



Student Guide: Pre-planning & Workflow

Pre-planning & Workflow

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Workflow and Pre-planning

Unit overview

In this unit we will learn the workflow of developing a site, the importance of client analysis, pre-planning, and the overall design process. We will look at site construction and begin our first component of your capstone project.

Unit Objectives:

- ☞ Demonstrate knowledge of the web design workflow process.
- ☞ Identify various web authoring software.
- ☞ Identify various sources for web page styles and templates.
- ☞ Explain the importance of client analysis and how it relates to the overall project.
- ☞ Explain the importance of developing a site map or flow chart prior to design.
- ☞ Explain the importance of developing a wire frame as a basis layout structure.

Reading Assignment: Chapter 1 pages 1-13

Workflow

Building a commercial site for a client is a **process**. Understanding the workflow of building a web site is essential. When you understand the workflow you will then understand how to approach a project and communicate the stages of project development to your client.

Key Terms:

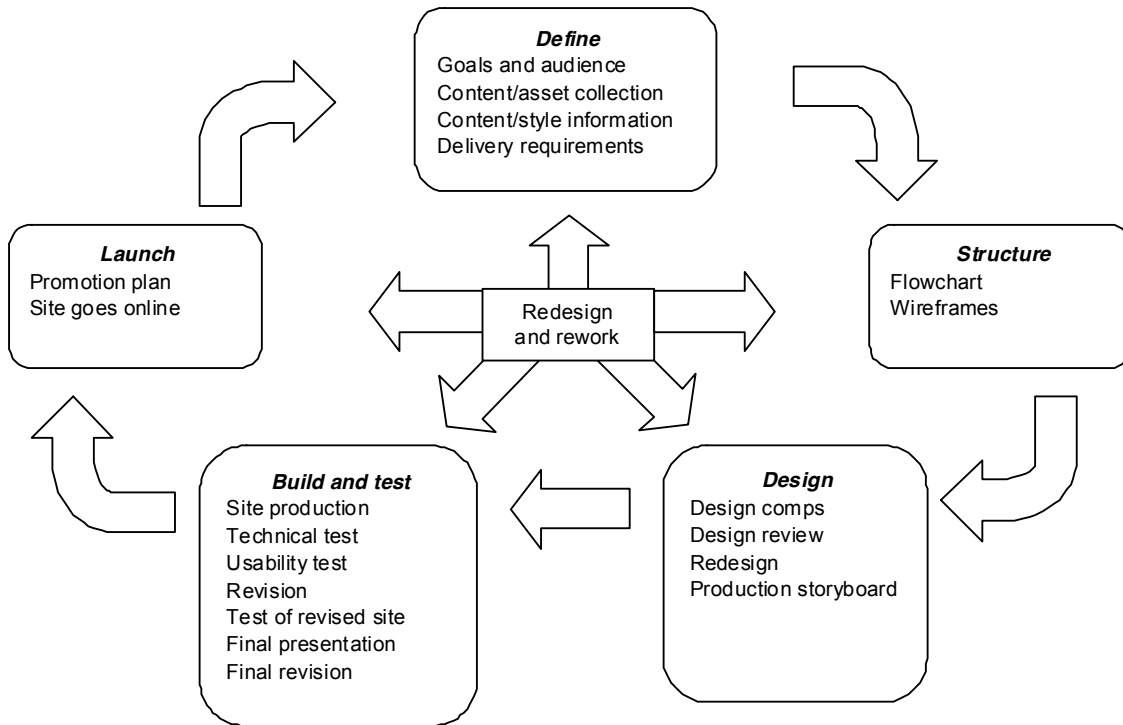
Workflow, client meetings, client analysis, information architecture, flow chart, site map.

Stages of Web Development:

1. Define the site - Discovery
2. Build the Structure - Exploration
3. Design the Site - Development
4. Build and Test the site - Development
5. Launch the site - Implementation

Professional web design and development process

When planning a web project, professionals break down the design and development process into phases such as the following.



Define	Structure	Design	Build and test	Launch
Goals and target audience	Flowchart	Design comps	Site production	Promotion plan
Content and asset collection	Wireframes	Design review	Technical test and bug list	Put site online
Content and style information		Redesign	Usability test	
Delivery requirements		Production storyboard	Revision	
			Test of revised site	
			Final presentation	
			Final revision	

Client Analysis

In order to define scope and functionality, information from the client is gathered to understand the goals and expectations of the client. Having the client answer a series of structured questions helps the client to think critically and clearly define goals and expectations.

Goal of this web project

1. In two or three sentences, what is the goal or purpose of this website?
» *The client must be very clear with this answer. If the goals are unclear DO NOT proceed until you understand exactly what the client wants to accomplish.*
2. What is your USP (Unique Selling Point).
If the client is not able to articulate the USP, help them work through this by asking questions such as "what makes you better than one of your competitors". For more on USP see page 9.
3. What information will visitors want to see first?
» *The key here is visitors. Find out what product or service is important to the visitor and make that your center of interest. Hint - not the company logo, building, etc.*

Questions that help define the project

4. Do you have a web presence now? If so, what do you want to keep and what do you want to change? Do you have any sites that you would like to emulate? What do you like about them?
» *Things will be much easier for you if you can get a feel for what the client likes. Give him what he likes and he will be happy.*
5. What will make this site a success? Hits? Publicity? Revenue?
» *Getting the client to think about this in advance helps both of you to manage expectations. If the client has expectations that have not been communicated to you, you may take the blame for his "lack of success". You may not get paid or may be forced to re-work the site for free!*
6. What type of content will be on the site? Does this content already exist?
» *It is important to determine who is expected to populate the pages with information.*
7. What items will be included in the site: Blog, e-commerce, feedback forms, registration forms, user submissions, etc.
» *The answers supplied here will help you to select the most appropriate framework.*
8. Will you want to update the site yourself? If so, how many different people will be updating the site? If you will NOT update the site yourself, how often will it need to be updated?
» *If the client will update the site himself consider a CMS framework. Otherwise, a brochure-ware site will work fine and you can bill for the updates or include updates in your fee.*
9. What are the categories (major groupings) of information that will be on every page?
» *These groupings will become the buttons that are on every page.*
10. Will this information likely be accessed by mobile devices?
» *If this is a concern 2 themes (or an extension for WordPress or Joomla) will likely need to be developed – one for computers and one that is optimized for the smaller screen size of mobile devices.*

Client Proposal

A typical proposal includes the following categories:

1. Summary
2. Project goals
3. Competition
4. Creative strategy
5. Process
6. Fees & billing schedule
7. Company overview, testimonials, & awards

1. Summary

The Summary is a one or two paragraph overview of the entire proposal. Clients will usually go here or to the budget first so make it short and to the point.

2. Project goals

This is where you outline what is you will deliver to the client.

3. Competition

In this section you will cover the client's competition, what they are doing well and what they are doing poorly.

4. Creative strategy

This section is where you will verbalize how you can solve your client's problems visually – without doing any layouts or other creative work. The idea here is to explain how you're going to meet the project goals and make the client's customer respond.

5. Process

This is where you outline the technical process required to make this all happen as promised. You would talk about how the Client Analysis, wireframe, flowchart and prototype process works. It helps to justify those *high fees you're about to quote*.

6. Fees & billing schedule

This is the bottom line. List out major tasks and assign a dollar figure. Always under-promise and over-deliver. If you do this, you'll always be a hero. Things always take longer than you expect.

7. Company overview, testimonials & awards

This section is where you showcase your background, awards you've won, and testimonials from those you have done work for.

Use InDesign or Word to create your proposal and feel free to use appropriate graphics and photos.

Regardless of which software package you use to create the proposal, submit a PDF so that your work can be seen and printed as intended.

Successful Web Page Design

Learning from others

The GOOD

The fine art “old masters” learned by copying other artist’s paintings – yes, they tried to make exact copies of other artist’s paintings! Although it is currently fashionable to downplay this way of learning, it worked for them. The modern objections that this stifles creativity just does not wash with history. Consider this time honored learning method and copy professional work you are drawn to.

Note: The “plagiarism” issue does not apply as we are in a learning environment.

The BAD & UGLY

Looking at bad website design is valuable because it gives us the opportunity to learn from other people’s mistakes without having to make them ourselves. Check out webpagethatsuck.com.

What is your USP?

Picture this: You’re the owner of a small business. You’ve received 5 development proposals for your new website. Which will you choose?

Because web development is such a highly competitive market, you can’t just slap together a proposal in 5 minutes and send it over to your potential client hoping to win the job. You need to differentiate your proposal from the others that your potential client will skim over when making their decision. You need a unique selling point, or USP for short.

What is a unique selling point? It’s one reason why you do what you do better than your competitors. Read the previous line 5 times before you continue.

I was at a seminar last week and one of the speakers was Jack Cohen, the founder of Hungry Jacks (the Australian franchise of Burger King). When asked why Hungry Jacks was so successful, he proudly stated something along the lines of “it’s because we flame grill our meat and don’t fry it”. That was his USP. The one thing that Hungry Jacks does to differentiate itself in the already over-crowded fast food industry.

Why flame grill meat instead of frying it? Taste, of course. We eat what tastes good, and flame grilled meat naturally tastes better than fried meat. When you think about it, most (if not all) of the worlds biggest companies have a USP - that one reason for you to choose them over anyone else.

By Mitchell Harper, from <http://www.interspire.com/content/articles/28/1/Tips-for-Client-Proposals>

Before you begin your design, ask your client two questions:

1. What is your “USP” and how will you communicate it?
2. Will the customer understand and accept your message as you have chosen to communicate it?

Website Styles & Templates

Static or “Brochure-ware” Style

The term “brochure-ware site” refers to a website that is an online version of a company’s printed materials. These sites are often ideal for small companies because they have products and services that cannot be readily sold via the Web. Instead of selling on-line, these sites include detailed product information, pricing, store locations, coupons, FAQ’s, testimonials, and product support.

Advantages: Relatively easy to do and low initial cost.

Disadvantages: Difficult for customer to update. No e-commerce or interactivity.

Dynamic Style

A dynamic website is one whose information changes often, is stored in a database, and whose page content is put together in a template as the user requests the page. The site interacts with users in a variety of ways. Dynamic Style sites are run by Content Management Systems such as Drupal, Joomla, and WordPress.

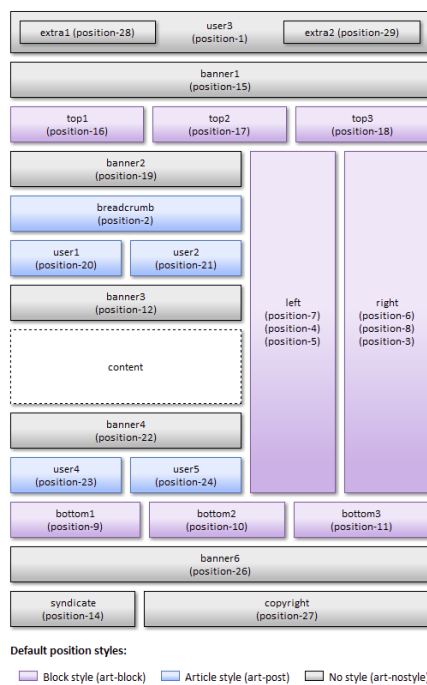
Advantages: Easy for customers to update. E-commerce and interactivity are often built-in.

Disadvantages: More difficult to set up. Higher initial front-end cost.

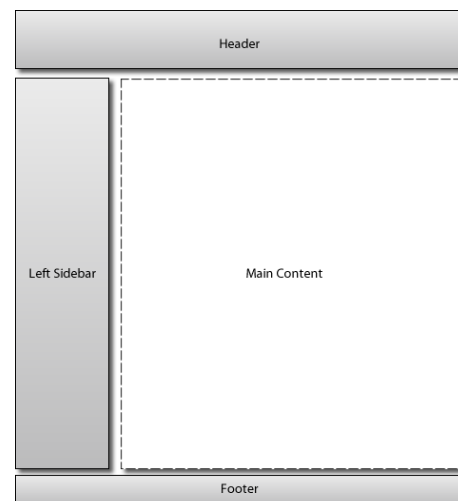
Templates

Static and dynamic sites are often designed so that all pages use a common template. This common presentation helps the customer navigate the site and reinforces branding.

Most templates contain a header, a navigation area, a content area and a footer. Portfolio sites often modify this formula by having the home page entirely Flash-based. This allows for a media-rich presentation when the visitor first enters a site.



Dynamic CMS template showing module positions



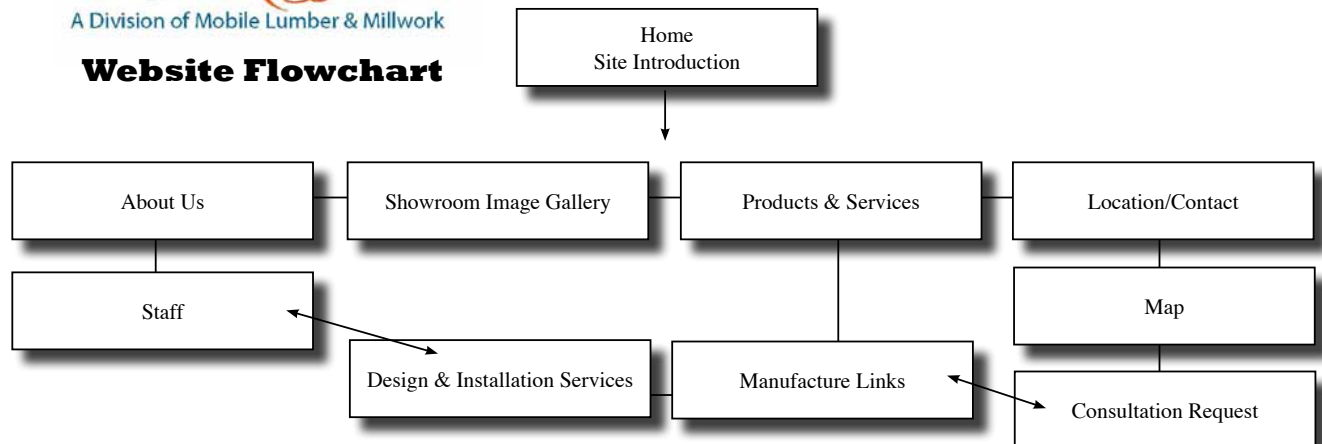
Static HTML template showing header, left sidebar, content, and footer positions

Flowcharts

Preparing a flow chart allows you and your client to determine the content and functionality of your proposed site. Flowcharts help organize the content, determine the pages on your site, and determine the navigation. This step should be completed PRIOR to beginning the visual design as the organization and navigation will, in many cases, drive the design. Flowcharts can be simple for smaller sites, or very complex for larger sites.



Website Flowchart



Flowchart

The purpose of creating a flowchart for a website is to help visualize the site structure without the distractions of graphics.

Boxes usually represent pages or categories of information.

When creating a flowchart, use the KISS principle: Keep It Simple, Stupid. Anyone should be able to read your flowchart and understand. Do not use difficult terms, or strange acronyms to describe boxes, processes, or decisions.

A flowchart can be created in any vector software program as well as Word or Excel. A popular option is to use a free web-based application www.drawanywhere.com.

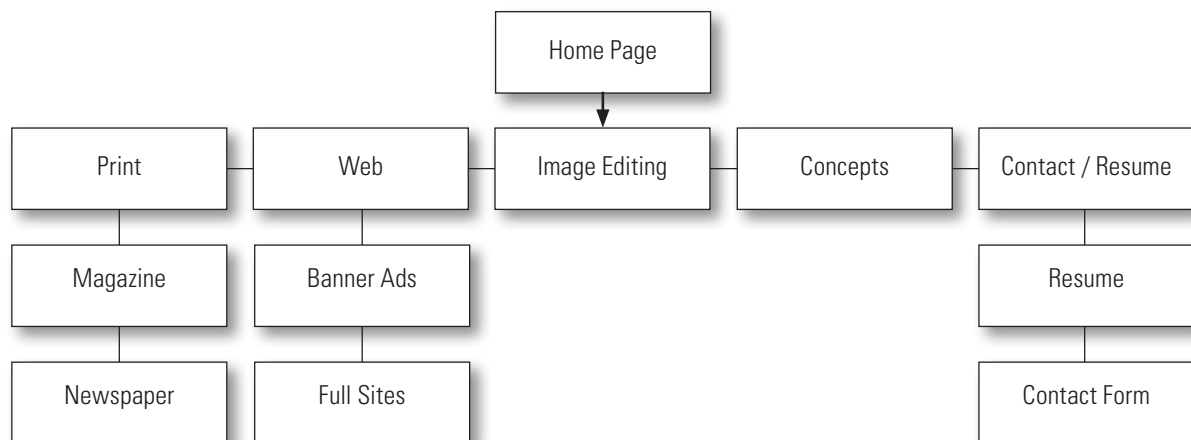
Submit as a JPG or PDF

Regardless of which software package you use to create the flowchart, you must also save a copy as a JPG or PDF to submit for grading.

Submitting a JPG or PDF to the client (and instructor) ensures your work will be seen as intended even though the recipient does not have the same fonts or software installed on their computer.


Example

A flowchart showing the home page and main categories, which will become menu items or buttons.



** This page is an excerpt from student guide developed for GRD470 Interactive Media 1 written by DMACC instructor Mr. Steve Bendy.*

Wireframe

Technology for Long-Term Care Banner		Site Map Contact Us Feedback <input type="text"/> <input type="button" value="Search"/>
Home About This Site Consumer Forum Resource Links MySite Barriers Report		<input type="button" value="Advanced Search"/>
		
Login Email <input type="text"/> Password <input type="password"/> <input type="button" value="Login"/>	Page Title Site Introduction - Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. <div style="border: 1px solid black; padding: 5px; float: right; width: 200px;"> Find out how to personalize this site using MySiteName. </div>	
----- > Fall Management > Wander Management > Nurse Call Systems > Incontinence Technologies > Family Contact > Leisure Enhancement > Medication Distribution > Mobility Devices > Transfer Devices > List all Products	Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum Et harum und lookum like Greek to me, dereud facilis est er expedit distinct. Nam liber te consicent to factor tum poen legum odioqueviuuda. <hr/> <p style="text-align: center;">- Privacy Policy -</p> <p style="font-size: small;">The records in Technology for LTC are provided for information purposes only. Neither the U.S. Department of Health and Human Services, the Assistant Secretary for Planning and Evaluation, Pollster Research Institute, nor (contractor) has examined, reviewed or tested any product, device or information contained in Technology for LTC. The Department and (contractor) make no endorsement, representation or warranty, express or implied as to any product, device or information set forth in Technology for LTC.</p>	

Wireframe example from
www.gdoss.com

A wireframe is a basic visual guide used in web design to suggest the structure of a website and relationships between its pages.

IMPORTANT! Your wireframe should be based on the framework you have chosen. You will need to carefully research the specifications and restrictions of your chosen framework and technology so that you understand where navigation and content are allowed.

Designer Michael Tuminello lists these benefits of creating wireframes prior to design and development:

1. Wireframes help you communicate the fact that your design is a work in progress - and therefore subject to change based on feedback
2. Wireframes help ensure that the functional design is evaluated separately from the visual design
3. Wireframes don't become dated like comps, so you can reuse those unchanged dialog box sketches in your version 2.0 functional specifications even though you have completely reskinned the application
4. You can create wireframes much faster than you can design high-quality graphics - and it doesn't require much artistic skill
5. Using wireframes instead of comps for initial design reviews helps you to avoid the inevitable "please make the logo bigger" request until the functionality has been decided
6. Unlike the thinking and discussion that precede your actual sketching, making and editing wireframes should be easy and quick to do.

Wireframes can be created in any software application. Regardless of which software package you use to create the wireframe, submit a JPEG or PDF so your work can be seen & printed as intended.

Web Application Frameworks

Overview

What software you use to create a website depends largely on the functions required by your client, your skill level, and personal preference.

Content Management Systems



A content management system (CMS) is a program used to create and update the content of a Website. The “look and feel” of the site is controlled by a “skin” or theme which can be changed and/or customized without effecting the actual content of the site.

Some advantages of a CMS are: 1) they allow multiple users to update a site at the same time, 2) different levels of security are allowed based on user name and password, 3) the site can be updated with a web browser (no special software needed), 4) many plug-ins and themes are available.

Some of the most popular CMS systems such as Joomla and Drupal are “Open Source” which means they can be downloaded and installed free on a web server. Using an open source CMS is significantly more cost effective than building a CMS site by hand-coding. Some Internet Service Providers specialize in installing and supporting CMS systems. Setting up a CMS requires that you study the documentation carefully, and like most software the learning curve is steep. Compare the various CMS's here: <http://www.cmsmatrix.org/>

Hosted Content Management Systems



Companies that provide a hosted content management system seek to make it as easy to create and update a feature-rich site. They manage the technology and software – all the customer needs to do it to choose a theme, add the desired plug-ins, and update the content of the site. This is all done using a standard web browser. Squarespace, WordPress.com, and Wix.com are examples of this increasingly popular system. The disadvantage is that you are often “locked-in” to using their system, making it more difficult to move your content to another vendor.

Web authoring tools



Website creation software allows those who are completely unfamiliar with the web to design and publish professional looking websites. You can incorporate custom text styles, graphics and even multimedia, such as audio and video, into your website. Although limited in functionality, these site are very easy to use and maintain. Prices ranges from totally free (googlesite.com) to under \$100. The disadvantage of this software is that you are often “locked-in” to using their system, and the client would also need to buy the software to update the site. **Windows** based software includes Web Easy Pro and WebPlus. **Macintosh** based software includes iWeb (free with iLife), and RapidWeaver. The price for each piece of software is under \$100.

Custom Built (Dreamweaver, PHP, etc.)



A custom built site can range from a static “brochure-ware” site created in Fireworks/Dreamweaver to a full blown, dynamic, database driven CMS (Content Management System) site created in PHP or other technology.

The “look and feel” of these sites are designed in either Photoshop or Fireworks, while the code is created in Dreamweaver, PHP or other software.

Capstone Assignment Guide: Define the Site

It is important to understand your client in developing their site. Otherwise you may design a site that does serve the purpose and goals of the client may not hit the desired target market, and may not be user friendly to the viewer. The client analysis is truly the first step in design.

Find a business and/or non-profit organization that either needs a site, or (in most cases) would benefit from a newly designed site. This will be the basis of your capstone project so choose carefully. *(note - avoid overly complex sites - work to keep is basic and simple).*

1. Use the *Client Analysis form* to guide you through the analysis.
2. Your analysis should include sites to emulate (see instructions below)
3. Prepare a typed, professional analysis and submit both as an electronic document AND as a hard copy. Hard copy should be in a plastic cover.

Sites to Emulate

One thing about creating a custom site for a commercial business or organization is that you need to find 1. Find out what else is out there, 2. Determine what makes these sites good, and 3. How your clients site can be improved.

1. Do an internet search and find other sites that are of similar content to your clients. Take a screen shot of the site home page and include that in your analysis. Identify at least TWO different sites of similar product/service to your client.
2. Identify elements of these sites that make them not only visually pleasing but shows good functionality.
3. Identify how your clients site can be improved and be competitive in the target market.

Flowchart or Site Map

Prepare an organizational chart (flow chart/site map) on how your web site will navigate. You can hand draw this initially, but your final submission must be an electronic document.

Identify Method of Execution.

State which web authorizing software you will use to develop this site. Are you going to need to use a Content Management bases application such as Joomla or Durple or will you be creating a custom designed site? If your site will be custom will you be using Dreamweaver or hard coding the HTML/CSS? Will your client provide all graphics and images or will you need to generate them? If you will need to create graphics, Identify which methods and software you will need. ie - digital camera, Adobe Photoshop, Fireworks, Illustrator?