# The Complete
# WEBSITE REDESIGN HANDBOOK

*The Marketer's Guide to Taking a Website Redesign Project from Idea to Launch*

**percussion**

# TABLE OF CONTENTS

# Preface

**A website redesign is something of a misnomer. It implies a touch of low-effort spit and polish, or, at best, a fresh coat of paint on something that's already built and standing. Anyone who has gone through a redesign project knows that it's really a brand new design project—with baggage.**

Tackling a website redesign requires a lot of planning and resources, as well as a combination of the right project team and tools. This handbook was designed to be a marketer's ultimate guide to a successful redesign, and to help you identify the best team and tools, simplify the planning, and minimize the time and resources required to go live. It's exactly the kind of handbook we wish someone had given us before our last redesign.

The information you'll find comes from both sides of the project—the customer and the design agency—and from every key stakeholder in such a project. From CEO, to project manager, to content marketing manager, to the lead-generation team, to developers, to sales, to creative directors—you'll find something relevant to your part of the project, even if you're not managing all of it.

## Stages of a Website Redesign

We've identified five stages that every website design and redesign go through. They are:

1. Planning

2. Preparing

3. Production

4. Pre-Launch

5. Post-Launch

Use this handbook to better understand each stage, to serve as a strategic planning tool, or to illuminate less familiar aspects of a design.

PLANNING

# Planning

**The conversation about redesigning a company website usually begins when someone points out that traffic is down, conversions are weak, or just that the design looks outdated. You aren't attracting customers, prospects, students, donors, or whichever constituencies you need to be successful, and your team agrees it's time for a change.**

## Does Your Website Need an Overhaul?

Because redesigns can be so expensive, complex, and time-consuming, building a case and getting a budget is often challenging. They also involve much more than just design work; there's SEO, navigation, and content creation.

Adding to the difficulty, design seems so subjective and personal, that sometimes a high level stakeholder liking or not liking the website is reason enough to start or nix a project. What's worse, after the new website is live and the bill has been paid, it's not always clear whether the project was a success by any metric other than "we like the new one better."

# PLANNING

Fortunately, there are plenty of good reasons to start the website redesign process, and identifying them early will help you build a bulletproof case for a serious overhaul. If any of these eight are true for your website, it's time to get started.

## 1. Your website is not responsive

Your website should look great on every device. It's not that all your prospective customers are on the go, but with mobile Internet usage overtaking PC traffic for the first time in 2014, their online habits have changed. Having no mobile-specific web presence, or building a mobile-only site, is an outdated approach that leaves you with two sites to manage at best, and zero mobile customers at worst.

## 2. Your website doesn't showcase your content

Just putting up a website is not enough. It's not a static brochure that can stay the same for all time. To keep your site ranking well in search, you have to continue creating fresh content to keep Google crawling back. If your website was designed using Flash, or works best as a series of content-light tableaus, it's time for a change.

## 3. You look exactly like your competition

Prevailing trends in web design, and sometimes within a specific industry, lend themselves to

websites that look so similar that none of them are memorable. As your primary digital outpost, your website needs to communicate your brand in a strong, distinct way. If your website looks too much like competitor websites, it's not helping you stand out, and might even inadvertently repeat some of their worst practices. Break away from the pack and offer potential customers a website experience that feels like a breath of fresh air.

## 4. Visitors can't tell what you do, sell, or where you are

Even savvy marketers and web designers occasionally go for "shiny" instead of "useful." Above all, your website should make it absolutely clear what your company or organization does, what you offer, and where and how customers can get it.

## 5. Your staff don't use your website because they can't find any information

If your team isn't impressed with your website, how do you expect to win over someone who doesn't have a relationship with you? Someone who works in your company at least knows to walk over to the accounting office to ask a question, but what will a brand new visitor with zero information do if unable to find critical information? Leave.

### 6. You're sending people to your Facebook page, Twitter account, YouTube channel, email newsletter, Pinterest Board—anywhere but your website

If you're embarrassed to send people to your website, that's a red flag. Your social channels are critical to amplifying your signal past your website, but your website is the core of your content marketing and digital business strategy. It's where potential customers can request more information or complete a transaction. If it doesn't hold up to your other online channels, it's time to upgrade.

### 7. You can't connect website activity to business outcomes

This is indicative of a bigger problem than just your website design, but site effectiveness is a major contributing factor to your overall marketing success. If you don't have the ability to measure the impact your website has on driving leads or closing sales, you will need to establish the right KPIs and measure accordingly. If you do have metrics in place and they show zero net effect from your web efforts, that's a good indicator the breakdown is happening in your web presence, and it's time to redesign your website.

### 8. You know your website is having a negative impact on sales

If you know for a fact that your current website is costing you inquiries, leads, or sales, then not redesigning is costing you revenue every single day. Can you afford not to fix the leak?

Any of the reasons listed above is a good foundation for your project case. If two or more of these ring true, running your website is already costing you money and losing revenue. Redesigning your website can dramatically increase its marketing effectiveness, help you close business with highly engaged prospects, and look great while doing it.

# Setting Business Goals for a Website Redesign

If you've successfully made the case for a website redesign, now there are a million things you could do to get it up to date. So where do you start? How do you act based on what is most important to your business or institution? It all starts with goals.

Setting goals is a critical part of building any successful organization. You do this at the strategic and mission level, at the department or team level, and at the individual level. As a tool responsible for business and revenue growth, your website deserves the same level of focus and attention.

## Choosing the Right Goals for Your Website

There are a variety of business goals for most websites that you use. Typical goals for a website might include focusing on:

» Brand identity

» eCommerce

» Advertising

» Demand or lead generation

» Customer retention

» Customer satisfaction

» Raise money

» Employee retention and satisfaction

» Sharing product information

» Customer portals (for example, banking or financial services)

Although you can have multiple business goals for your website, prioritizing a limited number will help focus the redesign process on achieving your desired outcomes.

## Stop Chasing So Many Rabbits

There's an old proverb about chasing two rabbits at a time, and catching neither. A similar rule applies to your goals. In general, leading with the goals that drive new and recurring revenue should be your first concern. Everything else is secondary, and should ultimately support the main goals.

It's also important to remember that even an outstanding website redesign is not a magic bullet, nor the best strategy for meeting all your goals. A bold design, clear calls to action, and strong communication of product benefits, company culture, and engaging, valuable content seem like no-brainers to add to the redesign project list. Attracting new customers and talent can benefit from a similar approach on the web, but that approach is not sufficient every for audience.

To see which goals should be your top priority, answer these three questions:

1. What business are you in?

2. What are the main business and strategic goals for your organization?

3. What does your website need to do to support your business?

This should help you articulate your highest priorities, and focus on no more than three big ones to address with the project.

Ultimately, being able to connect a redesign or any undertaking to your business goals is the best way to justify the investment and get your leadership team on board.

# Building Your Budget

The good news about budgeting for a website redesign is that there is a solution for every budget size. The bad news about budgeting for a website redesign is that there is a solution for every budget size.

You know you could get a new website for $500,000 or for $50,000, or your boss's nephew who's in college could do it for $500. Deciding how much to spend depends on available capital, expectations of the outcome, and many other factors.

There's a design project truism you might be familiar with: fast, good, and cheap—pick two. Depending on your timeline, goals, and available resources, the right size budget will differ. To simplify this complex part of the process, it helps to get a better understanding of what could be included in the project price tag, and all the items that carry their own costs.

» **Design service**—this will include a thorough review of your website, its goals, primary audience, and a comparison against your competition, as well as websites you might want to emulate. This only goes as far as visuals and doesn't always include coding.

» **Image library**—don't take for granted that your design firm will supply the imagery you will use throughout your website. If you have a lot of product photography that needs to be showcased

on your site, consider how those images will be collected, organized, and prepared to be featured online.

» **Development**—development is the portion of the project where a web developer actually writes the code for your website to properly render in a web browser. Depending on the skill set you have in house, or how much you want to control project costs, development can be executed by agency staff or members of your team. When making this decision, bear in mind how much time you can afford from your in-house developer's daily tasks in order to write code for new pages.

» **Implementation**—the implementation of your designs is the process of converting the developed code to templates within your content management system that any content contributor can use to create and update pages without being able to alter the design.

» **Web content management system**—your team will need the ability to manage and update website content on an ongoing basis, long after the site launches. A web CMS is the best way to make that easy. Content management systems are usually proprietary software with their own license costs. Some open source solutions have no immediate price tag, but will require additional custom development and implementation from a design partner, and that means incurring more cost. The latter often means the initial cost of redesigning and launching a site is lower, but the ongoing cost is much higher. Do your research to understand your options.

» **Website and CMS hosting**—a website needs somewhere to live, as does the CMS it runs on. That place is a server. Some businesses have the resources to do their own hosting, but there are many hosting and cloud solutions than can manage servers and software for you. These could carry additional costs and should figure into the project budget.

» **Content creation and editing**—without content, your website is not worth much. Just as a bad design can make great content irrelevant, poorly written and organized content can undermine the power of a great design. This is another part of the project you can take on with your in-house team, with the understanding that it will consume a lot of time, or decide to outsource at least in part.

» **Search engine optimization**—if you're ready to make a major investment in your website by redesigning it, there's no better time to engage the services of an SEO firm, but this of course introduces added cost. Read the search engine optimization section in the Pre-Launch chapter to decide whether to include SEO in your project budget.

» **Ongoing support and future changes** - the redesign project might be complete once your website is live, but the website itself is never really "finished." You will continue to update content, modify design, test performance, and optimize for conversions. Whether you can take on these functions internally or want to outsource them to a third party is going to affect the ongoing cost of keeping it running.

PREPARING

# Preparing

**A good portion of your website redesign project is just ensuring you have the right tools, resources, and people in place to get the job done. Think of it as project mise-en-place: you're preparing and arranging all the ingredients to make the cooking process smooth and pleasant, and ensure delicious results.**

## Building Your Dream Team

Having a well-rounded team of stakeholders whose input and goals are relevant to this project will be essential to keeping the process focused. Try to keep your core team to a small number of people, because you don't want too many cooks in the kitchen when it comes to making decisions. You also want enough people in the room to carry the progress of the project to their teams.

Your project team should include people from different departments and with different skill sets. For example you want people from these skill buckets: creative, user experience focused, content-focused, project planning, marketing, and sprinkle in a few executives.

Although it can be challenging to get the executives to come to all these meetings, you can tell them which meetings are business-critical and let them decide additional meetings to attend. In fact, they are most useful at the initial high-level discussions where business goals and branding are considered. The minute details of the project don't need to be discussed by every stakeholder.

When you work with an outside agency for your redesign, it's important to name one person from each team as a single point of contact (or SPOC). Encourage communication flow to go through the SPOC for each team to ensure clarity and consistency, and make scheduling easier for all parties. Plentiful communication is good, but fragmented communication is not, and no project ever benefited from devolving into a game of "telephone."

## Selecting a Design Firm

Choosing the right partner can make or break the success of your website. Beyond the first impression of their work, make sure you ask the right questions to determine the best fit and a design firm's ability to help you meet your business goals.

### Do you like the design firm's website?

You can tell a lot about a design firm from their own website. As it is with your own site, this will be the first impression you get from them. Does their site have all of the bells and whistles you want in your design? Are you able to find what you're looking for easily? While we all have heard about "the

cobbler's unshod children" this should not apply for a website design firm. If they're not employing the latest trends and technologies for themselves, how can they share best practices with you?

## Does their design portfolio reflect your website goals?

Most agencies display their portfolio by vertical, industry or company size. That can be helpful if you're in a highly specialized vertical that requires unique website needs such as compliance. If they don't understand HIPAA compliance, they won't be a good fit for your healthcare website. But the needs of your website may not be dictated solely by vertical. Based on your goal definitions, make sure the agency has demonstrated experience addressing your goals.  A beautiful website that can't accommodate multiple calls to action would be awful if driving leads is the primary goal of your redesign. This is an agency's best work, if it doesn't get you excited, it's probably not a great fit.

## Do they have a project management methodology that will clearly get you from start to success?

All agencies will say they have a "proven methodology." Ask for details that substantiate this claim. How much time do they suggest for discovery? What are the outputs for each stage? How many revisions are standard versus what you pay more for? These nuances can have a significant impact on budget and time frame, so dig deep on their methodology to find out the finer details.

## Do they listen?

All websites are not created equal. And all website goals aren't either. If a design agency is trying to offer solutions before they've actively listened to your needs and goals, this is a serious red flag. In order to develop a website that fulfills your needs they need to understand your needs! If you're presenting questions and asking for clarity during the vetting process and you're only getting stock responses, this is what you'll get during the project. A firm that listens to your problems before offering solutions is going to provide you with a much richer experience—the experience working together and the website experience.

## Do they have offices near my office?

In today's flat world, most work and collaboration occurs online. And with tools like Basecamp, this form of collaboration is easier and easier. But with a website redesign, having the opportunity for some face-to-face time can be helpful. Being able to share real-time feedback can have a profound impact on review cycles—less time clarifying feedback and more time spent finessing wireframes and designs.

Coupling standard selection criteria (budget, time frame, portfolio, etc.) with these considerations will give you a more complete view of your design short list. Once you've selected your design agency, you don't want any bombshells to derail your project, so ask as many questions as you need in this phase to mitigate surprises.

# Selecting a Content Management System

Planning a website redesign project requires managing multiple moving parts, each being a major project in its own right: setting website goals and timeline, deciding on the best infrastructure and content governance process, deciding on a new look and feel, and refreshing or completely rewriting your website content.

To reduce the complexity of the process, we often rely on design firms to act as partners in the project, and to vet and recommend the right technology to support your site.

There are many reasons to choose and control the technological environment for your new website instead of deferring these decisions to another party. Here are the three most important ones:

## 1. Your goals are not their goals

This might seem obvious, but it's the biggest reason why your choice of web content management system should be yours alone. A design agency's goals on a project will include minimizing their labor and costs, maximizing their revenue, and creating a portfolio-worthy project that will garner awards and future customers.

Helping you meet your organizational and business goals is tied into achieving theirs, but make no mistake, your project is a means to another end in a lot of ways. This doesn't imply any malice on

the agency's part, but underscores the very real fact that you need to always keep your business interests front and center. It's not fair to expect another business to do it for you.

Your current infrastructure, future spending, and availability of on-site technical support are also part of the bigger picture and overall costs that an outside agency will not consider.

Finally, your website should directly contribute to your lead and revenue generation, and needs to fit into your long-term content strategy and the arsenal of marketing technologies ranging from automation, to personalization, to CRM to be truly effective.

## 2. Short-term relief can create long-term reliance

Decision fatigue is a real phenomenon in which constant decision-making wears down the ability and willingness to make more decisions. It's tempting to hand over the reins to an experienced partner in order to find some relief.

The old adage about teaching a man to fish rather than just feeding him fish runs counter to the needs of a business that relies on ongoing revenue streams. Regardless of the one-time cost of a website redesign, a design agency can make a lot more through ongoing design and website management services. In some cases, it's in their best interest to guide you towards a solution that opens the door to an ongoing support and service model.

When the short-term relief leads to long-term reliance, it's really no relief at all, it just means you've deferred the pain.

Design agencies have years of experience in design and implementation, and will have a good understanding of the WCM products they're familiar with. Their preference will be to stick with what they know in order to reduce friction.

Understanding your goals and needs and choosing the right WCM system for your ongoing content marketing needs requires time and effort, but owning your decision and finding the right fit will put you in control of the redesign process, and pay long-term dividends.

## 3. Separating Content Marketing from Content Management Weakens Your Content Strategy

To create a compelling content marketing program, the website must serve as a hub and central repository of content that can be easily shared and distributed via social media and email. Creating an end-to-end process for content creation, management, publishing, distribution, and measurement allows marketers to collect data on the fly and remain nimble in creating content that supports their business goals. This "closed loop" marketing approach requires feedback, speed, and integration in order to give the organization an accurate picture of what's working in their content marketing.

For web content management to be the foundation for content marketing, it must be accessible to the marketing team. It must be extremely easy for marketers to be able to log in, create and publish content, and measure the effectiveness of what they're doing.

Mashing well with other marketing tools is also critical to successfully combining content marketing with content management. WCMs system should allow marketers to choose their favorite platforms according to specialization, needs, and budget, and tightly integrate them into the website. Although behemoth all-in-one systems are out there, they're not a good fit for every business, are too broad to do everything well, or require a dedicated developer to deliver their full value.

# Defining Your Content Strategy

Getting your content strategy in order should be at the top of your website redesign project list. Even though this project feels big enough already and the temptation is strong to keep the to-do list short, you know it's best to do it right the first time. Great content for your great design is an absolute must-have.

## Why Does Content Matter?

Your content is the copy on your home page, your landing pages, your news section, and your blog. It's also your images, the homepage slideshow, your SlideShare presentations, videos, and

downloadable ebooks. If you'd like to produce more video content, or find a better way to share your event photos, that becomes part of your content plan, and informs your design decisions.

A website redesign is a somewhat aspirational practice, with organizations wishing to present their brand at its very best. If you are reinventing yourself as the most customer-service-oriented credit union, you'll need some content to back up those stock photos of smiling people wearing headsets.

## Content and Design Need to Work Together

Good design can inspire copycats, and we often look to our peers to decide how our websites should look, but inspiration is only a starting point. Understanding your brand identity and what you're trying to say should guide the final design, and developing your messaging is crucial to having a design that doesn't look like it came from the website corner store.

Content migration doesn't have to be a painful process, but if you're building a new design to accommodate content that's going to get replaced or doesn't have a replacement lined up, you're signing up for a wedding gown that won't allow alterations, and could make for an awkward fit when all eyes are on you.

Any good web design firm will do its homework before pushing a single pixel into place. In fact, if their designers want to dive in without asking any questions about your goals, analytics, target audience, or content, run. By reviewing your content and defining your desired outcomes and

strategies, you'll be able to provide a lot of the information the agency would be seeking during its discovery phase. You still want to let them do their research, but supplying more information and good content ahead of time will yield a smoother, faster process, and a better end result.

Your website isn't finished on the day you launch. As you see future opportunities for growth, you can prepare a strategic road map that can lead your organization towards its goals. Your website is a way to deliver business-critical content, engage customers, and drive revenue. Having a content plan will help you ensure you know how to measure whether you're hitting your targets and when to adapt your approach.

## Conducting a Content Audit

Conducting a website content audit is a big project, and it seems there's never a right time to do it. Except, for when you do a website re-design. If you say "I'm going to wait to do this after the redesign," you are setting up your project for long term failure. Having a good grasp of the state of your content and a content strategy before you redesign is critical to launching a successful website that can meet your business goals.

Break down the process into steps to make it more manageable and easier to plan around.

### Step 1: Scan and Catalog Your Existing Website Content

When planning for a successful website redesign project, it's important to account for the existing content currently on your website. This is your opportunity to assess whether you can move forward with what's there, or need to build creating or revising content into your project plan. You can use a tool like Screaming Frog, which scans your website to find all URLs, Title Tags, Alt Tags, Image URLs, style sheets, and all files required to keep your site up and running. You can export this output as an excel spreadsheet and then sort by HTML pages to isolate the pages you need to review and have a complete and accurate list.

### Step 2: Review Your Content for Gaps and Quality

Once you have your excel document cleaned up and ready to go, create a column to rank your content. I prefer ranking each page with an A, B, or C. Use A for content that doesn't need to be edited, B for content that needs some cleanup, and C for content that needs drastic revisions or a complete rewrite. If something is identified as a C, make sure you add notes for what needs improvement.

Some reasons to revise:

» the content is outdated
» the content is inaccurate

» the existing content was created without a documented content strategy

» it isn't written in your brand voice or consistent with other content

» you see web metrics indicative of poor engagement or conversions and know it's not effective

» there's not enough information on a particular topic

» there is no discernible content optimization for search engines

This ranking process is important because it helps you see the full scope of work that needs to be done on your website beyond just the redesign, and gives you a way to start prioritizing.

## Step 3: Prioritize Your Content Revisions

Now that you have ranked your content, you can decide which content should be edited first over what to just spend little time touching up. I recommend adding columns in your spreadsheet for page bounce rates and number of page views. This will help you assess content effectiveness, and understand which updates are most critical, regardless of their size or complexity.

Structure your website redesign project plan to include a few different waves of content edits to allow you to target the most challenging content first. Once your content manager has the first round of content edited, it can enter review phase by the remainder of the team, and while he/she moves onto the next wave of content.

If you are on an aggressive project timeline, prioritizing can also allow you to defer specific areas of content until after launch if they are in good enough condition.

## Step 4: Make It Great

Now for the fun part. Figure out what you want the new website information architecture and navigation to look like. Pull out all of the content you want to use for the new navigation and start editing based on your A,B, or C ranking. Just remember to do this piece by piece and in waves to keep from going crazy.

Stopping to catalog, review, and revise your website content sounds daunting, but if you are going to pull the rug out from under you, pull the whole rug not just part of it. As creating fresh web content continues to become increasingly important, getting ahead of the game is going to be more beneficial in the long run.

Finally, make sure you take the time to record web analytics benchmarks so you can track the success of your changes, and ensure they are meeting your business goals for the website redesign.

# Project Timeline and Risk Mitigation

How long does a website redesign take? Just like deciding on how much you should spend on a redesign, the answer is: it depends.

A typical redesign project will include the following stages in the statement of work or proposal you get from an agency:

- » Discovery
- » Information architecture
- » Wireframes
- » Art direction
- » Proposed design and review
- » Design delivery (this might be Adobe Photoshop files that your team will convert to code, or it could be static HTML files)
- » Development (if your agency is doing the coding)
- » Implementation (if your agency is converting the code to templates in your CMS)

The length of time required to deliver your project should be reverse-planned from your desired go-live date, if you have one. Sometimes a website launch coincides with a re-branding, new product release, the start of financial accounting period, or some other milestone. Other times, there's no firm due date, just the desire to have a more effective website.

Some phases of the project, such as content review and creation and design can happen concurrently, but others have to happen in sequence and can't be rushed. Your design firm has gone through this planning process many times, and based on how many templates you think you might need, how many in-house resources you can commit, and other considerations, they can help you come up with a reasonable timeline, and even let you know where they can be more flexible, or the timeline can be made more aggressive.

Whatever your situation, be prepared to work from a conservative time estimate, and remember that speedy delivery is not the top indicator of a successful website project. Completely redesigning your website and getting it launched will take several at least several weeks, and could take a few months if your website is large enough.

If keeping your timeline tight is important, the best thing you can do is to come to your design agency prepared with clear goals, strong understanding of your intended audience, and relevant information you can share. This can help shorten the discovery phase and get everyone on the same page faster, which means the fun work will begin sooner.

## Strategies for Risk Mitigation

If you are the website design project manager, you are tasked with many roles: moderator, scheduler, traffic controller, leader, disciplinarian, manager, problem-solver, and so on. In every situation, the objective is the same: avoid risk and failure, and make sure the project moves smoothly and is

completed on-time and on-budget, while simultaneously ensuring that everyone involved is pleased.

Experienced project managers understand that pitfalls, like scope-creep or communication challenges arise even in the best projects, but the right risk mitigation strategies and some planning can keep everyone on track and the project out of jeopardy.

## Let Technology Help With Communication

Transparency and communication are essential to a successful website project. Even if you fully trust that your design agency is doing a great job according to the agreed upon schedule, it's great to have a direct view into the progress of the project.

With the right tools, it's easier than ever to keep communication seamless and ongoing. Many agencies will use a cloud-based project management platform like Basecamp to track project deliverables and communicate with their client. Use email, calendars, and teleconferencing platforms to communicate regularly with the project team, and make it easy to track that communication.

Whatever technology you use, remember that your feedback to project partners should always be constructive and—even more importantly—actionable.

## Ensure Scope and Expectations are Understood by All Parties

Your design agency will present a statement of work (SOW) before getting started, so you know what you have signed up for. If two rounds of review were slotted for a deliverable, than that is what you are planning for—as an internal project manager, this is what you hold your team to. If another review is needed, it can always be discussed and added in. Keep in mind that the project cost you agree to is based on that initial scope and SOW, and adding to either will add to the cost and put the timeline at risk. It's also important to understand early on exactly who is responsible for which part of the project, and where there's a potential for confusion or bottlenecks.

## Remain Proactive Throughout

Trust your instincts. If you are starting to see red flags on the horizon, address them head-on. Most problems have a way of growing wild when left unchecked, and problems with complex projects have a way of growing very expensive very fast. It's best to stop and reassess the situation as soon as potential issues are identified. See what's causing the problem, where the communication breakdown is happening, and address it quickly to get your project back on track.

There is no one way to handle a website design project successfully. Each project will have its own nuances and uniqueness, so be prepared to make adjustments and keep a level head on your shoulders.

PRODUCTION

# Production

**With planning and preparation complete, you can kick off the hands-on parts of the project. The initial stages are often the most difficult and delicate because they require stakeholders to review and comment on something that doesn't exist yet. It also involves designers explaining to non-designers how something might be built and could look while keeping the client from focusing on something that is temporary and far from the finished product.**

If you've never been involved with a design project before, you might be surprised to find that the actual design is one piece of a longer chain of tasks that comprise a successful website build.

The initial discovery phase is mostly contained in the previous Planning and Preparation sections. It's about ensuring your organization understands its business and online goals well enough to communicate them to a design partner in a constructive way, setting the right tone for the project.

Providing a good experience for the end user—most likely your future customers—is the focus of the information architecture and wireframe stages. Once the design is completed, developers at your

design agency or in your organization still have to write the code based on the design, which then will be implemented within your content management system.

By now, you can probably see that the design part of a website redesign, is really a blanket term for a complex project that involves everything from business goals, to usability, to technical requirements.

## Information Architecture

Before beginning the actual design part of a website redesign you need to define your site information architecture, or IA. Whether you rely on your internal team or a design agency to do the design work, your IA will help you determine the scope of what needs to be done, and guide decisions and priorities around design and content changes. Most importantly, your IA has tremendous impact on your website's usability, user-friendliness, and SEO.

With these priorities in mind, it sounds like the process should be straightforward, but it's often not. Just as when reviewing a new design, you're likely to get as many opinions as there stakeholders at the table. Use this brief guide to help build a good information architecture for your website that prioritizes what matters, and excludes what doesn't.

## Your Information Architecture Is Not Your Navigation

Website navigation is based off your information architecture, but they are not one and the same. Your navigation will show website visitors how to get to the information or content they are seeking. Information architecture determines where that content is going to live, and also which parts of your site should be featured in the top levels of the navigation.

## Your Information Architecture Is an Exercise In Discipline and Simplicity

Once you start planning your IA, you have to account for all the content you currently have on your website and decide where it's going to go. Conducting a content audit is a critical part of this process because it forces you to assess the quality of your content, and discover where there might be gaps that need to be filled. It's also the perfect time to see where pages and sections can be consolidated, and how you can shorten the path between your visitor's first click and intended destination.

## Your Information Architecture Is Not Your Org Chart

When designing your information architecture, it seems natural to follow the structure of your organization. Depending on your industry, it might be obvious that your accounting and facilities offices don't need their own sections on the website. When several divisions are each in charge of multiple product or service lines, the temptation is even stronger to group the information based

on that structure. But will it make sense to a first time visitor? If your site has multiple target audiences, see how you can segment content according to visitor personas and needs rather than your internal organizational structure.

## Your Information Architecture Is the Foundation of Good User Experience

Information architects have to balance two seemingly conflicting directives: reduce the number of clicks a visitor needs to take to reach her destination and reduce the number of options available on the first screen to prevent confusion and overwhelm. Doing this requires understanding the best and most likely path for a visitor to take, and delivering them to what they want with minimal friction, and without requiring them to consider information that is not relevant to them.

## Your Information Architecture Is Not Supposed to Be Clever

Marketers are generally a smart bunch, with many good writers among them. Getting witty and creative with copy can work incredibly well in print, but on the web, the rules are different. With body text, you have some leeway to play with tone, wit, structure, and even the occasional pun—and you should in order to make the experience of visiting your site more fun. However, when naming pages, sections, and navigation elements, straightforward language is best.

## Your Information Architecture Is a Way to Boost SEO

Search engines look at page titles (your H1 headings) and names and URLs to determine the relevance of content. Using plain language that will make sense to visitors and align with what they search for will help your website perform better in search. Like your meta titles and descriptions, the navigation elements and page titles as determined by your information architecture will strengthen SEO and help page ranking.

Creating a strong information architecture for your website will ensure a smoother redesign project, an improved user experience, and more focused web content. It's bound to be a challenging, and possibly contentious process, but it's worth the effort to get right before moving forward with your website project.

# Content Development and Migration

Depending on whether you decided to optimize existing content or develop new content for your website, the amount of time you will need to spend on content migration will vary. The size of your current website and your future site are other variables that will determine how much time you should block out for content development.

Content revision and optimization can be done concurrently with the design part of the project and completed shortly prior to launch.

# PRODUCTION

Whether you are writing all new content or hiring someone to do it for you, or trying to balance in- and outsourcing content creation, you can keep this work independent of the rest of the project. The only areas where there is overlap is information architecture—which will determine what content should be created—and the work you do with your SEO firm, which will ensure your content is the right content for your audience, and structured appropriately for search engines.

You can also begin revising and developing content well ahead of a website redesign kickoff, and save even more time from the project schedule!

If you're happy with your current content, make sure you include migration in the project discussions, and find out whether it will be a manual process, or one that can be automated through the content management system.

## Design

With the discovery, goal setting, content planning, and information architecture development finally out of the way, it's time for the part of the project that both stakeholders and agencies look forward to the most: the visual and creative parts.

A good web designer is more than a graphic designer who happens to know some HTML. Whereas in print media the only interaction with a piece is viewing it and possibly turning pages, a visitor to a web page can interact with what she sees in many ways, with each click either getting her closer or farther away from what she is seeking.

# PRODUCTION

The design process will aim to distill the mechanics of a visitor interacting with your website and knowing how to deliver that visitor to the right pages, and motivate the actions and behaviors that will yield positive business outcomes.

This section should help you navigate the tricky and sometimes contentious wireframing and art direction portions of a design, and what is involved in going from design mockup to usable code.

## Wireframes

Your design firm or designer should be able to interpret your goals, the desired behavior from future website visitors, site content, and other needs, and offer a structural preview of how these requirements will meet in a harmonious way on your website. Wireframes are the best way to do this before committing to visuals that cannot be easily revised.

Although the wireframe portion of a design project is not the most labor intensive, it is often the most difficult for the project team to work through because of their nature.

So how do you make the process less painful? Understand the role wireframes play in the redesign process and how to help your team do the same.

## What are wireframes?

Wireframes are used by user experience and user interface designers to account for the various components of a page on a website, ensuring all necessary functionality and content is captured and has a place in the upcoming design.

Wireframes are not a blueprint for how the final product will look, or a map of where every item will appear. Try thinking of them as a visual checklist that ensures every important element is included, and that relationships between elements are mapped out.

## Why are wireframes important?

Wireframes are the web design version of the old adage to "measure twice, cut once." The actual design and development of your website is complex, involved, and often expensive process. Once it has begun, you want to keep changes as minimal as possible and don't want to rethink direction with a half-built website.

Focusing on information architecture, content quality, and structuring various elements prior to the actual development gives you multiple opportunities to ask questions, make important decisions, and spot and address problems where it's most time and cost effective to do so.

## Why is working with wireframes so difficult?

Humans are wired to respond to visual information and it's hard to ignore something in front of us and picture it's going to be something else. This is one of the great challenges for visual designers in any discipline: non-designers always struggle to imagine something they can't see, and don't always know what they want or don't want until they see it.

While the UX designer wants feedback on whether every page element is present and behaving properly, the project team may get stuck on "move that to the left" and "will it be green or blue?"

## How can working with wireframes be more productive?

In order to keep from getting stuck on the wrong information during a wireframe presentation, your design agency should help the project team understand the mechanics of what a wireframe does prior to actually showing it. Emphasizing that it is more of a checklist than a mock up might help.

Designers can also explain that the focus is on user interaction with individual items, and how they interact with one another in a page, consistently emphasizing function over appearance.

What your project team can do is limit who is present at the table. Whatever the size of your website redesign committee, the decisions to be made here are more technical and structural than visual. Only the core stakeholders should be involved in approving wireframes.

Most executives will admit they are not designers, and even that a wireframing discussion goes right over their heads. Their concern is that the website is structured soundly in a way that will keep the process on target, and on budget, and focused on meeting the website goals your team defined earlier on.

It's hard not to get attached to the first visual representation of the website your team is so excited to launch. With a little preparation, patience, and better understanding of where wireframes fit into the process, you can keep the discussion focused and productive so you can move on to the fun part: reviewing the actual website design.

## Building Consensus

Approving a design by committee opens the door to a multiple of perceptions and opinions. When everyone at the table wants to feel a sense of ownership and confidence in the outcome, it's difficult to step away from the process and let someone else make decisions. How could you hand over that power to someone who doesn't see what you see?

When your proposed website design leads to disagreements and colleagues digging their heels in. Some will try to invoke design experience in an effort to give their opinion more weight. You might find yourself tactfully responding to the HiPPO (highest paid person's opinion) in the room and struggling to build consensus.

Before you sit down for final approval, select whose word is final in the discussion. It doesn't have to be your company president or CEO. The CMO or marketing director is often the best equipped person to make the final call, not because of being a "creative type," but specifically because of experience targeting messaging and design to the customer rather than internal stakeholders.

## Going from Subjective to Productive: A Step-by-Step Process

When you sense that there are some strong conflicting opinions in the room, it's time to pause the discussion and rely on a process to keep the dialogue constructive, focused, and productive instead of devolving into a conversation about personal preferences.

If you know you can't reach agreement quickly, you'll need to:

» Thank the design firm for the work they've presented and agree to provide them with consolidated feedback—this is where they exit the discussion

» Acknowledge more discussion is needed internally before that feedback is supplied

» Review your original website goals and try to identify whether any of them are at risk of not being met with the new design

» Shrink your project team to keep the discussion more focused

» Identify points of agreement and articulate them in as much detail as possible in writing so you can send it to the design firm

» Identify points of contention and drill down to why some elements or design choices are generating negative reactions

» Ban the word "like" from the discussion and speak directly to customer behavior, usability, readability and other specific features and benefits of the design or desired outcome

» Expect to reach consensus and drive relentlessly towards agreement and solving the problem, repeat for each point of contention as needed

» If all else fails, shrink the team again and ask someone to step away while affirming the ultimate decision-maker's commitment to putting the website goals first

Remember that a website design, while requiring a creative and visual approach, is still a business endeavor with expected business outcomes. A successful website is one that drives the desired customer response and that is the most important metric. A successful website will also instill confidence in your team and how your brand is presented, but remember that pleasing your internal audience is secondary.

## Development

On the web, people see videos, images, and text. Web browsers see code. In order for browsers to load a website that looks like what your design firm presented, someone is going to have to supply the code that these browsers can read. This is the role of the web developer.

Depending on the original statement of work supplied by your design firm, the development could

be done by either their in-house developer, or someone on your staff who has development skills and deep knowledge of how to later implement that code with your content management system.

Doing the development in-house can save you on project costs because it means less billable time on the agency side, but it can be costly in terms of time required from your team, and away from other projects.

Which content management system will be used for the new website can also determine which path is best. You might have a lot of in-house expertise around building page templates in your CMS, or it might be a development-heavy effort that is best left to someone who has done dozens of similar projects.

Regardless of who uses the design mockups to create static HTML versions of pages, implementing that code as part of CMS templates can be another major or minor project in itself.

## Implementation

The content management system you selected for your website can make a big difference in overall project cost and timeline, as well as the ongoing cost of keeping the website up to date and making occasional design changes.

If you choose a new content management system implementation to go along with your website project, you might be able to leverage your CMS vendor's services and expertise in helping you go live.

# PRODUCTION

The actual implementation of your website and CMS is the part where the marketer and your organization are usually least involved, but how it happens has long term repercussions for who is truly in charge of your website.

Because the timeline, cost, complexity, and transparency of your implementation is inextricably linked to the content management system you use to host your website, it's beyond the scope of this handbook to cover every potential timeline.

Ask these questions early on in the planning process to assess what the implementation might look like, and whether it will fit with your website goals and project timeline:

» Will we use our current CMS or implement a new one?

» How long will be required to implement each template?

» Is a custom CMS environment going to be built from scratch for my implementation, or is the CMS ready to use out of the box?

» Can we easily migrate any existing files or content into the new CMS?

» What technical skills are required to implement the new website?

» Who will have the skills to complete the implementation? (this is to help you decide whether hire to that skill set or rely on a third party)

» When will content be migrated into the CMS? Can this happen concurrently with development or after implementation?

# PRODUCTION

» Who will make content changes to the website once it is live (agency or in-house team)?

» Who will make design changes once the website is live?

» How long will content and design changes take to execute?

» Can I reuse design or content elements if I choose to redesign the website later on?
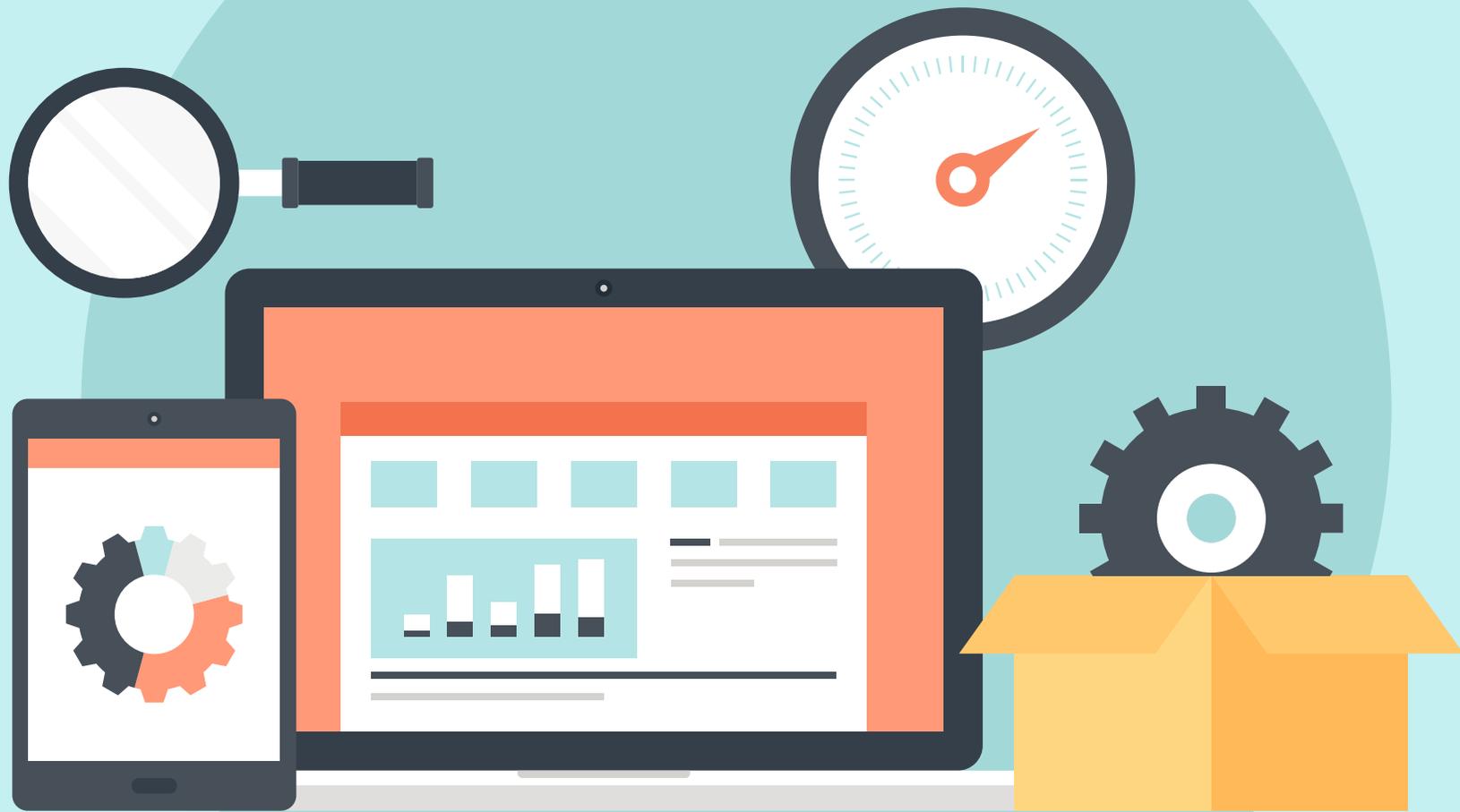
PRE-LAUNCH

# Pre-Launch

**Once the design, development, and content migration are completed, there is still a lot of work to be done before your website can go live. From testing, to search engine optimization, these less glamorous and strictly behind-the-scenes tasks are nonetheless critical to a successful website launch.**

## Search Engine Optimization

A successful website redesign isn't just about design. It's actually about giving your content a great place to live so it can engage your audience and grow your business. It's not difficult to understand, but takes a lot of effort to deliver.

Adding an SEO firm to your website redesign team is a great way of sharing the project workload, but that's not the biggest benefit. Engaging with SEO experts during your project maximizes the impact of your redesign by ensuring your content will perform strongly in search, and drive more traffic to your new website.

Your website is the digital hub of your business, and getting found is critical to staying in business. Having enough SEO expertise to perform well in search is always valuable, whether that knowledge comes from your team or a firm.

If you follow SEO best practices, you know that search engines don't share too much knowledge, and a best practice one day (think meta keywords or Google Authorship) is meaningless the next. SEOs focused on discovering, testing, and mastering this evolving science are best equipped to assess your website's needs, and deliver the most up-to-date solutions. This is especially true if you're in a highly competitive market and your visibility is partly determined by the quality of your competitors' SEO.

An SEO firm can be an invaluable partner in ensuring your newly launched site is ready to step up your online marketing game, and help ensure peak performance day after day, quarter after quarter, and year after year.

## Integrating Other Marketing Tools

More than ever before, marketers are becoming masters of various marketing platforms and software designed just for them. You need to publish website content, measure website traffic, analyze the engagement of your social posts, send and track email campaigns, and find ways to test what's going to make all of the above more effective.

Some of the third-party tools you might include in your website:

» Marketing automation

» Email campaign management

» A/B and multivariate testing

» Accessibility compliance software

» Website analytics

» Personalization

» E-commerce platform

» Forms and surveys

» Video hosting

» Calculators

Whatever software tools you use for managing marketing automation, social media, email, and other digital marketing tools, they need to tie into your website to ensure that all of these efforts are conducted in concert.

While you need to ensure that your content management system allows you to integrate the tools used by your team before initiating the project, actually plugging them in usually happens later in the implementation process.

Many of these marketing platforms can inherit design styles from the websites they integrate with, but make sure you go through the tools you use and ensure the display properties of items like forms, buttons, calls to action, and banners all match the behaviors and visual appearance of your entire website.

# Quality Assurance Testing

As confusing and contentious as other parts of a website project can get, there's probably unanimous agreement on which is the least fun. Quality assurance testing your newly minted site is labor-intensive, repetitive, time-consuming, and it might make your eyes glaze over. It's also absolutely non-negotiable and has to take place before you launch your site.

## What Should You Check During the QA Period?

Every website is different, and what's critical for one business might be less important to another. How you prioritize what has to be 100 percent complete prior to launch depends largely on your business goals. However, this short list should give you a good idea of the kinds of things you want to test before publishing.

» Visit every page in the top 3 levels of your navigation (ideally, every page on your site, if possible)
  » Ensure all images and videos load

» Ensure there's a link to take visitors back to the homepage

» Click every link in the navigation to make sure it goes somewhere

» Click every global link (links in your header and footer) to ensure they work for each page template on your site

» Click every link on every page within the page content to ensure they go to the appropriate locations

» Test your website search to ensure it works

» Visit the website on multiple mobile devices, or use the mobile preview in your CMS to see how the pages render

» If you have downloadable assets, make sure the download links work

» Check how iframe content renders within your pages

» Look out for any behavior that looks like a glitch—there could be a script error happening

» Read the content! Read out loud to force your eyes to slow down and spot remaining typos or errors

## Divide and Conquer the QA

In order to ensure your website is truly ready to go live, you need to ensure everything works as it's supposed to and that nothing is missing. It's a lot of work, and you should reserve a few days for it. The good news is that you don't have to do it alone.

# PRE-LAUNCH

While it's the least interesting part of your project, QA is also the lowest-skilled part, and that means anyone on your team can do it. Most QA tasks involve just looking, clicking, and reading and can be easily assigned to a group of testers.

To ensure that errors are found and recorded in a consistent way, create a spreadsheet that represents your website information architecture, with one row for each page. Include the title and URL of that page, and assign each section or group of related pages to one tester. You can then create columns for different stages or aspects of QA: one for broken links, another for broken images, and one for typos, for example.

However you structure this spreadsheet, save it in a shared folder, or use a cloud app like Google Spreadsheets to allow multiple testers to access and update it at once. You'll have a central location for all the errors and a comprehensive view that will enable you to make better decisions about the website's readiness for launch, and to prioritize and assign necessary fixes.

POST-LAUNCH

# Post-Launch

**You've heard the truism that a website is a fluid, "living" entity that is constantly evolving. With anything that is prone to frequent change, completing any quality assurance is a moving target. While this can seem discouraging, making it feel like the project is never truly complete, it also means that whatever is not working or meeting expectations can be addressed and changed. Barring any major limitations in your content management system, lack of in-house skills, or your design agency relocating to another planet, any issue can be fixed.**

## More QA, More Testing

Even the most thorough and determined group of QA testers is likely to miss a few small things here and there. That's the nature of any project with many interactive pieces. To further reduce the likelihood of any errors going live, a soft launch is a great option. What we mean is going live for your internal organizational network, so stakeholders and all your other colleagues can visit the new

site and admire the result of everyone's hard work. They can also interact with the site in a pattern typical of a first-time visitor, and catch whatever may have been missed.

Launching the site internally is also a great opportunity to build enthusiasm and excitement for the public launch within your organization, using that sneak peek to help everyone build a sense of pride and ownership in the website that's about to go live.

## Project Post-Mortem

The day you launch your new website is a day for two things: catching the little things you can't believe you missed during your extensive QA period, and exuberant celebration. A project post-mortem should take place when you've had the opportunity to collect enough data to do an informative comparison of your website effectiveness before and after launch.

In the first month following launch, you're likely to be so busy continuing QA and catching up on all the work that was set aside during the project, that you won't have much time to spend reviewing site performance. Ideally, you will see some early signals of success, but resist the temptation to capture outcomes too quickly.

Two to three months after the launch, you should have enough data to take to the original project stakeholders and explain just how successful your website redesign has been. Ideally, you will have captured at least one quarter's worth of data prior to the launch, and after, so you can do a

worthwhile comparison and see whether you are on track to meet your goals. This is the ideal time to call project stakeholders back together and review your website's performance, how it compares to your expectations, and whether the goals first set in the project plan are being met.

Taking the time to analyze your website performance not only identifies the strengths of your new digital presence, but points out any shortcomings and associated opportunities for improvement. It's an opportunity for improvement and making the appropriate modifications to increase conversions and optimize your overall web presence.

The cycle of measuring, analyzing and optimizing a website doesn't stop after one round but should continue as an ongoing part of your digital marketing strategy. A website requires the proper maintenance and attention to deliver a user experience that consistently drives towards your business goals. So while the launch of your new website is certainly a great accomplishment and something to celebrate, it truly is just the beginning.

# Appendix

## Additional Resources

We have more helpful resources to make planning your website redesign easier. Check out some of our other resources, available for free on our website by clicking the links below.

» **White Paper: Why your design firm should not select your CMS**

» **RFP Template for Web Content Management**

» **White Paper: Challenge the Orthodoxy and Launch a WCM Before You Redesign**

» **Webinar Replay: Debunk the Top 10 Website Design Myths**

» **Webinar Replay: Measure Website Effectiveness and KPIs**

# About Percussion Software

Percussion CMS helps marketers create, publish, and share website content that drives online traffic, engages visitors, and looks great on any device. Percussion powers websites in business, higher education, government, and financial services, helping them measure content impact, improve SEO, and grow business. Visit www.percussion.com to learn more.

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# Website Redesign Project Checklist

**percussion**

## Planning

- ❑ Identify reasons for redesign

  (check all that apply)

  - ❑ Not responsive
  - ❑ Too little content
  - ❑ Looks like competition
  - ❑ Value proposition unclear
  - ❑ Staff doesn't use site
  - ❑ Staff use other channels
  - ❑ No measurable ROI
  - ❑ Negative impact on business
- ❑ Define primary website goals

  1._____

  2._____

  3.._____
- ❑ Present business case
- ❑ Secure project budget
- ❑ Set preliminary go live date

## Preparing

- ❑ Assemble project team
- ❑ Select CMS
- ❑ Select design partner or team
- ❑ Review statement of work
- ❑ Agree on project timeline
- ❑ Document content strategy
- ❑ Conduct a content audit

## Production

- ❑ Content development
- ❑ Define information architecture
- ❑ Complete discovery phase
- ❑ Review wireframes
- ❑ Review art direction
- ❑ Review design round 1
- ❑ Review design round 2
- ❑ Additional review if needed
- ❑ Approve final design
- ❑ Code development
- ❑ Template and CMS implementation
- ❑ Content Migration

## Pre-Launch

- ❑ SEO review
- ❑ Technical audit
- ❑ Quality assurance testing
  - ❑ Ensure videos & images load
  - ❑ Test all links
  - ❑ Test navigation
  - ❑ Test website search
  - ❑ Check iframe content
  - ❑ Test file downloads
  - ❑ View site on multiple devices
- ❑ Third-party tool integration
  - ❑ Website analytics platform
  - ❑ Webmaster tools account
  - ❑ Marketing automation
  - ❑ A/B testing platform
  - ❑ Personalization
  - ❑ Mobile optimization
  - ❑ Other

## Post-Launch

- ❑ Additional QA
- ❑ Conduct post-mortem
- ❑ Remember to celebrate!