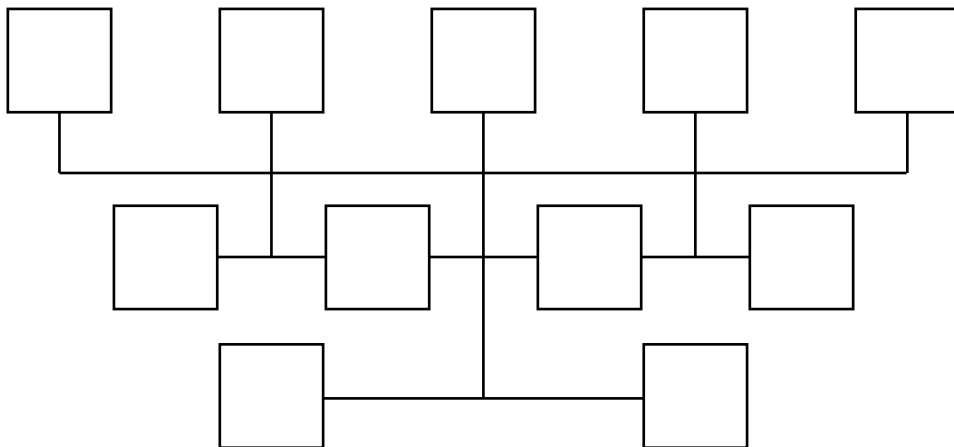


A practical Web site planning guide for small to medium sized companies and organizations.



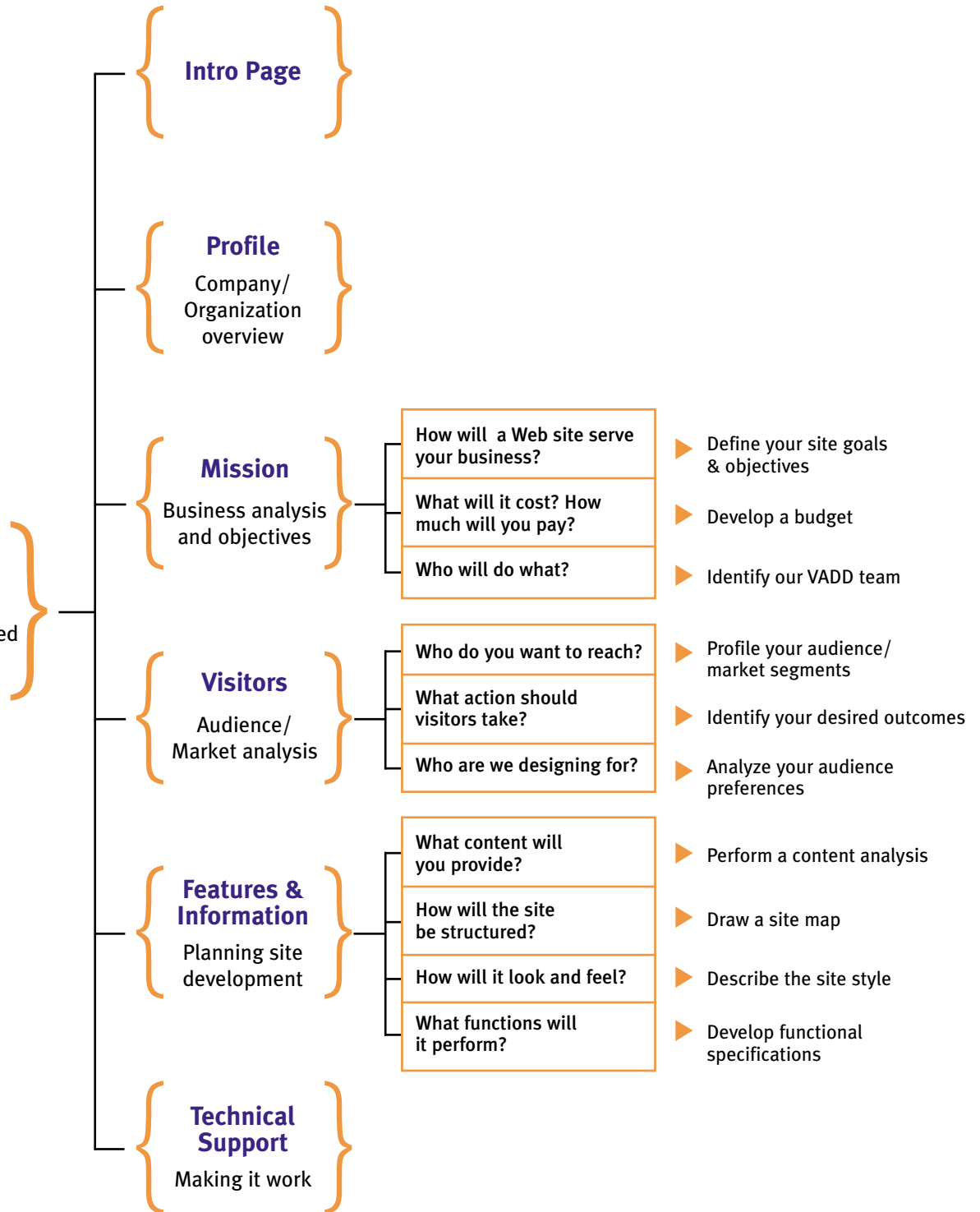
## F L O W C H A R T



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Web Discovery Book

**Site Discovery:**  
A practical Web site planning guide for small to medium sized companies and organizations.



# SITE DISCOVERY:

*A practical Web site planning guide for small to medium sized companies and organizations.*

## **So you want to build a Web site.**

Perhaps you are trying to keep up with your competitors, trying to increase your market, or simply inform the public about your product or service. Maybe you run a small family-owned business, a non-profit organization on a budget or a large multi-state association. You may already be comfortable with Web technology, or this may be your first foray into the sometimes intimidating world of Web development.

Regardless of your background or goals for establishing an effective Web presence, we believe the wisest course of action is to balance your dreams of the “ideal site” with careful planning and common sense. It is not enough to know you want a Web site. Much like an architect, you will need to carefully plan out your Web site to identify what is to be built, who it is to be built to accommodate, and the purpose of the structure.

## **Why is this necessary?**

Imagine you are a builder. A client comes to you and states, “I want a house.” Without a detailed set of blueprints, you would have a hard time estimating and building a house for this client. What kind of house? How many floors, rooms, windows? What sorts of materials will be needed? Where will it be located, and how will it be used (residential, apartments, office space)?

You can assume that you know what the client wants. You can build the best structure of your entire career. Invariably, however, it will not be what the client had envisioned. The client will want to change the pitch of the roof, knock out a wall here, and add a wing there. At the end of the job, it will be discovered that some functionality has been left out, the project is months behind schedule, and that the budget was blown in the first week of construction.

Conversely, if a client approaches you with a well thought out plan with the intent to stick to that plan, it is much easier to provide an accurate assessment of the job and move forward with everyone under the same set of assumptions. This allows the job to stay on track and within the client’s budget. Of course, things will change. However, it is much easier for all parties to understand what effect these changes will have on the overall structure, timeline and budget.

The same is true in Web development. When you put together a Request for Proposal, you are providing your Web development firm with a detailed set of blueprints. This allows the project to be estimated and completed with a minimum of problems, and a maximum return on investment. All parties understand the goals and objectives of the site and can work as a team to facilitate a smooth, efficient and cost-effective development process.



## Getting Started

This guide provides you with a structured framework for thinking through how and why to develop a successful Web site. As you'll notice from our table of contents, this guide is developed around a series of planning tasks and questions. This strategic evaluation of your project will help you get a handle on what you are constructing, enabling you to produce a professional quality Request for Proposal.

In order to minimize your anxieties about this process, we have two options:

- Option 1:** You can read through our document, gather the appropriate information, and produce a well thought out Request for Estimate, which can be sent to any Web development firm.
  
- Option 2:** We can assist you in planning out your Web site, walking you thorough the steps of this document. We will then produce a professional Request for Estimate, which you can send to any Web development firm.

# PROFILE:

## *Company/Organization Overview*

**Company/Organization Name:**

**Company/Organization Type** (ex. Business, Association, Non-Profit, etc.):

**Describe your business and its function:**

**Identify your current market:**



**How do you currently market/sell/promote your products or services?**

**Where is the company/organization located?**

**How long have you been in this business? (optional)**

**What is your annual revenue? (optional)**

## 1. How will a Web site serve your business?

### **What are your goals and objectives for building this site?**

(For example, do you want it to reduce costs, market a product, create efficiencies, educate the public, publish your newsletter, promote an event, sell a product, etc.)

## 2. What is your budget?

Just as you can build a dream house with hundreds of rooms and tons of luxuries, a Web site can be built with all the bells and whistles. Just about anything you can imagine can be done – for a price. By identifying a budgetary range, you will help both yourself and your Web development firm allocate resources to reach your goals.

Typically, a custom site runs \$3,500 on the low end (small, simple, HTML driven) and can increase exponentially from there. When developing your budget, remind yourself that sometimes a few more dollars upfront can lead to savings later. For example, if your site has a calendar which needs to be updated often, paying for a ColdFusion application which will allow a staff member with little to no HTML knowledge to update the calendar on a daily, weekly, even hourly basis. This saves the cost of maintenance package or the expense of training a staff person on HTML.

### 3. Who will do what? Identify your team and assign accountability.

Your Web development team's capabilities include designing, coding and programming as well as hosting and marketing assistance for the promotion of the site. This minimizes the number of different vendors with which you will need to coordinate.

#### **Your Web Development Team includes:**

- ▶ Customer Service Representative
- ▶ Web Coordinator
- ▶ Designers
- ▶ Coders/Programmers
- ▶ **A single point of contact from your company**

This single point of contact is responsible for the coordination of content, responding to comps/site layout and approval of all structure and applications. This person is also available for questions. The contact has the authority to sign approvals or make changes to any piece of the Web project.

## 1. Who do you want to reach?

What market are you trying to reach with your Web site? Is this consistent with your current market, or are you trying to reach a new market? How will your target audience find your site – search engines, current marketing pieces, advertisements?

## 2. What action should visitors take?

An effective Web site isn't just a pleasant place for people to wander in and out, like taking a leisurely stroll through the park. Why do you want to attract people to your site? What benefit will they provide? For example, you may want them to:

- ▶ Read your newsletter online (reducing print costs)
- ▶ Register for a conference
- ▶ Become a member
- ▶ Purchase a product
- ▶ Learn about upcoming events
- ▶ Research your products/services
- ▶ Take legislative action
- ▶ Apply for a job
- ▶ Sign up to be on a mailing list

Wherever possible, state your goals in quantifiable terms. Your answers will drive the site's design and be a benchmark for its success.

## 3. Who are we designing for? Identify the least technical segment of your audience.

Does your market include the high-tech sector? Mid-level businesses? The public? Will your market have the most up-to-date technology? Or will you have audience members on a 56k modem who do not have Adobe Acrobat reader or the ability to view Flash?

# FEATURES & INFORMATION:

## *Planning Site Development*

### 1. What content will you provide?

#### **Make a content wish list.**

Good content is essential to an effective Web site. Your visitors may come to view the design and layout – but they will stay for the content. In planning your Web site, you need a good idea of what content and information you will give to your visitors. One way to go about this is to create a content wish list.

In your content wish list, you will want to outline everything that you may want to include on your Web site. At this point, there are no limits. Do not be concerned with budget, resources or deadlines. Simply list as many possibilities as you can. For example you may want contact info, tips, information about your organization, newsletters, press releases, mission statement, specials and promotions, tech support, customer service, registration forms, an online catalog, job openings, games, videos, etc. There are no wrong choices.

#### **Perform a content analysis.**

So now you have a long list of potential content. You will want to streamline your content list as much as possible without losing clarity for your audience. Review your content list and begin to pare it down, using the following questions:

- ▶ What is it your audience wants to see, and will the information you provide generate the desired response from your visitors?
- ▶ Will the information help to achieve your Web site goals?
- ▶ Which are essential elements, and which are purely wishes?
- ▶ What appropriate content do you already have, what additional content will you need?
- ▶ How will you display this information (HTML, PDF, Word document).

## 2. How will your site be structured?

### Draw a site map.

Similar to the builder's blueprint, the site map is a graphical representation of how your Web site will be structured. Through it, you can layout how all the pages (rooms) of your site will relate to each other and function as a whole. It will assist you in determining how your content will be displayed and how a user might find that content.

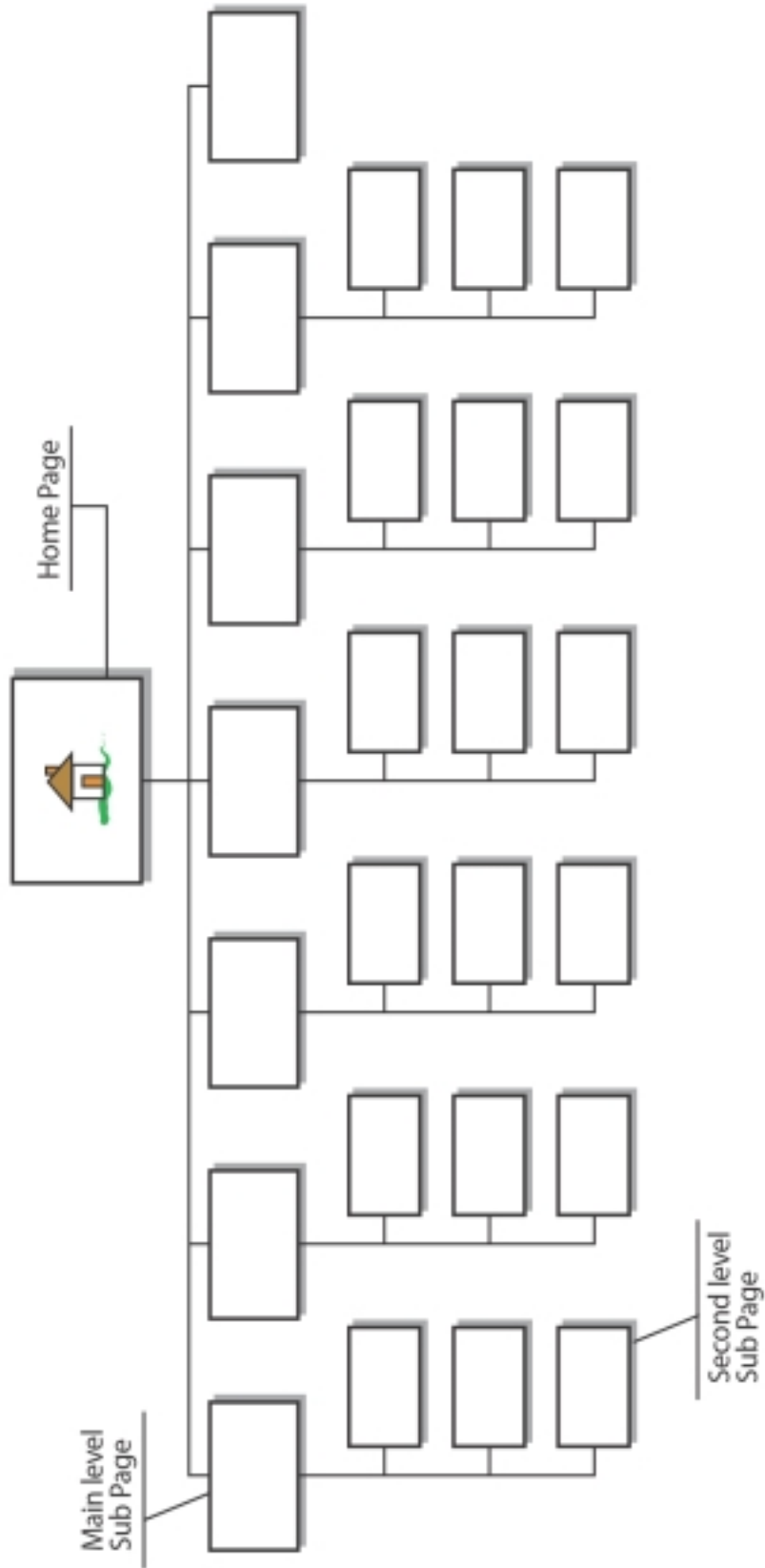
We have included two sample site maps for your review. While there is no set convention for how a site map should look, these are the most widely used. The first is a fairly extensive site with several layers of navigation. The second is a much more simple site. Yet both benefit from the use of a site map. The last site map is blank and has been included for you to begin the planning of your site. Don't feel that you need to fill every page, or that you are restricted to the number of pages provided.

You will notice that these examples are very similar to an organizational chart. Like the organizational chart, the most important information is at the top level – the home page – and everything branches out from there. Whatever is on the level directly below the home page becomes the main navigational structure for the entire site. This navigation will appear on every page, so this information should be important enough to justify a spot at the top level of the navigational hierarchy. We recommend that the number of pages in this section be limited to between 5 and 7.

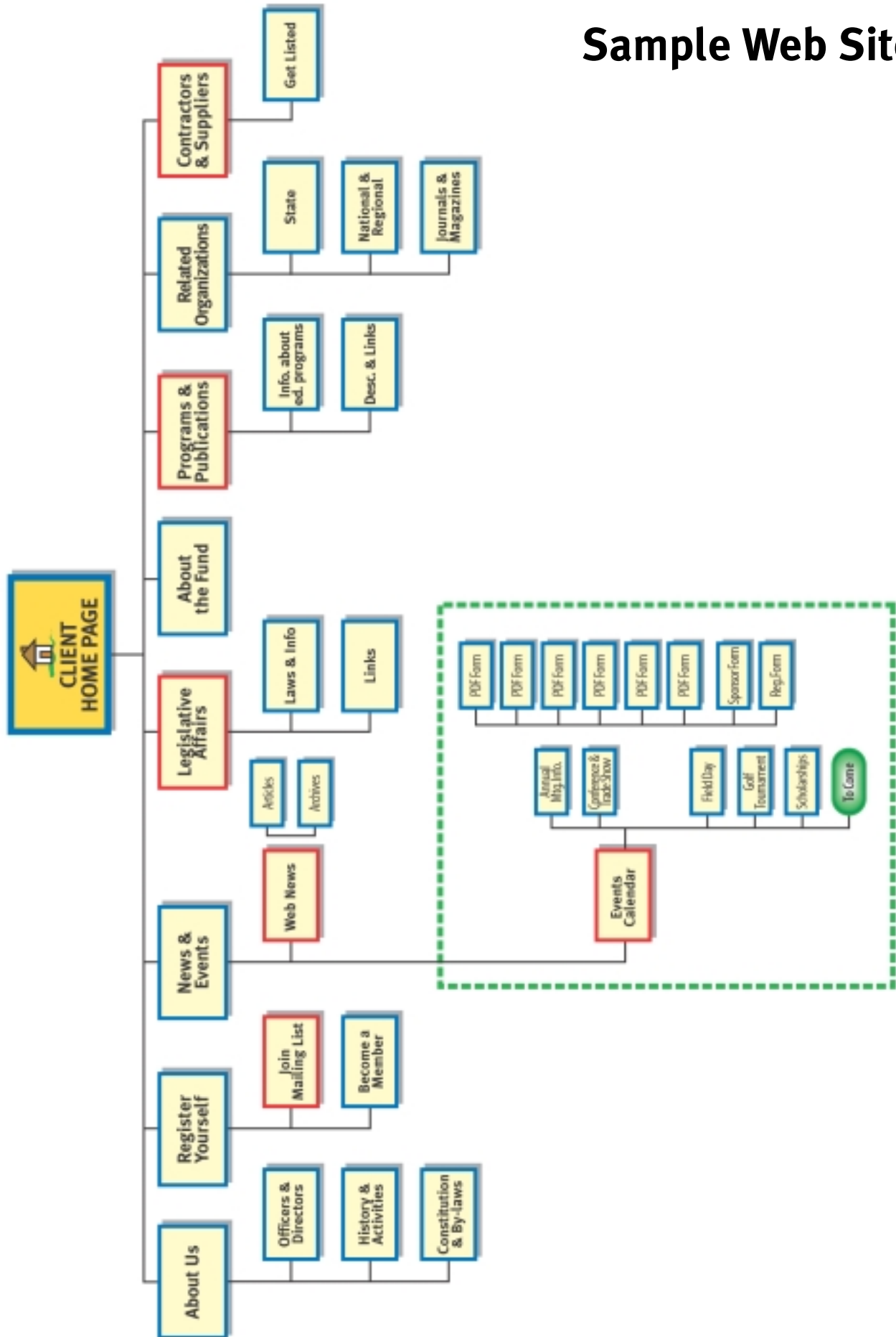
Don't make the mistake of setting up your site map based on your internal business organization. View your Web site from the user's perspective instead of your own. Categorize your content list and lay it out so that someone unfamiliar with your company can quickly and easily find the information you believe they will be looking for.

Don't become too attached to your first site map. You will probably go through several versions of the map before you finish. Being flexible allows you to create the best possible plan for your site.

# Web Site Map



# Sample Web Site



### 3. How will it look and feel?

#### **Describe your vision.**

Now that you have an idea of what your site will contain and how it will be organized, you can begin determining how the site will look and feel.

Web designs range from simple text with a few graphics to complex sites using graphic text, Flash movies, images maps and more. The design should be appropriate to your audience and content. We have developed a few questions and some tasks to help facilitate communication between you and your Web designers.

- ▶ When deciding the look and feel of your site, you may want to spend some time surfing the Internet. Find examples of sites you like and those you don't. Remember to visit competitor's sites. List the design elements that you like and dislike about each.
  
- ▶ How would you characterize your business? (Conservative, cutting edge, home town)
  
- ▶ How do you represent yourself in any printed materials?
  
- ▶ What are your corporate colors?
  
- ▶ Do you have an electronic version of your logo or a clean, scannable copy? Do you have the PMS numbers and font names for the logo?
  
- ▶ Do you prefer a left justified or centered site?
  
- ▶ Will you provide photos? Do you wish to use stock photography? Do you prefer illustration?

## 4. What functions will it perform?

### Identify any special functionality.

Ok, so now you have designed a site for your users. Done? Not quite. There is still a question of functionality. A Web site can perform simple functions such as serving up Web pages, or it can be as complex as conducting online searches and financial transactions.

- ▶ Are there any specific functions you would like your Web site to perform?
- ▶ Will there be any forms?
- ▶ Is there content you would like to be able to update often (newsletters, calendars, press releases, etc).
- ▶ Will there be any monetary transactions?
- ▶ Is there a need for information gained from the site to be included in current company databases?

If you answered yes to any of the above questions, the next step is to create a functional specification. In other words, simply describe how you see these functions working. For example, if you are gathering information from your visitors, note what form will be used to collect it, how it will be stored (sent to an email, dropped in a database, etc.), and what it will be used for. Be as specific as possible.

If there are forms, please remember to specify where they will be submitted (to an email address, a database, etc), as well as the fields needed (including required fields). A field is the container for a specific type of information. “Name,” “Address” and “Telephone Number” might all be fields in a form. A required field is a container that must be filled before the form can be submitted (example: to create an email list, you might require that visitors submit their email address).

For many of these functions, an administrative section will be needed, allowing your staff to update the Web site without a strong knowledge of HTML coding. In order to have the functionality that you deem necessary, it is important to specify the following:

- ▶ Is there a need for multiple user accounts? (*how many people need access to the administrative section?*)
- ▶ Is there a need for multiple security layers? (*will some staff have the ability to enter some sections of the admin section, but not others? How much security is necessary?*)
- ▶ For each section, what would you like to be able to control? (*text, headers, images, tables, etc.*)
- ▶ Are there any special cases or conditions for any of the sections? (*ex. The calendar should have the ability to specify a range, such as 8 – 10 a.m.*)



6. Are or will any domain name re-directs need to be accounted for?



7. Will you need a secure certificate?

8. Is there a need for statistic reports/user tracking?

9. Do any email accounts need to be set up? Emailing lists?

10. Will you need the site submitted to search engines?

11. Will any portions of the site be database driven? Does a database exist, and if so, what database software is being used?