



Website Strategy & Planning

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**“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?”



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.

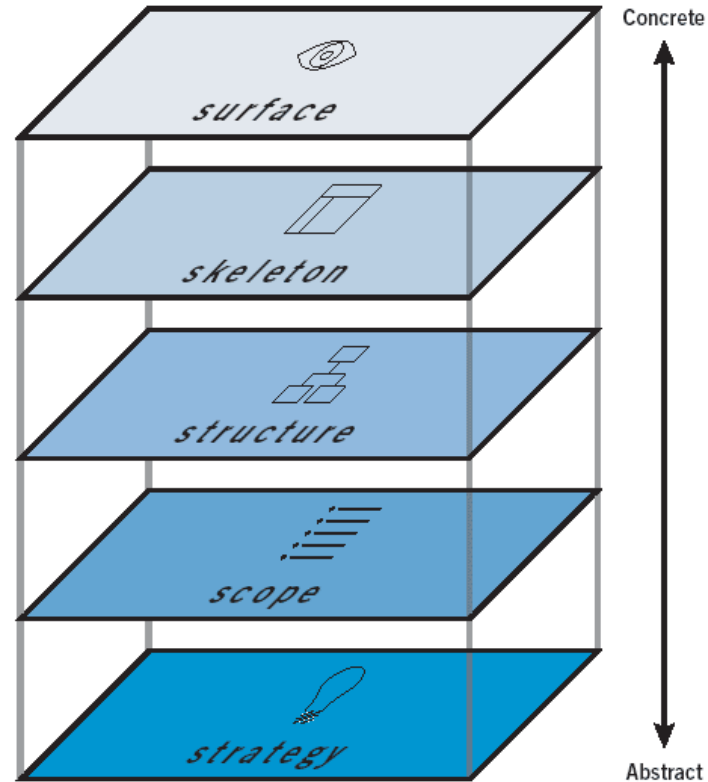
I just know my business."



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.jjg.net



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

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



**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.**



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?



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 **constrains** content to arbitrary branding rules.

A decorative vertical strip on the left side of the slide featuring a complex floral and leaf pattern in shades of blue, purple, and white. The pattern includes stylized leaves, swirling vines, and small white flowers.

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?

- 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?



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



And how does that fit with your strategy?

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



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...



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?



Structure Plane

Questions:

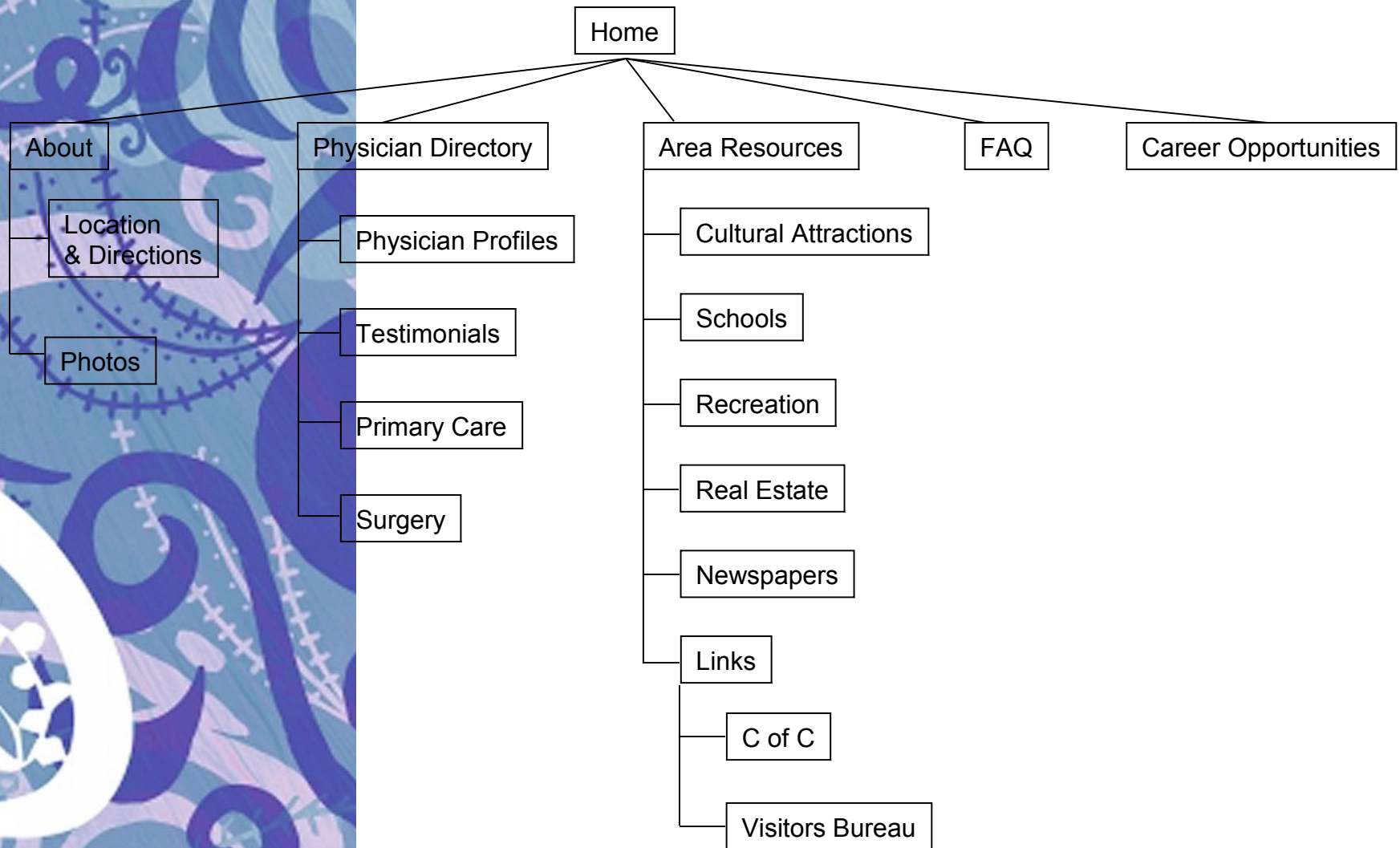
- How should the content be organized?
- What are the navigation button names?



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?



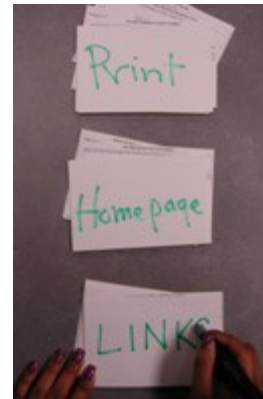


What is a site map?

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

How to develop a site map?

- Card sorting

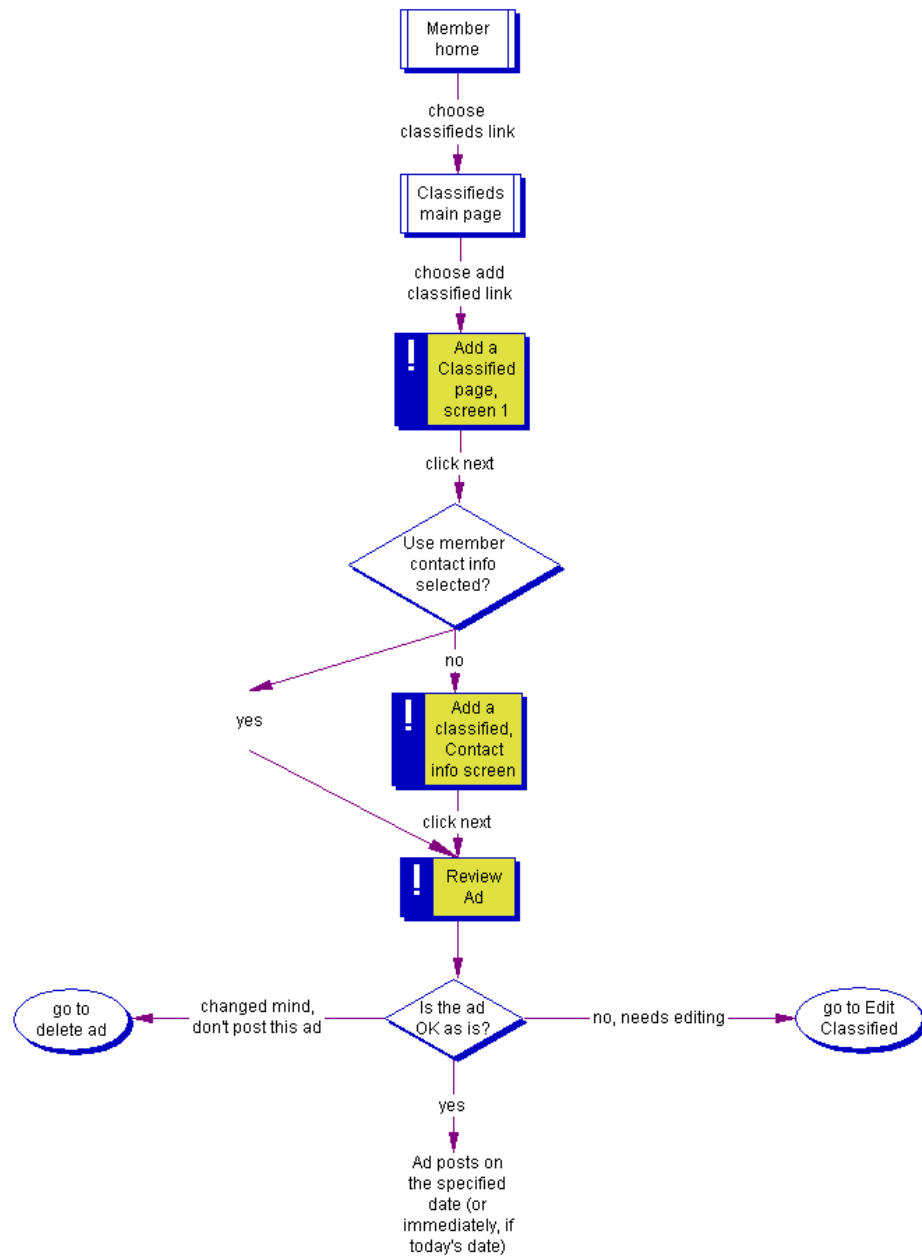




Flow charts

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

Add a Classified Ad





Structure Plane

- Any Questions?



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



| NAV | | NAV | | NAV | | NAV | | NAV | |
|---------------------------------------|--|----------------------|--|---------------------------------------|---------------------------------------|----------------------|--|-----|--|
| Header | | | | | | | | | |
| 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"/> | | | | |



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?



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.



Canned template/theme positives

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



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



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

- Expensive
- How good are your graphic design skills?
- Can you convert the design to templates?



Surface Plane

- Any Questions?



Questions?

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