

CLARITY



Your Guide to a Successful Web Project

# PROJECT

## SUCCESS THROUGH PLANNING

Statistics state that 85% of all projects go over budget, and the number one reason is scope creep (changes that occur after the project has been estimated or started). So how do improve your odds that your web project will end on time and on budget? Read on - that is the goal of this guide.

The real key to every project's success is proper planning. With a quick search, you can find hundreds of project "quick checklists" that only scratch the surface in getting you prepared to succeed.

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# 85%

of all projects go over budget

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This guide takes a different approach. In it we ask you the hard questions too, and if you can answer them, it will mean that you're ready to start a successful web project. If you can't answer some of the questions or do not understand their importance, then Clarity is here to help. Give us a call or visit us at [Clarity-Ventures.com](http://Clarity-Ventures.com) to get ready for your project.



## 6-STEPS TO A SUCCESSFUL PROJECT

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### ○ STEP 1 - PROJECT PLANNING

Once the scope of features / tasks has been defined, then adjustments to any of the three triple constraints (time, money, resources) or what's in scope can make a big difference in finishing the project on time and within budget.

### ○ STEP 2 - DESIGN PLANNING

Even if you're the project champion, make sure you know who wants to be involved with approving the design. Stakeholder involvement in a project can have a significant impact on how they feel at the end of your project.

### ○ STEP 3 - CONTENT PLANNING

One of the most important things you can do before, or as part of, the project is to do your SEO research to ensure that your content supports your business, and that you're building domain and page authority with every word.

### ○ STEP 4 - FUNCTIONALITY PLANNING

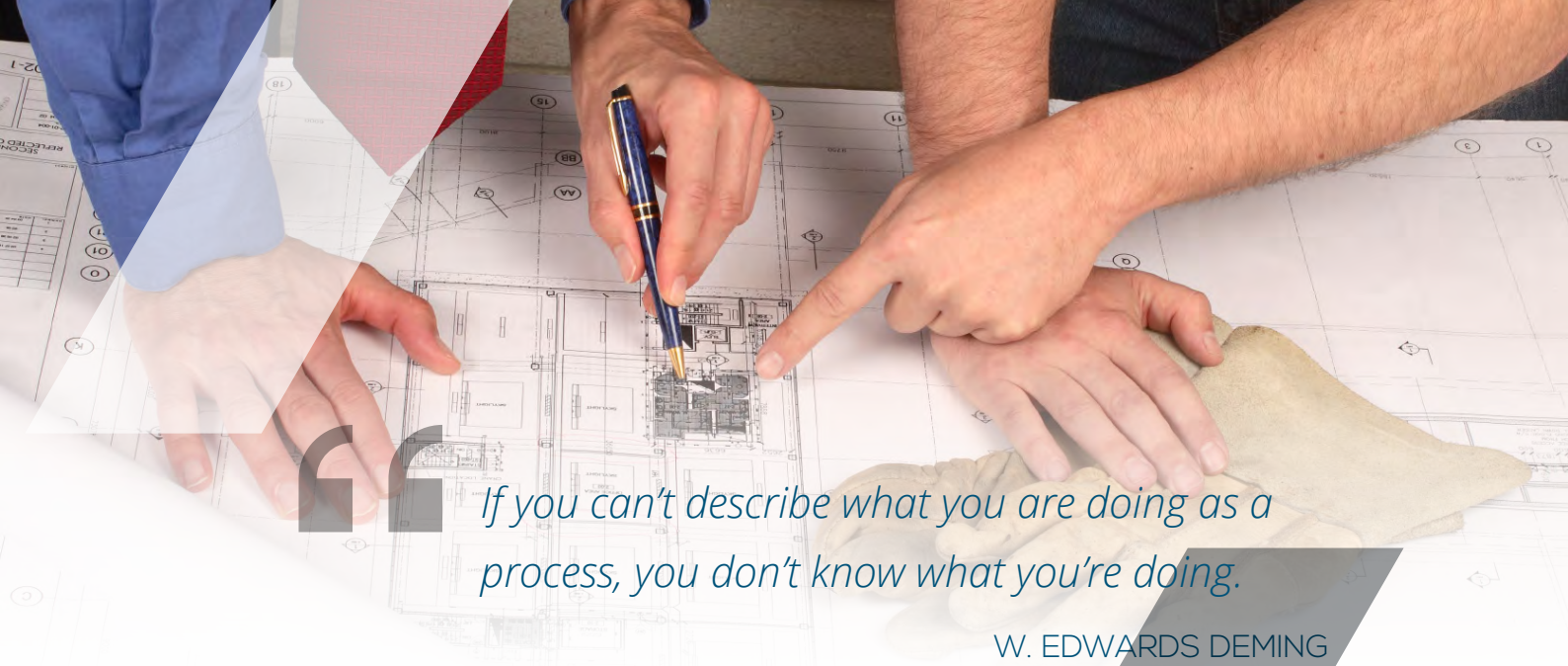
Before specifying functionality and features you need to define the role of the site within your organization - sales, marketing, e-Commerce, etc. and what other applications hold data that the site needs (invoices from ERP, user accounts from CRM, etc.).

### ○ STEP 5 - TESTING & VALIDATION

Change is inevitable. Make sure before you start your project that you've determined what success means to you or your company when it comes to your project and decide how you'll measure it going forward to allow for change.

### ○ STEP 6 - ONGOING MAINTENANCE

Almost all web projects are never "done." Prepare a project performance report for key stakeholders. Gather their input both during and after the project. It will influence their perception of the project's current and future success.



*If you can't describe what you are doing as a process, you don't know what you're doing.*

W. EDWARDS DEMING

## STEP 1 - PROJECT PLANNING

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### Purpose / Requirements

- Why are you undertaking this project? What are your goals for the site? What issues are you trying to fix or caused you to do this project?

### Budget

- What is your budget? How much flex does your budget have? How will you measure spend along the way?

### Time line

- What is your time line? What event is driving it? What is your back-up plan if you don't complete it by then?

### Roles and Responsibility

- Who is the key decision maker for the project? Who controls the budget? Who can authorize changes in scope / budget? Who is responsible for each part of the project (RFP definition, Vendor selection, Budget setting / approval, Domain registration, Marketing objectives, etc.)? Who are the stakeholders, core team, project sponsors?

### Target Audience

- Who are you building the site for? Who is your audience? What are their typical behaviors on sites like yours? What do you want them to do?

### Technology requirements

- Are there any technology requirements for this project (PHP, on-premises, SaaS, integration to ERP / CRM / Financial package, etc.)?

### Tracking

- How does your vendor track your project's progress, budget? Do you have transparency into the project?

### Traffic

- How many visitors does your current site have (daily, monthly, etc.)? What are your future goals? How will you get there?

### Hosting

- Do you have a current hosting provider? Are they equipped to handle (optimal provider choice) your new site? What are your plans if the site out-grows your current provider?

### Hosting

- Do you already have a registered domain URL? If not, how will you find a good one? Does your vendor have a strategy to help?

### Success Criteria & Analytics

- What constitutes success? How will you measure ongoing success? What tools will you use? Do you know what's available?

# STEP 2 - DESIGN PLANNING

## Design Ideas

- What ideas do you have? Did you collect sites that you like? Did you check your competitors? Do you have a list of descriptors for your designer (fresh, contemporary, high-tech, beautiful, bold, clean, simple, elegant, etc.)?

## Style guide

- Do you have one? Does the designer have full creative license? What are your inspirational sites?

## Images / Graphics

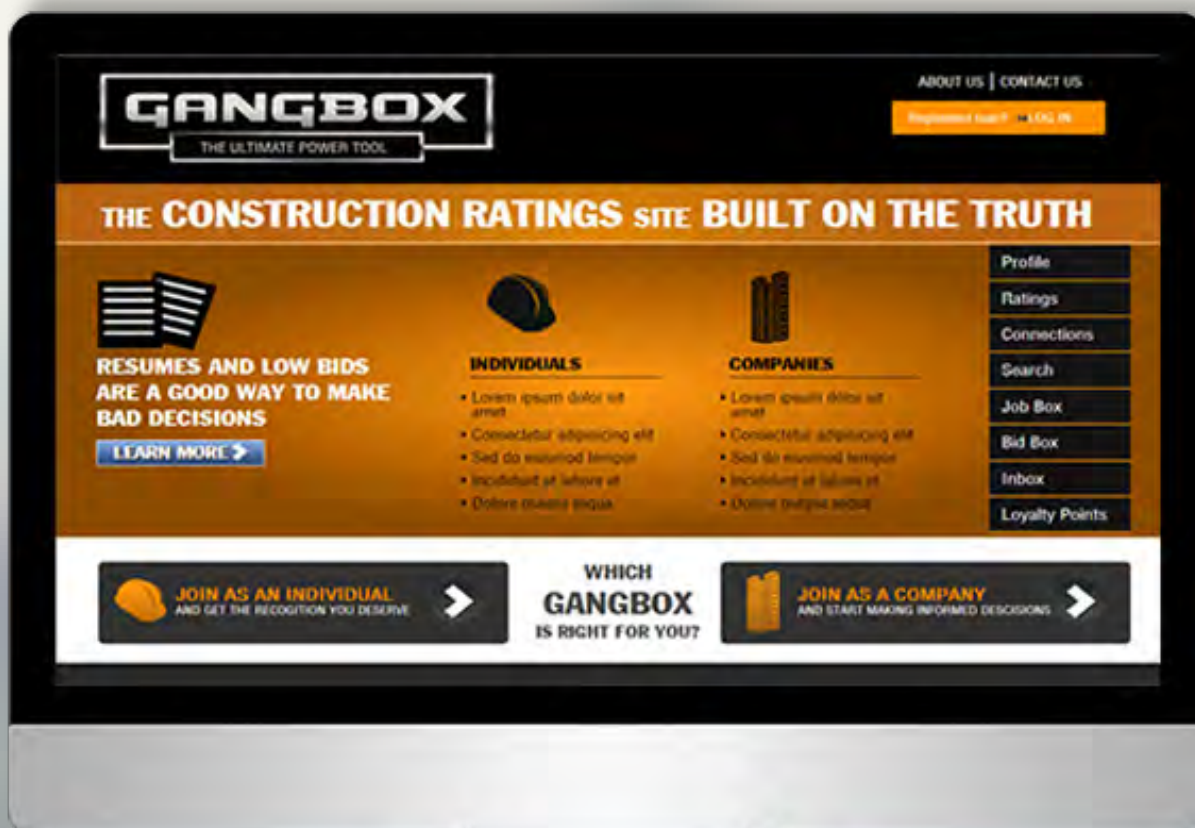
- Do you have a hi-res version of your logo? Is it time for a new logo? Do you have any special images you want / need to use (customer logos, executive headshots, projects you've worked on, etc.)?

## Favicon

- Do you have one? Do you know why you should have one? Do you need one created for you?

## Logo / Site ID

- Do you have one? Is it good? Does it describe what you do? Is it brand-worthy?



# STEP 3 - CONTENT PLANNING

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## Tagline / Site Description

- Do you have one? Does your content fit together? Does it help the logo / brand describe the purpose of your business and site?

## Page Titles

- Do you have good page titles? Are they descriptive, unique to every page, heavily targeted for the keyword(s) you're trying to rank the page for? Are your Meta keywords and page descriptions unique and keyword-heavy?

## Great Content

- Did you scrub / update your site content? Is it written around your SEO research? Is it clear and concise, correctly spelled with proper grammar?

## Access control

- Do you need to dynamically serve content to different users / roles on the site? If so, content, documents, case studies / files, or both? What do you use for document management?

## Import

- Is there content that needs to be imported into the new site? Is it in a usable format?

## Volume

- Are there any technology requirements for this project (PHP, on-premises, SaaS, integration to ERP / CRM / Financial package, etc.)?

## Calls-to-Action / Marketing Hooks

- Have you defined your calls-to-action? What goals and funnels will you create? Do you have a clear call-to-action for every page?

## Navigation

- Have you decided on your navigation design? Have you prioritized the design to guide user behavior? Did you consider other designs? Did you look at competitors? Did you include an intelligent search? How about bread crumbs?

## Languages


- What languages does the site need to support? Is it the exact same exact content for each language?

## Regulatory

- Are there any regulatory or compliance standards the project needs to meet (HIPAA, PCI, etc.)? Do you have any SSL or code signing certificates?

## Legal

- Do you have a Terms of Use? Do you need any other legal protection (release for uploaded, possibly copyright protected material)?



IF A WRITER KNOWS ENOUGH ABOUT  
WHAT HE IS WRITING ABOUT, HE MAY  
OMIT THINGS THAT HE KNOWS.

ERNEST HEMINGWAY

# STEP 4 - FUNCTIONALITY PLANNING

## Features

- Do you have a list of items you want on the site (blog, social media, calendar, shopping cart, executive BIOs, an FAQ page, contact us form, live chat, RSS feed, predictive search, job module, video player, rotating images, etc.)?

## User Registration

- Do you plan on gating certain content? Will you have user profiles? How do you want to manage them?

## Integration

- What systems will the site integrate with (ERP, CRM, tax calculations, shipping companies, EMR, database, email clients, marketing automation, etc.)?

## Integration Goals

- What do you hope to accomplish through integration? With each system?

## Workflow

- Have you defined any workflow needed (approvals, email notifications, etc.)?

## Management

- What administrative reporting / management do you need? What roles / scopes need to be created?

## Mobility Optimization

- Which of the mobile phases will you support (pinch friendly, unique mobile pages, complete responsive site, mobile application)?

# PROJECT LIFECYCLE

## objective

identify the main needs or opportunities



## details

list out tasks, create to-dos, assign resources



## work

time to execute, project / change management, document work



## launch/assess

launch project, post-assessment, plan for maintenance & future improvements



## budget

map out the budget, get approval, establish the time line



## team

identify the stakeholders, map out communication plan, contingencies, risks



## measure

project status reports, frequently update the stakeholders

INITIATION

PLANNING

EXECUTION

CLOSURE

# STEP 5 - TESTING & VALIDATION

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## Cross-Browser testing

- Which browsers are you going to support? Do you know how to determine which ones to support?

## Degradation

- Does your site work with JavaScript turned off? Do you need it?

## Validation

- W3C Validator - does your site pass? Are you okay with what doesn't validate?

## Analytics

- Did you install an analytics tool? Will you need another tool like Optimizely, Clicktale, Visistat, etc.? What will you measure? Why?

## Sitemap.xml

- Do you have one? Do you need one? If a crawler encounters any problems with your site, how will you know? Did you register yours with webmaster tools?

## Robots.txt

- Do you want the engines to crawl your entire site? If not, have you created a list of those pages you don't want crawled?

## Forms Validation

- Do you have any forms? Do they need Captcha? Are the email notifications being sent? Are your analytics being tracked as designed (marketing tactics, etc.)?

## Content Review

- Who will verify functionality? Content accuracy? Search engine optimization? Consistent voice?

## Links

- Did you link your logo to the home page? Are all links to external sites properly tagged (http//)? Do all links work? Do they target the correct parent or new tab / window

## Smart 404 Page

- Did you design one? Do you know why you should? Where do you want to send people that hit a page that doesn't exist anymore (home, sitemap)?

## Performance

- What will you do to measure performance? Have you optimized your page load speeds? Did you group images (CSS sprites, image maps)? Are you caching pages on the server? Which ones?

## Back-up / Disaster Recovery

- What is your plan if the site goes down? What is acceptable downtime for your business? What SLAs, strategies, partners, and technologies are you using to achieve your goals?

# STEP 6 – ONGOING MAINTENANCE

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## Post-launch Support

- What's your plan? Does your vendor provide support / maintenance? Hosting? Hosting support?

## Maintenance

- Who will make the updates to the site (content, user accounts, links, calls-to-action, modules / functionality, security, etc.)? Who will respond if the site goes down / has a problem?

## SEO Strategy

- Do you have one? How will you drive traffic to the site? What is your budget? What is your plan to keep the website rankings? What are your ranking goals? What strategies and tactical steps will you take to accomplish those goals? Do you know what options you have and who can help?

## CRO Strategy

- Do you have one? How do you measure your goals and funnels? What are your plans for improvement (A/B testing, etc.)?

## Social Strategy

- Do you have one? Do you need one? Where do you start, and where do you spend your efforts? Who can help?

## PPC Strategy

- Do you have one? Do you know why you should / shouldn't? What is your budget? How do you create and measure success?

## Future

- Have you considered what else you may want from the site? Do the current vendor / design take those into consideration? Have you communicated those to the vendor?





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