Website Strategy & Planning

"I need a site and I want it blue. How much will that cost?"

❧ ❧

"I need a house, and I'd like blue paint and beige carpet. How much will that cost?"

CURRICULUM DESIGN
JEN KRAMER
TECHNOLOGY INSTRUCTOR

"I need a website and I want responsive design. How much will that cost?"

What are your next questions?

- What do you need?
- How many pages?
- What is your budget?
- Timeline?
- Do you want to edit your own site?
- What features do you want to include?
- Does it have to work for mobile?
- Do you want Joomla or WordPress?

CURRICULUM DESIGN
JEN KRAMER
TECHNOLOGY INSTRUCTOR

Ever forget to ask something?

Oops. Now you're in trouble. Especially if you bid a fixed-rate contract.
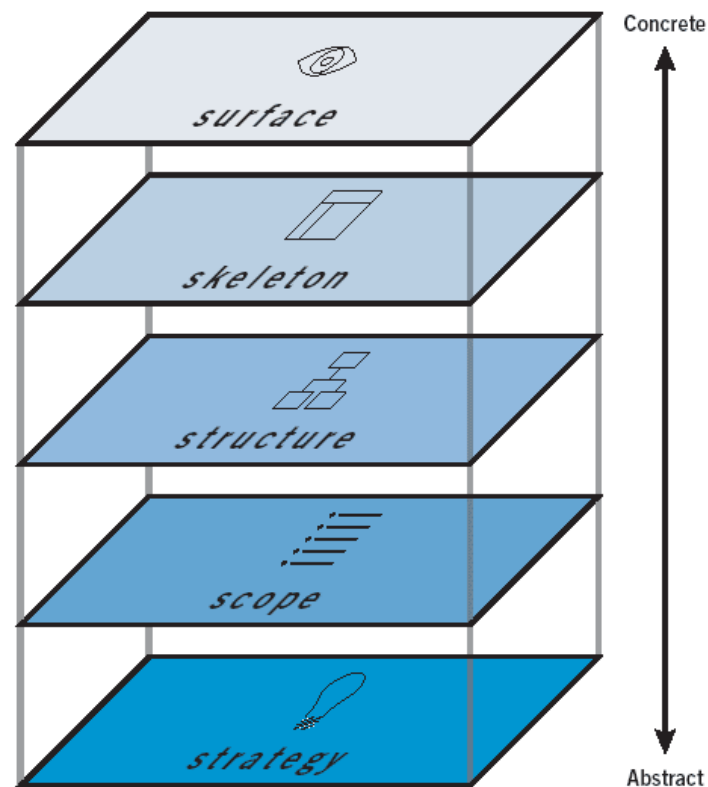
What questions should I be asking?

What questions should I be asking?

- The basic questions are always the same and in the same order.

- You can make the questions more specific or more general as needed.

- Follow the plan and your site will turn out great with less bumps.

JEN **KRAMER**
CURRICULUM DESIGN
TECHNOLOGY INSTRUCTOR

The Elements of User Experience

- Developed by Jesse James Garrett, www.jjg.net
- Read chapter 2 for free: http://jjg.net/elements/pdf/elements_ch02.pdf
- Or go buy the book and read it. It's skinny.

JEN KRAMER
CURRICULUM DESIGN
TECHNOLOGY INSTRUCTOR

Everyone wants to start by making it pretty.

∞ That's planning your interior decorating without developing the floor plans first.

CURRICULUM DESIGN
JEN **KRAMER**
TECHNOLOGY INSTRUCTOR

Some clients might feel like you're wasting their time.

- You're not. You're actually saving them time and a bundle of money. But that's often hard to understand.

Strategy Plane

Questions:

- What do we want to get out of the site?
- Who are our users?
- What do our users want?
- What experience are we trying to provide?
- How will we measure success?

What do we want to get out of the site?

- An x% increase in the number of visitors
- Reduce tech support costs by y%
- Convey the mission and vision of our project and enlist sponsors
- Sell our top 20 products to a wider market
- Increase our visibility in the marketplace by establishing our expertise
- Reduce phone calls for store hours and location

Who are our users?
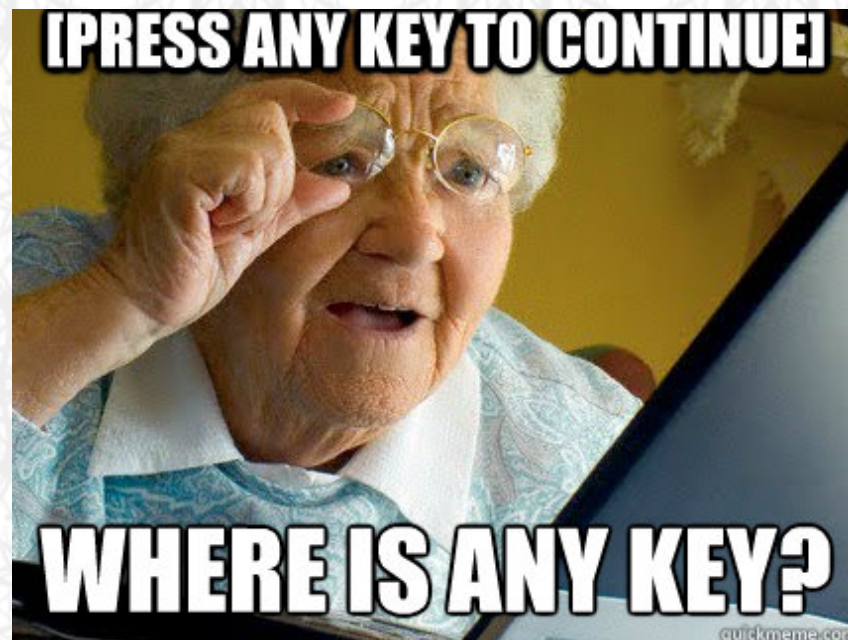

ଚ Get as specific as possible

- Good: 18-24 year old males in urban areas of the US with shoe sizes 12 and up

- Not as good: Young people with fashion sense

"Anyone who might be interested" is *never* the right answer.

CURRICULUM DESIGN
JEN KRAMER
TECHNOLOGY INSTRUCTOR

Who are our users?

- **What are their specific limitations?**
  - Specific website needs: arthritis, wear glasses, colorblind
  - Type of internet connection: dialup still reigns supreme in rural areas
  - Old computers? New computers? Most recent browser(s)? Netscape 4?

What do our users want?

- Be entertained; share photos, stories; reconnect with old friends and colleagues
- Get that @#$%^ printer driver installed and working
- Find out how to sponsor your project
- Purchase a widget at 11 PM in their PJs
- Find the widget thought leader and see what they think about X
- When does the store open and where are they exactly?
- Tell me more about that thing I read about in the paper this morning
- Do you offer X service? X product? How much?

What experience are we trying to provide?

- Efficient
- Simple and straightforward
- Meandering, wandering
- Cheerful and peppy

… and does that intro movie really support that experience?

What experience are we trying to provide?

Deep thought:

No one ever says they want to make a frustrating, difficult website.

But frequently, under the banner of "branding", organizations do exactly this.

Remember that an excellent CMS graphic design **supports** content, by working with it, rather than **constrains** content to arbitrary branding rules.
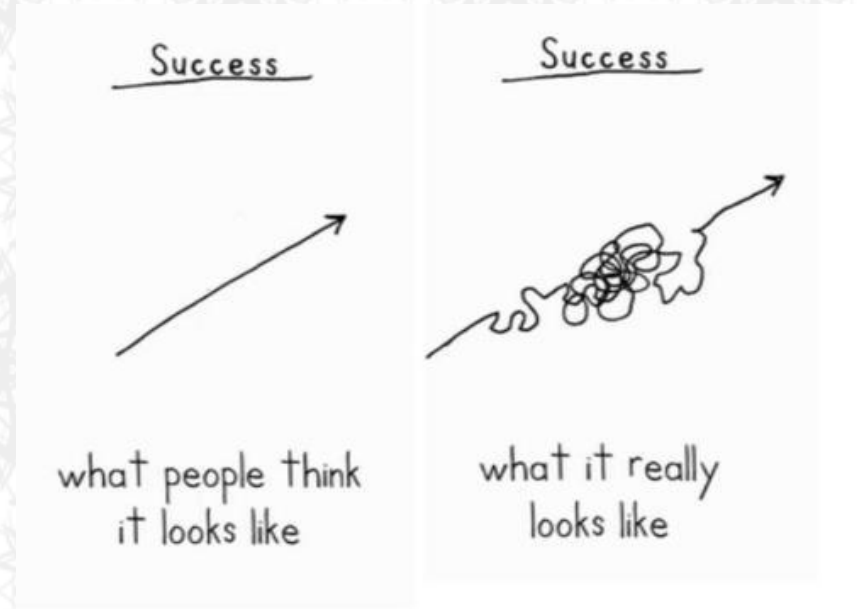
How will we measure success?

- It's not all about Google Analytics…
  - (train your clients to use and interpret their GA results)

- Reduce phone calls about store location and hours by 10% over the next 3 months.
  - Associates will track number of calls over next 3 months.

And if the website isn't "successful" by metrics?

ജ Make "store location" more obvious on the home page

- o And how will you do that?
- o And how will you measure the results?

Success

what people think
it looks like

Success

what it really
looks like

Strategy Plane

Scope Plane

Questions:

ஐ What features will the site need to include?

ஐ What kind of detail will those features have?

ஐ What tools, skills and personnel will we need to build the site?

ஐ What is the timeline for building the site?

What features will the site need to include?

- Client edits content
- Blogging/comments
- Discussion board
- Random quote
- Countdown clock
- Banner ads
- Google ads
- Recommended links
- Calendar

- E-commerce
- Online chat
- Contact form
- Newsletter signup
- Polls
- Survey
- Social bookmarking
- User profiles
- Zip code locator

CURRICULUM DESIGN
JEN KRAMER
TECHNOLOGY INSTRUCTOR

And what did you say your budget was again?

- Client edits content
- Blogging/comments

What tools, skills and personnel will we need to build the site?

- **Is X CMS right for this job?**
  - The reason there are [thousands of open source CMSs](#) is because not every CMS is right for every job.
  - Do you even need a CMS at all?

What tools, skills and personnel will we need to build the site?

- **Do I need some help?**
  - Graphic designer to create a custom design vs. canned template
  - Joomla extension vs. custom engineered extension
  - Client-provided content, or am I writing the content, or do I need a pro?
  - SEO assistance?
  - HTML/CSS assistance? Custom template construction?
  - Something else?

What is the timeline for building the site?

- There are entire courses and certifications devoted to project management.
- Figure out the launch date, and work backwards to the present to establish milestones for completion.
- Make sure the client knows what they need to deliver when.
- And make it a week earlier than that.

PMI
Project Management Institute
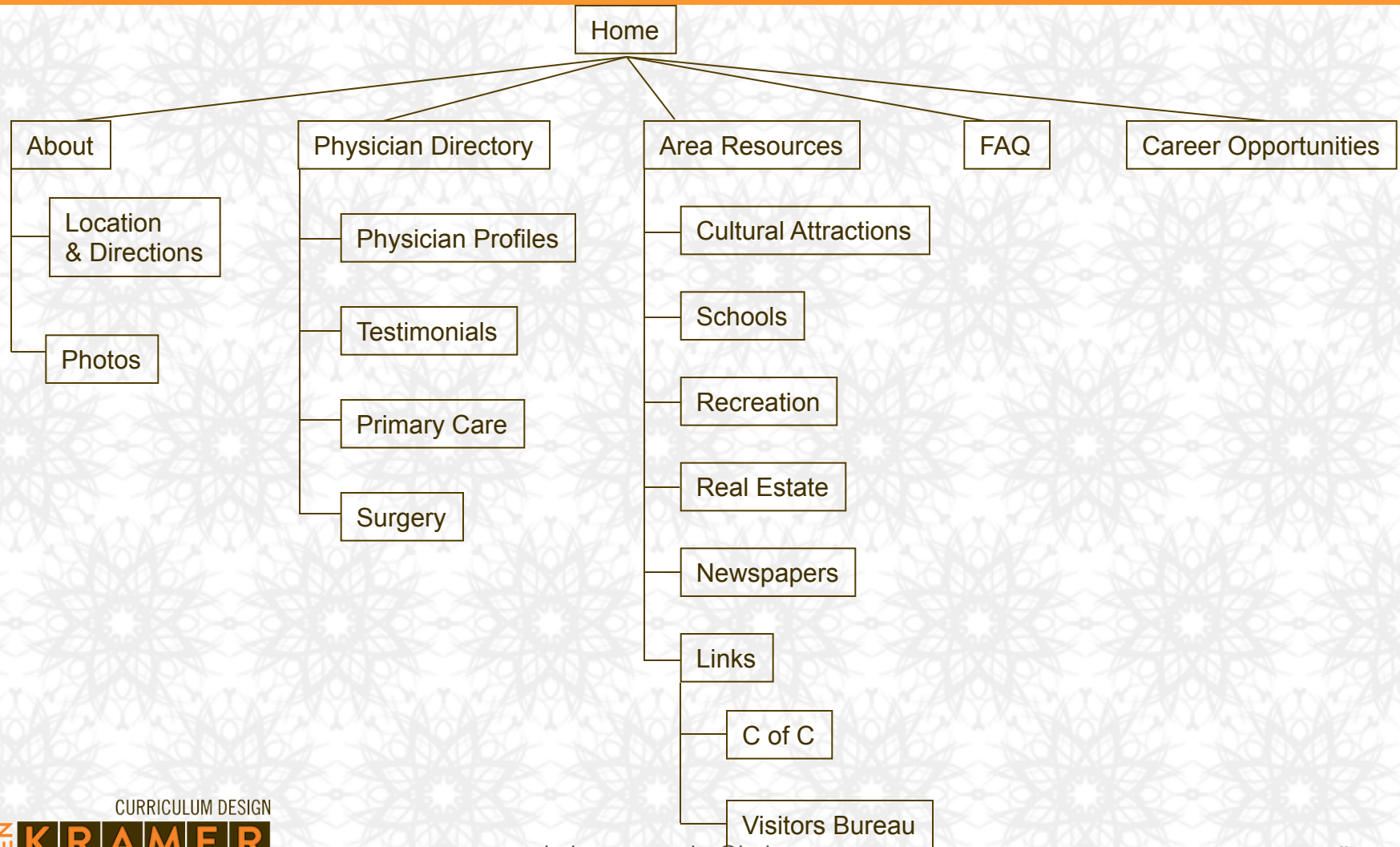
CURRICULUM DESIGN
JEN KRAMER
TECHNOLOGY INSTRUCTOR

Scope plane

Structure Plane

Questions:

ℂ How should the content be organized?

ℂ What are the navigation button names?

ℂ What about mobile considerations?

CURRICULUM DESIGN

JEN **KRAMER**

TECHNOLOGY INSTRUCTOR

What is a site map?

- Think of this as an org chart.
- This is the hierarchy of your pages in your website.
- It can be displayed as an org chart, or as a bulleted list.

What is a site map?

CURRICULUM DESIGN
JEN KRAMER
TECHNOLOGY INSTRUCTOR

What is a site map?

- Home
- FAQ
- About
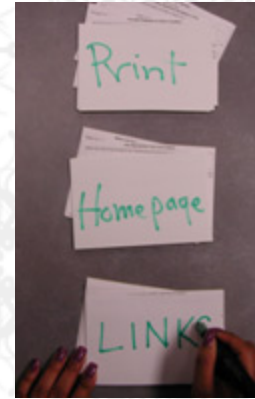 - Location & Directions
  - Photos
- Area Resources
  - Recreation
  - Links
    - Chamber of Commerce
    - Visitor's Bureau

CURRICULUM DESIGN
JEN KRAMER
TECHNOLOGY INSTRUCTOR

How to develop a site map?

∾ Card sorting

CURRICULUM DESIGN
JEN **KRAMER**
TECHNOLOGY INSTRUCTOR

Mobile Considerations

- You will need a mobile-compatible version of this site.
- Will you need separate information for a mobile device?
  - If so, how is that information structured?
  - Separate mobile site, a mobile app, or responsive design – and base your choice on your **content**, not on the **technology**.

Structure Plane

Skeleton Plane

Questions

  € How should forms and other interactive screens look?

  € Where should important information be located?

CURRICULUM DESIGN
JEN KRAMER
TECHNOLOGY INSTRUCTOR

Surface Plane

Questions:

⅊ What will the finished product look like?

⅊ What colors, fonts, and logo will we use?

⅊ Sanity checks on layout, user understanding of the site, etc.

⅊ Mobile testing

Pop Quiz!

- [Yale University School of Art](#)
- [Shop in Paradise](#)
- [Zinc Bistro](#)
- [OXO](#)

- Evaluate the site you chose:
  - What does the owner want to get out of the site?
  - Who are their users and what do they want?
  - What experience is provided?
  - What would you keep? What is the site doing well?
  - What, if anything, would improve the site?