is about testing to see if the delivered system (the web site) does indeed meet the specification.
- **Functional and Application testing.** This include a number of things e.g. testing for compliance with stated browsers, checking for broken links, checking file sizes and page weights, testing site response times and speeds, testing applications to check they really work.
- **Load Testing.** This is about testing what levels of usage the site can tolerate before performance begins to be impaired.
- **Content Proofing.** Checking the content for accuracy, relevance and so on. Also includes checking to see ALT tags have been added, page titling is consistent, relevant metatags are present etc.
- **Usability Testing.** See next Section 3.12
- **Security Testing.** Security experts can test your site to see how secure it is against malicious attacks e.g. 'penetration attack' testing.

2.6.1. Test Plan

File location \ name:

6. Testing\E-consultancy-test-plan-MSword.doc

The test plan sets out at the beginning of the project what the overall approach to testing will be. Amongst other things it specifies:

- which tests will be carried out
- at what points in the project testing will occur
- who will be responsible for conducting and monitoring the tests
- what the success criteria will be
- what resources and environment are required to conduct the tests

By documenting this detail early on it sets out clear quality standards for the team to adhere to as well as allowing sufficient time for the appropriate test environment to be put in place.

2.6.2. Test Case

File location \ name:

6. Testing\E-consultancy-test-case-MSword.doc

A test case (as illustrated in the template) should be written for each use case or requirement, to ensure that project deliverables are fit for purpose.

2.6.3. Defect Log

File location \ name:

6. Testing\E-consultancy-defect-log-Excel.xls

A template for logging all defects as an outcome of functional testing in order that they can be managed and reported efficiently.

2.6.4. Test Results Log

File location \ name:

6. Testing\E-consultancy-test-results-summary-Excel.xls

A detailed log for all tests, their expected outcome vs. the actual outcome. There are more complex macros in this spreadsheet which provide reporting on test success/failure rates, and the severity of defects.

2.6.5. Test Approval Sheet

File location \ name:

6. Testing\E-consultancy-test-approval-MSword.doc

A formal sign off sheet for documenting the outcomes of testing and approval to proceed to the next phase of the project.

2.6.6. Pre-publication checklist

File location \ name:

6. Testing\Information&Design-pre-publication-checklist-MSWord.doc

A checklist for those final days before launch!



We'd like to thank Gerry Gaffney, Founder and Director of **Information & Design**, <http://www.infodesign.com.au>, for providing this file. Information & Design is a small usability consultancy based in Melbourne, Australia, providing usability, user experience design and information architecture services. Find out more about Gerry here: <http://www.infodesign.com.au/aboutus/biography.asp>

2.7. Project Closure

2.7.1. Sign-off certificate

File location \ name:

7. Project closure\E-consultancy-final-sign-off-MSWord.doc

This is a simple 1 page document that you can use to get final sign off on your web project. This is very important to draw a line under your responsibilities for a particular project. For agencies this sign off is often the point at which any outstanding fees can be invoiced and any subsequent work can be charged for separately.

2.7.2. Lessons Learned – meeting agenda

File location \ name:

7. Project closure\E-consultancy-lessons-agenda-MSword.doc

Lessons learned is about providing valuable feedback to the project team and the wider organisation in order to improve processes for future projects. To achieve maximum value from these sessions they should (ideally) be impartially facilitated, and should focus on behaviours and tactics that were successful or problematic rather than focussing on people.

Try not to allow the session to become biased towards either positive or negative comments, and ensure that feedback comes from all the key project areas not just from the usual suspects.

Make sure the outputs are properly documented in a positive way which translates the lessons into future best practices, and ensure it is distributed appropriately e.g. via a post-implementation report so it can be fed into the planning of the next project.

2.7.3. Lessons Learned Report

File location \ name:

7. Project closure\E-consultancy-lessons-report-Excel.xls

A 1 page spreadsheet documenting the outputs of the lessons learned review process.

2.7.4. Post-Implementation Review

File location \ name:

7. Project closure\E-consultancy-PIR-MSword.doc

This document should be used as part of the formal handover of the project to the business. It summarises the success of the project against its original objectives, articulates the key lessons for future projects and starts the process of quantifying the benefits being realised by the business through the implementation of the project.

2.7.5. Style Guide

File location \ name:

7. Project closure\E-consultancy-style-guidelines-MSWord.doc

Creating a set of agreed web site style guidelines makes site updates run hugely more efficiently. Endless discussions and debates over often subjective design details such as type faces and colors can waste large amounts of time. It is not that these details are not important but if they can be codified it avoids having the same debates over and over again. Team members and content

contributors can work much more efficiently if they clearly understand the design and brand parameters they must work to.

This becomes particularly important as a web site grows and there are increasing numbers of distributed authors and parties involved in adding to, and updating, the web site (internet or intranet). For global sites it is important to define the style guidelines at a central, global level in order to maintain quality and consistency across all sites. These guidelines should, however, allow enough room for appropriate localisation.

NB: for an excellent real example of a Style Guide look at:

www.monash.edu.au/staff/web

www.medschool.ucsf.edu/webresources/web_style_guide

2.8. Maintenance

2.8.1. Maintenance Release Schedule

File location \ name:

8. Maintenance\Maintenance schedule.xls

The maintenance schedule is a simple tool which allows the business to keep tabs of future planned changes to the site, in order that releases can be scheduled and prioritised effectively to meet both IT or business needs.

2.8.2. Email Marketing Evaluation

File location \ name:

8. Maintenance \Marketing-Insights-E-mail-Campaign-Calculator-Excel.xls

8. Maintenance \Marketing-Insights-Web-Metrics-Spreadsheet-Excel.xls

Clearly it is important to measure how well your web site is doing in order to understand the returns you are getting on your web investment and to improve future performance.

The two Excel spreadsheets included give you templates to use to measure the effectiveness both of e-mail campaigns and your web site.

The e-mail campaign calculator spreadsheet contains various worksheets to help you measure campaign return on investment and newsletter efficiency – more detailed guidelines are given at the bottom of each worksheet.

The web metrics spreadsheet (which also contains a more detailed guide to use) provides you with a template to report on visitor, traffic, conversion and stickiness metrics.



We'd like to thank Dr Dave Chaffey, BSc, PhD, MCIM, who is the Director of **Marketing Insights Limited**, <http://www.marketing-insights.co.uk>, for providing us with these two template files. Dave is a recognised expert in Internet Marketing, and provides training and consulting services as well as being author of numerous books on the topic. You can find out more about Dave here: <http://www.marketing-insights.co.uk/aboutus.htm>

2.8.3. Website Evaluation

2.9. Compliance

2.9.1. Contract for Web services

File location \ name:

9.Compliance \Pillsbury-Winthrop-Sample-Contract-for-Web-Services-MSWord.doc

Before you look at the sample contract provided, please read the following helpful guide...

Legal Contract FAQ – A primer for Clients on the essential aspects of legal contracts

Q: Why do I need a contract?

A: In fact – you will end up in a contract with your Developer whether you intend to or not. Contracts do not need to be in writing, nor do they need to be signed and so merely agreeing that the Developer will do some work for you will bring into existence a contract.

Q: If there is going to be a contract anyway – why should I have a “legal contract”

A: The answer is certainty. The vast majority of IT projects fail because of uncertainty; either uncertainty in the original specifications, uncertainty in the scope of the project, uncertainty in the time for completion and uncertainty as to the exact cost. Even when the web site is built there can be uncertainty in who owns the intellectual property in it and if things go wrong, you need be certain who is liable and for how much. Secondly, if you do not specify the contract to be used then there is a risk that you are contracting on the Developer’s standard conditions of sale – a contract which is going to be biased heavily in favour of the Developer. A formal contract and specification which sets out the scope of the project is invaluable in ensuring that the project meets your expectations, is delivered on time (or at least in a time frame you expect) and is within budget.

Q: What contracts are in the E-consultancy pack?

A: There are three: a contract for developing and supporting a web site, some standard terms and condition for the web site itself and a privacy policy for the web site. Any lawyer will tell you that there no such thing as one standard contract – in the same way that there is not just one spanner for a mechanic. These contracts have been provided as example contracts, but when developing your own contracts you should ensure that they reflect the commercial arrangements that you want. This is quite “specialist” work and you should consider getting professional help from a suitably qualified UK lawyer.

Q: How does the contract for developing and supporting a web site work?

A: The contract is modular; on the first page you write in the names of the parties and some of the headline commercial terms and refer on that page to a number of schedules which will describe the project. You should always include Schedule A which contains the main legal terms and conditions. That first page, the Cover Page, is also the page which you sign. Although you don’t need to sign a contract to make it enforceable – you can save yourself a lot of trouble later if you can point to the version of the contract which the parties agreed to with their signatures.

Q: What goes in the schedules?

A: The schedules will generally be written in collaboration with the Developer. Many of the schedules the Developer will need to create individually for your business anyway, for example, the functional specification, the storyboard (if you have one), the project plan and the description of the support services. For the reasons we discussed above, it is important that the schedules contain all the aspects of the project you are anticipating. The paragraph at the bottom of the Cover Page and clause 16.2 of the contract provides that if the feature or provision is not in the contract or schedule then it is not part of their scope of work.

Beware agreements to agree.

Q: Why?

A: They are generally only good for the Developer. An agreement to agree is unenforceable, as under English law you cannot force someone to agree in the future. If you leave schedules either incomplete or subject to further agreement then there is often no guarantee that you can get the things that you want in the schedule once the contract has been signed. Before the execution of the contract the Developer will be in sales mode, trying hard to get the contract, and will often describe you as partners with all the same goals. Once the contract is signed and work is underway, this partnership and goodwill may disappear, particularly if the Developer has taken on other clients who are competing for his/her time or if the project turns out to be much more time consuming than they anticipated – so eroding their profit margin.

Q: Invariably our projects change over time as the various parts of our business provide their input.

A: The basic principle is that you can always make a change to any part of the contract and schedules if it is with the agreement of all the parties. This contract provides that the change should be in writing (clause 3.1). Where you anticipate that there needs to be a change in the scope of the contract, clauses 3.1 to 3.3 provide a mechanism for you to ask the Developer to price the change before it goes ahead.

Q: What are intellectual property rights?

A: This question is really worth an FAQ of its own but essentially in this context there are several types of intellectual property: Patents – for inventions, Copyright – for text, pictures and software, Trademarks – for product and company names and Confidential Information. The basic rules to remember are:

- (1) Generally and unless otherwise agreed, the person who creates the intellectual property owns it. If the Developer creates a bespoke site for you and you have no provisions in the contract about ownership of the intellectual property, then the Developer will own the intellectual property in the site. This can make things very difficult if you part company with the Developer and want to retain a successor developer.
- (2) Intellectual property is like real property, you can both assign it and licence it. The parallel to real property is selling the freehold and granting a short lease for your apartment. As with real property assignments of intellectual property need to be in writing, signed, and should contain the words “assign with full title guarantee” to be fully effective (see clause 8.1). Ownership of patents must be registered, ownership of trademarks should be registered to make them most effective and ownership of copyright requires no registration or other formalities at all.
- (3) If you think that the work to be developed might include an invention which can be patented then it is critical that details of the invention are kept confidential. A patent cannot be granted for inventions which are already in the public domain and so if the invention is disclosed before it is patented, then that will prevent a patent being obtained.
- (4) A patent is essentially a monopoly over an invention and even if you do not consider obtaining a patent it is possible that the technology in the web site has already been patented by someone else. You can be liable for damages if you use someone else’s patent without their permission. Our contract (see clauses 7.3 and 10) makes this the Developer’s responsibility. You can learn more about patents and search a database of patents at <http://www.ipo.gov.uk/patent.htm>.
- (5) A trademark is not a monopoly over use of the name or logo which is trademarked but it does help prevent other companies from using your company name or product name for their products. Similarly you may have inadvertently picked a company name or product name which has already been trademarked by someone else. The fact that you were able to pick your company name and get it on your certificate of incorporation does not mean that it is not someone else’s trademark, as registering companies and registering trademarks are separate systems. You can learn more about trademarks and search the UK and European trademark registers at <http://www.ipo.gov.uk/patent.htm>. Although our contract makes infringement of intellectual property a risk for the Developer, you will be responsible for any intellectual property in the material you provide (described as Client Content – and to be provided by you in Schedule D). See clauses 7.4 and 10.

Q: The budget is quite tight for this project and we are already at the limit of it with the improvements that the Developer is recommending.

A: One of the best controls for keeping projects on track is controlling the payment of money. There are a large number of different ways to approach this but one technique which is firmly in your favour is to ensure that some payments are not made until certain milestones are reached. These milestones, and the appropriate payments should be set out in Schedule E - Project Plan. When the Developer finishes a section of the project which is subject to a milestone then the contract provides (see clause 2) that that section of the project should be subject to acceptance testing. As currently drafted the Developer does the testing, provides all the results to you and you inform them of any errors. They then need to go back, fix the errors and retest. If they fail this process three times then that is considered to be a breach of the contract. Again there are a number of variants to this process you can consider, in particular, you may wish to do some of the testing yourself or at least provide or agree certain for test data to be used.

Q: What are the most important bits of the contract?

A: Assuming that the project is scoped and that there are no “agreements to agree” then the most important aspects are price, liability and intellectual property. We have dealt with price and intellectual property but liability is more important yet. The only way for companies to limit liability is to agree enforceable limits in a contract. Our starting point is at clause 11. This language is extremely fair to the Developer – you might want to start your negotiation with the Developer by leaving clauses 7.4, 11.1 and 11.2 out. English law provides that you cannot set limits of liability unreasonably low and hence the mechanism which provides that the limit cannot drop below

£10,000. The contract provides that the limit is set to twice the Fees. A Developer may resist this but it is a good starting point for negotiation. As a rule of thumb, the limit should never be set to be below the Fees. As an alternative, you could let the liability be limited to a set amount. Other aspects to this part of the deal are the types of loss which are recoverable. Currently we have been fair to the Developer by permitting the exclusion of consequential loss or damage (see clause 11.1). You may think that this is too generous. Lastly, we have, as is usual, sought to ensure that the limits of liability do not limit the protection we receive and give in relation to third party intellectual property infringement (see clause 11.2 linked to clause 10.1).

Q: What are the other contracts which you have provided?

A: We have also included a sample User Agreement for a web site and a sample Privacy Policy. These will be contracts between you and the users of the web site. It is important to ensure that these contracts are actually incorporated - and so the link to them should be clear on the principal pages of the web site and when the user goes through a registration process they should "click to accept" these terms and conditions. You should keep a record of all the "click to accepts" - it is important evidence in the case of a dispute. These contracts are for a very basic web site. If your web site downloads software onto the users computer or allows the user to enter into any commercial transactions then you will need additional terms and conditions. Distance selling is a regulated activity within Europe and so you should ensure that both the terms and conditions and the processes you use comply with the law. In conjunction with the Privacy Policy you should ask the User some questions which will allow them to elect what you do with their personal data. The law in this area is currently changing and so I would recommend that the default position for each user is that you do not pass their data to any third parties unless they have specifically requested it (called "opt-in").

[Disclaimer: This agreement is provided by E-consultancy and Pillsbury Winthrop as an example only. There may be circumstances applicable to your situation which would make this agreement inapplicable or inaccurate. The information given in this agreement is not legal or commercial advice nor a substitute for such advice and must not be relied on as such. If you require legal advice you must always consult a suitably qualified lawyer.]



We'd like to thank **Pillsbury Winthrop**, <http://www.pillsburywinthrop.com>, for providing this template.

2.9.2. Privacy Policy

File location \ name:

9.Compliance \Pillsbury-Winthrop-Privacy-Policy-MSWord.doc

For more details on this privacy policy please refer to the earlier "Legal Contract FAQ – A primer for Clients on the essential aspects of legal contracts" which is on Page 5 in section 3.1 Contract for Web Services.

For a live example privacy policy, look at E-consultancy's at <http://www.e-consultancy.com/about/privacy.asp>



We'd like to thank **Pillsbury Winthrop**, <http://www.pillsburywinthrop.com>, for providing this template.

2.9.3. Service Level Agreement

File location \ name:

9.Compliance \E-consultancy-maintenance-sla-MSWord.doc

In the same way that the project specification documents are designed to make it very clear to all parties concerned what is being delivered, and by whom and for how much, the SLA defines the level of service the client can expect on an ongoing basis, and what the costs involved are likely to be.

The Service Level Agreement Content List is a MS Word document that contains a list of the content that you would expect to be detailed within such an agreement. As such the document can be used as a checklist to ensure that the important parts of any maintenance agreement are correctly specified post development.

NB: Refer also to the Contract covered in Section 3.1 which gives an example of the actual legal language that would go into a contract covering maintenance and support services.

2.9.4. Website User Agreement

File location \ name:

9.Compliance \Pillsbury-Winthrop-User-Agreement-MSWord.doc

For more details on this User Agreement please refer to the earlier “Legal Contract FAQ – A primer for Clients on the essential aspects of legal contracts” which is on Page 5 in section 3.1 Contract for Web Services. Below is the relevant section:

Q: What are the other contracts which you have provided?

A: We have also included a sample User Agreement for a web site and a sample Privacy Policy. These will be contracts between you and the users of the web site. It is important to ensure that these contracts are actually incorporated - and so the link to them should be clear on the principal pages of the web site and when the user goes through a registration process they should “click to accept” these terms and conditions. You should keep a record of all the “click to accepts” – it is important evidence in the case of a dispute. These contracts are for a very basic web site. If your web site downloads software onto the users computer or allows the user to enter into any commercial transactions then you will need additional terms and conditions. Distance selling is a regulated activity within Europe and so you should ensure that both the terms and conditions and the processes you use comply with the law. In conjunction with the Privacy Policy you should ask the User some questions which will allow them to elect what you do with their personal data. The law in this area is currently changing and so I would recommend that the default position for each user is that you do not pass their data to any third parties unless they have specifically requested it (called “opt-in”).

For a live example User Agreement, look at E-consultancy’s at <http://www.e-consultancy.com/about/user.asp>



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