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Smart tools.

Consider the following factors when planning a new or revised website project. Defining key elements up front can pay dividends in guiding the appropriate execution, tools, or methodologies for the task, and in minimizing unnecessary revisions—**regardless of the technical approach to the project.**

GENERAL INFORMATION | The big picture your website developer needs to know

☑ **Identify the intended URL**, as well as other URLs that redirect to your main URL. Be sure to include social media sites as well as other associated sites.

☑ **Describe the concept,** product or service this site is intended to promote or provide, including the value proposition and key aspects that might benefit from specific website executions. Doing so will help guide many other decisions to be made along the way.

☑ **Identify the primary contacts** for input, as well as the ultimate decision-makers who will have final approval on the project, and coordinate communication among them and your website developers.

☑ **Identify your intended launch date for the site.** Identify any specific events or considerations that might impact, or be impacted by, the launch schedule *(e.g. a PR launch, marketing campaign, event, conference, board meeting, etc.).*

☑ **Establish your budget**, including potential sources of funding if there are different operating units impacting different facets of the project.

GOALS & OBJECTIVES | Your benchmarks of success for what you want to achieve

☑ **Identify the main business problem** you hope to solve with the website, general or specific outcomes required to classify this project as successful, and any specific measures of success for the solution *(i.e. what criteria will be measured)*. Refer to those objectives frequently throughout the project to guide decision-making.

☑ **Prioritize your primary short-term/long-term online business objectives** for the website *(e.g. marketing/branding awareness, increased lead generation, direct online sales, fewer customer service calls, etc.)*. Include any secondary objectives, whether short-term or long-term.

☑ **List any special opportunities or potential problems** that might be associated with the project, as well as any existing on-line or off-line strategies that are in place to meet the new business objectives.

☑ **If you plan to generate revenue through this website,** identify how that is intended to be done:

- **Asset Sale** *(selling physical goods)*
- **Usage Fee** *(service fee, e.g. FedEx)*
- **Subscription Fees**—selling a continuous service *(e.g. Hulu Plus)*
- **Lending/Leasing/Renting** *(e.g. leasing a property)*
- **Licensing**—intellectual property *(e.g. software)*
- **Brokerage Fees**—charging for services as an intermediary between two parties *(e.g. broker selling stocks or real estate)*
- **Advertising**—revenue generated from charging fees for advertising *(e.g. advertising as seen on free mobile apps)*
- **Additional Considerations**

☑ **Identify any specific eCommerce requirements** or other implementation requirements needed to align your implementation to support your revenue model.

TARGET AUDIENCE | Outlining the right approach for the right reaction.

☑ **Map out your intended audiences** for the site, including:

> - information about them,
> - your expectations of what they should get out of the site,
> - their motivations for coming to the site,
> - their motivations for choosing to use your services or buy your products. *(Doing so can help you identify important content and functionality needed in your website solution.)*

☑ **Conversely**, identify any potentially sensitive areas to downplay or avoid when communicating or dealing with your targeted audiences.

POSITIONING/IMAGE | Defining the desired end-user experience

☑ **Use adjectives** to describe the new website's desired look, feel, and functionality, and how the user should perceive it *(e.g. prestigious, informative, friendly, corporate, fun, forward thinking, innovative, and cutting edge)*. Plan for design components and functionality to inspire those perceptions.

☑ **How does your organization** try to differentiate itself from competitors or alternatives? How do you think your current audience perceives/differentiates your organization vs. the competition in the offline environment? Identify whether you want to maintain that image in your website, or change it.

☑ **Identify your competitors' URLs**. What do you like and dislike about those websites? What do you feel works well? What improvements could give your site an advantage?

☑ **List the URLs of other relevant websites** you find compelling. Identify attributes or functionality of those sites that you feel would add value in helping you achieve the goals for your new website.

DESIGN | Establishing the look-and-feel of your new website

☑ **List any organizational graphic standards** that need to be followed, providing any written guidelines or examples available.

☑ **Identify all visual elements or content** that should be utilized from your current marketing materials *(logo, color scheme, navigation, naming conventions, etc.)*.

☑ **Cite examples or analogies** of the experience you want for your site visitors, as well as examples or analogies of what you do NOT want your site visitors to experience.

☑ **Do you need to accommodate** visitors who might have visual impairments that must be addressed with Section 508 compliance?

CONTENT | Managing expectations for the substance of your website

☑ **Outline your vision for the website's structure/content,** including an Information Architecture and the path or direction you want a visitor to take upon visiting the site.

☑ **Will the site use existing content?** If so, what is the source, has the content been audited, and who is responsible for approval? If not, will you be creating content in-house or using an outside provider?

☑ **What percentage of content** is ready to "go live" now? What percentage is new, needs to be revised, or needs to be developed? Identify who will be responsible for new content. List any content feeds coming from outside sources *(e.g. stock ticker, YouTube videos, etc.)*.

☑ **How often do you intend to update your site**, and what will be the nature of those changes? Having a need for frequent, small updates by non-technical personnel can have a significant impact on the website structural approach you should take.

☑ **Identify any regulatory issues** that need to be addressed in content *(e.g. health or financial disclaimers, etc.)*.

TECHNOLOGY | Identifying structural requirements to guide optimal execution

☑ **List any mandatory or primary functionality or technology requirements** (e.g. content management, data-driven search, eCommerce, Google Analytics, etc.).

☑ **Outline additional desired functionality requirements** and whether they are Phase-I or Phase-II items (e.g. RSS feeds, search, blogs, dated news items/calendar, searchable database, personalization, etc.). Even if those functionalities are not part of the initial website launch, they can impact decisions on the original structural approach and the most efficient technologies for long-term success.

☑ **Describe, in detail, any currently used software** that needs to be integrated with the new website (e.g., CRM, accounting software, data collection, eCommerce, etc.).

☑ **Describe any business application(s)** you would like to be developed along with the website, if applicable (e.g. information portal, intranet, document repository, etc.).

☑ **Identify any existing technology limitations** that need to be addressed.

MARKETING | Preparing your new website for maximum exposure and success

☑ **How do most people find out about your existing website?** How do you expect them to find out about your new site? Outline strategies for encouraging users to come back to your new site.

☑ **Describe how you plan to market your new site**—pre-launch, at launch, and beyond.

☑ **Do you plan to employ traditional media** in concert with your new website? Do you currently use unique URLs and landing pages to track traditional campaigns?

☑ **Do you plan to employ online media/advertising** coordinated with your new website? Do you currently use online tracking mechanisms for those campaigns as well?

☑ **Identify other goals or plans** for using Web technology to support additional promotional strategies/tactics.

For more insight into our process, toolset, and proof of performance, contact:
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