



IS&T - WEBSITE PLANNER

A Practical Guide to Planning
Your Successful Web Presence



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IS&T Website Planner

Introduction

The number of details to consider when launching a website can be daunting, so we've created this planner to help you get started in building a successful online presence.

This planner is intended to be opened and completed in Microsoft Word. You may type your answers in the shaded boxes, or print out the pages and fill them in by hand. It's often a good idea to distribute copies to key members of your project team. Gather and refine your answers before finalizing the planner.

Of course, we'll answer any questions you have and help you every step of the way. You can phone us at 713-622-3443, or send us email to – design@is-t.net.

1. Name of this project

What is the name of this particular project?

2. Name of your organization

Who are you? What is the name of your business or organization?

3. Business Address

List the street address of your primary location.

4. Business Phone

List the phone number of your primary location.

5. Contact Name

Who will we be contacting for questions regarding this project? Who has final approval on the project?

6. Contact Phone

What is the phone number of the contact person listed above?

7. Contact Email

What is the email address of the contact person listed above?

8. Current Site Address

What is the Internet address (URL) of your current website? If this is a new site, what would you like the address to be?

9. Intended Launch Date

What is the intended launch date for the site?

10. Budget Range

What is the budget for the project? Is there an acceptable budget range, depending on the level of services provided? If you have no idea what things cost, leave this blank.

Next Steps

- Create a mission statement for your site.
- Identify details of how the mission and goals of the site might change from short-term to long-term, given the direction of your organization and industry.
- Provide corporate and industry descriptions, including competitors, along with brief critiques of their sites.

1. Name of this project:

2. Name of your organization:

3. Business Address:

4. Business Phone:

5. Contact Name:

6. Contact Phone:

7. Contact Email:

8. Current / Intended Site Address:

9. Intended Launch Date:

- ASAP
 No firm deadline

In time for:

- Product launch on: _____
 Trade show on: _____
 Other firm deadline: _____

10. Budget Range:

Purpose and Goals

Why do you want a website? Be honest with yourself. It's natural for the initial answer to be "to make money" or "everyone else has one," but if you never refine your purpose beyond that, your site will not be successful.

Form follows function. The content and design of your website should reflect both why you are creating it and why people visit it. Start by focusing on the results you want to achieve from your site.

11. What are the specific goals of the site?

Why are you creating a website? Is the goal to sell specific product or service, generate floor traffic, communicate with investors or shareholders, or support the products you have already sold? Your purpose may include some or all of these, as well as some goals not listed here. Clear answers here will help us to design a more effective website.

12. How should the site fit with current marketing strategies/materials?

Should the site reinforce or reuse existing marketing materials?

13. How will you measure the success of the site?

For the site to succeed, the results must be measured. What result will be reflective of success? How will you know?

14. How will success be tracked?

What is the particular number or statistic that will allow the success of the site to be measured?

Next Steps

- Assign a 'tactic' to each of your objectives. Examples can include trial programs, competitions, limited product giveaways, screensavers for download, newsletters, autoresponders etc
- Determine your key messages and the type of content information that will support your tactics.

11. What are the specific goals of the site?

- Establish a Web presence, increase marketing and public awareness
- Increase positive company/brand awareness
- Increase product/services awareness
- Increase product/services sales
- Generate requests for information
- Generate advertising revenue
- Direct product sales from the site
- Build retail or business traffic
- Internal communications
- Knowledge sharing
- Offer service or support
- Reduce support costs
- Reduce existing advertising costs
- Develop a list of prospects/leads
- Build a database for organization contact/mailings
- Support existing marketing efforts
- Provide information regarding new products/services, procedure, sales, events
- Survey customers/prospects
- Recruit new employees/post job opportunities

Other:

12. How should the site fit with current marketing strategies/materials?

- Brand reinforcement
- Product/services awareness
- Product/services sales
- Entertainment

Other:

13. How will you measure the success of the site?

- Increased site activity (visitors or hits)
- Positive visitor comments
- Increased media coverage
- Increased customer information requests
- Increased sales

Other:

14. How will success be tracked?

Defining your Audience

Who is your intended audience? What are their needs? Your response to these questions will help determine the type and level of detail of the information your site should provide. First-time buyers, for example, will need a lot of "How-to-buy" information. Repeat buyers require more details (specifications, features, etc...) and quicker ordering.

15. Who is your external audience?

These are the visitors from outside your organization. While many groups will visit your site, you should limit your focus to the 2-3 most important.

16. Who is your internal audience?

Will groups within the organization use the site? Do they require another site or area within the primary site?

17. What is the primary action the user should take when coming to your site?

What are you trying to make it easy for them to do?

18. What are key reasons a customer chooses your company's products or services?

What motivates your customers? What should your site emphasize?

19. How often do you want visitors to return to your site?

Will the site be an ongoing resource? A source of industry news? Why will they revisit?

20. Where is your market located?

Answers to this question will determine some of the content – for example, is more than one language required? Is a map or driving directions for local customers or clients needed?

Next Steps

- Create a ranked Audience Master List.
- Use a client survey to gather demographic data and get a sense of who visits your site and what they want when they are there.
- Create a typical user profile for each target group including:
 - Age
 - Gender
 - Occupation
 - Online frequency
 - Connection speed
 - Online habits (what sites they visit, how Web savvy they are...)
- Create usage scenarios based on Aligned Master List.

15. Who is your external audience?

- Current customers
- Potential customers
- Potential employees
- Suppliers
- Professional / Trade Organizations
- Investors
- Competitors
- Children
- Schools / Educators
- Sight-impaired

Other:

16. Who is your internal audience?

- All employees
- Management
- Marketing/Sales
- Operations
- IT
- Stockholders/Investors

Other:

17. What is the primary action the user should take when coming to your site?

- Make a purchase
- Call for information
- Visit your location
- Search for information
- Subscribe to a publication

Other:

18. What are the key reasons a customer chooses your company's products or services?

- Price
- Service
- Quality
- Value

Other:

19. How often do you want visitors to return to your site?

- Daily
- Weekly
- Monthly
- As needed, no fixed interval

20. Where is your market located?

- Locally
- Regionally
- Nationally
- Internationally

Competition and Other Sites

Identify the sites of competitors and others that may provide direction on the content, feature set, look-and-feel for your site. What are you aiming for?

This part of the profile is very important. The more work you put into it, the more your project will benefit. Find at least three high-quality sites (more is better) on the Web that relate to your project in the following categories:

- Branding in a similar situation to yours (new company, new brand, established brand, etc.)
- Target customer appeal
- Colors, look-and-feel, user interface, layout
- Size of site
- Publishing model (frequency, novelty of content, etc.)
- Attracting new people to the site (newsworthiness, giveaways, impact, etc.)
- Quality of content
- Quality of graphics
- Functionality (things sites do for people)
- Community, special features, responsiveness, other categories important to your project
- Overall favorite sites (for whatever reasons)

To help get you started we've enclosed a disk with a number of competitor sites listed.

Next Steps

- Develop a competitive analysis of key competitor sites: functional features, technologies used, look-and-feel, etc. Determine where your site should match, exceed or avoid elements of competitors' sites.
- On a regular basis, revisit key competitor sites and update your competitive analysis.

Site Name:

Site URL:

Site Features/Technologies used:

Breadth of content/look-and-feel:

Site Name:

Site URL:

Site Features/Technologies used:

Breadth of content/look-and-feel:

Site Name:

Site URL:

Site Features/Technologies used:

Breadth of content/look-and-feel:

Content

Information – content – forms the basis of every successful website. An attractive, easy to navigate, fast site that lacks good content may win awards, but won't produce results. Your website will succeed to the extent that your information and your audience's needs overlap. As you review the sites you have visited, analyze how they have met the needs of their visitors.

21. Which informational elements should your site have?

The architecture of a corporate Web site is becoming more conventional. People have some basic expectations when visiting a site. Though many Web designers feel the medium is changing too quickly to allow rules to be written, we propose these items below as must-haves.

22. Which functional elements will your site require?

Functional elements of the site add interactivity or ease of use to the site. We've listed a few of the most common functionalities.

23. Where will content come from?

Original content written specifically for the site is best. Existing copy can be used, but usually requires editing for viewing on the Web.

24. How often will new content be added?

Will the site remain mostly static or will the site change frequently and over multiple sections? How much staff time will be needed to update the content?

25. Who will update the content?

Who is the person responsible for updating the content? Do they have the needed skills? Will they need training or additional software to update the site?

Next Steps

- Describe each functional feature. What exactly will it do?
- Identify the resources required, and any technical and budget issues for each functional feature.
- Assign content responsibilities to the resources identified previously.
- Gather written content for your Web pages (preferably on a diskette formatted for *Microsoft Word*, or other word processor. We can convert most word processor formats.)
- Use the Content Worksheet to organize your files.
- Content includes more than just text. Provide any photos or graphics to be included. You may send graphics and photos that we can scan into electronic form. Even better, send us a diskette or ZIP disk with your graphics in any popular PC format, such as GIF, JPEG, BMP, EPS, CDR, PCX, etc.). Be sure to include your company logo, and tell us the PMS color.
- Gather samples of your printed materials - brochures, letterheads, cards, booklets, etc. - so we can see how you present your company image.

21. Which informational elements should your site have?

- About Us
- Contact Us
- Copyright notice
- Legal statement /Disclaimer
- News
- Frequent Questions (FAQs)
- Privacy statement
- Postal or street address
- Map to facilities

Other:

22. Which functional elements will your site require?

- E-commerce/shopping cart
- Site Search
- Customer service/support
- Technical support
- Discussion forums
- Catalog/information order forms
- Newsletter
- Email
- Autoresponder
- Feedback form
- Member logon
- Password protected areas
- SSL-encrypted areas

Other:

23. Where will content come from?

- Original content written for the site
- Repurposed, existing copy

Other:

24. How often will new content be added?

- Daily
- Weekly
- Monthly
- As needed, no fixed interval

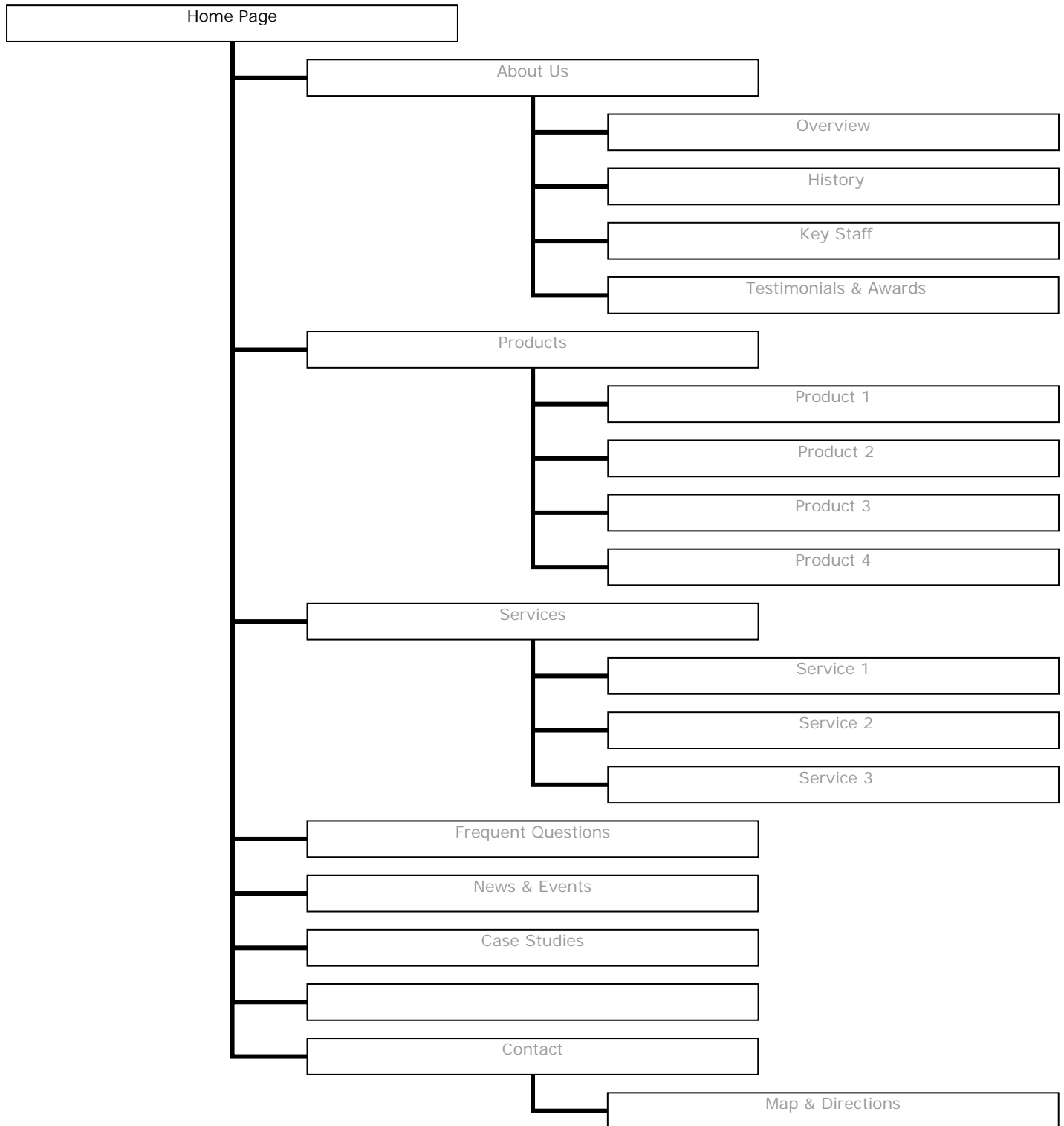
25. Who will update the content?

- We will
- You (the developer/consultant) will
- We have a consultant who will update

Name of consultant:

Content: Site Flowchart

Sketch out the basic areas of the site and the information you expect to include. We've added a few suggested topics, but feel free to overwrite them. We've work on the content development directly with our clients as part of the process later on, so this page is only a preliminary step.



Technology

26. What is your target browser?

Different browsers have different idiosyncrasies and capabilities. Most people use some version of Internet Explorer. If your audience has a different preference, you should take that into account.

27. What functional requirements do you believe to be necessary?

Back-end functionality can add to the utility of the site, both should be considered carefully. Sophisticated functions add considerably to cost.

28. Who will update these functions?

Do you have the expertise to maintain these functions in-house, or will you need to re-train staff or out-source?

29. Are there extraordinary security issues?

Will you be dealing with private financial, medical or proprietary information, like credit card numbers, medical diagnoses, or trade secrets?

30. What is the budget for hosting and maintenance of the site?

Quality web hosting costs between \$20 and \$50 per month. A good rule of thumb for maintenance is that the yearly maintenance cost is roughly equal to the initial development cost.

31. Who will serve/host the site?

Cut-rate hosting can prove expensive when the company goes out of business, or you need 24-hour voice support. Make sure the package you purchase includes all the functionality you need, as well as room for expansion.

32. What is the host account user name and password?

We require the account user name and password to access the server so that we can put the site up and test it.

Next Steps

- Describe each functional feature. What exactly will it do?
- Identify the resources required, and any technical and budget issues for each functional feature.
- Assign content responsibilities to the resources identified previously.
- Gather written content for your Web pages (preferably on a diskette or as an attachment formatted for *Microsoft Word*, or other word processor. We can convert most word processor formats.)

26. What is your target browser?

- Internet Explorer 3.0 – 5.0
- Internet Explorer 6.0 and up
- Netscape 3.0 and up
- Netscape 4.7 and up
- W3C-Standards compliant
- Opera

Other Platforms:

27. What functional requirements do you believe to be necessary?

- Download areas
- Database-driven pages
- E-commerce
- Catalogs
- Animation
- Video

Other:

28. Who will update these functions?

- We will
- You (the developer) will
- We have a consultant who will update

Name of the consultant:

29. Are there extraordinary security issues?

- E-commerce security
- HPPA security

Other:

30. What is the budget for hosting and maintenance of the site?

31. Who will serve/host the site?

- We will host internally
- We want you (the developer) to host
- We have a third-party hosting firm

Name of the hosting company:

32. What is the host account user name and password?

Username:

Password:

Promotion

No matter how appropriate your website's design, its success depends on an ability to attract first-time visitors. Promoting your site starts during the development, with attention to search engine requirements from the outset.

33. Site description of not more than 200 characters

This description is what many search engines will display next to the site's title. Good descriptions are succinct, without marketese.

34. 20-30 key words or phrases

These key phrases are what you think your visitors will be looking for when they want to find you. Think like they do. Add locations, problems to be solved, products, and common misspellings. Avoid trademarks.

35. Which search engines or directories would you like to list in?

Popular search engines and directories have begun charging for inclusion. These costs must be budgeted for.

36. How often will the search engine rankings be evaluated?

Search engines change their rankings continuously. How often should the rankings be reviewed?

Next Steps

- Design a site announcement plan for online and offline launch announcements. Who will be notified of the site launch?
- How can the site fit into traditional marketing efforts? Is the site address listed on:
 - Brochures
 - Business cards
 - Letterheads
 - Outdoor signage
 - Telephone on-hold messages
 - Press releases

Maintenance

A website is a process, not a goal. Stale, tired sites are an invitation to failure. Inaccurate or out-of-date information will result in the loss of the visitor to another one that promises more relevant content.

37. Which content is likely to go out of date?

List the content likely to need updating.

38. How quickly will content go out of date?

How often will the content need updating?

39. How often will the links be reviewed for accuracy?

Links, especially to information off-site, tends to change or be deleted as sites change or close. Links should be tested and reviewed periodically.

Next Steps

- Design a maintenance plan. Identify unique maintenance feature.
- Identify the resources required, and any staffing and budget issues for maintaining the site.
- Assign maintenance responsibilities to the resources identified previously.

33. Site description of not more than 200 characters:

34. 20-30 key words or phrases:

35. Which search engines or directories would you like to list in?

- Yahoo (\$299/year)
- LookSmart (\$299 one-time fee)
- Overture

Specialty or industry-specific directories:

36. How often will the search engine rankings be evaluated?

- Monthly
- Quarterly
- Annually

Other:

37. Which content is likely to go out of date?

- News
- Homepage copy

Other:

38. How quickly will content go out of date?

- Daily
- Weekly
- Monthly
- As needed, no fixed interval

39. How often will the links be reviewed for accuracy?

- Monthly
- Quarterly
- Annually
- As needed, no fixed interval