

A vertical decorative column on the left side of the slide. It features a repeating pattern of stylized, swirling flowers in shades of blue, purple, and white. The flowers have a textured, almost stitched appearance with visible cross-hatching and small dots. The overall effect is organic and modern.

Website Strategy & Planning

Jen Kramer
Northeast PHP Conference
August 11, 2012



Jen Kramer



HARVARD EXTENSION SCHOOL



Center for Digital Imaging Arts





“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?”

A vertical decorative column on the left side of the slide. It features a repeating pattern of stylized, swirling flowers in shades of blue, purple, and white. The flowers have a textured, almost stitched appearance with visible cross-hatching and dotted centers.

As a web developer, you are frustrated.

- You need a bit more information to “ballpark” the site.
- The client also needs to have a bit more vision when they call for help.



How do I help my client get the vision thing?

“I don’t know geek stuff.

I just know my business.”

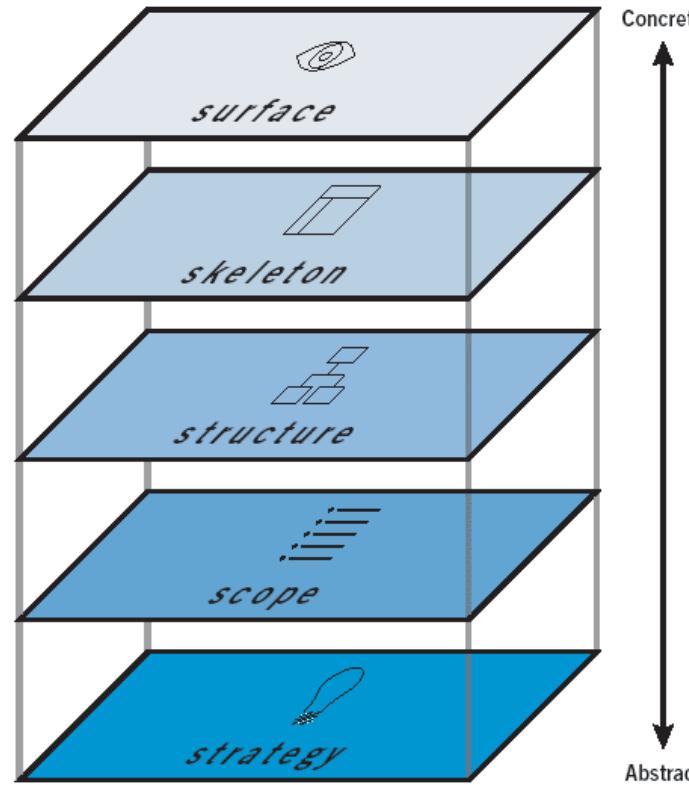
A vertical decorative bar on the left side of the slide. It features a repeating pattern of stylized, swirling flowers in shades of blue, purple, and white. A large, solid white circle is positioned in the lower-left corner of this decorative area.

Just remember the Five Planes.

- 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.
- No geek stuff required.



The Elements of User Experience



- Developed by Jesse James Garrett, www.jjjg.net

A vertical decorative panel on the left side of the slide. It features a repeating pattern of stylized, swirling flowers in shades of blue, purple, and white. The flowers have large, expressive petals and are set against a background of curved lines and dots.

**Everyone wants to start
with making it pretty.**

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

A vertical decorative panel on the left side of the slide. It features a repeating pattern of stylized, swirling organic shapes in shades of blue, purple, and white. The shapes resemble leaves, petals, or perhaps abstract representations of DNA helixes. The overall aesthetic is modern and artistic.

**What's more, your client
may feel like you are just
spending their money.**

You are not. You are saving your
client 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?

- **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 not the right answer.**

A vertical decorative bar on the left side of the slide. It features a repeating pattern of stylized, swirling blue and purple flowers and leaves on a light blue background. A large, solid white circle is positioned in the lower-left corner of this decorative area.

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?

A vertical decorative column on the left side of the slide, featuring a repeating pattern of stylized flowers in shades of blue, purple, and white. The flowers have large, sweeping petals and are set against a background of curved lines and dots.

Who are our users?

- **Great tools for identifying user groups**
 - Interviews
 - Personas
 - Analytics tools



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 **constraints** content to arbitrary branding rules.

A vertical decorative column on the left side of the slide, featuring a repeating pattern of stylized flowers and leaves in shades of blue, purple, and white. The pattern is composed of large, sweeping, organic shapes.

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.

A vertical decorative bar on the left side of the slide. It features a repeating pattern of stylized, swirling flowers in shades of blue, purple, and white. A large, solid white circle is positioned in the lower-left corner of this patterned area.

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

- Make "store location" more obvious on the home page
 - And how will you do that?
 - And how will you measure the results?



Strategy Plane

- Questions so far?

A vertical decorative column on the left side of the slide. It features a repeating pattern of stylized, swirling organic shapes in shades of blue, purple, and white. The shapes resemble leaves, petals, or perhaps microscopic organisms, creating a textured, layered effect.

Scope Plane

Questions:

- What features will the site need to include?
- What kind of detail will those features have?
- What tools, skills and personnel will we need to build the site?
- 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

A vertical decorative column on the left side of the slide, featuring a repeating pattern of stylized flowers and leaves in shades of blue, purple, and white. The pattern is composed of large, sweeping, organic shapes with smaller, more intricate details like dots and lines.

And how does that fit with your strategy?

- Client edits content
- Blogging/comment s
- Discussion board
- Google ads
- Recommended links
- Calendar
- Contact form
- Newsletter signup
- Social bookmarking
- User profiles
- Zip code locator

A vertical decorative column on the left side of the slide, featuring a repeating pattern of stylized flowers and leaves in shades of blue, purple, and white. The flowers have prominent, wavy, light-colored petals and dark blue centers. The leaves are large and sweeping, with some having intricate vein patterns.

And what did you say your budget was again?

- Client edits content
- Blogging/comments



What technology is required to build the site?

- It Depends.
- Open source vs. proprietary considerations
- Personnel
- Budget
- Available support
- And more...

A vertical decorative panel on the left side of the slide. It features a repeating pattern of stylized, swirling flowers in shades of blue, purple, and white. The flowers have a textured, almost stitched appearance with visible lines and dots. The overall effect is organic and modern.

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.



Scope plane

- Questions?

A vertical decorative column on the left side of the slide. It features a repeating pattern of stylized, swirling organic shapes in shades of blue, purple, and white. The shapes resemble leaves, petals, or perhaps microscopic organisms, with some having internal cross-hatching. The overall effect is a modern, artistic, and organic feel.

Structure Plane

Questions:

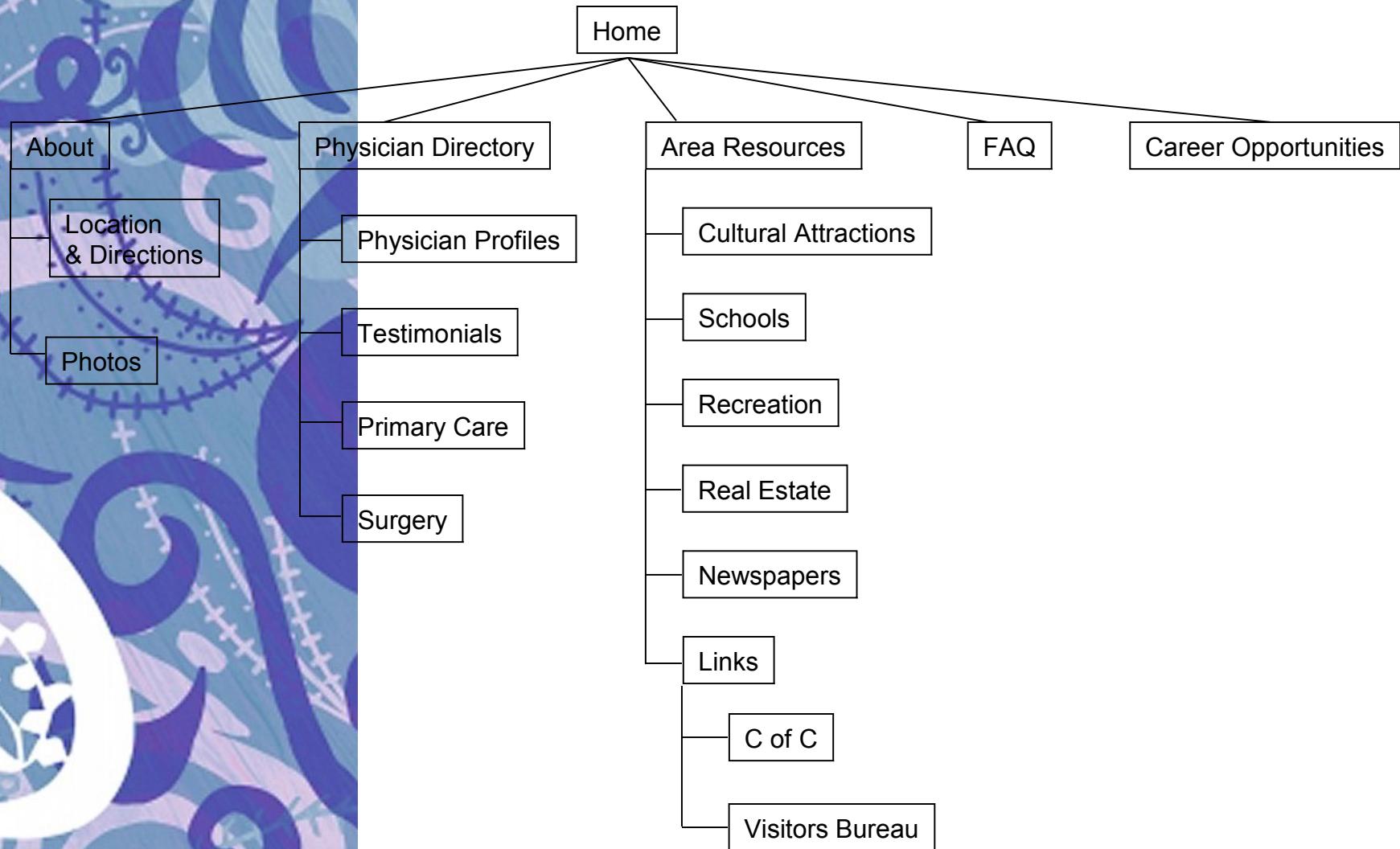
- How should the content be organized?
- What are the navigation button names?



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?





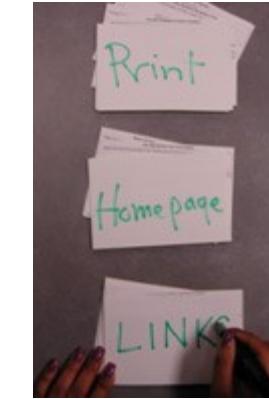
What is a site map?

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



How to develop a site map?

- Card sorting

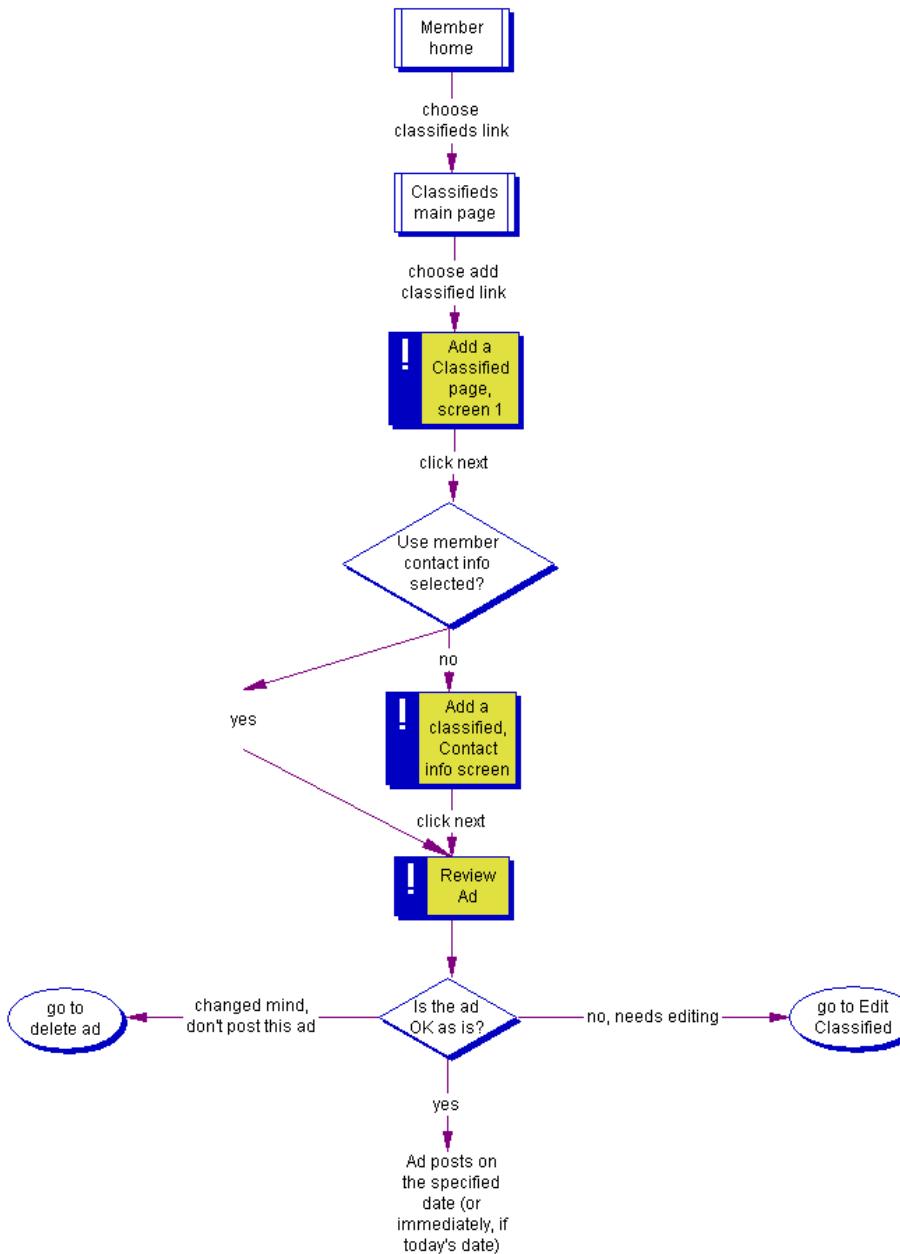


A vertical decorative column on the left side of the slide. It features a repeating pattern of stylized, swirling flowers in shades of blue, purple, and white. The flowers have large, expressive petals and are set against a background of curved lines and dots.

Flow charts

- Helpful for thinking about tasks and the order they need to be completed
- Makes you think about error handling

Add a Classified Ad



A vertical decorative column on the left side of the slide, featuring a repeating pattern of stylized flowers and leaves in shades of blue, purple, and white. The design includes intricate line work and cross-hatching.

Structure Plane

- Any Questions?

A vertical decorative column on the left side of the slide. It features a repeating pattern of stylized, organic shapes in shades of blue, purple, and white. The shapes resemble leaves, petals, or perhaps abstract representations of DNA helixes. White, dashed lines resembling stitching or embroidery are overlaid on the shapes, creating a textured, layered effect.

Skeleton Plane

Questions

- How should forms and other interactive screens look?
- Where should important information be located?



Skeleton Plane

- Wireframe diagrams
- Low-fidelity usability testing
- HTML sketches



Header	NAV	NAV	NAV	NAV	NAV
Press Release					
Title:	<input type="text"/>				
Deck:	<input type="text"/>				
Release Date:	<input type="text"/>				
YYYY-MM-DD					
Body:	<input type="text"/>				
Photo:	<input type="text"/>			<input type="button" value="Browse"/>	
Contact Name:	<input type="text"/>		Contact Name 2: <input type="text"/>		
Title:	<input type="text"/>		Title <input type="text"/>		
Company:	<input type="text"/>		Company <input type="text"/>		
Phone:	<input type="text"/>		Phone <input type="text"/>		
Fax:	<input type="text"/>		Fax <input type="text"/>		
Email:	<input type="text"/>		Email <input type="text"/>		
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>					

A vertical decorative column on the left side of the slide, featuring a repeating pattern of stylized flowers in shades of blue, purple, and white. The flowers have large, sweeping petals and are set against a background of curved lines and dots.

Low-fidelity usability testing?

- Make a paper diagram of how the site will work.
- Test the site with users, next-door neighbors, anyone you can
- “Paper Prototyping” by Carolyn Snyder



Skeleton Plane

- Any questions?

A vertical decorative bar on the left side of the slide. It features a complex, abstract pattern in shades of blue, purple, and white. The design includes swirling organic shapes, dashed lines, and small cross-like motifs, creating a textured, modern look.

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.



Where does the design come from?

- Generally speaking, two choices:
 - Canned template/theme
 - Build your own template/theme based on a graphic design



Which is better?

- It Depends.

A vertical decorative panel on the left side of the slide, featuring a repeating pattern of stylized flowers in shades of blue, purple, and white. The flowers have large, sweeping petals and are set against a background of curved lines and dots.

Canned template/theme positives

- Cheap to develop with a free or low-cost canned template
- Template almost always works correctly.
- Generally reasonable graphic designs.

A vertical decorative panel on the left side of the slide. It features a repeating pattern of stylized, swirling flowers in shades of blue, purple, and white. The flowers have a textured, almost stitched appearance with visible cross-hatching and small white dots. The overall effect is organic and modern.

Canned template/theme negatives

- Not a unique look
- Limited in regions for adding modules/widgets/nodes
- Helps to know HTML and CSS for modifying the template
- Can be tricky to understand what the template designer did and why

A vertical decorative panel on the left side of the slide, featuring a repeating pattern of stylized, swirling flowers in shades of blue, purple, and white. The flowers have a textured, almost stitched appearance with visible cross-hatching and small dots.

Custom template/theme positives

- Unique, perfect look for the client
- Changeable and moldable to the content
- No extra code – does only what it needs to do
- You can charge more ☺



Custom template/theme negatives

- Expen\$\$ive
- How good are your graphic design skills?
- Can you convert the design to templates?



Surface Plane

- Any Questions?



Questions?

Jen Kramer

Instructor | Author | Speaker |
Curriculum Designer

www.jenkramer.org

jen@jenkramer.org

Twitter: [jen4web](https://twitter.com/jen4web)

LinkedIn: linkedin.com/in/jen4web

Amazon: amazon.com/author/jenkramer

Slideshare: slideshare.net/jen4web