

PLAN RIGHT

And Get the Most Out
of Your New Website



ABOUT ME

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PURPOSE

Help you get a website that...

- » Supports your mission
- » Is launched on time, and within budget



AGENDA

- » Planning
- » Recruiting
- » Development
- » Post-launch



BEFORE YOU BEGIN

- » Ask yourself if you will have the capacity to get the most out of your new website?

Pitfall: Getting the most out of your website takes care and feeding. Plan, budget, train and, if necessary, hire for it.



BEFORE YOU BEGIN

- » What type of help do we need to get this site online?
 - > Technical development
 - > Content coaching/writing
 - > Graphic design (If you don't have even a simple brand yet, stop web project and start here.)
 - > Creating new or acquiring photography and video



PLANNING: MAKE THE TEAM

- » Select Internal Project Manager
 - > Think “Cat-Herder-in-Chief”
not “Decider”
 - > Manage timeline
 - > Relationship with web
developer



PLANNING: MAKE THE TEAM

Create a cross-departmental team to represent the interests of staff, board and community stakeholders, and to serve as project “ambassadors”.

Tip: Balance size with representation



PLANNING: MAKE THE TEAM

- » Select and make clear who the final decision makers are
 - > Very time-consuming, and sometimes detrimental to do everything democratically
 - > Have one or two individuals (may be the project manager and communications director or the president)



PLANNING: AUDIENCE

- » Document and prioritize who you're trying to communicate with using this website
- » Understand who they are & the "WIFM" that brings them to you

Pitfall: In the rush to build a website, it's easy to focus on pleasing your internal audiences.



PLANNING: GOAL SETTING

- » Who should inform this process?
 - > Web Team
 - > Staff & outside stakeholders

Pitfall: Don't forget the administrative and operations staff.



PLANNING: GOAL SETTING

- » Survey and interview
- » Analyze the data
collected and create your
goals



PLANNING: GOAL SETTING

- » What's a good goal?
 - > Broad and strategic
 - > Not tool/solution specific

Bad: "We need a slideshow."

Good: "We would like to raise the visibility of our grantees." Ex.) A
slideshow to promote grantees on homepage.



PLANNING: TOOLS & FEATURES

- » Once you have goals you can:
 - > Link them up with audience actions (Ex. Increased grantee visibility will result in people reading our blog, or spending “X” amount of time on site.)
 - > Bonus: Figure out what metrics to link with these actions
 - > Define tools and features that may help

*Tip: Prioritize goals, tools and features.
You may need to walk
away from some things.*



PLANNING: BUDGET

- » Well, how much you got?
 - > \$1K: Simple, template design
 - > \$5K - \$10K: “Jack-of-all-trades”
 - > \$15K: Low-end for multi-person team (Beware of size of biz)
 - > \$20K - \$100K: Sites with “integration” / “ecommerce”



PLANNING: TIMELINE

- » **Small Project:** 1 – 3 months
customized template, site turned over
so owner can add content themselves)
- » **Medium Project:** 4 – 6 months,
custom design, content loaded to site
at launch, etc.
- » **Large Project:** 6 mo. – 1 yr., API,
e-commerce, membership



PLANNING: TIMELINE

- » Budget more time if...
 - > You have a lot of content on your site
 - > If you have e-commerce or API
 - > Members-only/Private areas of site
 - > Larger web team
 - > Want more staff engagement
 - > High info/low-trust culture
 - > Staff members are in charge of writing and collecting content...



PLANNING: TIMELINE

- » Pitfall: The primary reason web launches are delayed: Staff could not/did not budget enough time to create and collect content.
- » You might be tempted to simply “shovel” the old content – don’t!
- » Tip: Help people manage their time. Build expectations about the project as legitimate work. Consider using pro help to write web content.



PLANNING: COMMUNICATIONS

- » How often do you want reports or meetings?
 - > Weekly
 - > Biweekly
 - > Monthly

- » What's your preferred way to communicate?



DOCUMENTATION

- » Creative Brief
- » RFP



RECRUITING A DEVELOPER

- » Please, don't hire your Board Chair's cousin's BFF
- » Don't go with local *just* because they're local.

*Competence is more important than proximity.
Being near
is not the same as having
good communication skills.*



RECRUITING A DEVELOPER

- » Tip: Keep it succinct. Phone interviews can flesh things out nicely.

- » Open RFP:
 - > Allows you to cast a wider net, but prepare for randos
 - > May miss out on those too busy (e.g., those who are more skilled)

- » Closed RFP:
 - > Get a shortlist of recos (TechWorks or MCF Listserves)
 - > Send to specific firms



MUST-ASK QUESTIONS

- » Can I have 3 references? (More valuable than an interview. Listserv also a great resource.)
- » Will this be ADA compliant/search engine friendly?
- » Can you build us a mobile responsive site? (Responsive vs. Mobile Only)



MUST-ASK QUESTIONS

- » What security best practices do you put into place?
- » How often will the site be upgraded?
- » How do you handle back-ups? Can you access copies directly?
- » Will your platform be open-source or proprietary?
- » How easy will it be to migrate the site in the future?



MUST-ASK QUESTIONS

- » Can you train our staff?
- » Do you have written documentation?
- » Will you be available for on-going support/bug fixes/improvements?
- » Can I hire someone else to help me later if needed?
- » How popular is this platform? How hard would it be to find help?



MUST-ASK QUESTIONS

- » Which features or areas of the site will we be able to update?
- » What can we not/should we not update? Will you assist us with those updates?
- » What's your average rate of overages? What's the average amount?



TYPICAL SELECTION PROCESS

- » Have internal agreement about the selection process in advance
 - > The process
 - > The final decision makers
- » Do screening interviews over the phone with top 4 to 7
- » In-person/in-depth interviews with top 3
- » Don't forget the references!



REVIEWING THE CONTRACT

- » Make sure the “must-ask” questions are covered
- » If you have a lawyer, or someone on your board who is one, ask them to review it



DURING DEVELOPMENT

- » Be prepared to readjust your timeline if needed (thinking in phases can help)
- » Prioritize your needs, and be prepared to let go
- » Communicate early if you spot problem areas



MAKE THE MOST OF YOUR NEW SITE

- » Budget time and money for ongoing support
- » Plan time for updating the site and assign a webmaster
- » If you want staff to participate, put it in their job descriptions. Make it a part of evaluations.

