Planning a technology project

Start with one task people already do. A useful brief makes it clear who does the work, where it slows down and what should improve.

Walk through the work

Ask someone to show you the last real example. Follow it from the first request to the final decision. Write down where they copy information, wait for an answer or rely on memory.

Choose a first release

Pick one workflow, audience or location to start with. Name one person who can make decisions and one person who can test the work. Record the budget, deadline and any tools you need to keep.

Set a check you can repeat

Measure the current task before changing it. For example, time how long the weekly report takes. Ask the same people to make the same report after the pilot and compare the two.

How M-CreativeHub can help

We can review your process, prepare a brief, compare options and scope a first phase. The proposal can set out deliverables, costs, responsibilities and what the team needs to supply.

What to bring to the first conversation

One example task, the people involved, the tools you use today, a target date and one result you want to see.

Before you budget for the build

Use one real task to decide whether a process change, a small prototype or a funded build is the best next step.

Separate the cause from the symptom

If invoices go out late, time the steps. Missing prices, slow sign-off and duplicate entry require different fixes. Try a shared price list or an agreed approval deadline before paying to recreate that process in software.

Cost the first year

List setup, data cleanup, hosting or licences, staff training, support and time away from normal work. Ask which items recur, which may rise with use and which are paid to other providers. Set aside a budget for maintaining what launches.

Run a trial with a stop rule

Choose a small group and one workflow. As an illustrative target, a report that takes two hours today might need to take under one hour in a trial, with the totals still matching the source records. Agree up front who checks the result and when to stop or revise.

Do not commission a build before these basics are settled

Pause if nobody owns the process, the records are unavailable, or the team cannot spare time to test. Spend first on documenting the workflow and assigning responsibility. A short discovery phase can reveal whether further design is worth funding.

Before you commit

Proceed when you have an owner, a sample of the work, a measure of improvement and a realistic first-year cost.

Building a brand identity

A clear brand helps customers recognise your organisation and understand what it offers, whether they see it on a sign, a phone or an invoice.

Write down what people should remember

Name the people you serve, the problem you solve and the words you want customers to associate with you. Bring examples from your own work and note where your current materials feel inconsistent.

Plan for the places the brand will appear

List your main uses, such as social media, stationery, signage and your website. Check that the logo reads at small sizes and in one colour. Agree on typefaces, colours and how much space to leave around the logo.

Agree on the assets before design starts

A typical handover can include editable logo files, screen and print exports, colour values and a short guide. If you need templates or licensed fonts, include those in the brief and confirm who will maintain them.

How M-CreativeHub can help

We can develop or refine your identity and prepare practical brand templates. Your team can review them against the materials you actually use before sign-off.

What to bring to the first conversation

Your current logo if you have one, a short description of your audience, the materials you use most and examples you can share.

Where brand work pays off

Decide what the identity must fix, then choose the smallest set of changes that helps people recognise and trust the business.

Check whether you need a redesign

Compare your current logo, signage and social pages side by side. If the identity still fits but looks inconsistent, a clean-up and templates may do the job. If customers regularly misunderstand the name or offer, work on the message before paying for artwork.

Ask for examples at real sizes

Request a small social avatar, a plain black-and-white version and a sample of the hardest item to produce, such as signage or an invoice. Print or view at actual size. Ask a person outside the business what they think the offer is.

Confirm costs and rights

Separate design fees from type licences, stock images, printing and sign production. Ask who can edit source files and whether a font or image can be used across your intended channels. If registration matters, check name and mark availability through the appropriate service before production.

Avoid an expensive rollout too early

Pause printing if the name, offer or approval is unsettled. Confirm the first two items you will use before ordering a large batch. Keep a single approved folder so teams are not using several competing versions.

Before you commit

Agree on the use cases, the person who approves the work, editable files and any recurring licence costs.

Writing a business or organisation profile

A good profile helps a customer, partner or funder understand what you do, who you work with and how to reach you.

Start with the reader’s decision

Decide whether the profile should help win client work, introduce your organisation to a partner or support a proposal. Open with what you do, who you serve and where you work.

Build the profile around evidence

Give each service a short description and an example. Use current facts, approved photographs and dates that can be verified. Check permission for client names, quotations and images before publishing them.

Keep a version your team can update

Settle on the page length, language and contact details before layout. Keep headings and copy editable. Export a small PDF for email and a print version where required. Update your key facts when your services change.

How M-CreativeHub can help

We can outline, edit and design profiles, presentations and reports. Your team reviews claims, approves photos and signs off on the final copy before we prepare the files.

What to bring to the first conversation

Your legal or working name, short history, services, verified examples, approved images and current contact information.

What makes a profile credible

Give the reader enough to make a decision. Ask them to verify the offer, relevant experience and the best way to contact you within the first few pages.

Build an evidence inventory

For each claim, record its source and date. Pair a capability with a completed example, a verified result or a clear description of the work you can deliver. Use figures only when staff can explain what they measure.

Choose one primary reader

A client may need to understand your services and how to ask for a quote. A partner may look for your track record and delivery capacity. Keep a short core profile and tailor the examples to each purpose.

Price the work with content in mind

Check how much writing, photography, editing, translation and updating the quote includes. Ask for an editable source and specify who checks names, links, contact details and permissions before export. Agree what a later revision will cost.

Review before sending it out

If claims or permissions are missing, start with verified information and leave out material you cannot substantiate. Ask someone unfamiliar with the organisation to read the draft and tell you what they would do next.

Before you commit

Keep a source list, approved visuals, current contact details and a named person responsible for updates.

Websites, content and communications

A website gives people a place to check what you offer and take the next step. Photos, video and reports make your work easier to understand.

Decide what visitors should do

List the two or three actions that matter, such as asking for a quote, reading a programme update or finding directions. Build the page list and navigation around those actions.

Prepare the material

Gather the service descriptions, approved photographs, contacts and any forms or reports visitors need. Write short page summaries. Plan captions, image descriptions and transcripts where they help users follow the content.

Agree on launch and ongoing costs

Record who owns the domain and hosting accounts. Ask which costs recur, who will maintain updates and how you can restore the site if something goes wrong. Check the site on a phone and a slower connection before launch.

How M-CreativeHub can help

We can design and build pages, develop written and visual content, and plan photography or video where the brief requires it. We can also agree on a support plan and show your team how to update routine content.

What to bring to the first conversation

Your audience, the actions you want visitors to take, any existing domain, approved materials and the person who will maintain the site.

What you need before a website goes live

A website earns its keep when a visitor can complete a useful action and the team can keep the information current.

Try the task before adding features

Ask a customer to find a service, contact the right person or complete a request on a phone. Note exactly where they hesitate. A clear page and a working reply process may solve the issue before a booking system is needed.

Know what the quote includes

Ask about domain and hosting renewals, theme and plugin licences, copy and photography, form delivery, maintenance and backups. Keep account ownership with the organisation. Ask what can be exported if you move hosts or change providers.

Test outside the office

Try on a phone, on a slower connection and with a keyboard. Send a form enquiry to the real receiving inbox and confirm the reply path. Check that links, contact details and images load. Have a team member edit a page and restore a test backup.

Remove blockers before launch

Delay launch if forms do not reach staff, the team cannot renew the domain, or public images and claims are unapproved. Assign someone who will respond to enquiries and know if the form stops working.

Before you commit

Agree on two visitor tasks, name the owner of each account and set a budget for renewals and maintenance.

Portals and business systems

A portal gives staff one place to record and review work. Start with a routine process your team knows well.

Define records and user roles

List the records you want to manage, such as sales, expenses, stock or requests. Decide who creates, edits, approves and exports each type. Record what should be kept when a user leaves.

Use real examples to design screens

Walk through ordinary events and exceptions. For example, a sale might need a correction, an expense might be rejected or an approver might be absent. Decide which actions require notes and which changes must be traceable.

Test over a small period

Try the proposed system with a small group and a limited set of records. Compare totals with the current records. Ask users whether they can find and complete their tasks on the devices they normally use.

How M-CreativeHub can help

We can scope custom portals, reporting, user roles and approval flows. The handover can include basic training, access details and a maintenance plan. Integrations depend on the tools and access available.

What to bring to the first conversation

A blank sample of your current form or spreadsheet, user roles, approval steps and examples of the reports you need.

When custom software is worth the cost

Build a custom portal when the process is stable enough to describe and the existing tools cannot meet an important requirement.

Compare a simpler option first

Try a controlled spreadsheet, an existing product or a prototype with one process. Evaluate role access, reports, corrections, export and running cost. If the existing option can meet those needs, spend effort on adoption and documentation first.

Write the exceptions into the brief

Describe how staff reverse a sale, recover from a wrong entry or act when an approver is absent. Decide which changes need a dated record. Use sample figures for tests and reconcile them against a known report.

Ask about migration and operating costs

Estimate time to clean historical records, map fields and test imports. Agree which records move and which remain archived. Ask about hosting, support, training, recovery time and how your team can export the data in a usable format.

Set a pilot exit condition

Do not switch off the existing process until the pilot has matched agreed totals and users can do routine work. If results differ, reconcile the difference before expanding. Decide what triggers a return to the current process during the pilot.

Before you commit

Approve a build once users, exceptions, exports and the first report have been tested with representative records.

Field data, maps and dashboards

Good reporting begins with simple collection rules. When field teams record the same things in the same way, reviewers can check data and use it with more confidence.

Define what a record means

For each field, agree what counts and how it is checked. Give records a stable ID. Decide which forms need dates, coordinates or photos, and collect only what the reporting question needs.

Plan for weak connectivity

Use a collection process that can handle the places your team works. Test when records sync, what happens if the same item is entered twice and how a reviewer can return a record for correction.

Design the dashboard around decisions

Choose the indicators the team actually needs, confirm how they are calculated and show the time period. Check permissions before showing maps or field records publicly, especially if they contain sensitive locations or personal information.

How M-CreativeHub can help

We can map data flows, assess sources such as forms and spreadsheets, and build reporting and map views where data quality and access support them. Start with one programme or a small set of indicators.

What to bring to the first conversation

Your reporting questions, blank forms, an indicator list, reporting periods and a clear decision about what can be shared.

Before connecting a dashboard

A dashboard is worth building when the team can explain where its numbers come from, who checks them and how they influence decisions.

Write a definition for each measure

Record the numerator, denominator, time period and data owner. Decide how to count repeat visits, missing records and late corrections. Confirm the same definition applies across reporting periods before comparing figures.

Test sync, review and export

Try a full cycle from field collection to verified report. Include a duplicate, a correction and a delayed upload. Check that reviewer roles, exports and map coordinates behave as agreed, and that updating a record does not inflate a total.

Price the work behind the charts

Include form changes, cleanup, connector or storage fees, staff review time and support. Confirm that each data source permits authorised exports or integrations. If access is missing, start with a documented manual import rather than budgeting for live sync.

Decide what can be published

Keep private field information and sensitive coordinates out of the public view. Use aggregated results when suitable, agree permissions with the data owner and show the period and source on each chart.

Before you commit

Start with one reporting period and a few indicators that reviewers can verify against the source.

Automation, AI and educational tools

Repeated tasks and clear rules are good places to look for automation. Use the simplest approach that your team can check and maintain.

Start with a rule you can explain

Write the trigger, the action and the exceptions. For an approval, for example, record who receives it, what happens if they are away and how a mistake can be corrected.

Keep human review where it matters

AI can assist with tasks such as drafting or tagging. Check its output before publishing or taking action. Agree which data may enter third-party tools and who is responsible for reviewing the results.

Build learning tools around actual access

For an assessment project, ask teachers how they prepare questions, guide learners and review answers. Decide what can be printed or used offline, which languages are needed and how student information will be protected.

How M-CreativeHub can help

We can assess a workflow, prototype a focused idea or connect tools where supported. We discuss review, permissions and operating costs before recommending a launch.

What to bring to the first conversation

The repetitive task, the rules it follows, the mistakes that would matter and a person who can review the result.

How to tell whether automation is ready

Write down the rule, check it with real examples and decide which decisions must remain with a person.

Choose a routine result

Good first trials include reminders, turning approved records into a draft or routing a routine request. If people cannot agree on the rule or the exceptions change frequently, improve the process before automating it.

Test the failure cases

Include incomplete records, duplicate requests, wrong classifications and a failed connection. Decide who receives errors and how a person can undo or correct the result. For AI-generated text, compare a sample with source material and measure the time needed for review.

Check costs and data handling

Estimate use, review time and any charges per run. Confirm what information may be sent to a provider and who can access it. Do not use live student or sensitive organisational data in a prototype without permission and an agreed review process.

Keep the trial focused

In education, try one class or exercise using sample data. Observe how teachers work when connectivity drops and how they correct answers. Pause expansion if accuracy, accessibility or manual recovery is unresolved.

Before you commit

Proceed when the task repeats, rules are agreed, results can be reviewed and there is a clear manual fallback.

Consultancy, training and handover

A project lasts longer when the people using it can maintain it. Agree early on who owns the accounts, files, content and routine decisions.

Choose the support you need

A consultation can help compare options or fix a specific workflow. A fixed-scope project is useful when the deliverables are clear. A phased plan can help when your team wants to test a smaller release before expanding.

Write down what will be handed over

Ask for the agreed source files, account roles, update instructions, recurring costs and backup or export steps. For a website or system, have someone from your team practise making a routine update.

Agree on how support will work

Name a contact on each side. Clarify which updates are included, how problems are reported and how change requests are estimated. Keep a note of renewal dates and the person responsible for them.

How M-CreativeHub can help

We can advise on priorities, build or improve the agreed work, and train the people who will use it. Handover and any ongoing support are scoped with you.

What to bring to the first conversation

Your main contact, current tools, what needs to be fixed first, and who will be responsible for maintaining the work.

How to choose support you can sustain

Choose support that can be explained in a short scope and maintained by someone on your team after the project.

Set a decision for the engagement

A short consultation should give you an answer, such as whether to improve an existing tool or pilot a new one. Ask for options, assumptions, trade-offs, estimated running costs and who would do the work.

Make acceptance concrete

List the files, accounts and instructions that must change hands. Agree who signs off and what they will demonstrate, such as publishing an update, exporting records or restoring a backup. Arrange training for the people who do the work.

Separate one-off fees from ongoing support

Ask what counts as a defect, a content update or new work. Record the renewal dates, available support hours, response arrangements and how changes are quoted. Confirm who remains responsible when a supplier or staff member leaves.

Watch for gaps before committing

Pause if the proposal leaves account ownership, recurring fees or support unclear. Confirm that your organisation can access its materials and records. If a supplier provides a proprietary service, ask how exports and a future move work.

Before you commit

Approve the engagement when the next decision, handover test and ongoing costs are clear.