



Worksheets & Exercises

Web ReDesign Redefined: Strategies for Success
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Worksheets & Exercises

Part 1: Redesign Redux

- #1 Pg. 18 Review of Core Process
- #2 Pg. 44, 47 Review of Client Survey
- #3 Pg. 49, 115 Review Audience Profiles & User Scenarios
- #4 Pg. 64 Prepare a Communication Brief

Part 2: Effective Web Writing

- #5 Pg. 95 Review Content Delivery Plan
- #6 Pg. 48 Determine Maintenance & Ongoing Content Needs

Part 3: Strategy & Analytics

- #7 Pg. 188 Perform Competitive Intelligence

Part 4: Putting it into Practice

- #8 Perform Current and Future State Analysis
- #9 Plan Your Initiatives
- #10 Create Waterfall Chart

Closing: Live Site Reviews ! (as time allows)

#1 Review of Core Process

As the basis of any project, redesign or otherwise – the Core Process is the place to begin. Use this process as a guide to follow, and modify to meet the needs of your specific projects and organization. Following this methodology, or any modified version allows for a project team to be more effective. Clear communication is the goal, and this process will help get you there.

Please review **Page 18** in Web Redesign:

01	02	03	04	05
define	structure	design	build	measure
				test and iterate

<p>discover</p> <ul style="list-style-type: none"> gather information understand your audience analyze your industry develop functional requirements <p>plan</p> <ul style="list-style-type: none"> create a project plan set the budget create schedule assign team set up stage plan for testing <p>clarify</p> <ul style="list-style-type: none"> set high-level goals prepare communication brief kick off the project 	<p>content plan</p> <ul style="list-style-type: none"> audit existing content outline new content create delivery plan <p>structure site</p> <ul style="list-style-type: none"> create site map address existing site organization set naming conventions <p>structure pages</p> <ul style="list-style-type: none"> create wireframes address navigation naming & labeling define user tasks create user scenarios 	<p>create</p> <ul style="list-style-type: none"> review site goals develop concepts design presentation <p>confirm</p> <ul style="list-style-type: none"> create HTML protosite test functionality <p>hand-off</p> <ul style="list-style-type: none"> create graphic templates create design style guide 	<p>prepare</p> <ul style="list-style-type: none"> assess project status establish guidelines set file structure <p>build</p> <ul style="list-style-type: none"> slice and optimize create HTML templates implement light testing populate pages integrate backend <p>test</p> <ul style="list-style-type: none"> create a QA plan prioritize and fix bugs conduct final survey 	<p>deliver</p> <ul style="list-style-type: none"> production style guide create handoff packet conduct post mortem <p>launch</p> <ul style="list-style-type: none"> prepare announcement plan optimize for search engines launch site <p>maintain</p> <ul style="list-style-type: none"> assess maintenance team capabilities develop maintenance plan confirm site security plan for iterative initiatives measure success
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**Note: Site-View has been modified to "structure site" and Page-View and User-View have been modified to "structure pages" in this version. Other areas of the core process have been slightly modified from the Book version.*

#2 Review of Client Survey

Client input is the foundation on which successful websites are built. This survey will help you articulate and identify the overall goals of your site redesign, including specific questions regarding message, audience, content, look and feel, and functionality. Each key decision-maker should fill out his or her own survey, answer each of the questions in a thorough but brief and clear manner, and add any additional notes or comments at the end of the survey. When finished, all compiled information should be emailed back to the project manager on the web development team.

Please review on page 44 with additional questions listed on page 47.

General Information

1. What is the name of your company and your current (or intended) URL?

2. Who are the primary contacts from your organization and who has final approval on the project? Please list names, titles, email addresses, and phone numbers.

3. What is your intended launch date for the new site? Are there any outside considerations that might affect the schedule (i.e., PR launch, tradeshow, annual report)?

4. Do you have a specific budget range already established for this project? Can this project be divided into phases to accommodate budget and timing constraints?

Current Site

1. Do you feel your current site promotes a favorable user experience? Why or why not?

2. What specific areas of your current site do you feel are successful? Why are they successful?

3. What shortcomings exist with the current site, and what three things would you change on the site today if you could?

4. Have you conducted usability tests or gathered user feedback for your current site? If so, how long ago? Please include any reports or findings.

5. How important is it to maintain your current look and feel, logo, and branding?

Reasons for Redesign

1. What are the main reasons you are redesigning your site (new business model, outdated site, expanded services, different audience)?

2. What are your primary online business objectives with the site redesign? What are your secondary objectives? (Examples include increased sales, marketing/branding awareness, and fewer customer service calls.) Please discuss both long- and short-term goals.

3. What is the main business problem you hope to solve with the site redesign? How will you measure the success of the solution?

4. What existing strategy (both on- and offline) is in place to meet the new business objectives?

Audience/Desired Action

1. Describe a typical user coming to your site. How often is the user online, and what does he generally use the web for? How old is the user and what does he do for a living? (Use as much detail as possible in profiling your target user. Profile more than one type if appropriate.)

2. What is the primary "action" the user should take when coming to your site (make a purchase, become a member, search for information)?

3. What are the key reasons why the target user chooses your company's products and/or services (cost, service, value)?

4. How many people (as far as you can tell) access your site on a daily, weekly, or monthly basis? How do you measure usage? Do you forecast usage to increase after the site launch and by how much?

Perception

1. Use a few adjectives to describe how the user should perceive the new site. (Examples include prestigious, friendly, corporate, fun, forward thinking, innovative, and cutting edge.) Is this different than the current image perception?

2. How is your company currently perceived offline? Do you want to carry the same kind of message through your website?

3. How does your company differentiate itself from competitors? Do you think your current audience differentiates you from your competition? Please list competitor URLs.

4. List the URLs of any sites you find compelling. What specifically do you like about these sites?

Content

1. Will this site use existing content from the current site? If so, what is the source, who is responsible for approval, and has the content been audited? If not, will you be creating content in-house or using an outside provider?

2. What is the basic structure of the content, and how is it organized? Is it a complete overhaul of the current site or an expansion? (Expand if necessary on a separate sheet or in outline format)

3. Describe visual elements or content that should be utilized from your current site or marketing materials (logo, color scheme, navigation, naming conventions, and so on).

4. How will the content of this site (along with functionality and navigation) expand or differ from your current site? Do you have an existing sitemap for the outgoing site structure? Do you already have a sitemap or outline for the proposed redesign?

Technology

1. What is your target platform and browser (if you know)?

2. Are there specific technologies (CSS, Ajax, Flex, etc.) that you would like to use in the site? If so, how will they enhance the user experience? Please describe in detail.

3. Will you have database functionality (dynamic content generation, search capabilities, personalization/login)? Do you already have a database in place? Please describe it in detail, including specific information regarding existing programs and software.

4. Will you have a need for secured transactions (e-commerce)? Do you already offer transactions online? Please describe in detail.

5. Will you require other specific programming needs (such as personalization or search capability)? Please describe in detail.

Marketing/Updating

1. How do most people find out about your current website? What methods of distributing the URL already exist within the company?

2. Briefly, what are your short-term marketing plans (specifically, for the site redesign and the 12 months following launch)?

3. Do you have an existing or planned marketing strategy in mind to promote this site redesign? If so, please describe.

4. Do you intend to keep the site updated? If so, how often? Who is responsible for updating and providing content?

#3 Develop Audience Profiles

An audience profile describes a particular type of person who you expect to use the redesigned site. By creating a collection of such profiles, you can begin to "humanize" the demographic data, and craft personalized stories that can both clearly define your design goals to the client. Additionally, audience profiles can aid your designers throughout the creative process by breaking down the demographic data into information they can easily relate to. Each profile should start with the following general information:

- ⇒ Age range
- ⇒ Male or Female
- ⇒ Occupation
- ⇒ Salary range
- ⇒ Online experience (newbie, experienced, very savvy)
- ⇒ Online frequency (how many hours per day? Per week? Per month?)
- ⇒ Online location & activities (What do they do at work vs. at home?)
- ⇒ Connectivity (modem, DSL, ISDN, T1)
- ⇒ Types of sites visited
- ⇒ Online purchases per month

Audience Profile Grids

Understanding your primary and secondary audience by creating a grid of several profiles helps to prioritize key actions and content on the site. Creating an overview of your audience helps your organization and team to answer the question: Who is coming to your site and why? How can we meet their needs? What questions do they have? What are the main things they would like to accomplish using the web site? An example of a grid:

Primary Audience			Secondary Audience	
Photo	Photo	Photo	Photo	Photo
Name, Title	Name, Title	Name, Title	Name, Title	Name, Title
Age, Activities	Age, Activities	Age, Activities	Age, Activities	Age, Activities
Technical saavy, online status	Technical saavy, online status	Technical saavy, online status	Technical saavy, online status	Technical saavy, online status
Why are they coming to the site	Why are they coming to the site	Why are they coming to the site	Why are they coming to the site	Why are they coming to the site
What are they trying to accomplish?	What are they trying to accomplish?	What are they trying to accomplish?	What are they trying to accomplish?	What are they trying to accomplish?
What questions to they have?	What questions to they have?	What questions to they have?	What questions to they have?	What questions to they have?
What obstacles to they currently face?	What obstacles to they currently face?	What obstacles to they currently face?	What obstacles to they currently face?	What obstacles to they currently face?
How will the site help to meet their goals?	How will the site help to meet their goals?	How will the site help to meet their goals?	How will the site help to meet their goals?	How will the site help to meet their goals?

#4 Prepare a Communication Brief

Answering the questions on this worksheet will build the skeleton for your communication brief. The information gathered in the Discovery process (Client Survey, research, interviews) will provide you with the answers.

Project Summary:

State general project information, goals, and relevant background information for the site redesign or project initiative. This paragraph should be a statement overview of the project as a whole.

1. What is the basic overview of the project? Briefly include background information if relevant.

2. What is the single purpose of the new site or initiative?

3. What are the secondary goals of the new site or initiative?

4. What are the long-term goals?

Audience Profile:

Profile the target audience. Provide enough detail to enhance everyone’s understanding of who the audience is. Include some user demographic information. Your goal with this section is to answer the following: Who is the target? What do these people care about? And what do they do online on a daily basis?

1. Who is your target audience? Choose a typical user and profile in detail. Include occupation, age range, gender, online frequency, online activities, and any other relevant information. Profile more than one if applicable.

2. What is a typical task the user might perform on the new site? (For example, register, log on, search for information, buy a specific product, send their email address, call for more information.)

Perception/Tone/Guidelines: How should your target audience to respond to your new online presence?

1. What does the target audience think and feel about the company and the current website?

2. What do we want them to think and feel?

3. How will this new website or initiative help achieve this goal?

4. What adjectives can be used to describe the way the website and the company should be perceived by the target audience?

5. What are some specific branding goals the site should communicate?

Communication Strategy: How will we convince the target audience?

1. What is the overall message you are trying to convey to your target audience? (For example, cost-effective, secure, reliable, efficient.)

2. How will you convey the overall message? (For example, effective messaging through copy, directed path towards goal, specific offer on home page.)

3. Identify stages of development (if appropriate) used to execute goals.

4. How will you measure the success of the redesigned site or initiative?

Competitive Positioning: How you are different from your competition and the factors that will make you a success.

1. How is your company or your web presence different from your competition?

2. What specifically sets your company apart from your competition?

3. What areas of the current site are successful and why?

Targeted Message: State a single-minded word or phrase that will appropriately describe the site once it is launched.

NEW CONTENT: IN DEVELOPMENT				
FLASH / GIF ANIMATIONS; ILLUSTRATIONS; DEMOS; MEDIA				
IMAGES; PHOTOGRAPHY; MISC.				

For page level copy, there may be several sections on the page, including advertising and demos. Here is a sample script for walking a client through a potential page layout:

- + What is the primary goal of this page?
- + Who are the primary and secondary visitors and what information are they seeking?
- + What is the key action the visitor will take when they are on this page?
- + Describe what will go on this page. (the client says, 'an overview'). Dive deeper. A short paragraph or a long paragraph? Approximately how many lines? Are there links in the copy or a single call to action?
- + Are there any graphics or images on this page?
- + Are there additional ways the visitor can contact the company, or achieve their goal?

Ask 'deep diving' questions – you will be surprised how much detail you can gather that has already been envisioned for page-level copy.

#7 Perform Competitive Intelligence

Without actually spying, there are many ways to gather information about your competition. It pays to keep up with what your competitors are doing, all from a user experience perspective. Stephan Spencer, in *Web Redesign 2.0* states, *"Most companies don't even realize that their competitors are ranking higher in the search engines, getting more traffic, converting more visitors into buyers, and enjoying better returns on their website investment. .. what do you need to know? For starters: how well your site is performing. And how it stacks up against competitors."*

From Stephen Spencer's Expert Topic p. 188, 189

In Google:

Link Check

"link: www.<websitename>.com"

Lists all sites linking to this URL. It helps to determine industry positioning and also to find out what kind of reach your site (or your client's site) has.

Page Listing Check

"site: <websitename>.com"

Checks how many pages you and your competitors have listed at Google. Don't list the "www" as it will yield ineffective results.

Toolbar for PageRank

<http://toolbar.google.com>

Browser plug in for IE on Windows to check web page's PageRank score (based on Google's algorithm.)

Updates & Site Changes

<http://www.googlealert.com>

<http://www.changedetect.com>

For a quick and dirty traffic analysis and ranking, use Alexa.com. This is not to replace actual stats, however allows insights into area of your competition and the industry you would not otherwise have access to.

#8 Perform Current and Future State Analysis

In order to understand how your web presence fits into the larger picture, take time to perform a current and future state analysis. Identifying the gap between where you are today and where you want to be in the next two years allows you to plan a solution. Modify for applications, single initiatives or Intranet/Extranets. Some of these you have already answered in the earlier survey. Coming up with answers should be easy! Alternatively, use this sheet to 'Interview" someone else on your team, key stakeholders or a current 'client' as an exercise.

1) How effective is your web presence today? (circle one)

Not **1 2 3 4 5 6 7 8 9 10** very

2) How usable is your site currently? (circle one)

Not **1 2 3 4 5 6 7 8 9 10** very

3) How important is your online presence to the organization as a whole? (circle one)

Not **1 2 3 4 5 6 7 8 9 10** very

4) How well do you know your customer, do you talk to them often? (circle one)

Not **1 2 3 4 5 6 7 8 9 10** very

5) Is your site meeting your customer's needs? (circle one)

Not **1 2 3 4 5 6 7 8 9 10** very

6) What is the Value Proposition, or Brand Value you provide for your customers TODAY?

7) What is the Value Proposition, or Brand Value you plan on providing IN THE FUTURE?

8) List three to five things you would change on your site TODAY if you could:

1)

2)

3)

4)

5)

7) What obstacles are you currently facing that currently limits your team from making these changes? (resources, budget, buy-in, vision)

8) What factors make up the GAP between where you are today and where you want to be in the future? Take a guess if you aren't sure.

8) Of this list, pull out the top 3 that will most positively affect the user experience (in your opinion).

1)

2)

3)

9) Off this list, pull out the top 3 that will most positively affect your business and the company's bottom line. (in your opinion,).

1)

2)

3)

10) Off of this list, pull out the three items that you could immediately implement – with budget and resources.

1)

2)

3)

11) Off of this list, pull out two to three items you could implement in the next 6 – 12 months.

1)

2)

3)

12) Off this list, think of what you would attempt in the next 12 – 24 months.

1)

2)

3)

13) Now, wrap it up and select, based on the above, the top three to five initiatives from a user experience, business and 'doable' factor.

1)

2)

3)

4)

5)

#9 Plan Your Initiatives

This exercise helps to visualize your group’s initiatives over the next several quarters. Outlining what initiatives you are planning over the course of the next 6, 12 and 24 months helps to plan budget and resources.

Initiative Planner: Overview

Initiative Name			
Initiative Description			
Immediate Goals			
Long-Term Goals			
Estimated Start Date			
Estimated Weeks			
Estimated Launch			
Internal Resources (%)			
External Resources (%)			
Estimated Budget (total guess)			
User Experience Priority (list 1 – 5)			
Business Priority (list 1 – 5)			
Other Comments			

Initiative Planner: Overview

Initiative Name			
Initiative Description			
Immediate Goals			
Long-Term Goals			
Estimated Start Date			
Estimated Weeks			
Estimated Launch			
Internal Resources (%)			
External Resources (%)			
Estimated Budget (total guess)			
User Experience Priority (list 1 - 5)			
Business Priority (list 1 - 5)			
Other Comments			

Waterfall Diagram:

	#1	#2	#3	#4
Q4: 2005				
Oct: 2005				
Nov: 2005				
Dec: 2005				
MILESTONES				
EST BUDGET				
Q1: 2006				
Jan: 2006				
Feb: 2006				
Mar: 2006				
MILESTONES				
EST BUDGET				
Q2: 2006				
Apr: 2006				
May: 2006				

June: 2006				
MILESTONES				
EST BUDGET				
Q3: 2006				
July: 2006				
Aug: 2006				
Sept: 2006				
MILESTONES				
EST BUDGET				
Q4: 2006				
Oct: 2006				
Nov: 2006				
Dec: 2006				
MILESTONES				
EST BUDGET				
Q1: 2007				

Jan: 2007				
Feb: 2007				
Mar: 2007				
MILESTONES				
EST BUDGET				
Q2: 2007				
Apr: 2007				
May: 2007				
June: 2007				
MILESTONES				
EST BUDGET				

Summary				
Measurable Goals for 2005				
Budget Estimate				
Measurable Goals for 2006				
Budget Estimate				
Measurable Goals for 2007				
Budget Estimate				