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Part 1: Website Workbook & Development Planner

GETTING STARTED ON YOUR NEXT PROJECT

Document Overview

This document gives you an overview of the development process of a typical web development project and what will be required from you at each phase. This document is based on hundreds of website implementations done for clients of all sizes by ideaLEVER Solutions Inc.

The actual process followed by your designer or project manager may be different.

A well-managed web project from design through launch can take as little as 4 weeks with many being completed in less than 6 weeks. A successful and quick project depends on good planning, good communication and a clear understanding of what is required for the design team and your organization. As the project timeline stretched out, project management costs inevitably increase because more time is required for status updates and project reviews.

Time managements is essential to getting your web design project up and running on schedule. You need to be aware of when you will be needed and what is expected from you. Our designer is responsible for the creative aspects of your site but will be relying on your team to provide the details that make your site unique.

There are a few simple guidelines will help to keep your project on track.

Limit the Number of Decision Makers

There should be 1 person at your location who is responsible for the project. This person will have the skills, knowledge, and authority to make decisions on behalf of your company. The more people involved in each decision, the longer it will take to gather feedback, the harder it will be to build consensus, the longer your project will take, and the more your project management budget will grow and to be honest, the weaker the final solution will be.

Timely feedback

To keep the project operating on an efficient timeline we recommend providing feedback within 2 business days. If you are unable to respond quickly, acknowledge the enquiry

and tell your developer when they can expect a response. This will allow them to look after our other customers and leave time available to deal with your feedback when it arrives. If ideaLEVER has to follow up several times to get a response, this will be reflected in increased project management costs. Unexpected delays can also result in other customers being given priority compounding the delays.

Availability

Most customers should plan on a minimum 6 week project. If key individuals will be unavailable for some or all of that time, it is best that it is disclosed at the beginning of the project so that your team can plan around the absences. Switching decision-makers part way through a project increases project management costs.

Be Prepared

Use the schedule on the following page to keep track of your project. Some of the tasks can be time consuming but it is possible to get a head start and reduce the disruption to your regular routine. The most common source of delay is content preparation which most organizations underestimate.

Stay On Track To Success

STAY DETAIL ORIENTED
A detailed project can help keep people focused and stay involved in the process!

STICK TO A TIMELINE
A website doesn't get pulled together overnight, but a good plan can help motivate everyone and keep the project moving.

PROJECT OVERVIEW

The following table shows an overview of a typical web development project and assumes that the client will be responsible for content deployment in SiteCM. Remember this is just an example, your project might involve more steps but if you structure the process and stay involved the process can be quick and painless

Website Project Plan	Assigned	Status	Date
[Customer] Website			
1 Pre Production			
1.1 Signed Agreement	Client		
1.2 Deposit Received	Client		
1.3 Asset Collection	Client/Designer		
1.4 Creative Review (reference sites)	Client/Designer		
1.5 Project Timeline	Designer		
2 Design	**2 - 4 weeks + approval time**		
2.1 Design Draft	Designer		
2.2 Client Review and Feedback	Client		
2.3 Second Draft	Designer		
2.4 Client Review and Feedback	Client		
2.5 Final Creative	Designer		
2.6 Technical Requirements Doc (As Needed)	Designer		
2.7 Client Approval	Client		
3 Production	**1 - 3 weeks + approval time**		
3.1 Design Integration	Designer		
3.2 Customizations (As needed)	Designer		
3.3 Content Preparation	Client		
3.4 Delivery testing	Designer		
3.5 Delivery of Staging Site	Designer		
4 Site Building	**1 - 4 weeks**		
4.1 QSV Review	Client		
4.2 SiteCM Training	SiteCM/Client		
4.3 Content Setup	Client		
5 Launch!			

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Part 2: Web Design Workbook

UNDERSTANDING AND PREPARING FOR WEB DESIGN

Document Overview

This document was developed by ideaLEVER Solutions Inc. and is provided as a free resource for organizations considering a SiteCM web development project. It assumes that your organization already has logos and existing marketing material.

If you are working with a SiteCM Partner or a third party designer, branding, or PR Company, their processes and requirements will be different.

Design Asset Collection

To understand you and your organization, your web designer will require a few raw materials before they begin:

- Electronic version of current logos and branding guidelines
- Print and/or electronic versions of marketing material
- Photos
- Mission Statement

Logos and Guidelines

You should have these on file or be able to get them from your designer or printer. It is preferable to have PSD (Adobe Photoshop) EPS or AI (Adobe Illustrator) files but JPG files are acceptable.

Larger companies usually have branding and logo usage guidelines. These can be quite detailed and provide the design team with preferred presentation, acceptable usage, colours, and the amount of space needed around the logo.

Marketing Material

Your web site should have the same look and feel as your other marketing material so that all customers facing material has the same market positioning. PDF's or printed copies of your marketing assets provide the designer a better understanding of your organization and visual identity.

If you are not happy with your current material, provide samples and explain what you see as the defects. Without this guidance your web designer might make the same mistakes.

Photography

Do you have specific photos that you would like us to use? Anywhere from 6 to 24 photos is generally sufficient. Too few and we are limited in our creativity, too many and time can be lost sifting through the options.

You can also provide photo ideas from royalty free stock photo sites like www.istockphoto.com. Royalty free images are affordable and a great way to add high quality images to your site.

Mission Statement

Your mission statement helps the designer to better understand your organization, what is important to you and what you are trying to do. This might be on some of your existing marketing material already.

Content Planning

Goals of the site

Your web site should have a purpose and you should be able to articulate a primary and secondary goal for your site. This will help the designer to focus their efforts on achieving these goals, and will provide a benchmark to determine the success of your site once it is running. Be sure to think of key messages and calls to action that you want your site visitors to see.

Target Audience

Who is your audience or customers? Your audience might be professional, technical, old, young, female, male, university educated or a bit of each. For example, a college needs information for current students, prospective students, and parents.

Competitors

We can assume that your target market is familiar with them and will expect your site to be as good or better. You have a better idea of what these sites or organizations are and if possible, tell us how your offering compares to them.

Formatting Tips

Site Map

A rough site map will help ensure that you have the correct license and will help the designer present you with familiar elements.

SiteCM allows you to create and manipulate your content with ease, but it is important that you have a rough idea of how your site will be structured before you start. You don't need to worry about getting it absolutely perfect, but you do need to think about your menus and how you would like the content will be grouped. Once you are adding content it is easy to change the names of the items or even their order on the menus.

Basic Site Map Planning

The site map can be as simple as using a word processor to create a simple outline like the one below (left). Another technique is to lay out the content in a table or spreadsheet as shown below (right).

1. **Home**
2. **About Us**
   a. **History**
   b. **Staff**
   c. **News**
3. **Services**
   a. **Service 1**
   b. **Service 2**
   c. **Service 3**
      i. **Details**
      ii. **More info**
   d. **Service 4**
4. **Testimonials**
5. **Contact**

Home

About	Services	Testimonials	Contact
• History • Staff • News	• Service 1 • Service 2 • Service 3 o Details o More Info • Service 4		

Sample Content

A page or two of sample content is particularly helpful if you do not have an existing site or any significant marketing material. It is never too early to begin thinking about what content you want to have on your web site.

Creative Review

Please provide a list of a few sites you like whether they are in your industry or not and if possible list what is it that you like about each one. (colour, navigation, layout, features, etc.)

Site Name and URL (address)	Why you like/dislike it.
Site 1 **EXAMPLE**: www.anysite.com	Reason: Love the simplicity, its clean and easy to read, would like the rotating banner
Site 2:	
Site 3:	
Site 4:	
Site 5:	
Site 6:	
Site 7:	
Site 8:	

Feel free to add more if necessary.

Appendix: Web Design Issues

This section will help you to be more comfortable with the decisions you will be making during the design phase.

Web design is not like print design. Understanding the issues can help you make more-informed decision and understand many of the designer's choices. One of the goals of web design is to make sure the largest numbers of site visitors have the best possible experience. Design considerations must be balanced against myriad technological issues.

Our design team works with these issues every day and takes them into account before you receive a design.

Diverse Platforms

When designing for print you have the luxury of knowing what type and size of paper you are using, and what colour process you are using. You can even get a proof showing you exactly what it will look like when the printing is done. When designing for the web, the surfer's web browser and computer actually determine how the site appears and even how some items work. This is the root of all of the challenges of web design.

Evolving Technology

Web and computer technology continues to evolve with new browsers adding or sometimes even dropping features and capabilities. We follow industry standards and design for the largest possible audience within reasonable limits. As a guideline we design for current browser versions less 2 full releases. This standard accommodates web surfers who have not upgraded their systems for approximately 2 or 3 years.

No designer can guarantee compatibility with products and technologies that have not been invented yet.

Fonts

Words can be presented on the web as images or as text. When displaying your content as text, there are a limited number of fonts available that are common among all web browsers and platforms. To make matters more complex, PC and Macintosh computers display font sizes slightly differently. It is also possible for the web surfer to cause their own font and text size preferences to override all of the settings that we determine in the design phase.

When using images, you can use any font currently available and determine the exact size with no possibility that the web user can override it. This is not as good as it seems though or else everyone would be doing it. Using images prevents search engines from reading your pages and indexing the content. With no text in the search engines, your site becomes almost impossible to find on the Internet.

High quality images also take time, skill, and software to produce. This is beyond the means of most small businesses. It is much easier to update your content if you can simply type it into your content management system.

Screen Size, Resolution & Scalability

Not all web surfers that come to your site will have the same physical size screen and resolution. Your web statistics should be able to tell you the screen resolutions of your site visitors. Two people with the same monitor can have different settings giving them different resolutions.

Screen resolution is usually expressed in pixels and this affects both the width and the height of the content the surfer will see without scrolling. Web surfers also have different habits and while some surf with their web browser maximized (taking up all of their screen space) many others, especially those with larger screens, will not.

Manufacturers will pay a premium to be displayed at eye level in a physical store. On the web, the equivalent of eyelevel is the top part of the screen that is visible as soon as the page loads, with no scrolling. With different screen resolutions this can be anywhere from 500 to about 800 pixels long. We borrow a term from printing and refer to this area as "above the fold".

How your site reacts to the different sized screens is referred to as scalability. The major issue with scalability is how it affects your layout. A nice descriptive paragraph with 4 lines stretches to 2 lines if you double the screen width. A bullet list with short lines floats in a sea of white space if the screen width increases. To ensure the integrity of your design, we recommend using a fixed width design. While users are all comfortable scrolling down a web page or document, horizontal scrolling is usually seen as a major inconvenience and should be avoided whenever possible.

To accommodate the largest number of site visitors without horizontal scrolling we recommend a maximum fixed width of 1024 pixels. If you are concerned about visitors with older computers then a maximum width of 800 pixels is preferable. Currently only about 5 % of users have a screen resolution of only 800 pixels.

Using a fixed-width design gives you a design area, and a background. The background is visible to a greater or lesser extent depending on the user's screen resolution and width of their browser. When using a fixed-width design, you have two choices for positioning the design on the background. The design can either be centered, or fixed to the left of the screen. If the design is centered then the background shows to either side of the design area when the browser is larger than the design area. When the design is anchored to the left, the background

We can design sites that scale. However unless this has been discussed in advance, additional charges will apply. Designs that scale require significantly more testing and more attention to layout when creating content. (see Mobile)

Design Evolution

Clothing fashions change every year and so do trends in web design. Some franchises require franchisees to redesign their stores every few years. You can expect that your design will continue to evolve over the coming years as tastes and technology continue to evolve. As you learn more about the needs and wants of your customers you should plan a full redesign every 3 or 4 years.

Splash Pages

We do not usually design a splash page for your site unless it adds value for the visitors and has been discussed in advance.

Web Accessibility initiative

The World Wide Web Consortium (W3C) has published a set of guidelines to ensure that sites are accessible to people with disabilities. The basic rules are common sense and a great deal of the responsibility for ensuring that your site is accessible rests with the people maintaining your content.

Mobile

The explosive growth of smart phones and tablets has thrown mobile capabilities to the top of everyone's list. The reality for most sites though is that mobile visitors are still a small percentage of overall web visits.

SiteCM powered sites display well in mobile devices with all content being reduced to fit the smaller screens. To ensure the best experience, avoid using Adobe Flash for key messages or functions on your site.

SiteCM can detect mobile devices and serve up unique pages to your visitors but this will increase your costs of deployment and if it is a requirement it should be discussed with your designer in advance.

All of our sites can be viewed by people browsing the web on their smart phones but with a little extra effort **we can offer them a mobile optimized site**. This is not a requirement for all businesses.

There are two main options for this: Mini-site or Responsive

Mobile Mini Site

A Mobile Mini-Site detects that the visitor is using a smartphone and directs them to a mobile optimized template where you can have content specifically of interest for mobile users.

For example, you might want to have your locations, hours and contact information easily accessible so that people in their cars can find you easily. You might also want to have simplified content and limit your site to a few pages that highlight your key products and services. A visitor on a mini-site can always choose to go through to the full version of your site if they prefer. A mini-site is easy to add to your site at any time.

Responsive website

A Responsive site affects the whole way your site is programmed and must be planned as part of the initial design.

A responsive site detects the resolution of the device being used by the site visitor and responds accordingly by re-sizing and changing the layout of the content appropriately.

This can be handled by hiding content that is not critical, or by stacking items vertically that appear side by side on a wider screen.