

# Web Project Workflow

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July 2005

This workflow borrows from well-documented contemporary web design practices, but it's also been tested and refined using real-world projects. Use it to help you develop a website of any scale: small sites, or those with limited functionality, usually require a less formal approach, while large, complex, or high-profile sites generally require additional supporting materials. No matter what size your project, create a Project Plan to capture your decision making and, when the project launches, serve as an archive of your strategic thought process.

## 1. Project Definition

### Discovery

- Stakeholder interviews
- Competitive analysis
- Audience profiles
  - Market/audience research: Profiles of primary and secondary audiences
  - Audience capabilities and constraints: skills, expectations, typical needs, browser/platform requirements

### Analysis

- Higher-order goals for the site
- Functionality and content needed in final product
- Internal capabilities: staff and financial resources

### Strategy

- Business objectives: primary and secondary
- Communications strategy: tone and style (summarized in a Creative Brief)
- Success metrics
- Marketing Plan
- Scope: what to do now, what can wait

## **Project Plan (Outline)**

- Project Summary
- Strategy
- Audience
- Requirements
  - Functional/interactive
  - Content
  - Visual
- Scope
- Metrics for success
- Marketing
- Maintenance and ongoing support
- Future development
- Team and roles
- Vendor relationships
- Approval loop
- Budget
- Timeline

### *Project Definition Deliverables*

For a small project: Project Plan

For a large project, add: Creative Brief, Marketing Plan

## 2. Structural Design

### Content Definition

- Existing content inventory: text and imagery, including non-web sources
- Content to be developed or edited
- Authoring and editing responsibilities (staff)
- Content maintenance plan

### Functional Definition

- Functional requirements
  - User workflow
- Technology requirements
  - Server and hosting
  - Application development and integration
  - Data integration
  - Vendor or third-party relationships and responsibilities
  - Test plan, bug tracking and bug fix process
  - Ongoing development or maintenance
- Real-world workflow and integration requirements
  - Marketing integration: channel integration with postal, email, phone, or other media
  - Back-office database integration and workflow
- Support requirements
  - End-user support plan
  - Training or hiring internal staff
  - Ongoing site maintenance
    - Internal responsibilities
    - Vendor responsibilities

### Site and Page-level Diagramming

- Information architecture
- Site mapping
- Wireframes: schematic page layout
- Naming and labeling conventions

### *Structural Design Deliverables*

For a small project: Information Architecture Diagram, Wireframes

For a large project, add: Functional Spec, Technical Spec, Test Plan, Support Plan

When vendor relationships are required: Contract, Service Agreement, Licensing, Non-disclosure Agreement

### *Structural Design Testing and Sign-off*

Review wireframes with stakeholders

Reality-check wireframe sketches with 3-5 users

## **3. Content Collection and Creation**

### **Content Authoring**

- Writing and editing content according to site information architecture and page diagrams; for repurposed content: make web-ready
- Sourcing photography and illustration

### *Content Review and Sign-off*

Run content through approval loop

## **4. Visual Design**

### **Site Graphic Design**

- Applying brand and graphic identity
- Photography and illustration
- Design comps
- Low-resolution prototype

### *Design Deliverables*

For a small project: Design comps

For a large project, add: Design Style Guide, interactive prototype of key site sections

### *Design Review and Sign-off*

Run design through approval loop

Reality-check design with 3-5 users

## 5. Production

### Engineering

- Server and hosting set-up
- Data or database development
- Application development
- Content management system integration
- Page or template design and development: HTML, CSS, page-level scripting tools
- Design of reusable elements: graphics, navigation, META tags, etc.
- QA testing

### Site Construction

- Flowing-in content
- Applying styles
- Integrating data, application, other functionality
- Staging on test server

### Quality Assurance Testing

- Content testing and review: link checking, graphics review
- Functional testing: application and interactive elements
- Real-world workflow and integration testing
- Browser testing

### Sign-off

- Stakeholder review and final approvals

## 6. Launch

### Roll-out

- Soft-launch with small user base; progressive launch to full user base
- Site marketing
- User support

### Maintenance

- Site hand-off to maintenance staff
- Site metrics: data gathering, reporting, and monitoring
- Initial site or workflow adjustments

### Phase 2 Planning

## Selected Bibliography

*Access by Design: A Guide to Universal Usability for Web Designers* by Sarah Horton; New Riders, 2005 (forthcoming).

Sarah's latest book attempts to balance accessibility and graphic design—two factors that have, for much of the history of the web, been at odds.

*Don't Make Me Think! A Common Sense Approach to Web Usability* by Steve Krug; New Riders, 2000.

An excellent guide to usability testing; presents simple, easy-to-follow guidelines for testing your site with users.

*The Elements of User Experience* by Jesse James Garrett; New Riders, 2003.

Book-length explanation of Garrett's framework for designing an effective website.

*Information Architecture for the World Wide Web, 2nd Edition* by Louis Rosenfeld and Peter Morville; O'Reilly, 2002.

Not a lightweight book. Useful for understanding how to structure content for maximum usability and findability.

*Web ReDesign: Workflow that Works*, by Kelly Goto and Emily Cotler; New Riders, 2002.

Equally useful for new site development, *Web ReDesign* presents a comprehensive guide to the process, from strategy to launch. The project outline above borrows heavily from Goto and Cotler.

*Web Style Guide, 2nd Edition* by Patrick Lynch and Sarah Horton; Yale University Press, 2001.

Excellent overview for constructing simple, usable sites. The full text is also available at [www.webstyleguide.com](http://www.webstyleguide.com).

*Why We Buy: The Science of Shopping* by Paco Underhill; Simon and Schuster, 1999.

Underhill is a retail shopping anthropologist and consultant. Read this book for insight into user behavior and how to design a good user experience.