

Playbook & Toolkit



Follow this simple step-by-step playbook to complete a **website redesign** that supports your **company's values and vision**.

Table of Contents

WEBSITE REDESIGN

Framework		03
Introductio	n	04
STAGE 1	Set Goals & Timelines	06
STAGE 2	Analyze Your Needs	09
STAGE 3	Design Your Website	13
stage 4	Prepare For Launch	19
STAGE 5	Launch Your New Site	24
STAGE 6	Refine Your Efforts	28
Conclusion	1	31
About		32

Framework

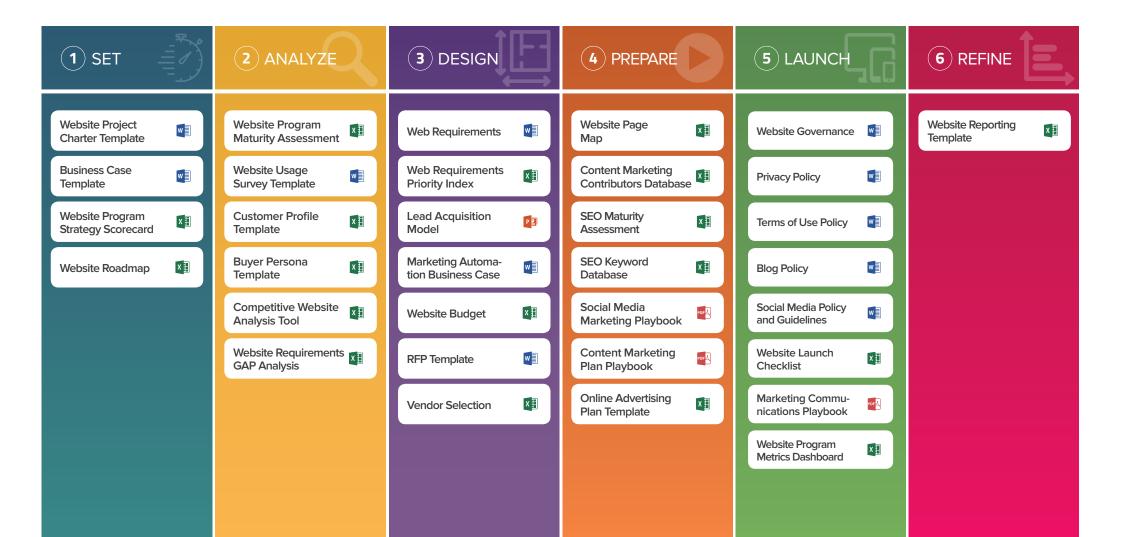
Leverage the framework below to quickly empower your organization's website redesign strategy.







Click the buttons below to access all related training, tools, templates, and other resources.



1	2	3	4	5	6
Set Goals &	Analyze Your	Design Your	Prepare For	Launch Your	Refine Your
Timelines	Needs	Website	Launch	New Site	Efforts

What Is the Purpose of This Playbook?

The overall goals of a website redesign project can vary from one business to the next. However, a website redesign can serve any (or all) of the following purposes:

- It can support the corporate marketing strategy
- It can be part of the marketing communication plan
- It can be part of your individual product marketing plans

This playbook will help you conduct a website redesign that is aligned with your corporate values & vision, happens quickly & efficiently, meets or exceeds your expectations, impresses your colleagues & customers and is optimized for the goals you set.



How to Use This Playbook

This playbook consists of six stages, each with a description, steps, and action items. Action items include using our premium tools and templates. Our intention with this playbook is to help you:



Achieve your website goals and objectives





1	2	3	4	5	6
Set Goals &	Analyze Your	Design Your	Prepare For	Launch Your	Refine Your
Timelines	Needs	Website	Launch	New Site	Efforts

Outputs from This Playbook



Stage 1 - Set Goals & Timelines

Project Charter, Strategy Scorecard, Website Roadmap



Stage 2 - Analyze Your Needs

Assessment, Content Audit, Survey, Competitive Analysis, GAP Analysis



Stage 3 - Design Your Website

Requirements, Priority Index, Feature Release, Budget, RFP, Creative Brief



Stage 4 - Prepare For Launch

Page Mapping, SEO, Social, Content, Online Ads



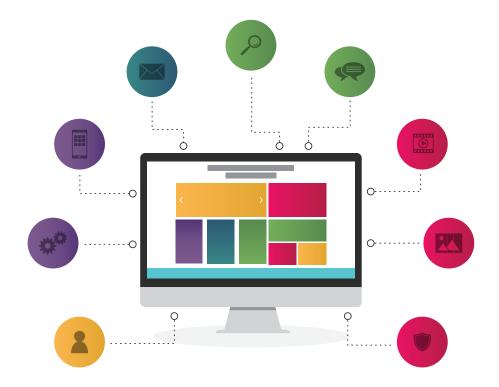
Stage 5 - Launch Your New Site

Governance Document, Policies, Launch Checklist, Reporting Tool, Dashboard



Stage 6 - Refine Your Efforts

Reporting, User Survey, Roadmap, Dashboard







Set Goals & Timelines

The hardest part of any project is getting started. This Stage can be used as a starting point and will make it easier for you to get the ball rolling.

During this Stage, you will lay a solid foundation for your website redesign project by conducting the following exercises:



STEP 1: Build a Project Charter

STEP 2: Outline Goal and Objectives

STEP 3: Create a Project Roadmap



Introduction

Set Goals &
Timelines

Analyze Your

Design Your Website

3

Prepare For

4

Launch Your New Site

5

Refine Your Efforts

6

STEP 1

Build a Project Charter



Action Item

Use our **Website Project Charter Template** to organize your thoughts and gain buy-in and approval to move forward with your website redesign project.



What do you need to know about the website project charter?

- Critical Success Factor: Ownership. This document clearly identifies the Project Manager, who should lead the effort to create the Website Project Charter.
- The output of this step is a comprehensive document that will facilitate the go/kill website redesign decision.
- Our <u>Business Case Template</u> is another great resource for helping to secure buy-in & get approval.

STEP 2

Outline Goal and Objectives



Action Item

Use our <u>Website Program Strategy Scorecard</u> to outline your high-level goals, objectives, KPIs and target time-frames for your website redesign project over the next 12–18 months.



Use the scorecard to document your high level business objectives for the new website. A few examples include:

- Increase Visibility Online
- Improve Customer Web Experience
- Optimize Web Content
- Create New Lead Generation Channel





Set Goals & Timelines

Analyze Your Needs

Design Your
Website

Prepare For Launch

4

Launch Your New Site

5

Refine Your Efforts

6

STEP 3

Introduction

Create a Project Roadmap



Use our <u>Website Roadmap Template</u> (Web Development Schedule tab) to organize and plan the deliverables, milestones, due dates, owners, and approvers for each phase of development.



What phases might be included in a website redesign project?

Planning

Launch

Design

- Training
- Development
- Refinement
- Pre-Launch Prep





STAGE 2 Analyze Your Needs

Now that you have a good understanding of **who** is involved in the redesign project, **what** your key objectives are and **how** long it will take to get there, this Stage in the website redesign project involves conducting a detailed internal & external analysis of your situation so that you can document your requirements in Stage 3.

During this stage, you will conduct the following exercises:



STEP 1: Audit Your Current Situation

STEP 2: Understand Your Audience

STEP 3: Review Your Competitors' Websites

STEP 4: Research Technology

STEP 5: Conduct a Gap Analysis



Set Goals & Timelines 2

Analyze Your Needs

Design Your Website

3

Prepare For

4

Launch Your New Site

5

Refine Your Efforts

6

STEP 1

Audit Your Current Situation



Use the <u>Website Program Maturity Assessment</u> to evaluate your organization's website program maturity. You'll be able to benchmark your current situation and show measurable improvement over time.



Areas of evaluation include:

- Strategy, Process & Skills
- Clear Communication
- User Friendliness & Easy Navigation
- Search Engine Optimization
- Social Media

- Landing Pages
- Lead Conversion
- Content
- Analytics

STEP 2

Understand Your Audience



Use the <u>Website Usage Survey Template</u> to get a better understanding of the way that your customers, employees, prospects and contractors interact with your website.



The goal of conducting this survey is to help you understand and monitor habits, interests, and participation across your web properties.

Be sure to encourage constructive feedback that you can incorporate into your website strategy. Also, if you're using Google Analytics be sure to review your key metrics.



Helpful Hint – Be sure to add any important insight to your **Customer Profile** and **Buyer Persona** templates.





Set Goals & Timelines 2

Analyze Your Needs

Design Your Website

3

Prepare For

Launch Your New Site

5

Refine Your Efforts

6

STEP 3

Review Your Competitors' Websites



Action Item

Use the <u>Competitive Website Analysis Tool</u> to conduct an objective apples-to-apples comparison of your website and your top two competitors based on best practices.



This template will help you:

- Identify strengths & weaknesses in your competitors' websites
- Generate new ideas and/or requirements for your redesign

The results of this analysis can also be used to support the business case for a website improvement project. Once you have completed the project, you can use this tool to demonstrate a measurable and quantifiable improvement.

STEP 4

Research Technology



Action Item

Use the following Demand Metric resources to asses your wants and needs:

Technology	Considerations	Resources
Systems	CMS? CRM? Security? ecommerce?	Drupal, Wordpress, Salesforce, Etc.
Analytics	Free? Paid?	Google Analytics, Omniture
Social Media	Blogs? Communities? Networks? Etc.	Social Media Playbook
Demand Generation	Lead Nurturing? Marketing Automation?	Demand Generation Playbook
Mobile	End Users? Cost/Benefit?	Mobile Marketing Playbook





Set Goals & Timelines 2

Analyze Your Needs

Design Your Website

3

Prepare For

4

Launch Your New Site

5

Refine Your Efforts

6

STEP 5

Conduct a Gap Analysis



Use our <u>Website Gap Analysis Template</u> to identify, analyze and resolve gaps for each competency area (People, Process, Technology).



This exercise will help you to identify goals and action items. You will need to identify the following for each target item:

- Current State
- Goal State
- Timeline
- Action Items

The results of this analysis will lay the foundation of your website redesign project.







STAGE 3 Design Your Website

The goal of this Stage is to help you design the website of your dreams. Follow the steps provided to prioritize your requirements, document your design specs and select the right website design firm for the job.

During this stage, you will conduct the following exercises:



STEP 1: Determine Your Requirements

STEP 2: Prioritize Your Requirements

STEP 3: Create a Feature Release Schedule

STEP 4: Build a Wireframe

STEP 5: Map Your Process

STEP 6: Determine Your Website Budget

STEP 7: Prepare an RFP for Web Design

STEP 8: Select the Right Website Design Firm

STEP 9: Draft a Creative Brief



Design Your Website

Prepare For

4

Launch Your New Site

5

Refine Your

Efforts

6

STEP 1

Determine Your Requirements



Action Item

Use our Website Requirements Document to help you document business requirements for your website.

Timelines



The results from this exercise will be prioritized using our web requirements priority index.

Determine requirements for each of the following stakeholders:

- **Executive Management**
- Marketing Department
- Sales Department
- Customer Service

- Product Development
- Operations Department
- Finance Department
- Human Resources

STEP 2

Prioritize Your Requirements



Action Item

Use our Website Requirements Priority Index to conduct a structured evaluation of the website requirements that you obtained when completing the website requirements document.



It's important to customize this template according to your needs. In order to do so, you need to review the ranking criteria and ensure that it aligns with your business priorities.

The default sections are:

- Strategic Fit
- Business Value
- Feasibility





Analyze Your Needs 3

Prepare For Launch

4

Launch Your New Site

5

Refine Your Efforts

6

ın Your

Design Your Website

STEP 3

Create a Feature Release Schedule

Timelines



Use our <u>Website Roadmap Template</u> (Agile Release Schedule tab) to document requirements, priority level and release dates of planned features on a project-by-project basis.



Are future releases of a website absolutely required?

- Most websites go through a natural evolution designed to provide new features and to stimulate engagement
- The Agile Release Schedule was designed to help you keep track of both hard and soft requirements
- If you don't plan to update your website, simply skip this step

STEP 4

Build a Wireframe



Action Item

Create a basic illustration of the structure and components of your web page. Use the <u>Ultimate Guide to Website</u> Wireframing to get started.



What's the difference between a wireframe, mock-up & prototype?

- **Wireframes** are generally the first step in the process.
- Mock-ups focus on the visual design elements of the site. These are often very close or identical to the actual final site design.
- Prototypes are semi-functional webpage layouts that serve to give a higher-fidelity preview of the actual site being built. This stage precedes programming the business logic of the site.

During this Step, you need to consider **navigation & content**.





Analyze Your Needs 3

Prepare For Launch

4

Launch Your New Site

5

Refine Your Efforts

6

Design Your Website

STEP 5

Map Your Process



Action Item

Map your process based on your objectives. If one of your objectives is lead generation, use our **Lead Acquisition Model** to outline and communicate your lead gen & nurturing process.

Timelines



This is a great time to consider the use of landing pages. Landing pages are a good option for gated content because:

- they allow you to capture your prospects' information
- they encourage social sharing
- they provide the opportunity for prospects to "opt-in" to future communications from you.



Helpful Hint – If you don't already have a marketing platform, get approval with our **Marketing Automation Business Case**.

STEP 6

Determine Your Website Budget



Action Item

Use our **Website Design Budget Template** to help you document the costs associated with your website redesign project.



Your Website Design Budget might include items like:

- **Development:** CMS, Graphic Design, Flash, Photography, Coding, Domain Name Registration, Images, Royalties, etc.
- Integration: Demand Generation, CRM System, Online Ads, Analytics, Hosting, etc.
- Testing & Updates: SEO Consulting, Training, Live Testing, Maintenance, etc.





Analyze Your Needs 3

Design Your Website

Prepare For Launch

4

Launch Your New Site

5

Refine Your Efforts

6

STEP 7

Prepare an RFP for Web Design

Timelines



Action Item

Use our **Website Design RFP Template** to create a request for proposal (RFP) for website design services.



Key sections include:

- Company Information
- Statement of Work
- Proposal Submission Procedure
- Scope of Work & Business Requirements
- Vendor Information
- Estimated Budget & Resources Required

STEP 8

Select the Right Website Design Firm



Action Item

Use our **Website Vendor Selection Tool** to assess, score and compare website vendors during the selection process.



Areas of evaluation include:

- Experience, Skill-Set & Approach
- Site Architecture, Technology & Design
- Pricing, Deployment & Training
- Referrals & Sample Sites





5 6 4 Refine Your Set Goals & Prepare For Launch Your Efforts Timelines New Site **Design Your** Website

STEP 9

Introduction

Draft a Creative Brief



Action Item

Now that you have selected the right website design firm, use our Creative Brief Template to communicate the strategic direction for creative development.



Sections of this document include:

Background

Awareness Levels

Corporate Facts

- Key Messaging
- Overall Assignment
- Measurement

Facts & Benefits

- Execution

Overview & Situation

- Timelines
- Customer Profile
- Budget & Resources



Helpful Hint – From this point forward, your web firm will own the process and you will focus on preparing for the launch.





18

STAGE 4 Prepare For Launch

Don't just sit back while the website design firm that you selected builds your website. Use this time wisely to prepare for the upcoming website launch.

During this stage, you will complete the following exercises:



STEP 1: Map Your Existing Pages

STEP 2: Create Content for New Pages

STEP 3: Create an SEO Strategy

STEP 4: Create a Social Media Strategy

STEP 5: Create a Content Marketing Strategy

STEP 6: Create an Online Advertising Strategy

STEP 7: Build Landing Pages

STEP 8: Integrate Technology



Introduction Set Goals & Timelines

Analyze Yo Needs Design Your Website

3

4

Launch Your New Site

5

Refine Your Efforts

6

Prepare For Launch

STEP 1

Map Your Existing Pages



Action Item

Use our <u>Website Page Map Template</u> to create a diagram of your website and identify "Indexed Pages" and "New Pages" in the space provided.



Next, send the completed document to your website developer so that he/she can ensure a smooth transition to the new site. Important terminology:

- Site Map a sitemap is a list of pages of a website accessible to crawlers or users.
- Redirects URL redirection is a World Wide Web technique for making a web page available under more than one URL address.

The goal here is to identify where pages should be redirected to.

STEP 2

Create Content for New Pages



Action Item

Now that you know where your existing web pages will be redirected, it's time to start creating content for your new website. Use our **Content Marketing Contributors Database** to keep track of your content contributors.



Your goal is to fill in the gaps with content that includes:

- Copy for new pages
- Copy for redirected pages
- Graphics (images, diagrams, pictures, etc.)
- Videos (orientation, demo, etc.)
- Other (about us, resources, product info, etc.)





Introduction Set Goals & Timelines

Analyze Your Needs Design Your Website

3

4

Launch Your New Site

5

Refine Your Efforts

6

Prepare For Launch

STEP 3

Create an SEO Strategy



Action Item

Use the <u>SEO Maturity Assessment</u> to help you measure your organization's search engine optimization maturity, and our <u>SEO Keyword Database</u> to gather information on the keywords that you are targeting.



A few important things to consider when it comes to SEO include:

- Keywords
- Link Building (directories, guest posts, content, etc.)
- On Page (Title Tags, Meta Tags, Heading Tags, Image Tags, Alt Tags)

STEP 4

Create a Social Media Strategy



Action Item

Use our <u>Social Media Marketing Plan</u> to create a results-oriented social media marketing program that supports the objectives of your website redesign project.



It's important that your site is easy to find. However, it's critical that your site can be shared easily. If you haven't already done so, review our Social Media Marketing Plan to learn more about how you can encourage social sharing.

If you're in a pinch for time, you can start by adding social widgets to your website, blog and landing pages.



Helpful Hint – Blogs are great for SEO. If you don't already have a blog, you should definitely consider starting one!





Introduction Set Goals & Timelines

Design Your Website

3

Launch Your New Site

5

Refine Your Efforts

6

Prepare For Launch

STEP 5

Create a Content Marketing Strategy



Action Item

Use our Content Marketing Plan to create a results-oriented content marketing program that supports the objectives of your website redesign project.



There are many different types of content and you don't have to use all of them. The following is a list of content types that are popular among marketers today:

Videos

- ROI Calculators
- Infographics
- Pricing Guides

eBooks

Press Releases

Articles

- Webinars
- How-To Guides
- Newsletters
- Case Studies
- White Papers

STEP 6

Create an Online Advertising Strategy



Use our **Online Advertising Plan Template** to outline key information about the ads that you will be running. This should include keywords and ad copy for the different ads that you are testing.



A few important things to consider when it comes to online ads include:

- Outline your goals
- Understand ads from your audience's perspective
- Have a clear call to action
- Test different ads
- Measure your results
- Don't forget to retarget your ads





Introduction Set Goals & Timelines

Analyze Your Needs Design Your Website

3

4

Prepare For Launch

Launch Your New Site

5

6

Refine Your Efforts

STEP 7

Build Landing Pages



Action Item

Use our **Lead Generation Playbook** to get a better understanding of how you can start using landing pages to generate high quality leads for your sales team.



A few important things to consider when it comes to landing pages:

- Keep it short don't add too much text
- Keep it simple provide a brief description and a bulleted list
- Keep it clear the offer should be easy to understand and valuable
- Keep it consistent remove the navigation bar and add a lead form

STEP 8

Integrate Technology



Action Item

By now, you will have selected the systems and technology required to achieve your objectives. This step involves setting up and testing the integrations to ensure that all systems are working properly when your new website is launched.

If you have decided to integrate new technology, such as marketing automation, you might want to consider asking an objective 3rd party for advice on process, best practices and/or how to get the most out of your new investment.





STAGE 5 Launch Your New Site

By now, the website design firm that you selected should be finished building your new website and should be adequately prepared for the website launch after completing the action steps outlined in **Stage 4**.

During this stage, you will conduct the following exercises:



STEP 1: Formalize the Governance Structure

STEP 2: Review Policies & Guidelines

STEP 3: Execute the Launch Checklist

STEP 4: Market Your Website

STEP 5: Measure the Results



Introduction Set Goals & Timelines

Analyze Your

Design Your Website

3

Prepare For Launch

4

Launch Your
New Site

Refine Your Efforts

6

STEP 1

Formalize the Governance Structure



Use our **Website Governance Document** to create a website governance document that will help you govern your corporate website.



At the highest level, this Microsoft Word document is intended to address the following:

- Governance Goals
- Governance Structure
- Governance Process
- Website Roles & Responsibilities

- Implementation Timeline
- Website Training
- Website Funding Model
- Website Metrics
- Continuous Improvement

STEP 2

Review Policies & Guidelines



Be sure to update the policies and guidelines on your website. If you don't currently have policies and guidelines in place, use our policy templates as a starting point.



Demand Metric has the following templates available:

- Privacy Policy Template
- Terms of Use Policy Template
- Blog Policy Template
- Social Media Policy & Guidelines Template





Analyze Your Needs Design Your Website

3

Prepare For Launch

4

Launch Your New Site Refine Your
Efforts

STEP 3

Execute the Launch Checklist



Use our <u>Website Launch Checklist</u> to help ensure that nothing is overlooked when you test and launch your new website.

Timelines



We have identified over 30 tasks that should be completed before launching your new website.

That being said, we realize that every website redesign is unique so be sure to add and/or remove tasks as required.

STEP 4

Market Your Website



Action Item

Create a plan to market your new website. If you don't already have a marketing communications plan, use our **Marketing Communications Plan** to get started!



Key elements of the Marketing Communications Plan include:

- Strategy & Environment
- Messages

Audience

Channels

Objectives

Budget & Measurement





Design Your Website

3

Prepare For Launch

4

5

Refine Your Efforts

6

Launch Your New Site

STEP 5

Measure the Results



Use our <u>Website Program Metrics Dashboard</u> to define, track, and report on your key website program metrics and key performance indicators (KPIs).

Timelines



A few possible KPIs include:

- Traffic Sources
- Pages/Visit

Top Pages

- Bounce Rate
- Unique Visitors
- Time on Site







STAGE 6 Refine Your Efforts

Despite what you might think, your website redesign project isn't over when you launch your new site. Over the past few years, many companies have deployed a more agile website development process that involves iterative & incremental development, allowing them to add requirements on an ongoing basis..

During this stage, you will conduct the following exercises:



STEP 1: Report Bugs, Features & Support

STEP 2: Solicit User Feedback

STEP 3: Evaluate Website Quarterly



Design Your Website

3

Prepare For

4

Launch Your New Site

5

Refine Your Efforts

STEP 1

Report Bugs, Features & Support

Timelines



Action Item

Use our Website Reporting Template to keep track of website bugs, website feature requests and website support requests.



A few items to track using this template include:

Type

Priority

Project

Issue

Assign To

Status

Stage

STEP 2

Solicit User Feedback



Action Item

Use our Website Usage Survey Template to capture feedback from your website users. Use the data that you collect to feed your website roadmap and your website reporting template.



You should consider hosting your survey across a variety of channels at different stages of interaction and at different touch points. For example:

- Website: Customer Satisfaction Survey Pop Up
- Email: Auto-Responder Following Purchase
- Blog: Embedded Survey with Blog Post and Call-To-Action
- LinkedIn Poll: What new features do you want to see?
- Etc.





Introduction Set Goals & Timelines

Design Your Website

3

Prepare For

4

Launch Your New Site

5

Refine Your

Efforts

STEP 3

Evaluate Website Quarterly



Continue to evaluate your website on a quarterly basis to ensure that you're on track to meet your goals & objectives.



Conduct an audit of your website by reviewing the following tools & templates:

- **Website Program Strategy Scorecard**
- **Website Program Metrics Dashboard**
- **Website Program Maturity Assessment**
- **Website ROI Calculator**

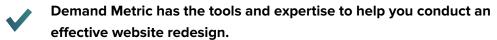


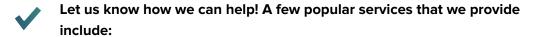


Conclusion









- Assistance with using any of the tools referenced in this playbook.
- Providing hands-on assistance to accelerate achieving your website goals.
- Personalized systems and infrastructure workshops.

About ANA



The **ANA** (Association of National Advertisers) makes a difference for individuals, brands, and the industry by driving growth, advancing the interests of marketers and promoting and protecting the well-being of the marketing community.

Founded in 1910, the ANA provides leadership that advances marketing excellence and shapes the future of the industry. The ANA's membership includes more than 1,000 companies with 15,000 brands that collectively spend or support more than \$400 billion in marketing and advertising annually. The membership is comprised of more than 750 client-side marketers and 300 associate members, which include leading agencies, law firms, suppliers, consultants, and vendors.

Further enriching the ecosystem is the work of the nonprofit ANA Educational Foundation (AEF), which has the mission of enhancing the understanding of advertising and marketing within the academic and marketing communities.

About Demand Metric



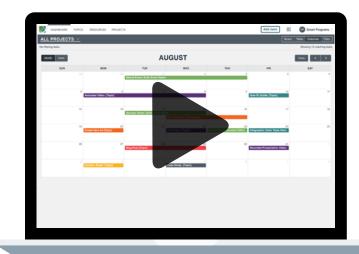
Demand Metric helps Marketing teams get stuff done with practical tools, training, and a simple, modern platform for managing work.

Our analysts identify best practices from fast-growing companies and build Playbooks & Toolkits, Guides & Reports, Training Courses, and Project Templates to help you optimize your processes, add structure to your department, and get your team punching above their weight class.

Manage your work visually with our easy-to-use platform, built for small marketing teams by design. See what your team is working on at a glance so you can spend less time managing projects and more time knocking stuff off your list.

Through strategic partnerships with the AMA, ANA, and AIPMM, our 1,000+ time-saving tools & resources have become the industry standard. Don't start from scratch!

Sign up for a free trial at www.demandmetric.com







© Demand Metric Research Corporation.

All Rights Reserved.

www.demandmetric.com





