

Starting Out Right with Web Designers and Developers

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0. How to use these worksheets

If you attend our session, these will make sense to you—we'll go through them step-by-step. But if you don't or didn't (or if you need a refresher on what they mean), here's a guide to using them:

1. Do a **1. Staff and board website survey** to assess your current site. Just use paper or email, don't hold a meeting.
2. Compile the survey results. Compare them to any hard numbers you have. Web traffic data from, say, Google Analytics or a similar platform should be your first stop. Gather data from any email broadcast platform you may use (e.g., PHPList, Constant Contact) to gauge it's reach and effect. If you have time or resources to do an audience survey, that would be helpful. All of this data along with the staff and board assessment survey will help you take a clear snapshot of how your organization is using the web.
3. Send out a second staff/board survey to discover what people want out of a new site. Use paper or email at first then hold an in-person meeting if you wish. For a variety of reasons, we've found it's best to ask people to focus alone before asking them to brainstorm.
4. Compile the results and prepare to write a **2. Project mission statement**. You'll now want to gather staff responsible for managing the organization's public face; typically this will include the executive director, communications staff, development staff and others who have a significant role in the creation, management or distribution of the organization's message. Make sure the project mission statement dovetails nicely into existing strategic, communications or marketing plans. After all, if you've already spent time organizing your thoughts and ranking action items (and already achieved some consensus among your staff and board about the direction of your communications strategy), it's best to mine that gold first.
5. After you create a project mission statement, move onto **3. An audience-driven website worksheet**. First, identify which audiences are going to come to the site: Members, funders, job seekers, donors, people in need of services, ticket buyers, consumers interested in local food, curious looky-loos—it's all dependent on your organization's mission, scope, focus and, too, the project mission statement you wrote in step 4.

Second, try as best you can to put yourself in the audience's place to imagine what content each segment might want from you. Imagine what search terms they used that led them to your site. Imagine what need they have or real-world situation they're in which brought them to your doorstep. One of the best things a website can do is *answer the user's questions before he or she even has a chance to ask them*.

Third, think about what actions by the users that would benefit your organization. Do you want them to get in touch? Become members? Buy tickets? Donate?

Finally, once you've compiled this list, you must rank each audience segment in order of how important that audience is to you. This is difficult but important; this ranking reveals the information hierarchy that will be used in everything from page design to navigation to your editorial calendar. Don't make anything tie; ties will muddle the message and muddle the design. Once you've completed this worksheet, however, you'll have a crystal-clear idea about where to give focus in your design, your development and your entire web strategy.

6. Now it's time to address the details in your **4. Website specs worksheet**. For this sheet (and for its appendixes in **4.1. Branding specs** and **4.2. Tools specs**), all you're interested in is detail. This is the time to think through what kind of user experience you want people on your site to have. You'll figure out the tools you want to build—and specify how your organization and your audience will use them. You'll also have a handy checklist of things your designer and developer will need later.

And that's pretty much it. Don't consider these worksheets sacrosanct, though. They are to be pushed, pulled, twisted, molded, adapted and remixed into something that *you* and *your organization* find useful.

After all, that's the whole point of communications: To make it clear and make it useful.

We skipped a lot

Out of necessity, we had to give instructions like, “Do an audience survey.” Or, “Rank these goals in order.” We understand it's not that easy. Each of these tasks is an art and science unto itself. To find out more about the best practices, nitty-gritty and massive possibilities of things like writing website copy, conducting surveys, writing audience segment profiles and the like, search around the web. There's a huge amount of information and examples that are lying about for free. (Hint: If information doesn't make sense or feels like a sales pitch, ignore it.)

One of our favorite sites is **alistapart.com**. A List Apart is the elite of hip website builders talking in plain, accessible terms about how awesome they are at their jobs. Their articles on writing for the web are particularly fantastic.

If you don't know **geekgirlsguide.com**, get to. The local team of Meghan and Nancy know their web stuff when it comes to social media, analytics and more geekery—and execute it with wit and style. Plus, since they're based in Minneapolis–St. Paul, you may run into them at a conference or workshop sometime. If you ever find yourself with the chance to take one of their sessions, do.

One book we recommend to everyone

Anyone and everyone involved in building a website—especially for the first time—should read Steve Krug's book *Don't Make Me Think!: A Common Sense Approach to Web Usability* (Que, 2000). It's an invaluable tool in providing a good, solid, easy-to-understand introduction to what it means to build a site. Plus, Mr. Krug wrote it to be short enough to read in a New York–to–Los Angeles plane trip, so everyone has the time to read it.

Though it was first published a decade ago, the lessons are the same. *Don't Make Me Think!* isn't a book that's about implementing cutting-edge tools so much as it's a book that can put you in the right frame of mind to design and develop a website effectively. Namely, it's a great book to read to get you away from your personal point-of-view and get you into the shoes of your audience. And being able to do *that* is one of the most useful skills you can develop.

We're happy to help

Depending on our availability, we're happy to answer any questions you might have about this stuff if you buy us lunch or a glass or two of wine. Remember, though, that we don't have the answers to everything; most of our professional expertise is in public policy and the arts—so if you run a health advocacy organization, for example, we may be out of our element. (And that's another good lesson: Not every designer or developer is right for every job.)

You can download all these worksheets at **chezpixel.com** and you're always welcome to email:

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Good luck! Viel Glück! Bonne chance ! Veel geluk!

1. Sample staff and board website surveys

Survey #1: Assessing what you have

Often, the first step to plan a web project is to assess what *already exists*. This helps everyone focus on what they already have—and how it fits (or doesn't fit) into the organization's work structure and communications goals. This step helps when later deciding what to keep, what to refine and what to abandon. If there are website tools that no or few staff members are using, it's important to figure out *why* those tools aren't used or needed. Remind each staff member to focus on their *own* experience with the site—not on how they imagine the entire staff or organization uses it.

1. What parts of our organization's current website are valuable?
2. Why are they valuable?
3. What tools or content currently on our website can be improved?
4. Why do you think they should be improved?
5. Who do you think the site's *primary* audience is currently? Is our focus on that audience worthwhile?
6. What three things would you change on the web site today?
7. How do you envision our organization's website helping you succeed at your job?
8. How might you measure the website's success in improving your own day-to-day work life?
9. How much time do you, personally, create or update website content now?

Survey #2: What's next

The next step is to survey the staff about what they think the site should *become*. It's helpful first to have people do this individually, then in a group. While brainstorming is often good, in website meetings it can often turn into creating an electronic curio cabinet. Unless you're going through a branding process (which is a completely different beast), it may be worth reminding everyone they're not there to discuss colors, fonts or pictures.

1. What three features would you like see take center stage on the home page?
2. Imagine a user you think will come to our new website. What's the user's age, location, education, workplace, socioeconomic background? Why did they look for our site? How did they find our site? How did they find what they wanted from our site?
3. How would you like people to describe our new site?
4. In one Tweet (a brief, 140-character sentence), describe the work you, personally, do for the organization. *Answers to this question can help uncover ideas for the brand—and can help uncover important work the current website might be neglecting.*
5. What's one work of art—book, song, film, TV show, painting, etc.—that you think reflects our organization's personality? Why? (Note: Don't be literal here. Abstract is good.) *This may be a very useful list for your designer later on.*
6. What's the best way the website can help us achieve our mission?
7. How much time per week do you think it's reasonable to ask you to create or manage website content?

2. Project mission statement

PROJECT NAME

What are you calling this project? *"2012 website redesign," "Annual gala fundraiser invitations."*

AUDIENCE

Who is the audience for this? *There can be multiple audiences, but you must rank them in order of who's being targeted first, second, third, etc. There cannot be ties, and there cannot be maybes.*

ACTION

What do you want this audience to *do*? *This is the verb-heavy part: Do you want them to buy tickets? Get in touch with you? Learn something? There can be multiple actions, but they must be ranked without ties.*

CATALYST

How are you going to instill in the audience enough interest, trust and goodwill to take that action? Why should they care? Why does your organization care? Why is now the right time for the action?

GOAL

How are you going to measure the project's success? Is this a dollar figure, a certain percentage of increase in the traffic to a web page, donations or membership, an increase in the number of press mentions? *There can be multiple goals, but you must rank them in order of how the goals fulfill the organization's mission. Hard numbers are best.*

VOILÀ! IT'S ALL TOGETHER...

Our [project] will [goal] by telling [audience] that they should [action] by demonstrating we [catalyst].

3. An audience-driven website

AUDIENCE	WHAT THEY EXPECT OUR WEBSITE TO PROVIDE	ACTIONS WE WANT THEM TO TAKE
<i>Funders</i>	<i>Annual report, financial information (990s, audits), program details</i>	<i>Donate, get in contact with development staff, attend events</i>
<i>Press</i>	<i>Press releases, staff directory for interviews, public positions on current issues</i>	<i>Get in touch with us, quote us, think of us as the go-to organization for our primary issue(s)</i>

4. Website specs worksheet

Use this as a starting point for a request for proposals—or to give to your designer and developer so they have a deeper understanding of what the project scope is. This worksheet should also provide you with a backbone for your freelancers' contracts.

STAKEHOLDERS AND CONTACTS

There are three groups to identify beforehand: (1) Who will you survey to assess the current site and to create parameters for the new site? (2) Who will be the organization's project manager and primary contact for the designer and developer? (3) Who has final approval for the project? Compile names, titles and contact information.

TIMEFRAME AND BUDGET

What date do you want to launch the site? Is there a particular event or date you wish the site launch to tie to? Is any part of the site tied to funding? What is your budget range: Less than \$5,000, \$5–9,000 or \$10,000+?

LABOR

Are you looking for a designer? Developer? Who will create the initial content for the new site, including copy, photos, blog posts, articles, podcasts and videos? Who will be responsible for content maintenance—and how many hours per week will they have to create, edit and manage content? Who will be responsible for any necessary site upgrades? Who is the go-to person if the site crashes?

PEERS' AND ADMIRER SITES

What are some peer organizations' URLs? Are there any sites you admire? Why?

LOOK AND FEEL

Do you have an existing visual identity you want to retain or do you want to create or update an identity? Elements include: Logo, fonts, colors, etc. (Use Worksheet #4.1 for deep details.) How flexible is the current identity?

AUDIENCE

Describe one to three typical users of the site.

ACTION

What do you want people to do on the site? Become members? Contact your organization? Buy things? Donate?

MESSAGE

What is the primary message of the organization (this isn't necessarily the same as the mission statement)? Do you want to use that same message on the website—or modify it, add to it or subtract from it?

CATALYST/PERCEPTION

How should users *feel* about your site? What words will they use to describe it (e.g., professional, casual,)?

TOOLS

In addition to updating the content of the new site yourself, what tools do you want to have? (Use Worksheet #4.2 for deep details.) Some examples:

Email newsletter sign-up	Photo gallery	Mobile site
Blog	Funder/sponsor recognition	Calendar
Document library	Search	Membership directory
ShareThis/AddThis (social media)	Staff/board directory	RSS feed(s)

ACCESSIBILITY

While accessibility is important for all sites, does yours have a particular concern for low-vision users?

HOSTING

Do you currently have a web host or will you need help locating one? Will you need help administering email addresses? What are the technical specs of your current host? What are the FTP and control panel log-ins for your current site? Who is your domain registrar? Is your organization willing to switch hosts if needed? What's your monthly budget for hosting? *All of this information is good to have on-hand if the developer asks for it—and she very likely will.*

SECURITY

How much personal information will be stored on the site? Are you planning on processing credit cards yourself or will it be through a third-party vendor (e.g., GiveMN, PayPal)? Do you work with *any* information that must by law be kept confidential?

BACKUPS, MAINTENANCE AND DOCUMENTATION

How are backups being made? Will you expect your developer to deploy upgrades? Will you need documentation written on how to administer the site? Will you expect any training sessions before the site launches?

4.1. Branding specs

If you don't have a brand book or other document outlining your organization's visual identity but aren't creating a visual identity out of whole cloth, gather as much information as possible about your organization's look in advance for your designer. You should also compile any collateral pieces (business cards, newsletters, brochures) that your organization has published—and that have a look everyone agrees is right. Discussions about branding can be meandering and laborious; this should help give the discussion some parameters and structure. Remember: Good graphic design isn't about creativity. It's about objectively measuring the effectiveness of a communications tool.

MISSION AND FEELING

Give your designer the mission statement of the organization—that will go a long way to explaining the scope of the organization's work. But, often more importantly, your designer will want to get to understand the organization's *personality*. Branding, after all, isn't just a collection of pretty colors and fonts; your brand in the most complete sense is *the emotional reaction people have when they're reminded of your organization*.

Spend some time with your designer explaining how you want people to *feel* when they see the finished project. Should it be a feeling of fondness? Admiration? Glamor? Should they be impressed with your professionalism or want to join in on your fun? Should they feel sympathy? Anger? Inspiration? Relief they've found the right help?

LOGO, ORGANIZATION NAME AND TAG LINE

Do you have a logo or a specific way the logo and organization name are displayed together? Do you have a tag line already, or will you need to create one? Is it important to put the geographic location (e.g., Minneapolis, Twin Cities metro, state of Minnesota, nationwide) you serve near the top of the page?

Something to remember: *Your designer will need a clean, quality version of your logo to work with. JPGs, GIFs or PNGs will do in a pinch, but look for a vector version of your logo. Vector files often have Illustrator (.ai) or EPS (.eps) document extensions and usually have a surprisingly small file size. All fonts in the logo should be converted to outlines.*

COLORS

Do you have colors you'd like to retain? Do you have any electronic files (Photoshop, PDFs, Illustrator) that have those colors? Do you have existing Pantone numbers? Do you have printed collateral (business cards, newsletters) with those colors?

Something to remember: *Color display varies wildly between different monitors, different operating systems, even different browsers. It's a guarantee that the colors you see on your monitor will not be the same colors everyone will see. Make sure your stakeholders understand this—and, if necessary, adjust the hue and contrast on their monitors if they see purple when everyone else sees blue.*

FONTS

Do you have an organizational font, font family or collection of fonts you'd like to use? Are you able to give your designer files so that she or he can install them on her or his own computer for use?

Something to remember: *Websites have a difficult and often impossible time using fonts that aren't standard (e.g., Times, Georgia, Arial, Tahoma). People are also often tempted to create headlines or copy with images so the fonts match—but this greatly reduces the accessibility of a site. So please be flexible with fonts.*

ILLUSTRATIONS AND PHOTOS

Does your organization have an existing family of illustrations or photos that you want to use? Are there any organizational illustration or photo libraries the designer can use? Do you have the proper copyrights or usage licenses secured? Will the designer be expected to research, create or purchase photos or illustrations?

4.2. Tool specs worksheet

Developing a new web tool can be done quickly if you don't develop it on the fly. This worksheet will help your developer understand what you (on the administrative end) want out of it—and how you want your audience to interact with the public side. Complete a spec sheet for each tool or content type you want: blog posts, podcast, library document, resource link, event, performance, staff profile, member profile, etc.

FIELDS

Every content-management system is simply a big database. When you're creating a tool, your developer will need to know what information to collect. This isn't only the information you want the public to see, it's also the information that you'll need to input to control display and editorial flow. Some of the most common fields are:

Title	Summary/teaser	Executive summary
Body (for articles, blog posts, etc.)	Categories/subjects/topics	Pullquote
Image(s)	Download files (PDF, Word doc)	Printable view
Name of author(s) (first and last)	References/notes	Publish date
Featured content (yes/no)	Link(s) to outside site(s)	Date/date duration (for calendars)
Address (street, city, state)	Price/cost	

The important thing is to think through all the different pieces of content that will be needed to create a whole.

DESIGN CONSIDERATIONS

Your developer may need to take the design into consideration for certain items. For example, a limit on the number of characters for the summary/teaser or title may be required for display in a sidebar. Image sizes (height or width) may be fixed by the design. Make sure your developer knows about those restrictions or guidelines.

EDITORIAL FLOW

Approval and editing: Who is providing or authoring this content? Should authors be allowed to publish content using this tool immediately, or should the content be held for an editor's approval or copy editing? Should authors be able to edit or even delete the content once it's posted?

Publish date/embargo: Do you want everything you publish to appear immediately or would you like to have a system where content can be embargoed and is made public automatically at a specified date/time?

Featuring content: Do you want content from this tool to be featured on the home page or in sidebars? Do you want to control which content is featured or is the newest content posted always going to be the content to feature? When you feature the content, would you like to use the entirety of the content or a teaser version?

USER INTERFACE

Browsing: Having a user interface to browse content is a necessity. Think about how you would like people to sort and browse the content: By date (newest first/oldest first), by category or subject, by author's name, by title, etc. Do you want the display to be like a blog or like a spreadsheet?

Sorting: If you want to have a manual sort order (i.e., a mechanism to sort content that's not alphabetical or numeric), let your developer know that at the start. For example, menus are best sorted by the time of day meals are taken (i.e., breakfast, brunch, lunch, dinner, desserts, etc.) instead of alphabetically (i.e., breakfast, brunch, desserts, dinner, lunch, etc.). Your developer will need to know to build that kind of manual control into the tool.

Interaction: Do you want people to be able to leave comments? Will those comments be held in queue for administrative approval? Should people be required to register or leave their email address to comment? Will you need a CAPTCHA to avoid spam (hint: the answer is yes)? In lieu of comments, do you want people to be able to email comments to the organization or content author?

Social media: Do you want people to be able to email the page or share it on Facebook, Twitter, etc.?