Website Redesign Methodology:

a proven approach and premium tool-kit

Follow this **simple**, step-by-step, methodology to complete a **website redesign** that supports your company’s **values** and **vision**.
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 methodology 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 consulting methodology:

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

1. **Identify** your website requirements and exploit new opportunities.
2. **Support** your website developer during the redesign project and stay organized.
3. **Achieve** your website goals and objectives.

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Stage 01 – Project Charter, Strategy Scorecard, Website Roadmap

Stage 02 – Assessment, Content Audit, Survey, Competitive Analysis, GAP Analysis

Stage 03 – Requirements, Priority Index, Feature Release, Budget, RFP, Creative Brief

Stage 04 – Page Mapping, SEO, Social, Content, Online Ads

Stage 05 – Governance Document, Policies, Launch Checklist, Reporting Tool, Dashboard

Stage 06 – Reporting, User Survey, Roadmap, Dashboard
STAGE 01 – 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:

- Build a Project Charter
- Outline Goals & Objectives
- Create a Project Roadmap
Plan

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 Business Case Template is another great resource for helping to secure buy-in & get approval
STEP 2 – Document Your Objectives

✔ Action Item – use our Website Program Strategy Scorecard to outline your high-level goals, objectives, KPIs and target timeframes 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
STEP 3 – Create a Project Roadmap

✓ Action Item – use our Website Roadmap Template (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
- Design
- Development
- Pre-Launch Prep
- Launch
- Training
- Refinement
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:

- Audit your existing website program
- Understand your existing audience
- Analyze your competitors
- Research & Evaluate Technology
- Conduct a GAP Analysis
STEP 1 – Audit Your Current Situation

✔ Action Item – use the [Website Program Maturity Assessment](#) to evaluate your organization’s website program maturity. Based on the results of this assessment, 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

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STEP 2 – Understand Your Audience

✓ **Action Item** – use the [Website Usage Survey Template](#) 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.
STEP 3 – Review Your Competitors Websites

Action Item – use the **Competitive Website Analysis Template** 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 competitor’s 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 assess your wants and needs:

<table>
<thead>
<tr>
<th>Technology</th>
<th>Considerations</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytics</td>
<td>Free? Paid?</td>
<td>Google Analytics, Omniture</td>
</tr>
<tr>
<td>Social Media</td>
<td>Blogs? Communities? Networks? Etc.</td>
<td><a href="#">Social Media Methodology</a></td>
</tr>
<tr>
<td>Demand Generation</td>
<td>Lead Nurturing? Marketing Automation?</td>
<td><a href="#">Demand Generation Toolkit</a></td>
</tr>
<tr>
<td>Mobile</td>
<td>End Users? Cost/Benefit?</td>
<td><a href="#">Mobile Marketing Toolkit</a></td>
</tr>
</tbody>
</table>
Analyze

04 Prepare
02 Analyze
03 Design
05 Launch
06 Refine

STEP 5 – Conduct a GAP Analysis

✓ Action Item – use our Website GAP Analysis Template 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.
<table>
<thead>
<tr>
<th>Design</th>
<th>01 Plan</th>
<th>04 Prepare</th>
</tr>
</thead>
<tbody>
<tr>
<td>02 Analyze</td>
<td>05 Launch</td>
<td></td>
</tr>
<tr>
<td>03 Design</td>
<td>06 Refine</td>
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</tr>
</tbody>
</table>

**STAGE 03 – 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 to select the right website design firm for the job.

During this stage, you will conduct the following exercises:

- Document & prioritize your website requirements
- Create a website feature release schedule
- Build a website wireframe
- Map your process
- Determine your budget & select the right firm based on your requirements
STEP 1 – Determine Your Requirements

✓ **Action Item** – use our [Website Requirements Document Template](#) to help you document business requirements for your website.

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
STEP 3 – Create a Feature Release Schedule

 ✓ **Action Item** – use our *Website Roadmap Template* (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.

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**.
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 Template](#) to outline and communicate your lead gen & nurturing process.

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.
STEP 7 – Prepare an RFP for Web Design

- **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 Template 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

Download
STEP 9 – 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
- Corporate Facts
- Overall Assignment
- Facts & Benefits
- Overview & Situation
- Customer Profile
- Awareness Levels
- Key Messaging
- Measurement
- Execution
- Timelines
- Budget & Resources

**Helpful Hint** – From this point forward, your web firm will own the process and you will focus on preparing for the launch.
STAGE 04 – 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:

- Map your existing pages
- Create an Online Marketing Strategy
- Build Landing Pages
- Integrate Technology
Prepare

STEP 1 – Map Your Existing Pages

✓ Action Item – use our Website Page Map Template 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 web site 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.)
STEP 3 – Create an SEO Strategy

✔ **Action Item** – use the [SEO Maturity Assessment](#) to help you measure your organization's search engine optimization maturity and our [SEO Keyword Database](#) 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)

**Helpful Hint** – For background information read our Executive Summary, “[Simplifying Search Engine Optimization](#).”
STEP 4 – Create a Social Media Strategy

✓ **Action Item** – Use our [Social Media Marketing Plan Methodology](#) 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 Methodology 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!
STEP 5 – Create a Content Marketing Strategy

✓ **Action Item** – Use our [Content Marketing Plan Methodology](#) 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
- Infographics
- eBooks
- Articles
- How-To Guides
- Case Studies
- ROI Calculators
- Pricing Guides
- Press Releases
- Webinars
- Newsletters
- White Papers
STEP 6 – Create an Online Advertising Strategy

✓ **Action Item** – 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 audiences perspective
- Have a clear call to action
- Test different ads
- Measure your results
- Don’t forget to retarget your ads
STEP 7 – Build Landing Pages

✓ Action Item – use our Lead Generation and Automation research section 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.

Click Here to schedule a call with an Analyst.
STAGE 05 – 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 04.

During this stage, you will conduct the following exercises:

- Formalize a website governance structure
- Review policies and guidelines
- Execute the launch checklist
- Measure the results
STEP 1 – Formalize the Governance Structure

✓ Action Item – use our Website Governance Template 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

✓ Action Item – 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 Template
- Blog Policy Template
- Social Media Policy & Guidelines Template
STEP 3 – Execute the Launch Checklist

✓ Action Item – use our Website Launch Checklist to help ensure that nothing is overlooked when you test and launch your new website.

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.

If you have any questions, Click Here to talk with an Analyst.
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 [MarCom Plan Methodology](#) to get started!

Key elements of the MarCom Plan include:

- Strategy & Environment
- Audience
- Objectives
- Messages
- Channels
- Budget & Measurement
STEP 5 – Measure the Results

✓ Action Item – use our Website Program Metrics Dashboard to define, track, and report on your key website program metrics and key performance indicators (KPIs).

A few possible KPIs include:

- Traffic Sources
- Top Pages
- Unique Visitors
- Pages/Visit
- Bounce Rate
- Time on Site
STAGE 06 – 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:

- Report website bugs, feature requests and support requests
- Solicit user feedback
- Conduct a quarterly website audit
STEP 1 – Report Bugs, Features & Support

✓ 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
- Project
- Assign To
- Stage
- Priority
- Issue
- Status
STEP 2 – Solicit User Feedback

✓ Action Item – use our Website User Survey Template to capture feedback from your website users. Use the data that you collect to feed your website roadmap and your website reporting tool.

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.
STEP 3 – Evaluate Website Quarterly

✓ Action Item – 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
- All Website Development Templates
At the end of any business process, it’s always a good idea to review it and identify areas for improvement.

Demand Metric has the tools and expertise to help you conduct an effective website redesign.

Let us know how we can help! A few popular services that we provide include:

» Assist with using any of the tools referenced in this methodology.

» Provide hands-on assistance to accelerate achieving your website goals.

» Personalized systems and infrastructure workshop.

To learn more, simply contact Demand Metric: info@demandmetric.com