

Master the Web Design Process



B2B Website Design



Mastering Your Website Build Project

'All things are created twice. Vision is the first creation.

... Make sure that the blueprint, the first creation, is really what you want, that you have thought everything through.

Then you put it into bricks and mortar...

You begin with the end in mind"

Steven R Covey



Contents

Mastering A Website Build Project.....	3
How to get it right.....	3
Start with a chemistry session.....	4
The Five Phases of Website Design and Build.....	5
Facilitation.....	6
Where your budget should go.....	7
Introducing the Five Phases of the Website Re-design Project.....	8
Your Website Project Phase by Phase.....	9
Phase 1a – Discovery.....	13
Phase 1b – Audit.....	18
Phase 2a – Strategy.....	19
Phase 2b – Architecture.....	21
Phase 3a – Content.....	24
Phase 3b – Design.....	27
Phase 4a – Build.....	29
Phase 4b – Test & launch.....	30
Phase 5 – Review and next steps.....	31

Mastering a Website Build Project

How to get it right

A website build project done well, delivered on-time and within budget can be a game-changer for your business, your brand, and your customers. However, selecting a website partner can be difficult. It is a large commitment in terms of time, energy, resource, and cash.



The biggest problem with website projects is balancing the buyer's need for clarity of budget, with the web designer's need to understand the scope of the project well enough to quote accurately.

At the start of the journey, both the buyer and the seller often have little idea of what is required to significantly improve website performance, but the buyer often needs a budget figure for the project.

This presents a real problem for the website designer. No house builder would quote for a house build without an architect's drawing, proper specifications, a quantity surveyor's report (detailing the materials required), and a project plan. Yet too often, website companies leap in and provide a quotation without first:

- Understanding the client's challenges well enough
- Taking the time to check the digital data and the facts properly
- Applying experience and quality thinking to design the solution required
- Agreeing on a detailed specification for the work
- Understanding what content needs to be created
- Understanding the desired business outcomes.

Getting to a detailed specification requires business acumen, digital marketing experience, strategic marketing thinking, and project management skills. The technical and design skills required to build a website are far more widely available than the business skills required to know what to build, and why.

Start with a chemistry session

Conduct a no-commitment chemistry session to explore the scope of the project and your budget expectations with your potential website partner.

You should be looking for somebody who challenges your thinking. You need to see evidence of value being added.

If you can agree that your budget broadly aligns with your expectations, you may both decide to move forward – if not, back out gracefully and respectfully explain why.

If you do move forward, do so on the explicit understanding that – unless you have detailed blueprints for your new website already - neither party knows exactly what you need at the outset. There is more work to do to establish that.



The Five Phases of Website Design and Build

This will be a journey of discovery. The journey will typically be broken down into five phases.

Phase 1 - Discovery and audit

Phase 2 - Strategy, structure, and functionality

Phase 3 - Content and design

Phase 4 - Build, test, and launch

Phase 5 - Review and next steps

Take one step at a time.

Each step is undertaken taken on satisfactory completion of the last. – establishing that the initial budget expectation is still realistic (or not) as you go.

Each phase has value and specific outcomes – each is worth paying for.

Make it possible for either party to walk away at any point, so the risk is limited on both sides. If at any point, either decide that the project would be best completed by somebody else, you both have that choice.

As you work through this process, expect your thinking and your assumptions to be challenged. It is highly probable that your understanding of your requirements will evolve significantly as researchers and strategists work with you to discover:

- The facts about your website and your website visitors
- what your competitors are doing
- The potential for improving traffic quality and volume to your website
- How re-designing your user journeys will increase results
- How to create more compelling propositions for your visitors



Facilitation

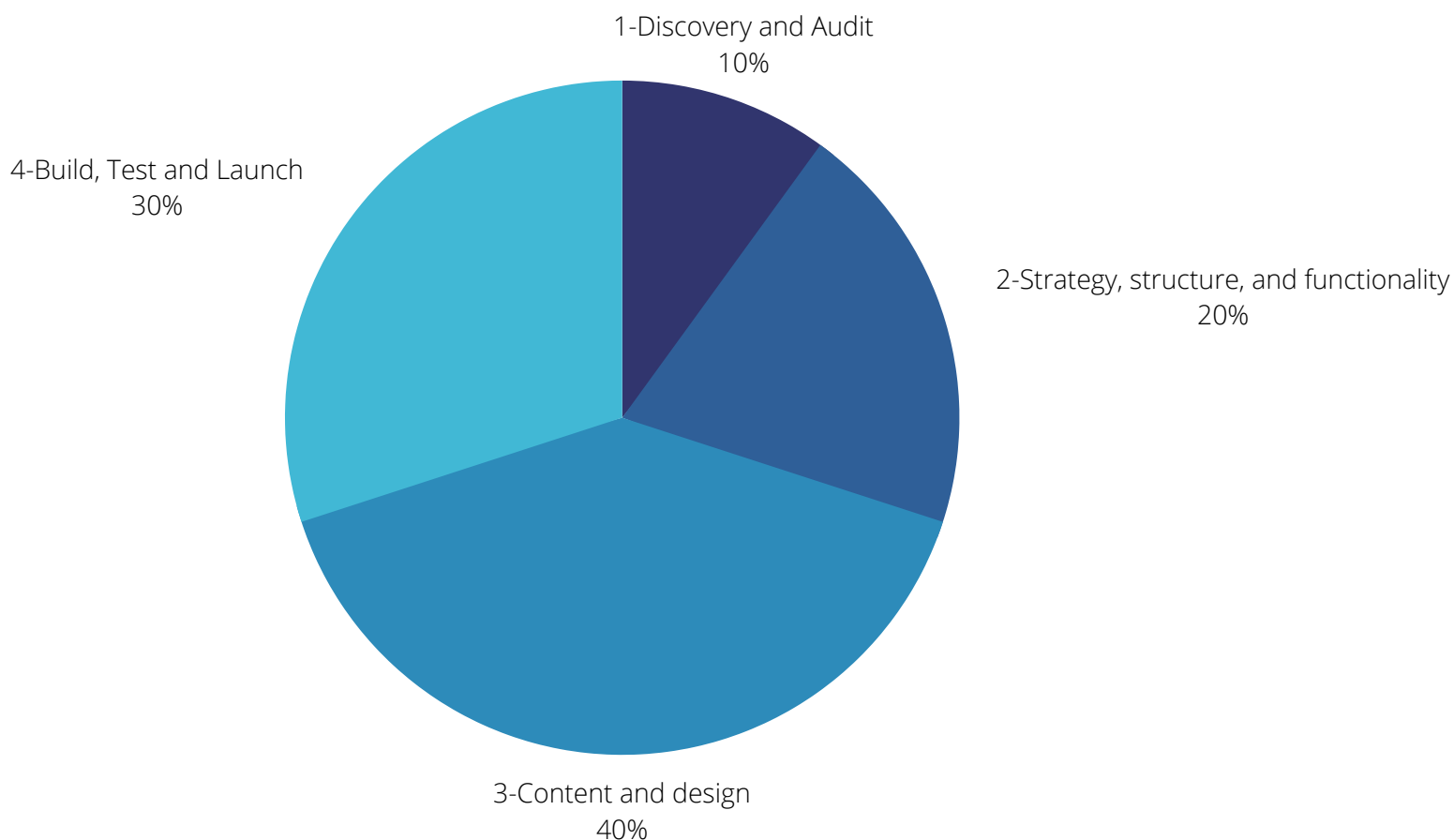
It is very helpful to bring in third parties to facilitate workshop sessions. Without a facilitator, it is difficult to avoid the senior people dictating the answers to the questions rather than engaging the team and getting multiple perspectives on the issues.

Naturally, Intergage provides these services for its clients, but this white paper is designed to be of value to you whether or not you have selected Intergage as your website partner.



Where Your Budget Should Go

In most cases, we believe your budget is best allocated over the first four (of the five) phases as follows:



The final, fifth phase is the review and next steps phase, for which your only investment is time.

Designing and building a website is only a part of the process. The magic happens in deciding what to build and why. This is where success lives.

Inexperienced marketing professionals and even agencies often jump straight to the design phase of a website build. This is a huge mistake.

Prioritising design over strategy may deliver an attractive website in the short term, but the price paid for that folly is inevitably frustration.

In the worst-case scenario, frustrated visitors will leave your new site early because they cannot see what is in it for them, while management ends up frustrated that the beautiful new site performs worse than the original did.

The Intergage 5 Step website build process puts strategy first. Every time.

Allow us to Introduce the Five Phases of the Website Re-design Project...

The five phases of the project move you through the process of understanding, strategy, specification, planning, design, and building the website as smoothly as possible.

For the purposes of this document, we will assume you already have an ageing website and want a new, improved replacement.

Outside-in thinking

You now need somebody to help you look at your business objectively, from the outside in.

Trying to look at your own business from the inside out is like trying to read the label on a bottle from the inside.

You need frank, respectful feedback, coupled with research and reporting at every stage.

At each stage you will need to know:

- Where you will be asked to invest (and how much)
- Who is responsible?
- Where you will be asked for input, sign off, and approval
- When payments become due

We designed this process to help our customers understand the journey and get clarity on these issues.

We are happy to share it with you and if you need further clarity on any issue, please get in touch.



Your Website Project Phase-by-Phase

Phase One Discovery and Audit	Outcomes
1a - Discovery	<p>Understanding your business, your goals, and your unique challenges</p> <ul style="list-style-type: none">• Project starting point established• Website project goals/time frames• Roles and responsibilities agreed• Project readiness checklists completed• Project scope and budget / realistic expectation established
1b – Audit (10% of budget)	<p>Document current website strengths & weaknesses and benchmark performance in terms of:</p> <ul style="list-style-type: none">• Most / least visited pages• Analysis of traffic, sources and trends• Conversion metrics• Organic search rankings• Paid search• Social media impact• Competitor audit <p>Optional audit elements where additional budget permits:</p> <ul style="list-style-type: none">• 3rd party UX testing of existing site• 3rd party competitor site UX testing

Phase Two Strategy & Architecture	Outcomes
2a – Strategy Workshop	<p>A study of your audience, their needs and how you differentiate your offering and position your brand for maximum impact.</p> <ul style="list-style-type: none"> • Perfect target company/organisation • Decision-making unit • Personas • Buying process • Competitor analysis • One-page plan • Creating sharper, more compelling sales messages <p>Brief for site architect</p>
2b - Architecture	<p>A process of defining your new website:</p> <ul style="list-style-type: none"> • Define and document the site map • Search engine considerations • Identify key user journeys • Identify high-impact pages • Identify bespoke page elements & document functionality • Identify 3rd party tools to be used • Define high-impact pages and associated user journeys & produce wireframes for these. • Recommend technology platform

Phase Three Content & Design	Outcomes
3a - Content	<p>From the defined critical user journeys, we will establish the content assets required:</p> <ul style="list-style-type: none"> • Copy • Photography / Imagery • Video • Iconography • Infographics • Downloadable resources (white papers etc.) • Conduct asset gap analysis • Quality Assessment of assets • Asset production plan • Checklist and assemble assets • Proofread copy • Brief designers <p><i>Note: At this stage we may identify a need for a more structured brand audit, which in turn may be subject to additional investment.</i></p>
3b - Design	<ul style="list-style-type: none"> ·Wireframes for high-impact pages ·Design home page visuals ·Design visuals for high-impact pages ·Agreed designs for all high-impact pages and key components ·Agreed style for template pages and page elements <p><i>Note: At this stage we may identify a need for additional branding design work, which in turn may be subject to additional investment.</i></p>

Phase Four Build, Test & Launch	Outcomes
4a - Build	<ul style="list-style-type: none"> • Content management system installed and configured • Website pages built, website page styling and content formatted <p><i>Optional (subject to budget)</i></p> <ul style="list-style-type: none"> • Bespoke page elements built • Integrations implemented
4b – Test & launch	<ul style="list-style-type: none"> • QA • Internal Testing (Intergage and client) • Amendments based on feedback <p><i>Optional (subject to budget)</i></p> <ul style="list-style-type: none"> • 3rd party UX testing and iterations • Site approved for launch • Launch and go-live checks
Phase Five	Outcomes
Review and Next Steps	<ul style="list-style-type: none"> • Training • Your feedback • Performance review date established • Case Study Production • Press release (optional)

Now, let us discuss each of the five phases in a little more depth...

Your Website Project Phase by Phase

What to expect and how to prepare

Phase 1a – Discovery

It's time to prepare. Here's a checklist an Intergage consultant would run through.

Your website partner needs to understand your business, project success criteria, and the purpose of the website.

We will prepare you for this questioning in advance so that we can be as productive as possible with your time. Broadly these questions break down into the following headings.

Understanding your business

- Purpose
- History and growth to date
- Growth goals
- Plans to achieve these goals
- Challenges you face

Establishing the project success criteria

- What is driving the project for a new website?
- Why now?
- Are there specific deadlines for delivering this project?
- What does project success look like?



Intended user engagement

As a result of visiting the site, you want users to:

- Email you, or contact you through a web form
- Call
- Request a call back
- Engage via chat
- Engage with a bot
- Download something
- Buy something online
- Share with friends
- Subscribe to a service or information feed

How will you measure success?

- What KPIs can you measure, and will you need to measure?
- What tools might you need to measure the performance?
- How will you report on the performance?

Establishing the project starting point.

- Is there a published marketing plan?
- Is there an annual marketing budget?
- Is there an established budget for this project?
- How much work have you already done in defining your requirements?
- How much help do you need to define or refine your requirements?
- What will the biggest challenge(s) be?
- Who are the stakeholders?
- Who owns this project internally?
- Who signs off each stage of the project?

Understanding your sales and marketing operation

- What is your sales and marketing infrastructure (people, roles, sites)?
- What do they want the site to do for them?
- What is your outbound lead generation process? (Is there a sales playbook? How does the website help?)
- How are inbound leads generated? (What does that currently cost?)
- How much do leads cost to generate?
- How are leads qualified?
- What are your average order values and current conversion metrics?
- What are your biggest sales / marketing challenges?
- What does a customer cost to acquire?
- What is the average lifetime value of a customer?
- Is there a documented account management methodology?

Understanding your market

- How many markets do you operate in?
- Who are your customers in those markets?
- What is their relative importance to you now and in the future?
- Are you the market leader or a challenger in these markets?
- How do you segment these markets?
- Are you creating one website to address all the markets or separate websites for each?
- Whom do you see as competition in each market (and who will review their websites)?



Ask yourself
"How will your new website help?"
"What does success look like?"

Understanding your Sales and Marketing Technology


What sales and marketing systems and tools do you use (or plan to use)?

<u>Tool</u>	<i>Today</i>	<i>Tomorrow</i>
Website Content Management		
Blog		
Landing Pages		
CRM / Contact Management		
Quotation Generation		
eMail		
Marketing Automation		
Customer Service/Helpdesk		
Live Chat		
Bot Technology		
Social Media Management		
Advertising Management Systems and Tracking		
IP Lookup		
Other Key Technologies		
Website Integrations with 3rd Party Tools		

Project Scope

At this stage, how big do we believe this website will be in terms of:

- Web pages (we will break these down into categories)
- News Articles (how many news articles exist and how many will you bring into the new site?)
- Blog Pages (Are we transferring existing blog content from your existing site and if so, how much of it?)
- Product / Service pages (will there be detail such as video, animation, specifications, and downloads?)
- Landing pages (campaign-specific pages not appearing on the menu or site map)?
- Information pages (about us etc.) / Utility Pages (Site maps, Ts & Cs etc.)
- How much of the current website content are we recycling?
- Where do we want to invest the most design time (high-impact pages)?
- What bespoke elements will need to be developed?
- What are the other factors that need to be considered (e.g., Data Privacy, GDPR policies and compliance, hosting arrangements etc.)?



“Operations keeps the lights on, strategy provides the light at the end of the tunnel, but project management is the train engine that moves the organisation forward.”

– Joy Gumz

Phase 1b - Audit

The audit is the process of establishing the facts about your existing website* and its performance before going on to develop something which will better meet your needs. Most businesses need a third party to assist with this process. It is important to understand what currently works (and what does not) before drawing a line in the sand and making plans to improve upon that performance.

The idea of this phase is to look in detail at current site analytics to establish:

- What works well and what doesn't – the focus for the new site is to enhance what works and remove any elements that deliver little or no value
- The most effective traffic channels (such as Google search) to ensure these are protected from the outset
- How paid search campaigns are working (ensuring key landing pages are preserved/improved).
- Which are the most important pages from a search and user journey perspective and what content is most effective in generating results
- Technical data about the devices our customers use and the website's speed
- Visitor demographics (age, gender, and geography) that can inform the next stage of the process

Your Auditor should produce a report to illustrate these findings and:

- Website traffic trends year on year
- Where that traffic comes from (year on year)
- How well your site shows up on search engines like Google
- What people typed into search engines to find your website
- Most / least popular pages
- Top user journeys (how users flow through the site)
- User engagement (where time is spent on-site, where traffic leaves the site, and an analysis of new v returning visitors)
- Crucially, how you compare to your competitors and what we can learn from their successes

*Access to Google Analytics and Google Search Console is required.

Phase 2a – Strategy

Preparation

- How many customers do you have?
- What sort of businesses are they?
- How do you categorise them?
- What is your typical split between new business and existing business? (What should it be?)
- What does the typical decision-making unit look like?
- Have you created marketing personas?
- What feedback do you solicit from your customers?
- How will the website serve your customers?

Once we are aligned, each member of the group should independently complete an exercise that leads them inside their potential customers' heads.

The objective is to see with the customers' eyes:

- The core problem the customer faces
- Other key challenges they must resolve
- Why the problem has not been solved already
- The trigger events that cause the problem to be prioritised
- What they search for online
- Their alternative potential solutions (your competitors)
- Makeshift solutions
- Other alternatives

The sales messaging workshop

Your strategy session should start with a sales messaging workshop - involving all your key stakeholders - designed to reveal the real needs and desires of your customers and how you can position your business with an irresistible proposition. You need to be all on the same page about your:

- Vision
- Mission / purpose
- Values
- Brand archetype
- Your perfect customer
- The buyer/buying team
- Your customers' buying processes
- Your competitors

Next, your team should be asked to consider how your company can help your customer by:

- Looking at the gaps in the market
- Examining value statements
- Considering what you do
- Understanding unfair advantages and non-advantages

Armed with these Insights you can move on to Consider:

- What the customer needs to know about you
- Your unique value proposition
- The first value experience
- The one thing...

You need to establish how the customer thinks, what solutions are available in the market and what makes your business unique. Then we revisit the assumptions we have made about our target market and your ideal customers before building out profiles of your buyers and their various perspectives (personas).

Now combine all the findings from the team to create one document that brings all the best ideas together before harnessing the combined thinking to examine how we can evolve new and unique messages that will:

- Differentiate your offering
- Prove irresistible to your customers
- Inform the content creation phase

Now we are ready to move on to creating the website your customers really want...

Phase 2b - Architecture

It is time to create. Armed with your strategic insights and improved messaging you can now put together the plan for the website your visitors and potential customers really want you to build for them

As a result of the insights garnered from the previous phase, we should now understand:

Your Website Audience(s)

- Who are we designing the site for?
- Why they are here and what they want
- How they got here
- What content they will find valuable
- How we expect them to engage with us and why

The goal is to create a site so easy to navigate that your customers will never even stop to think as they navigate to and engage with the content they need.

Your website architect's job is to turn theory into a plan you can understand - and ultimately a model for you to review and approve before the build starts. Wireframing tools can be used to create interactive models of websites.

Before we start to build the site, we need to be clear about its structure and the content required to create it - the information architecture.

Your site map is a visual tool that tells you how we recommend the pages on your site are organised to make life as easy as possible for your most important visitors.

We will work with you to understand how site visitors should optimally interact with your site and define clear user journeys, with a particular focus on high-impact pages – i.e., the pages that must deliver the best possible user experience as these are the pages that deliver most against your business goals.

We will use this information to create high-definition wireframes for selected high-impact pages. Your wireframe is a working model – a framework devoid of colours or design – that you can click through to understand the structure of the website. It illustrates the components of each page and how the pages link to each other. It gives you a real feeling of the user journeys we have designed for your website visitors...

There will be key areas of the site that require far more attention and design work than others. In building a house you would expect to invest more of your architect's time in designing the high-traffic, key living spaces (where users will spend the most time) such as the kitchen, lounge area and master bedroom; so it is with websites. The home page and other key pages in the journey are where the most design time and the best materials/assets are deployed (video, infographics, white papers etc.).

A more templated approach to less important areas (such as privacy policies, terms and conditions site maps) will probably suffice.

Intergage has also developed many great-looking, best-of-breed templates for common pages such as **"About us"** and **"Contact Us"** pages that you can choose to deploy to reduce costs and improve the speed of delivery.

Any bespoke or unique page components or features need to be carefully specified and documented so all parties understand exactly how they will work.

With the framework, functionality and page components specified and agreed upon, it is time to ensure you select the technology platform that provides the functionality, integrations, security, and performance you need. Intergage will help you ensure that your platform is appropriate for your needs and fully supported with business class hosting and support.

Once a website is built and handed over, we fully expect that site to be maintained and updated by your marketing team (although we are happy to provide this service if required).

Every Intergage website is built with a content management system that will allow you to add pages, blogs, news articles, and events – everything you need to update, market, and manage your site on an ongoing basis.

Typically, these platforms can also be expanded to encompass CRM, Marketing Automation, email, and more, if required.

Phase 3a - Content

All the work done to date has led you to the content and design stage of the project where 40% of the overall budget should be invested.

The wireframe informs us of the pages and content items we need to assemble. Now you have a detailed plan, you will know the precise size and scope of your website build project.

At this stage, the strategists' and architects' work is done, it's time for your project manager to step up.

Page titles, descriptions and metadata need to be crafted to ensure search engines and users alike can easily identify and find the right content.

You must evaluate what content you have, whether the quality of the assets available is sufficient for your new site and which of the new content assets you need to create.

- How much copy needs to be written (and by whom) and proofread?
- Is a comprehensive branding and content assets audit required?
- What photography, video, and animation assets are required?
- How many high-quality images may need to be sourced or created?
- Which iconography and infographics need to be designed or sourced?
- How many lead magnets / downloadable resources do we need?
- What bespoke website features need building?

It is time to reality-check the initial budget. Does it still fit? Assuming that the original budget is still adequate, we agree a collaborative project plan to assemble and create all the assets required.

It is possible that the original budget will not cover all the content you would ideally like to create. After all, the plan will have evolved throughout the process.

If so, we must ask ourselves:

- Do we need to re-visit the budget or take an alternative approach?
- Can we compromise what we create in version one of the new website and create a wish list for a second project when more budget becomes available?
- Can we build the most important and essential elements of the site now and build the rest later when more budget is available? Will you take whole or partial responsibility for the creation of additional content and assets if they are required, and if so, what impact is this likely to have on the project timelines?

Your Project Manager will now create a list of the assets required and manage the production of those assets to the agreed budget.

This can be a resource-heavy process. Sourcing. Editing and formatting images is time-consuming and creating video and animation are mini projects within the larger project. It may be necessary to allocate further budget to these items.

Copywriters must adopt your tone of voice for your corporate personality to shine through. The brand guidelines (and tone of voice guide) are relentlessly used to keep media and messaging look and feel consistent. We recommend reviewing the Intergage 'Marketing Journey' paper for guidance on this.

Each asset must be signed off individually before all the assets are assembled and checked off.



It is time to agree a brief for your Designer.

Your Project Manager will work with you to document your requirements and list references to examples of sites that work well in similar environments.

In signing off the content assets and the brief, you move to the design stage of the project.

Phase 3b - Design

With the assets assembled and the design brief, wireframes, and brand guidelines to hand, we can now move to the design elements of the project.

It is important that the website designer has a clear understanding of your strategic and tactical objectives **before** beginning the site design process. We will cover key topics including:

- The structure of the site
- Who is visiting it and why?
- The compelling messages we have designed for these visitors
- The key journey (s) we have designed for each visitor type (persona)
- The key content assets we are using and where we are using them
- How the visitor will engage with us and why
- The goals of the website /conversion metrics we will measure

Only this way can we build a beautiful site for you that works both for the website visitor and for your business. **Strategy first. Design second.**

The first page we design is the homepage. Each type of visitor must be able to locate their next click almost instantly. Everything has a purpose. Nothing is fluff. Every message is honed to its minimal best and all copy pruned to remove non-essential words.

Design visuals are produced to meet the brief. First for desktop and then mobile and tablet views of your website.

We collaborate to refine your designs to ensure that you are delighted with the look and feel before going on to illustrate how this approved design will be applied to other key pages (key landing pages and high traffic pages), page components and more templated pages.

Once you are entirely happy that your new website will be something you are proud of, we move to phase 4 – build, test, and launch.



Phase 4a - Build

With the plans, designs, and website assets (assembled, catalogued and organised) to hand, the build begins.

- Website content management software is installed and configured
- Fonts and colours are set up from brand guidelines
- Front-end developers create and perfect high impact pages
- Bespoke page elements are created and integrated into the site (including bespoke elements such as icons, calls-to-action and branded buttons where budget allows)
- Integrations are implemented and tested
- Standard web pages are constructed from Intergage components or imported from an Intergage best-of-breed template library
- Page titles, descriptions and metadata are added
- Copy, images, video, infographics, and animations are uploaded and added to the pages
- Hyperlinks are added to the copy where appropriate
- Images and graphics are tagged with descriptions to make them accessible
- Forms are added (often with links to third party CRM or marketing automation systems) and tested
- Administrators are set up and passwords issued

Your new site is created.

Phase 4b - Test & Launch

- The architect signs off on the completed site to confirm it was built to plan.
- The site is run through a comprehensive pre-launch checklist.
- The site is subjected to a final proofread – spelling, syntax and grammar are checked by an expert.
- Optionally, if budget allows, a test audience is employed to provide independent usability feedback. Feedback is collated and a report produced. Amendments and changes may be implemented based on feedback.

Now the site is ready for 'pre-live' acceptance testing.

Subject to your agreement that the site meets the previously agreed specification, the next stage is to put the website live.

Page re-directs ensure that any external links to pages on the old site are re-directed to appropriate new content, on the new site. Search engines like that.

Post go-live tests ensure the new live site is working as designed. These tests will include Google analytics, search console and third-party tools such as chatbots and live chat systems, forms, and integrations.

The website project is almost complete.

Phase 5 - Review and Next Steps

We believe that launching your new website is just the start of a journey. It is handed over to the team that will run and maintain the site and training provided.

The first thing we do after your site has gone live is to introduce you to our support team who will provide training and support to your team to enable you to maintain, manage and market your website in the future.

We will teach you how to add and organise pages, blogs, news articles, events and products on your website so that it stays current and continues to attract attention from search engines and serve your website visitors for years to come.

Upon completion of your training, we will ask you for full and frank feedback on the whole project. We want to know what you think worked, but also and perhaps more importantly, how to improve this process.

Additional Marketing Support post-launch?

Once your site has gone live and should you come to the conclusion that you need ongoing creative and strategic support, the Intergage team will be delighted to discuss a contracted partnership arrangement where you would have access to Intergage's Marketing-on-Demand service. Such a partnership will give you access to a highly experienced team of digital marketers ready to support your business.

We hope to be able to assist you in generating ever-improving digital marketing results and adopting further sales and marketing technology to enhance and evolve how you win and delight your customers.

We very much hope this will be the start of an ongoing journey.

Let's celebrate the successful launch of your new site!