How To Get Started

Planning to Stay on Schedule and Within Budget

Effective Pre-planning

Checklist 1.1

☐ **Choose a focus, and keep it simple.**

☐ **Delegate decision-making tasks.**

☐ **Plan ahead.**

☐ **Allow plenty of time to plan and develop your new website.**

Doing your Homework and Making Educated Decisions

- ☐ **Learn about and understand the common types of website features and content.**

- ☐ **Read case studies about how businesses that are different from, and similar to, your own have created their sites.**

- ☐ **Visit other websites.**

- ☐ **Compile a list of competitors' websites that you'll visit regularly.**

- ☐ **Research the kinds of skills that will be needed to develop your website.**

- ☐ **Research potential website costs.**

- ☐ **Seek advice from others who have experience with web projects.**

- ☐ **Learn about current best practices and standards.**

Developing a Website Style Guide

- ☐ **Provide and promote consistency among all of the website's elements and content.**

- ☐ **Include writing style guidelines and clear examples that show users how to maintain consistent written communications throughout the website.**

- ☐ **Include instructions about content publication and permissions.**

- ☐ **Include specifications for the usage of graphics and multimedia.**

☐ **Include guidelines for, and examples of, the use of logos and other branding elements.**

☐ **Include instructions for meeting, and text that addresses, the company's legal policies.**

☐ **Provide templates for the site's key web pages, along with instructions for, and examples of, their usage.**

Managing Like Magic: Effective Organization

Checklist 1.4

☐ **Break down your website project into its major phases.**

☐ **Within each major phase, create smaller, more manageable steps.**

☐ **Prepare and follow a task list based on the above task breakdowns.**

☐ **Create a realistic schedule.**

☐ **Plan to update website content regularly to keep it fresh and current.**

☐ **Consider using helpful project management tools.**

Working Together as a Team

Checklist 1.5

☐ **Communicate clearly.**

☐ **Keep one master plan and one master schedule. Make sure these documents are always current, accurate, and accessible to all team members.**

- [ ] **Be supportive.**

- [ ] **Be positive and dependable.**

- [ ] **Be diplomatic and sensitive to others involved in the project.**

- [ ] **Stay flexible.**

2

What to Find Out: Initial Questions to Answer

Establishing Your Target Audience

Who will visit and why?

☐ Determine the types of external visitors who will visit your site.

☐ Determine the range of abilities and disabilities your visitors are likely to have.

☐ Determine the levels of Internet experience your visitors are likely to have.

☐ Determine the reasons why each different type of user will visit your site.

How will they visit?

- ☐ **Identify the different browsers and alternative devices that visitors may use.**

- ☐ **Identify the different computer platforms that visitors may use.**

- ☐ **Determine the range of Internet connection speeds over which users will access your site.**

Identifying Your Initial Goals

- ☐ **Identify your site's primary goals and requirements.**

Identifying Your Budget

Domain Name Costs

- ☐ **Itemize and budget for all the domain names that will be registered each year.**

- ☐ **Consider the costs associated with purchasing more than one domain name.**

- ☐ **Don't infringe on trademarked names.**

Web Hosting and CDNs

- ☐ **Determine the bandwidth allowance you require.**

- ☐ **Determine how much disk space your site will require.**

- ☐ Determine the quality of hosting service you'll receive.

- ☐ Determine the level of hosting support you'll need.

- ☐ Determine the training you'll need to support your web hosting arrangements.

Identify Your Server Needs

Checklist 2.6

- ☐ Determine your needs for CGI use and access privileges.

- ☐ Determine your needs for server-side scripting technologies such as PHP, ASP.NET, and others.

- ☐ Determine your needs for server-side includes (SSI).

- ☐ Determine your needs for a secure server (one that uses SSL).

- ☐ Determine you email requirements.

- ☐ Determine your content distribution requirements.

Branding and Marketing

Checklist 2.7

- ☐ Consider using professional logo design services.

- ☐ Include costs for purchasing fonts, typography, and symbols, along with other branding-related expenses.

- ☐ Factor in the cost of paid search directory and search engine optimization.

☐   **Budget for online marketing expenses.**

☐   **Budget for offline advertising and promotions.**

☐   **Include costs for training staff members in marketing, advertising, search engine strategies, and related branding and marketing tasks for your website.**

Bringing in the Experts

Checklist 2.8

☐   **Include costs for a publicity agent or marketing specialist.**

☐   **Budget for the commissioning of content creators and editors.**

☐   **Include costs for an SEO (search engine optimization) copy expert.**

☐   **Include the costs of employing and training staff who are involved with the website's ongoing maintenance.**

How much is a picture worth?

Checklist 2.9

☐   **Budget to pay licensing fees for the online use of royalty-free stock images and image collections.**

☐   **Include the costs of hiring professional photographers.**

☐   **Include costs for the creation and/or use of illustrations and other custom imagery.**

☐   **Include in your budget the costs of purchasing or hiring the hardware and software necessary to take photos, and scan and prepare images.**

☐ **Ensure your budget includes the necessary training costs for the creation of photography and graphics, and the processing of images for your website.**

Ecommerce

Checklist 2.10

☐ **Include merchant account and related fees, or the fees charged by merchant account alternatives.**

☐ **Factor in the cost of secure server (SSL) facilities.**

☐ **Budget to purchase and run a shopping cart program such as the free and open-source Magento Community Edition.**

☐ **Include custom programming costs.**

☐ **Budget for product shipping, fulfillment, and related expenses if your product is physical rather than digital.**

☐ **Include the cost of training staff to manage all aspects of your site's ecommerce capabilities, as needed.**

Computer Software and Hardware

Checklist 2.11

☐ **Include the cost of purchasing hardware and software needed to write and edit content.**

☐ **Factor into your budget the costs of web design and programming software.**

☐ **Budget to purchase software with which to create and manipulate graphics and photos.**

- [ ] **Anticipate the costs of upgrading existing hardware and purchasing new hardware, such as high quality monitors, additional memory, and so on.**

- [ ] **Budget to buy a digital camera (if you're yet to own one).**

- [ ] **Include the cost of purchasing a scanner (if you don't already have one).**

- [ ] **Include the costs of hardware and software required to work with media such as audio and video.**

- [ ] **Include training costs in your budget as needed.**

3

Preparing Website Content

Gathering and Itemizing Content

Checklist 3.1

☐ Use physical file folders to organize print materials and notes.

☐ Save digital content to organized folders on your computer, or to a drive that's accessible to relevant project team members.

☐ Save electronic versions of existing website content to organized folders.

☐ Itemize common page elements and detail their content.

☐ Itemize each web page and detail the content it requires.

Providing Accessible Content

☐ **Provide thorough, current information.**

☐ **Provide helpful links to other websites and resources.**

☐ **Provide an accessible contact link.**

☐ **Provide helpful shopping information.**

☐ **Provide an informative privacy policy.**

☐ **Use plugins and alternative content formats judiciously.**

Preparing Web Copy

☐ **Write concise sentences.**

☐ **Keep paragraphs short.**

☐ **Use subheadings to break up content.**

☐ **Use list formatting when possible.**

☐ **Provide a summary or overview of key points for longer articles before providing the details.**

☐ **Use correct title case for headings.**

☐ **Provide clear, concise calls to action.**

☐ **Keep layout and formatting to a minimum.**

☐ **Avoid converting text content to HTML using word processing software.**

☐ **Minimize the use of alternative formats for text content.**

Preparing Images

Checklist 3.4

☐ **Select high quality images to support your site's credibility.**

☐ **Use photos that are in focus, are sharp, and exhibit good color contrast.**

☐ **Respect and obtain proper web-use licensing for the use of any images that you don't own.**

☐ **Select non-lossy formats for original images.**

☐ **Select illustrations, clipart, and other images that are sharp and have good color contrast.**

☐ **Crop images, if required, to target their most important aspects.**

☐ **Avoid purchasing or taking photographs that have that immediate "stock photography" feel.**

☐ **Prepare thumbnail images for larger images.**

☐ **Use appropriate, widely supported image file formats.**

☐ **Resize images using a graphics program.**

- [ ] **If you have a large number of images, batch process consistent treatments to save time.**

Content Management Systems

Assessing Your Website Content

Checklist 4.1

☐ **Take a content inventory.**

☐ **Itemize your content.**

Determining Your Content Management Needs

Checklist 4.2

☐ **Assess your needs for a content management system.**

☐ **Assess your needs for an ecommerce system.**

☐   **Assess your needs for HTML, XHTML, and/or CSS skills.**

☐   **Assess your needs for web authoring tools.**

☐   **Consider whether you need programming and database administration skills.**

☐   **Assess your needs for image editing tools.**

Web Authoring Tool Features

Checklist 4.3

☐   **The tool has a customizable, easy-to-use, user-friendly interface.**

☐   **The tool offers template support.**

☐   **The tool provides permission controls and the ability to lock templates.**

☐   **The tool offers snippet or clip support.**

Content Management System Features

Features for You and Your Staff

Checklist 4.4

☐   **The tool has a customizable, easy-to-use, user-friendly interface.**

☐   **The tool offers form-based text editing.**

☐   **The tool supports WYSIWYG content editing.**

☐   **The tool functions on multiple browsers and platforms.**

☐ **The tool offers spell-check functionality for content additions and editing.**

☐ **The tool offers staging server support.**

☐ **The tool provides for permission-based access.**

☐ **The tool supports automated version control and tracking.**

☐ **The tool allows for an unlimited number of content contributors.**

☐ **The tool permits annotations or comments for content review and changes.**

☐ **The tool provides email notifications of progress through steps in the workflow.**

☐ **The tool offers centralized content and document management features.**

☐ **The tool offers stability, reliability, and excellent performance overall.**

☐ **The tool is affordable.**

☐ **The tool offers excellent after-sales support.**

Content Publication Features

Checklist 4.5

☐ **The tool supports content life cycle management.**

☐ **The CMS allows for the scheduling of publications.**

☐ **The tool dynamically or automatically generates indexes or lists.**

- [ ] **The tool automates the cross-referencing and interlinking of content and other data on the site.**

- [ ] **The tool offers customizable directory structures and directory names.**

- [ ] **The tool supports customizable filenames and the creation of search-engine friendly, human-friendly URLs.**

- [ ] **The tool has customizable categorization options.**

- [ ] **The tool has flexible, customizable archiving options.**

- [ ] **The tool allows for the easy management and use of images, multimedia, and other website content formats.**

- [ ] **The tool facilitates the easy management of email subscriptions.**

- [ ] **The tool provides detailed activity logs and traffic reports.**

Behind-the-scenes Features

Checklist 4.6

- [ ] **The CMS is flexible, scalable, and nonproprietary.**

- [ ] **The tool provides automated, scheduled backups.**

- [ ] **The tool offers support for multiple platforms.**

- [ ] **The CMS offers support for popular scripting packages.**

- [ ] **The tool provides custom template support and integration.**

☐ **The tool separates content from presentation.**

☐ **The tool produces standards-compliant XHTML, HTML, XML, and CSS code.**

☐ **The tool provides support for W3C Web Accessibility Guidelines, and applicable government requirements.**

☐ **The tool validates internal and external hyperlinks.**

☐ **The CMS integrates with existing applications and processes.**

☐ **The tool generates dynamic pages.**

☐ **The tool generates static pages.**

☐ **The CMS lets you generate and manage metadata.**

Website Usability: Focusing on the User

Creating a User-friendly Index Page

Checklist 5.1

- ☐ **Provide obvious identification for your website.**

- ☐ **Provide an overview of what your website has to offer.**

- ☐ **Provide fresh content.**

- ☐ **Provide shortcuts to your site's most frequently visited pages.**

- ☐ **Provide easy access to your site's login tools, and direct links to registration forms and account information.**

- [ ] Prominently display the site's search box.

- [ ] Provide a direct link to your sitemap.

Ensuring Your Website Focuses on Users

- [ ] Give users the chance to provide themselves with self-service.

- [ ] Provide predictable and consistent global navigation.

- [ ] Display "You are here" cues for users.

- [ ] Support multiple methods by which users can reach or find content.

- [ ] Provide easy access to help and contact information.

- [ ] Provide friendly, helpful information about potential errors.

- [ ] Ensure that your pages load quickly for all users.

- [ ] Accommodate a wide range of user abilities, disabilities, browsers, and alternative devices.

- [ ] Use color effectively.

- [ ] Provide scannable pages.

- [ ] Speak your visitors' language.

- [ ] Use instantly recognizable and relevant hyperlinks.

☐ **Ensure that your pages are bookmark-friendly.**

☐ **Make sure your site's functionality and features behave predictably.**

☐ **User-test throughout the design and development processes.**

Providing Fast-loading Web Pages

Checklist 5.3

☐ **Accommodate a wide range of user connection speeds.**

☐ **Optimize your web page markup.**

☐ **Use minimal graphics per page, to save page load times and bandwidth.**

☐ **Optimize images and alternative file formats, including multimedia files.**

☐ **Promote "flow" by providing a fast response to user interactions, and minimizing distractions.**

☐ **Load useful content first.**

Accommodating User Abilities, Disabilities, Browsers, and Alternative Devices

Checklist 5.4

☐ **Provide a flexible website design that works in a wide range of screen resolutions and window sizes, and with alternative devices.**

☐ **Use scalable font sizes.**

☐ **Avoid using frames if possible.**

☐ **Provide printable versions of your website.**

Ensuring Predictability

☐ **Provide clear, predictable, consistent website and page architecture.**

☐ **Include important website and page identifiers, navigation elements, and location cues on every page.**

☐ **Keep existing browser functionality enabled.**

Using Conventional Practices

☐ **Underline hyperlink text, and display links in a different color from surrounding text.**

☐ **Avoid underlining text that is not a hyperlink.**

☐ **Differentiate between visited and unvisited hyperlinks.**

☐ **Apply easily recognized, commonly used labels.**

☐ **Place web objects where users expect to find them.**

☐ **Place your logo at the top-left of every web page, and link that logo to your home page on every page except Home.**

☐ **Place a Home link near the top-left of each web page, or in your global navigation.**

☐ **For websites that offer account management and/or shopping cart facilities, place View Cart and/or Manage Account functions near the top-right of each relevant page.**

☐ **Place a local website search form at the top of each web page.**

Providing User-friendly Corrections for User Errors

Checklist 5.7

☐ **Provide obvious, clear error messages that explain how the user can resolve the error.**

☐ **Use consistent error message content, formats, and locations.**

☐ **Use color and text to highlight user errors and explain how to fix the problem.**

☐ **Eliminate the need for back-and-forth clicking.**

☐ **Don't make users have to retype correct information.**

☐ **Provide concise instructions.**

Color

Preparing a Color-friendly Work Environment

☐ **Position your monitors in areas with subdued light, out of strong or direct light.**

☐ **Use color-neutral, daylight-balanced lighting in your work area.**

☐ **Set your displays to 24-bit or 32-bit color (True Color).**

☐ **Set your display contrast to its maximum unless the image display is too bright or harsh on this setting.**

☐ **Calibrate your displays to the sRGB ICC profile.**

Choosing a Color Scheme

☐ **Base your website's color scheme on your branding and logo colors.**

☐ **Use a neutral, subtle color scheme for your website to help direct the focus to your products or services.**

☐ **Use color to convey meaning.**

☐ **Consider the different meanings associated with colors in particular cultures.**

☐ **Use no more than six colors in your website color scheme, if possible.**

☐ **Avoid placing blocks of saturated, complementary colors next to one another.**

☐ **Test for color differences, inconsistencies, and problems using a variety of displays, resolutions, and platforms.**

Using Color to Enhance Functionality

☐ **Use color to direct user focus.**

☐ **Use colors consistently to avoid user confusion.**

☐ **Use color to distinguish hyperlinks from regular text.**

☐ **Avoid using purple to style unvisited hyperlinks.**

☐ **Avoid using blue to style visited hyperlinks.**

☐ **Where possible, use CSS, instead of graphics, to create website colors.**

☐ **Perform a "wireframe" test to ensure that you're catering for various user preferences and disabilities.**

☐ **Use color to emphasize the organization of information and provide visual cues.**

☐ **Don't rely solely on color to communicate important visual cues.**

Using Color to Enhance Readability

Checklist 6.4

☐ **For best legibility, use colors that provide a strong contrast between the page background and the text.**

☐ **Use solid, light-colored backgrounds behind dark-colored text for page content areas.**

☐ **Avoid displaying patterns, textures, and colorful backgrounds behind text.**

Information Architecture

Laying the Foundations

☐ **Determine how users will interact with your website.**

☐ **Document the steps involved for each user activity.**

☐ **Allow for a range of Internet experiences and a variety of skill levels among users.**

☐ **Allow for a variety of user abilities and disabilities.**

Improving Findability

☐ **Organize content from visitors' perspectives.**

- ☐ **Visually group pieces of information into manageable units.**

- ☐ **Visually group similar kinds of information together.**

- ☐ **Visually separate different information.**

- ☐ **Create multiple ways to find information on your website.**

- ☐ **Plan to monitor your site's search and activity logs.**

Organizing for Success

Organization Schemes

Checklist 7.3

- ☐ **Use an exact organization scheme for users who know what they want.**

- ☐ **Use an ambiguous organization scheme for users who may not know what they want.**

- ☐ **Use both schemes when possible.**

Organizing Content Structure

Checklist 7.4

- ☐ **Organize content into groups.**

- ☐ **Determine logical hierarchies.**

- ☐ **Identify related information.**

- ☐ **Use faceted classifications and hierarchies to help users view information in a variety of ways.**

☐ Ensure that your website's labeling system uses clear, short, consistent labels that your visitors will understand.

☐ Diagram your content's information architecture.

Preparing Web Page Information Architecture

☐ Organize web page content logically, predictably, and consistently.

☐ Emphasize important content.

☐ Create mockups, such as sketches, wireframes, and paper prototypes to reflect each of your web page architecture needs.

☐ Group corporate information items together.

☐ If you place ads on your home page, place them on the outer parts of the page, and make sure they're clearly differentiated from website content.

Information Architecture for Ecommerce Pages

☐ Make the shopping cart easy to find from anywhere on your website.

☐ For each product on a web page, display a clear, at-a-glance view of the item's name, price, current availability, an item description, shipping options, and Add to Cart or Add to Wish List links.

☐ Clearly show ordering options, and link to details.

☐ **Clearly show within the contextual navigation any related items that are available.**

☐ **Clearly display user's progress within the ordering process.**

☐ **Keep order forms simple.**

☐ **Emphasize to users that all transactions are secure.**

☐ **Clearly display special handling options for gift items.**

☐ **If your ecommerce store sells internationally, design menus and information accordingly.**

☐ **Clearly show options that allow customers to modify the quantity of each item being purchased.**

☐ **Provide clear links that allow users to return to the shopping process from their carts.**

Organizing Directories

Checklist 7.7

☐ **Base your user-friendly directory structure on your content's information architecture.**

☐ **Use conventional practice to create guessable, user-friendly, consistent directory names.**

☐ **Plan ahead for the growth of your directory structure.**

☐ **If you generate pages dynamically from a database, use server-side scripting to create easy-to-remember permanent URLs.**

☐ **Allow for secure areas in your directory structure.**

Using Friendly URIs, URLs, and Filenames

☐ **Use human-readable, consistent filenames.**

☐ **Create human-friendly URLs, including database-generated URLs.**

☐ **Keep filenames and directory names as short as possible.**

☐ **Use lowercase letters and numbers as first choices for directory names and filenames.**

☐ **Avoid the use of mixed-case or all-capitals for filenames and directories.**

☐ **Limit the use of underscores, hyphens, and periods in filenames and directory names.**

☐ **Avoid using special characters in filenames or directory names.**

☐ **Avoid character spaces in filenames.**

☐ **Create filenames and locations with a view to permanence and the long term.**

☐ **Redirect the URLs of pages that have been moved or removed.**

Hiding Filename Extensions as Much as Possible

☐ **Create your website's file directory structure to use directory defaults for web page filenames.**

☐ **In your site's markup, hide filename extensions as much as possible.**

Navigation

Golden Rules for Effective Website Navigation

Checklist 8.1

- ☐ **Create the navigation system with users in mind.**

- ☐ **Place the navigation system where users expect to find it.**

- ☐ **Ensure that the navigation system accommodates the various ways in which visitors want to access content and functionality on your site.**

- ☐ **Provide multiple ways for users to access information.**

- ☐ **Use the sitemap you created as you developed the site's information architecture to inform the development of your site's navigation.**

☐ Ensure that your navigation system provides context and flexibility to reinforce your information architecture hierarchy.

☐ Create and implement a consistent navigation system throughout your website.

☐ Use templates, server-side includes (SSI), or similar technologies to simplify the maintenance, and support the consistency, of your navigation system.

☐ Explain your navigation system in your website style guide.

☐ Use navigation labels that are concise, conventional, and easily understood.

☐ If you use icons within your navigation, use them as enhancements, not as the only visual cues.

☐ If you use graphics in navigation areas, be sure to cater to visitors who use low-bandwidth connections and/or alternative devices.

☐ Avoid using Flash to create your website's navigation.

☐ If you use JavaScript to create or enhance navigation elements, make sure your navigation works without it.

☐ Keep in mind the browser features that are used to access your website.

☐ Don't disable browser navigation features.

Creating User-centered Global Navigation

Checklist 8.2

☐ Include a link to your home page in your global navigation.

☐ **Include links to all of your website's top-level sections in your global navigation.**

☐ **Include links to your website's help information in your global navigation.**

☐ **Provide contextual clues that identify the user's current location.**

☐ **Use minimal global navigation on form pages.**

Creating Local or Section Navigation

Checklist 8.3

☐ **Complement your website's global navigation with local navigation.**

☐ **Use local and internal navigation to link to more detailed information.**

☐ **For websites that have subsites, or sections with subcategories, consider including subcategory navigation within the global navigation.**

☐ **Use structural breadcrumb navigation to add context for users.**

☐ **Create local navigation systems for sections of your website that contain more than a few pages.**

☐ **Create a user-friendly table of contents for each section of your website.**

Providing Internal Page Navigation

Checklist 8.4

☐ **For longer pages, create a table of contents whose items link to each heading or subheading on the page.**

☐ If content is broken across several pages, include links to all those pages from each page of content.

☐ If content is broken across several pages, give users the option to view it all on one page.

☐ Provide Top of Page links for pages that span more than two screens.

☐ For longer pages, include Top of Page links at regular intervals.

Adding Supplemental Navigation

Creating Sitemaps

Checklist 8.5

☐ Create a sitemap for sites of more than fifteen pages.

☐ Create a text-based sitemap rather than a graphical sitemap.

☐ Make sure your sitemap reinforces your site's information hierarchy.

☐ Make sure your sitemap provides easy, quick, direct access to your website content.

☐ Make sure your sitemap supplements existing navigation, rather than being a last resort for users, or an excuse for poor global navigation.

Creating Site Indexes

Checklist 8.6

☐ Create your site index based on the terms that users actually look for.

☐ **For each term in your index, provide a listing of the documents indexed with that term.**

☐ **Remember to update your site index regularly to keep it current and accurate.**

Creating Search

Determine Whether You Need a Search Feature

☐ **Include a search feature if your website has too much information to browse easily, or if users expect it.**

☐ **Include a search feature if you have highly dynamic content.**

Developing a Search Feature

☐ **Include a search box within the global or local navigation on every page of your site.**

☐ **For search options with restricted scope, clearly state the scope of the search in both the search box and the results pages.**

☐ **Ensure that search results are sorted to present the best matches first.**

☐ **Organize search results in groups according to the website structure.**

☐ **Keep page abstracts short on search results pages.**

☐ **For advanced search, provide brief, helpful instructions.**

☐ **Allow users to search within their current results to help narrow their search.**

☐ **Provide helpful options when a search yields no results.**

☐ **Make sure your search results program eliminates duplications within the search results list.**

☐ **Enhance search destination pages, for instance, by highlighting the user's search terms.**

Best Coding Practice: W3C Recommendations and Standards

Creating Semantic, Valid Markup

☐   **Use consistent markup.**

☐   **Use the correct `DOCTYPE`.**

☐   **Validate your code.**

☐   **Include the correct character encoding with the `Content-Type` `<meta>` tag on every web page.**

☐   **Encode reserved HTML characters as HTML character entities.**

- ☐ Include the `title` element on each page.

- ☐ Include `meta` elements to aid your website's search engine rankings.

- ☐ Avoid using proprietary markup or scripts.

- ☐ Avoid using deprecated markup.

- ☐ Mark up text using an HTML editor or W3C-compliant CMS.

- ☐ Optimize the markup generated by graphics programs.

Separating Content from Presentation

Checklist 9.2

- ☐ Use external CSS.

- ☐ Use absolute links, rather than relative links, with externally linked files.

- ☐ Avoid the use of embedded scripts and embedded or inline CSS.

- ☐ Use CSS to control web page presentation and element styling.

- ☐ Use the `table` element to display tabular data only.

Ensuring the Integrity of Your Markup

Checklist 9.3

- ☐ Use proper heading elements.

- ☐ Use `ul`, `ol`, and `li` elements to mark up lists.

- [ ] Use definition list elements—`dl`, `dt`, and `dd`—for lists of definitions.

- [ ] Use the `br` element for line breaks only.

- [ ] Avoid using the `pre` element for general formatting.

- [ ] Use the `span` element sparingly.

HTML5 Markup

Checklist 9.4

- [ ] Where semantic tags apply to an element, use them instead of a `<div>`.

- [ ] Use lowercase letters for all element and attribute names.

- [ ] Close all elements.

- [ ] Use the `id` and `name` attributes for fragment identifiers.

- [ ] Use the `alt` attribute with images.

- [ ] Use `&` to express the ampersand (&).

- [ ] Avoid including line breaks and multiple whitespace characters within attribute values.

- [ ] Format comments correctly.

Using CSS

☐ Use CSS for decorative images.

☐ Use CSS to designate borders and whitespace, and achieve the visual alignment of images.

☐ Designate the anchor pseudo-class rules in order: `link`, `visited`, `focus`, `hover`, `active`.

☐ Minimize the use of CSS hacks and workarounds, and ensure that those you *do* use validate.

Using Appropriate CSS Naming Conventions

☐ Use the `id` attribute for core structural components.

☐ Assign helpful, descriptive names to describe the function or purpose of each CSS `class` and `id`.

☐ Begin `id` attribute names with a letter, not a number.

☐ Avoid using underscores in CSS `class` and `id` attributes.

☐ Avoid names that describe location, such as "left" or "right."

Using CSS3 Features

☐ You have more control over borders than ever before.

☐ **Use multiple backgrounds to create more intricate background effects.**

☐ **Drop shadows are now easy to implement.**

☐ **Create highly responsive designs with media queries.**

☐ **Multicolumn layouts can help you create a newspaper feel.**

Beware of Browser Bugs and Problems

Checklist 9.8

☐ **Know which browsers you need to accommodate.**

☐ **Be aware of which browsers support which features of CSS and plan for graceful degradation.**

☐ **Test continually as you develop your pages and your CSS.**

Using CSS for Print

Checklist 9.9

☐ **Use a separate external stylesheet to specify print rules.**

☐ **Use a media query to specify media types within the main stylesheet.**

☐ **Specify print-only images, such as your logo, that have been optimized for print use.**

☐ **Prevent website navigation from appearing when the page is printed.**

☐ **Avoid forcing page margins and padding.**

☐ **Avoid forcing font sizing for text content.**

☐ **If possible, make URLs for hyperlinks appear in printed versions of the page.**

Creating Accessible Websites

The Bare Bones of Creating an Accessible Website

Checklist 10.1

- [ ] **Ensure that your website conforms to W3C WCAG 1.0 Priority 1 or better.**

- [ ] **Ensure that your website conforms to your local laws, government guidelines, or company guidelines for accessibility.**

- [ ] **Use valid, structured, semantic markup.**

- [ ] **Separate content from presentation.**

- [ ] **Provide accessible navigation.**

- [ ] Provide users the ability to adjust text size via the browser or a style switcher.

- [ ] Use clear, simple language that's appropriate for your website's content.

- [ ] Conduct tests to ensure that your website makes sense without CSS.

- [ ] Avoid the use of frames.

- [ ] Avoid causing the screen to flicker.

Creating Valid, Structured, Semantic Markup

Checklist 10.2

- [ ] Use the correct `DOCTYPE` for every web page.

- [ ] Specify a character encoding for every web page.

- [ ] Use the `lang` attribute to identify the primary language for each web page and to highlight a language change within a page.

- [ ] Use heading elements (`h1`, `h2`, `h3`, `h4`, `h5`, `h6`) sequentially, beginning with `h1`.

- [ ] Use correct markup for lists and list items.

- [ ] Use ordered lists to help provide context for non-visual users when appropriate.

Using Recommended Markup in Content

Checklist 10.3

- ☐ Use `blockquote` to mark up quotations.

- ☐ Use `em` instead of `i` for emphasis.

- ☐ Use `strong` instead of `b` for stronger emphasis.

- ☐ Use `cite` to mark up the citations of names, such as the titles of books, movies, plays, and television shows.

- ☐ Use `dfn` to mark up definitions.

- ☐ Use `code` to denote program code.

- ☐ Use `var` to mark up variables within code.

- ☐ Use `kbd` to represent text typed at a computer keyboard.

- ☐ Use `samp` to mark up samples of computer program output.

- ☐ Use `abbr` (though these are not yet supported by Explorer) to mark up acronyms and abbreviations.

- ☐ Use `address` to mark up contact information about the author.

Providing Accessible Navigation

Checklist 10.4

- ☐ Ensure that all parts of your navigation system are accessible without a mouse.

☐ **Avoid making Flash or other plugins necessary for the use of navigation systems unless you provide accessible alternatives.**

☐ **Consider specifying link focus with the CSS focus pseudo-class to provide helpful visual cues, especially for the mobility-impaired.**

☐ **Provide several ways for users to navigate through your website.**

☐ **Use "skip" links when necessary, for example, before each navigation area (global, local/section, and internal) or block.**

☐ **Avoid skipping past website functions, such as search boxes and login forms.**

☐ **Avoid skipping past navigational links such as Next, Back, or Top of page buttons or links.**

☐ **Avoid hiding skip links.**

Color for the Masses

Checklist 10.5

☐ **Ensure that your website makes sense in black and white.**

☐ **Specify colors for the browser to use as defaults for body text, page backgrounds, links, and so on.**

☐ **Avoid using black text on red backgrounds or red text on black backgrounds.**

☐ **Avoid using green text on red backgrounds or red text on green backgrounds.**

☐ **Avoid mixing beige, yellow, or orange with red and green.**

A Thousand Words to Each Picture

Checklist 10.6

☐ **Provide a text equivalent for each image by specifying the `alt` attribute.**

☐ **Ensure that the `alt` attribute text makes sense out of context.**

☐ **Avoid animations, including blinking or scrolling text.**

Multipurpose Multimedia

Checklist 10.7

☐ **Implement the built-in accessibility features for all plugins and alternative content formats.**

☐ **Provide accessible alternatives if your content is not compatible with your users' accessibility requirements.**

☐ **Provide text information for non-text content that conveys information, such as instructional animations or videos.**

☐ **Provide accurate text transcripts for audio and video files, including conversation and relevant sound elements.**

In Good Form

Checklist 10.8

☐ **Place prompts above, or to the left, of text fields and combo boxes on forms.**

☐ **Place prompts to the right of checkboxes and radio buttons on forms.**

☐ **Wrap the `label` element around its related `input` element whenever possible.**

- [ ] Use the `for` attribute with the `label` element to associate prompts with their respective controls when necessary, for instance, when they're in separate table cells.

- [ ] Group related form fields using `fieldset`.

- [ ] Use the `title` attribute to provide advisory information.

- [ ] When using an `img` within a `button` element to produce a graphical button, use the `alt`, `value`, and `title` attributes to provide a text alternative.

- [ ] Avoid using a `reset` button to prevent its accidental use.

Sturdy Tables

- [ ] Reserve the `table` element for displaying tabular data.

- [ ] Make sure the content included in tables makes sense when linearized.

- [ ] Avoid using nested tables.

- [ ] Use proportional sizing for table and cell dimensions.

- [ ] Use the `caption` element to provide table names or titles.

- [ ] Use the `summary` attribute within the `table` element to provide brief summaries of complex data.

- [ ] Use the `th` element to mark up table headers within rows.

- [ ] Use the `td` element to mark up data columns within rows.

☐ **Use the `scope` attribute within the `th` or `td` element to associate headers with table cells.**

☐ **Specify the `tbody` element if you use the `thead` element.**

Website Optimization

Creating Clean, Lean Markup

Checklist 11.1

☐ Use external CSS rather than inline or embedded CSS.

☐ Use external JavaScript.

☐ For every web page, specify a `DOCTYPE` and create well-formed markup.

☐ Minimize HTTP requests by using CSS instead of images, and consolidating external CSS and JavaScript files whenever possible.

☐ Where images are necessary, employ sprites.

☐ Use structural markup and avoid presentational elements.

☐   **Avoid using tables for layout purposes.**

☐   **Remove excess whitespace and carriage returns from your HTML markup.**

☐   **Minimize or delete HTML comments.**

☐   **Avoid using redundant elements and attributes.**

☐   **Ensure that all `img` element `alt` attribute text is short and concise (but not at the expense of meaning).**

☐   **Include the `img` element `height` and `width` attributes.**

Minimizing URLs

Checklist 11.2

☐   **Use root relative paths for internal link markup whenever possible.**

☐   **Eliminate the directory default filename in links, where possible.**

☐   **Remove "www" from links whenever possible.**

Optimizing CSS

Checklist 11.3

☐   **Minimize CSS comments in production deployments.**

☐   **Remove excess whitespace and carriage returns from your CSS.**

☐   **Group selectors that share the same declaration whenever possible.**

☐   **Use CSS shorthand properties whenever possible for `font`, `background`, `margin`, `border`, `padding`, and `list`.**

☐ Use short `class` and `id` values.

☐ Use the highest-level parent possible for your CSS declarations.

☐ Use separate external CSS files for each media type you need.

☐ Use shorthand hexadecimal color values, RGB color values, or color names—whichever is shortest—where possible.

☐ Assign multiple CSS classes to a single element where appropriate.

Optimizing JavaScript

Checklist 11.4

☐ Use JavaScript to enhance, rather than create, the user experience.

☐ Use external JavaScript when possible.

☐ Use the defer attribute to defer or delay loading your JavaScript files if possible.

☐ Design or modify your JavaScript to encapsulate code into functions that execute at page load.

☐ Load external JavaScript conditionally whenever appropriate.

☐ Abbreviate and map your JavaScript.

☐ Rework your code to make it simpler and more efficient.

☐ Tune your expressions for speed.

Supporting Speedy Server Responses

☐   **Include trailing slashes on the URLs of directories.**

☐   **Ensure that your server resolves your domain name without the "www."**

☐   **Use HTML compression when possible.**

Optimizing Images, Multimedia, and Alternative Formats

☐   **Always reduce image dimensions with a graphics program, not via HTML.**

☐   **Crop each image to the smallest acceptable size, retaining only its most important areas.**

☐   **Use the highest possible image compression without degrading image quality.**

☐   **In JPEG format files that have a prominent foreground and a less-important background, blur the background.**

☐   **For larger images, create thumbnail versions for display on web pages.**

☐   **Use HTML text captions whenever possible.**

☐   **Optimize alternative format files, including multimedia files.**

12

Search Engine Optimization

Successful SEO in a Nutshell

Checklist 12.1

☐ **Plan your website's SEO before you create the site.**

☐ **Ensure that every page includes text, links and popularity components that will help boost your search engine rankings.**

☐ **Employ other means to market your website.**

Working with Keywords and Keyphrases

Checklist 12.2

☐ **Research keywords and keyphrases (multi-word phrases) before you create your website.**

☐ **Target keyphrases rather than single keywords.**

☐ **Use longer words and plurals.**

☐ **Focus on a few specific keyphrases for each web page.**

☐ **Create keyphrase-rich text content, especially for your home page.**

☐ **Include keyword and keyphrase research in your ongoing website SEO maintenance plan.**

Using Keywords and Keyphrases in Your Markup

Checklist 12.3

☐ **Include keywords and keyphrases in your site's information architecture.**

☐ **Use focused keyphrases within each web page's `title` element.**

☐ **Use your keyphrases within each web page's description `meta` element.**

☐ **Use your focused keyphrases within the page's heading elements, beginning with the `h1` element.**

☐ **Use your focused keyphrases within link URLs and corresponding `title` attributes.**

☐ **Use relevant keyphrases within your `img` elements' `alt` attributes.**

Being Search Engine-friendly

Checklist 12.4

☐ **Avoid the use of splash pages.**

- [ ] **Balance HTML text and graphics.**

- [ ] **Create search-engine friendly HTML text navigation and cross-links.**

- [ ] **If any of your web pages' URLs change, use server-side redirects to send search bots using the old link to the new URL.**

- [ ] **Use structural markup, and separate content from presentation as much as possible.**

- [ ] **Provide a website sitemap, and link to it from your home page as well as all your other web pages.**

- [ ] **If you use JavaScript links, include fallback `href` attribute links within the `<a>` tags.**

- [ ] **Avoid dynamic URLs that contain `?`, `&`, `$`, `=`, `+`, and `%` characters, `cgi-bin`, session IDs, or cookies.**

- [ ] **Use text alternatives to Flash content.**

- [ ] **Provide metadata and text alternatives for audio and other rich media files.**

Avoiding Being Banned by Search Engines

Checklist 12.5

- [ ] **Use genuine SEO methods.**

- [ ] **Avoid cloaking.**

- [ ] **Avoid using doorway pages or domain names used for doorways.**

- [ ] **Avoid stuffing keywords into comments or `title` or `alt` attributes.**

- [ ] **Avoid using JavaScript or `meta refresh` redirects to trick search engines.**

Getting Listed

- [ ] **Submit your website to search directories only after initial SEO is complete and content has been finalized.**

- [ ] **Submit your website to search directories only after your website is live and has been tested for broken links.**

- [ ] **Research each directory or search engine and its categories individually, read each directory or engine's FAQ, and follow instructions precisely before submitting your website.**

- [ ] **Research the best description to use for each search directory before you submit.**

- [ ] **Ensure your unique selling description is also included in your directory description.**

- [ ] **Write several descriptions of varying lengths to copy/paste into submission forms.**

- [ ] **Ensure your most important keywords are in every description, but avoid keyword stuffing.**

- [ ] **Consider paid or expedited submissions as a way to have your website listed more quickly.**

- [ ] Submit your home page to search directories before submitting other web pages.

- [ ] Submit other pages, particularly those on specialized topics, once your home page is listed.

- [ ] Submit your website manually to search directories, rather than using automated submission software.

- [ ] Submit your website to search directories such as Yahoo, DMOZ, JoeAnt, and Gimpsy.

- [ ] Avoid over-submitting.

- [ ] Use a `robots.txt` file and `meta robots` tags to denote content that you don't want indexed.

Creating an Ongoing Links Campaign

Checklist 12.7

- [ ] Provide ongoing, link-worthy content.

- [ ] Provide plenty of outbound links to websites that you recommend.

- [ ] Ask other website owners to consider linking to your website or exchanging links.

- [ ] Encourage website owners to use keywords that you're trying to rank for in the link's anchor text.

- [ ] If any URLs change at your website, be sure to inform those who link to it.

Planning for Ongoing Maintenance

☐ **Follow up every four to five weeks with search engines and directories to ensure that your website is listed.**

☐ **Contact a directory representative if you don't find your website listed at a directory after three submissions.**

☐ **Check your server logs regularly to see how visitors find your website and adjust your website accordingly.**

☐ **Add announcements about, and links to, new content from your home page, to help website visitors and search crawlers find it.**

☐ **Add new keywords and keyphrases to your SEO strategies when you add new content or make other changes to your site.**

☐ **Consider using analytics software to review keyphrases, search engine rankings, and listings status.**

☐ **Use the results of keyphrase analysis to add content to your website that visitors seek.**

☐ **Test the results of changes to your SEO strategy before tweaking your website further.**

☐ **Check your link popularity at search engines regularly.**

☐ **Depending on the industry, consider creating a calendar of keywords and keyphrases for future reference.**

Design

Basic Design Principles

☐ **Ensure contrasts are obvious in type, color, shape, whitespace, and lines.**

☐ **Use strong contrast to attract reader attention.**

☐ **Balance page weight using contrast.**

☐ **Create a strong, unifying visual identity using repetition.**

☐ **Use repetition consistently throughout your website.**

☐ **Create a clean, professional look by providing visual connections between elements.**

☐ Use alignment consistently.

☐ Avoid using justified text.

☐ Group related items together.

☐ Visually separate unrelated items.

☐ Draw attention with isolated objects.

Effective Typography

Checklist 13.2

☐ Apply the fonts you've used in your logo to other design elements.

☐ Use highly stylized novelty fonts sparingly, if at all.

☐ Use fonts consistently throughout your site.

☐ Avoid using more than two font families on a page.

☐ Use contrasting typefaces when using two or more fonts.

☐ Capitalize only the first word and any proper nouns in headings and titles.

☐ Use boldface type only for strong emphasis.

☐ Avoid using huge type.

Brainstorming

☐ **Develop paper prototypes.**

☐ **Base the look and feel of your website on your logo design and company colors.**

☐ **Base design concepts on your website's purpose, requirements, and visitor needs.**

☐ **Design for content.**

☐ **Provide a flexible design.**

☐ **Keep it simple.**

Finalizing the Design

☐ **Develop and refine paper prototypes into digital graphic prototypes.**

☐ **Create an interactive prototype.**

☐ **Test the basic functionality of your interactive prototype.**

14

Testing

Getting Started

☐ **Document your baseline website testing requirements.**

☐ **Source and install all necessary tools.**

☐ **Provide acceptable testing protocols.**

☐ **Set up a staging server.**

Good Testing Practice

☐ **Systematically test individual pages.**

☐ **Track bugs and confirm fixes.**

☐ **Regression test, especially when fixing bugs.**

☐ **Validate the markup for each individual web page.**

☐ **Validate all CSS.**

☐ **Conduct load testing to stress-test programming technologies and server hardware capacities.**

General Testing

☐ **Test your website on multiple browsers and platforms.**

☐ **Test page optimization with every update.**

☐ **View pages on a variety of displays.**

☐ **View pages on different screen resolutions and with various color settings.**

☐ **Check for adequate color contrast.**

☐ **Test the functionality of external and embedded scripts and functions.**

☐ **Test all links, including navigation.**

☐ **Check error pages.**

☐ **Test all downloads.**

- [ ] Test the search feature.

Solid Security

- [ ] Check that digital certificates and SSL URLs work correctly.

- [ ] Check that all pages requiring SSL access are accessible only via SSL.

- [ ] Test the security of restricted areas.

- [ ] Test forms and form controls.

- [ ] Test online shopping facilities.

Accessibility Testing

Conducting a Preliminary Review

- [ ] Select a random sampling of pages to test.

- [ ] Use a graphical browser to test sample pages.

- [ ] Use a voice or text-only browser to test sample pages.

- [ ] Use two evaluation tools.

- [ ] Manually examine representative pages using the checkpoints from WCAG 1.0, your government accessibility guidelines, or other requirements.

- [ ] Summarize the results.

Conducting a Comprehensive Review

☐ **Identify, determine, and document site-wide conformance requirements and levels.**

☐ **Test the site's accessibility conformance.**

☐ **Use *at least* two different accessibility evaluation tools.**

☐ **Manually examine representative pages using the checkpoints from WCAG 1.0, your government accessibility guidelines, or other recommendations.**

☐ **Use a graphical browser to test sample pages.**

☐ **Use a text-only browser and a voice browser to test pages.**

☐ **Ensure that interface elements are operable with multiple input devices.**

☐ **Proofread all content.**

☐ **Conduct usability testing with a diversity of participants.**

Testing with a Graphical Browser

☐ **View pages without images.**

☐ **Check that your pages allow users to vary the font sizes displayed.**

☐ **View tabular data with tables disabled or in a browser that doesn't offer table support.**

☐ **View the website with plugins turned off.**

Testing with a Voice- or Text-only Browser

☐ **Check that website navigation is available and works properly.**

☐ **Check all hyperlinks.**

☐ **Check that decorative images don't appear in text-only browsers and aren't read by voice browsers.**

☐ **Check that the information is presented in a way that's comprehensible when read serially.**

☐ **Test form controls.**

Usability Testing

☐ **List test objectives and concerns.**

☐ **Choose test approaches.**

☐ **Recruit users for testing based on your target market.**

☐ **Prepare an NDA (non-disclosure agreement) ready for users to sign prior to starting your tests.**

☐ **Determine testing location(s).**

☐ **Create a relaxed atmosphere for testers.**

☐ **Establish realistic tasks for users to perform and identify what, specifically, you will measure.**

☐ **Provide simple, clear instructions only.**

☐ **Allow users to perform their own tasks in addition to your pre-defined tasks.**

☐ **Create a post-test questionnaire.**

☐ **Analyze test results.**

15

Preparing For Launch

Conducting Final Checks

Checking Templates and Markup

Checklist 15.1

- [ ] **Ensure that your web page templates adhere to your website style guide.**

- [ ] **Provide clear instructions for the template's use and implementation.**

- [ ] **Ensure template markup is semantic, structural, and valid.**

- [ ] **Ensure that all stylesheets are validated.**

- [ ] **Conduct a final website optimization check.**

- [ ] **Conduct a final website search engine optimization check.**

Checking Layouts

☐ **Check overall page layouts and formatting for consistency.**

☐ **Check that your page layouts are based on the appropriate final version of your HTML template.**

☐ **Check that images are formatted and optimized correctly.**

☐ **Check that lists and tables are formatted correctly.**

Finalizing Content

☐ **Ensure that all content templates are complete, and provide detailed operational instructions.**

☐ **Nominate outsiders to review on-site content.**

☐ **Check the accuracy of your web page titles.**

☐ **Proofread content for correct spelling and grammar.**

☐ **Ensure that written text adheres to your website style guide.**

☐ **Ensure that required legal information is included and accurate.**

Checking Functionality

☐ **Check all internal and external links.**

☐   **Check the functionality of all forms and form elements.**

☐   **Test all scripting functions.**

☐   **Check the accessibility of plugin content using the specified plugins.**

Checking Server–side Requirements

Checklist 15.5

☐   **Ensure that domain names point to the correct server.**

☐   **Ensure that website statistics logging software is working properly.**

☐   **Ensure that periodic back-ups are set up and running properly.**

Conducting a Soft Launch

Checklist 15.6

☐   **Freeze website production and modifications.**

☐   **Allow one to four weeks for the soft launch testing phase.**

☐   **Move all necessary directories, files and databases from the development server to the live server.**

☐   **Verify functionality after the migration is complete.**

☐   **Ensure visual display elements remain intact after migration.**

☐   **Invite a selected group of users to trial the website privately and provide feedback.**

- [ ] **Fix bugs and resolve issues that require immediate attention.**

- [ ] **Ensure a solid plan is in place to rectify unresolved bugs and issues, and make post-launch website fixes and immediate content updates.**

- [ ] **Provide website maintenance training.**

Launching the Website

Checklist 15.7

- [ ] **Coordinate the website launch with related events.**

- [ ] **Launch during off-peak hours.**

- [ ] **For larger websites, plan to launch sections in phases, and launch the home page last.**

Completing Your Website Handover

Checking and Finalizing Project Documentation

Checklist 15.8

- [ ] **Finalize your site administration information, such as server login information and hosting control panel login details.**

- [ ] **Finalize your website style guide.**

- [ ] **Finalize your website maintenance document.**

- [ ] **Finalize your website testing plan and Quality Assurance document.**

- [ ] **Finalize all other related documents and instructions.**

- [ ] **Ensure that the handover package is complete.**

Creating a Handover Package

Checklist 15.9

- [ ] **Include copies of all original graphics program files, including custom preset files, Photoshop actions, and other automation tools.**

- [ ] **Include copies of all photos and illustrations, and their related copyright and usage rights information.**

- [ ] **Include copies of all fonts and their related usage permissions or licensing information (or purchase information, if needed).**

- [ ] **Include copies of all HTML templates, pages, and corresponding stylesheets.**

- [ ] **Include a detailed administrative sitemap that encompasses all of the site's pages, images, and related documents.**

- [ ] **Include copies of all database files.**

- [ ] **Include instructions, licensing, and tools (or purchasing information, if needed) for content management systems, editing tools, and other software.**

- [ ] **Include administrative login information.**

- [ ] **Include server login and authorization information.**

- [ ] **Include a copy of the website's root directory and all related files.**

- [ ] **Include the website maintenance document.**

- ☐ Include your website testing and Quality Assurance document.

- ☐ Include the final website style guide.

- ☐ Include electronic versions of print materials.

- ☐ Include a table of contents.

- ☐ Include a list of the names, contact information, and responsibilities of those involved in the website's production.

- ☐ Include a list of the names, contact information, and responsibilities of those who will be involved in the website's maintenance.

Archiving Project Documentation and Files

Checklist 15.10

- ☐ Archive a copy of the website project proposal.

- ☐ Archive a copy of the website project plan or creative brief, as applicable.

- ☐ Archive competitive analysis reports, if conducted.

- ☐ Archive the signed website project contract.

- ☐ Archive budget approvals, if separate from a signed website project contract.

- ☐ Archive copies of additional charges, invoices, and payments received.

- ☐ Archive copies of all emails related to this project, especially those that document change requests and approved changes.

☐   **Archive usability testing reports and all related documentation and notes.**

☐   **Archive notes, sketches, and files regarding information architecture and visual design.**

☐   **Archive any other notes or helpful information related to the project.**

☐   **Archive contact information for all those involved in the project, including vendors who provided photos, software, hardware, and other supplies for the project.**

☐   **Archive a copy of the handover package.**

16

Post-launch Follow-up

Conducting a Post-launch Review

Checklist 16.1

☐ Refine and instigate the levels of support and training that will be provided, and their time frames.

☐ Determine who will be responsible for updating the site's content.

☐ Determine who will be responsible for fixing website bugs.

☐ Determine who will respond to website-related email.

☐ Determine how frequently website-related email and queries will be answered.

☐ Review and implement plans to deal with potential problems.

☐   **Review and instigate methods to deal with post-launch usability issues.**

☐   **Organize your resources and ensure that they are sufficient to cover your website maintenance schedule.**

☐   **Determine who is responsible for monitoring the performance of the website and resolving server issues.**

Completing Initial Post-launch Tasks

Checklist 16.2

☐   **Implement the initial scheduled updates, and plan for upcoming updates.**

☐   **Schedule and instigate unresolved post-launch fixes.**

☐   **Obtain user feedback and usability test results.**

☐   **Implement plans to integrate quality assurance (QA) procedures with maintenance and updates.**

☐   **Confirm periodic, offsite backups of your entire website.**

☐   **Implement your website marketing and promotion campaigns.**

☐   **Ensure that appropriate resources are available for website maintenance.**

Orientating New Staff

Checklist 16.3

☐   **Provide a copy of the website style guide for review.**

☐   **Provide the handover package for detailed review.**

- [ ] Ensure that all website files and documents, including HTML templates, HTML pages, and administrative sitemaps, have been reviewed.

- [ ] Provide required login information and instructions for areas that require authorization.

- [ ] Ensure staff members are familiar with directory structures and directory and file naming conventions.

- [ ] Ensure that they're familiar with website testing and QA requirements and procedures.

- [ ] Ensure that sufficient training has been provided for tools used to maintain the website.

- [ ] Ensure that sufficient training has been provided to handle ecommerce requests.

Getting Attention

Checklist 16.4

- [ ] Update existing print materials to include your website information.

- [ ] Create new print materials that include your website information.

- [ ] Consider and implement other advertising and marketing options.

- [ ] Include your website URL(s) in an email signature at the bottom of every email you send.

- [ ] Use search engines and directories to bring in traffic.

☐ **Ask people you know if they can link to your site, and offer to link to theirs in return.**

Managing Maintenance

☐ **Ensure that staff involved with website maintenance possess adequate skills.**

☐ **Ensure that all maintenance staff members have a copy of the handover package and website style guide.**

☐ **Ensure that procedures for version control, backups, and site rollback are operational.**

☐ **Implement a method to update outdated content.**

☐ **Check each content addition or change for correct spelling, grammar, consistency of terms, and other content requirements specified in your website style guide.**

☐ **Ensure that new pages are created with the correct web page templates, as specified in the website style guide.**

☐ **Validate the markup for new or changed pages,**

☐ **Ensure that new pages are linked from the appropriate navigational sections and pages.**

☐ **Update your administrative sitemap to include new web pages.**

☐ **Ensure that new images are optimized and adhere to the website style guide.**

- [ ] **Inspect the licensing agreements and copyright terms of images obtained from third parties.**

- [ ] **Review, validate and approve all site updates and changes before they're published to the Web.**

- [ ] **Review server logs regularly to catch and resolve errors and other issues.**

- [ ] **Review bug tracking reports regularly to catch and fix bugs.**

- [ ] **Run periodic website accessibility tests to ensure that your website remains accessible and continues to adhere to accessibility requirements and guidelines.**

- [ ] **Run periodic website QA tests to maintain the site's quality and functionality.**

Undertaking Daily Duties

Checklist 16.6

- [ ] **Check and respond to website-related email promptly.**

- [ ] **Check and review website feedback forms, and follow up as needed.**

- [ ] **Ensure that your website is online, fully functional and secure.**

- [ ] **Check the fulfillment of ecommerce orders.**

- [ ] **Check for and correct any broken internal and external hyperlinks.**

- [ ] **Review your server logs.**

Conducting Monthly Minding

☐ **Compare your goals for the site with its current status to evaluate whether or not you're on track.**

☐ **Look for overall trends in your server logs.**

☐ **Check your site's status with search engines and directories.**

☐ **Review your marketing and advertising campaigns and website metrics to evaluate their successes, problems, and status.**

☐ **Plan the next iteration of your website.**

Performing Periodic Processes

☐ **Check for and correct any broken internal and external hyperlinks.**

☐ **Run site-wide validation tests.**

☐ **Run site-wide accessibility tests for sites that, by law, must adhere to accessibility guidelines.**

☐ **Check that directory structures, directory names, and filenames continue to adhere to your website style guide.**

☐ **Test your website's local search function to make sure search results continue to be current and accurate.**

☐ **Check that your shipping policies, options, and prices are still current and accurate.**

☐ **Check on software updates, licensing, and registrations.**

☐ **Check and test that all forms and error messages function properly.**

☐ **Perform content audits.**

Conducting Annual Activities

Checklist 16.9

☐ **Renew your domain name registrations.**

☐ **Ensure that copyright date information is updated on January 1 every year.**

☐ **Ensure that your legal documentation, including your privacy policy, website terms of use, and copyright terms, is current.**

☐ **Review website hosting prices and features to ensure that you're still getting the best value for money.**

Collecting Data

Collecting and Using Quantitative Data

Checklist 16.10

☐ **Collect data about user demographics and the reasons users visit your website.**

☐ **Collect data about the sources of your website traffic.**

☐ **Collect data about which search engines and directories provide the most traffic to your site.**

☐ Collect data about which keywords and keyphrases generate the most search engine referrals, and which aren't working well.

☐ Collect data about PPC (pay-per-click) results to help refine and improve your PPC campaign.

☐ Collect data about your website's traffic, including the most popular and least popular web pages.

☐ For ecommerce sites, collect data on shopping cart abandonment and the reasons for it.

☐ For ecommerce sites, collect data on order sizes to see if an upsell or cross-sell marketing strategy is working.

☐ Collect data about your website's local search to learn more about what users are seeking and to assess potential navigation problems.

☐ Collect data from bug reports and server logs to learn about and fix website problems.

☐ Collect data about problems found on the website, and apply appropriate fixes.

Collecting and Using Qualitative Data

Checklist 16.11

☐ Collect information about your brand, such as brand recognition, perception, and relationship information.

☐ Collect user feedback via email, questionnaires, focus groups, and reviews and ratings of your website to help improve your website.

☐ **Collect data for use with customer relations management (CRM) processes and tools.**

☐ **Collect information about your website's competitive advantage.**

☐ **Collect data about which website features your visitors like most and least, and why.**

Appendix A: Ecommerce Checklists

Assessing Ecommerce Content Usage and Management Needs

☐ **Accept and manage online payments.**

☐ **Accept and manage online credit card payments in real time.**

☐ **Automate order processing.**

☐ **Calculate and manage sales tax.**

☐ **Calculate and manage shipping costs, including international calculations.**

☐ **Manage order processing, shipping, or both.**

☐ **Send order confirmations or other related correspondence.**

☐ **Manage order tracking.**

☐ **Process and manage returns.**

☐ **Integrate ecommerce finances with existing book-keeping systems.**

☐ **Manage photos for each product or service.**

☐ **Manage data for products or services in a database.**

☐ Manage customer information or related ecommerce information in a database.

☐ Manage and administer downloadable products that may be accessed only after purchase.

Features to Seek in a Shopping Cart Program

Checklist A.2

☐ Automated, customizable sales tax calculation facilities.

☐ Automated, customizable shipping cost calculation facilities.

☐ Automated, customizable choice of payment methods, and the acceptance of online payments.

☐ Integration with online credit card payments, including real-time credit card payment verification.

☐ Integration with your existing book-keeping systems.

☐ Seamless PayPal integration.

☐ For digital products, integration with services like ClickBank and E-junkie that facilitate affiliate marketing.

☐ Automated, personalized email order confirmations, shipping status and confirmations, and other automated order-related correspondence.

☐ Automated production of personalized, printable receipts.

☐ **Automated customer follow-up and tracking.**

☐ **Display of a shopping cart order confirmation page prior to purchase finalization.**

☐ **"Remove" feature for customers to remove one, several, or all items from the shopping cart.**

☐ **Shopping cart summary to show products in customer's cart as the customer continues to shop.**

☐ **Option to change the quantities of each product ordered on the confirmation page, and recalculate costs accordingly.**

☐ **Option to show prices with and without local taxes.**

☐ **Customizable product search.**

☐ **Flexibility to use the software with your existing products database.**

☐ **Standards-based integration and customization to blend with your website design.**

☐ **Customizable product display in your online store.**

☐ **Customizable directory names.**

☐ **Customizable, search engine-friendly, human-friendly filenames and URLs.**

☐ **Ease in adding or changing product attributes, including pricing, photos, descriptions, and other details.**

- [ ] **Ability to remove products from the store temporarily.**

- [ ] **Customizable pricing.**

- [ ] **Customizable minimum and maximum quantities or units, and the ability to hide this feature if it's not applicable.**

- [ ] **Automated product inventory tracking.**

- [ ] **Ability to import and export all data and reports.**

- [ ] **Limitless number of items or products.**

- [ ] **Manual order processing.**

- [ ] **Customizable product download details.**