



Your Company Name

Website Planning Checklist

Date

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Revision History

Date	Version	Author	Change

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Note: Text displayed in blue italics is included to provide guidance to the author and should be deleted before publishing the document. In any table, select and delete any blue line text; then click Home→Styles and select “Table Text” to restore the cells to the default value.

1 Purpose and Introduction

The purpose of the *Basic Website Planning Checklist* is to provide sample information to consider when designing and developing a new website. The checklist includes information about the following topics:

- Purpose
- Audience Analysis
- Audience Profile Checklist
- Strategy-Competitor Analysis
- Strategy-Determine Your Approach
- Site Content
- Advertising and Maintenance
- Organizing Your Information
- Site Structure
- Navigation
- Text
- Visual Design and Layout
- Creating Images
- User Interface Design Techniques
- Testing



2 Website Planning Checklist

Your first planning question should be “What is the purpose of the website?”

- What do you want to do?
- What do you want to sell or accomplish on the web.

Use the checklist as a guide, which will influence your user interface design.

Topic	Comments
Purpose	
<i>What do you want to accomplish?</i>	
<ul style="list-style-type: none">• <i>Provide a clear statement of goals.</i>• <i>More customers.</i>• <i>New geographical markets.</i>• <i>Increased sales.</i>• <i>Greater customer loyalty.</i>• <i>Offer customers a better way to buy.</i>• <i>Something that's not possible by traditional means.</i>	
Audience Analysis	
<i>Which user groups?</i>	
<i>Business to Business (B2B)</i> <ul style="list-style-type: none">• <i>Large supermarket chains</i>• <i>Small shops</i>• <i>Catering companies</i>• <i>Suppliers.</i>	
<i>Business to Customer (B2C)</i> <ul style="list-style-type: none">• <i>What kind of audience?</i><ul style="list-style-type: none">○ <i>Rich, selective, specialist</i>○ <i>Lower class, cheap with bulk</i>○ <i>Young, modern market.</i>	
<i>Which of these users have web access and are likely to use it?</i>	
<i>Obtain feedback from potential users.</i>	



Topic	Comments
Audience Profile Checklist	
<i>Audience category</i>	
<i>Level of expertise</i>	
<i>Information preferences: What is most important first? Then what?</i>	
<i>Audience characteristics: Profession Location Gender Age Lifestyle preferences</i>	
<i>Scenarios of use</i>	
<i>Environment of use</i>	
<i>User's abilities</i>	
<i>Technical expertise</i>	
<i>Hardware and browser software</i>	
<i>Bandwidth available</i>	
<i>Monitors and screen resolution</i>	
Strategy-Competitor Analysis	
<i>Know your competition.</i>	
<i>Ask users which sites they use.</i>	
<i>Search for similar sites on the web.</i>	
<i>Keep checking back.</i>	
<i>Rate your competitor's sites.</i>	
<i>Determine you competitive advantage.</i>	
Strategy-Determine Your Approach	
<i>Select an approach that fits your audience and purpose.</i>	
<i>Define your message.</i>	
<i>Persuade your audience.</i>	
<i>Who does this? (Does it link with the Marketing Department and with product branding?)</i>	



Topic	Comments
<i>Level of detail:</i> <i>Provide enough information so users are hooked but not enough that swamps them; you could also provide more links to find more information.</i>	
<i>Tone:</i> <i>Is it serious, informal and fun, personal or distant?</i>	
Site Content	
<i>Select topics that your audience will find of interest.</i>	
<i>Use web technology in unique and interesting ways (be aware of your audience and browser versions).</i>	
<i>Content should always be relevant and easy to find and be up-to-date.</i>	
<i>Obtain URLs that will be meaningful and/or memorable (e.g., www.ibm.com, www.google.com).</i>	
Advertising and Maintenance	
<i>Keep in mind the promotion of your website:</i> <i>B2C: Meta tags for search engines, portal, links, outside publicity.</i> <i>B2B: Internal change so promote it.</i>	
<i>Maintenance is the key to gaining customer loyalty.</i> <i>Maintain links.</i> <i>Change content regularly (especially the homepage).</i> <i>Flag new topics and content.</i> <i>Use statistics to improve (e.g., about users and technology).</i> <i>Gather feedback from users (ensure you respond also).</i> <i>Decide how and who will maintain the site.</i>	
Organizing Your Information	
<i>Keep pages short</i> <i>Short pages are better suited to a display screen.</i> <i>Length of 1 to 3 screens (opinions differ on length and scrolling), depending on the purpose and user.</i>	
<i>Pages give information in chunks or bursts:</i> <i>Keep the most important information on top of each page.</i>	



Topic	Comments
<i>Logically connect the pages that can be browsed, which addresses the needs of the target audience.</i>	
Site Structure	
<i>Create a highly organized non-random structure.</i>	
<i>Create a flow diagram.</i>	
<i>Decide on your main content areas.</i>	
<i>Design hierarchies of breadth rather than depth (3 click maximum to reach your topic).</i>	
<p><i>Many structures are possible:</i></p> <p><i>Sequential Structure: Linear narrative, chronological, logical series of topics/processes (e.g., select car, request quotes, review, order), which are often used for purchasing, complex processes or large content areas (e.g., articles).</i></p> <p><i>Grid Structure: Any 2-dimensional or matrix structure (e.g., list of courses), can follow a grid across or down, which can best be used by experienced audiences-but may be difficult for the users to create the mental model. This may limit the user's ability to jump to other areas of the site.</i></p> <p><i>Hierarchical Structure: Well suited for websites where most users are familiar with hierarchies; uses a single home page and works well when material is organized; however the structure may be very narrow and it is hard to cross-over to other areas.</i></p> <p><i>Web Structure: Mimics free association of ideas; has many links to information inside and outside the site (ensure it's only used where it adds value) but can be confusing if poorly organized (i.e., avoid linking everything to everything else).</i></p>	
Navigation	
<i>Design links so that users clearly understand their function. It should be instinctive.</i>	
<i>Consider using links as icons or text.</i>	
<i>Provide information that tells users where they are in the site (e.g., headings, color schemes).</i>	
<i>Use navigation elements consistently.</i>	
<i>Always provide links to the home page and major</i>	



Topic	Comments
<i>content areas (don't gray out the Back button).</i>	
<i>Use different hyperlink colors but be careful not to override the default link colors.</i>	
Text	
<i>Make headings effective and clear.</i>	
<i>Most important information should be displayed first (e.g., like an inverted pyramid).</i>	
<i>Use in-text links: Avoid using "click here to go to the xyz site"; Instead "xyz recommends that you Consider whether using the "Next" or "Previous" button on the web page is good or bad.</i>	
<i>Keep to left-aligned text unless there is a good reason for centered or right aligned text.</i>	
<i>Have printable versions of pages available (i.e., for articles).</i>	
<i>Limit the use of background images or colors.</i>	
Visual Design and Layout	
<i>Design the layout within an image safe area, which will work well on a wide range of screen display settings (e.g., 1024x768 vs. 640x480).</i>	
<i>Test the visual design with sample users: What do you perceive as the purpose of the site? What would you be looking for on the site? What would you want to do after seeing this page? What impression does this visual style give you of the company?</i>	
<i>Establish a design convention that is consistent and stick to it.</i>	
<i>Draw attention to changed or new content, e.g., Latest News.</i>	
<i>Scrolling: Avoid the need to scroll horizontally. Limit the need to scroll vertically (depending on the site purpose). For the homepage, try to fit all the content onto one screen.</i>	



Topic	Comments
Creating Images	
<i>Fast page load time is an important key; so use few images and make them load quickly.</i>	
<i>Decide on image standards during design (e.g., max size and format).</i>	
<i>Reuse images rather than having many different items (overhead is minimized once the image is in the user's browser's cache).</i>	
<i>Reduce the size of the image files (including resolution and color palettes) while retaining sufficient quality.</i>	
User Interface Design Techniques	
<i>Be user-centered not developer centered.</i>	
<i>Speak the user's language and avoid jargon.</i>	
<i>Use presentation conventions the user will be familiar with.</i>	
<i>Use real world metaphors and analogies, but don't go too far.</i>	
<i>Seek consistency, uniformity, and standardization.</i>	
<i>Minimize the need for memorization and learning.</i>	
<i>Design for simplicity and attractive appearance-don't distract.</i>	
<i>Help the user avoid errors and help them correct errors they do make (e.g., dates, status bars).</i>	
<i>Provide support-frequently asked questions (FAQs), contact details, help pages, phone numbers, customer support).</i>	
Testing	
<i>Conduct quality assurance (QA) testing. Spelling and use of language. All links work correctly. Pages, forms, graphics, applets, and scripts behave correctly.</i>	
<i>Conduct performance testing (e.g., modem, broadband, etc.).</i>	
<i>Observe sample users accomplishing a set of tasks (e.g., look for confusion, navigation issues, etc.)</i>	



Topic	Comments
<i>Get it right the first time-make sure it is useable.</i>	

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3 Glossary

List any document terms that cannot be fully understood without some explanation.

Term	Definition
Business-to-business (B2B)	<p>B2B is a term commonly used to describe electronic commerce transactions between businesses. It can be an adjective to describe any activity, be it, e.g., marketing or sales.</p> <p>Automated E-commerce Transactions-a term also used in electronic commerce and to describe automated processes between trading partners.</p> <p>The volume of B2B transactions is much higher than the volume of B2C transactions. One reason for this is that businesses have adopted electronic commerce technologies in greater numbers than consumers. Also, in a typical supply chain there will be many B2B transactions but only one B2C transaction, as the completed product is retailed to the end customer.</p> <p>"Business-to-business" can also refer to all transactions made in an industry value chain before the finished product is sold to the end consumer.</p>
Business-to-consumer (B2C)	<p>B2C is sometimes also called Business-to-Customer) describes activities of E-businesses serving end consumers with products and/or services. It is often associated with electronic commerce, financial institutions and Internet marketing.</p> <p>B2C e-commerce has the following advantages:</p> <ul style="list-style-type: none">Shopping can be faster and more convenient.Offerings and prices can change instantaneously.Call centers can be integrated with the website.
Business-to-employee (B2E)	<p>B2E electronic commerce uses an intra-business network that allows companies to provide products and/or services to their employees. Typically, companies use B2E networks to automate employee-related corporate processes.</p> <p>Examples of B2E applications include:</p> <ul style="list-style-type: none">Online insurance policy managementCorporate announcement disseminationOnline supply requestsSpecial employee offersEmployee benefits reporting401(k) Management



Term	Definition
Consumer-to-consumer (or C2C) electronic commerce	<p>C2C involves the electronically-facilitated transactions between consumers through some third party. A common example is the online auction, in which a consumer posts an item for sale and other consumers bid to purchase it; the third party generally charges a flat fee or commission. The sites are only intermediaries, just there to match consumers. They do not have to check quality of the products being offered.</p> <p>Examples of C2C: eBay, Craigslist, Amazon.com</p> <p>This type of e-commerce is expected to increase in the future because it cuts out the costs of using another company.</p>
Electronic Business	<p>Electronic Business, commonly referred to as "eBusiness" or "e-Business", may be defined as the utilization of information and communication technologies (ICT) in support of all the activities of business. Commerce constitutes the exchange of products and services between businesses, groups and individuals and hence can be seen as one of the essential activities of any business.</p> <p>E-business involves business processes spanning the entire value chain: electronic purchasing and supply chain management, processing orders electronically, handling customer service, and cooperating with business partners. Special technical standards for e-business facilitate the exchange of data between companies.</p>
Government-to-Business (G2B)	<p>G2B is the online non-commercial interaction between local and central government and the commercial business sector, rather than private individuals (G2C).</p>
Uniform Resource Locator (URL)	<p>Uniform Resource Locator is a compact string of characters used to represent a resource available on the Internet. In popular usage and many technical documents, it is a synonym for Uniform Resource Identifier (URL).</p>



4 APPENDIX

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