

The Visual Learner's Guide to Managing Web Projects

How to plan, organize, build and manage effective Web sites



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The Visual Learner's Guide to Managing Web Projects

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Table of Contents

Overview	1
Plan	3
Assess your Web site.....	4
Compare your site to others	6
Identify the decision-maker.....	8
Select the Web Team	12
Conduct an initial meeting.....	19
Define the audience and purpose	20
Resolve the success criteria	23
List the resources available.....	23
Choose the right software	27
Train	35
Plan the curriculum	36
Prepare the Web team	41
Conduct training.....	43
Organize	45
Determine site content	46
Structure content groups.....	48
Create the site blueprint.....	54
Create the work plan.....	56

Build	61
Generate design models.....	62
Prepare content.....	69
Construct a working draft	71
Conduct audience testing.....	75
Post the site live	77
Maintain	79
Establish guidelines for structure and design.....	80
Set update schedule.....	81
Specify workflow for site additions.....	82
Create a site maintenance guide.....	83
Web Project Scenario.....	85
Site-Building Checklist.....	115
Index.....	119

Overview

Building Web sites in-house

If you're the typical person building a Web site, you're building one for an organization, whether that's your company, your church, your bowling league, your family, or some other group of people with whom you're affiliated. If your organization is typical, it would like to build and update its Web site in-house.

Perhaps the site was built by a contractor who didn't get it right, or it's maintained by a contractor who charges too much. Or maybe the contractor isn't responsive with updates. Bringing your Web work in-house offers to solve these problems, but Web work is complex, and requires a high level of coordination. It requires strong project management. If a Web project isn't managed correctly, building a Web site in-house can be much more troublesome and costly than hiring a contractor.

The Visual Learner's Guide to Managing Web Projects shows executives, managers, and everyone else involved with an organization's Web site how best to build and maintain it. It describes how to plan a site, train staff, conduct site construction and implement maintenance procedures so the site is effective and stays that way.

Web publishing process and procedures

This book is not a nuts-and-bolts manual for the technical aspects of Web development. Rather, *The Visual Learner's Guide to Managing Web Projects* is a "big-picture" guide that describes page structure and design procedures, as well as a sound site-building process. This process involves Planning, then Organization, and finally Construction. Since Web projects also require staff training and site maintenance, the process described is comprised of five stages:



This process figures prominently in this book because it's the most important factor in creating effective Web sites. For instance, professional Web firms often spend twice as much time planning and organizing a site as they do coding it. Web professionals know how much time, effort, and frustration can be saved by working according to a systematic process, and this process works equally well for in-house Web staff.

“Show” rather than “tell”

The Visual Learner’s Guide to Managing Web Projects contains numerous graphics, photographs, and screen shots that illustrate site-building concepts. Its main topics are presented in the order they’re encountered during a Web publishing project:

Plan helps an organization determine if building a new site is necessary, and if so, how it should proceed. It shows how to define a site’s audience and purpose, and why that’s important.

Train details how to get good instruction, plan an effective curriculum, and provide a learning environment for internal staff to become skilled at Web publishing.

Organize provides guidelines for determining what a site should contain and do, structuring site content, and planning site construction.

Build explains how Web sites should be constructed, tested, and approved.

Maintain describes sound procedures for site maintenance, and shows how to implement them in an organization.

The book also includes a scenario tracing the progress of a sample Web publishing project and a site-building checklist to guide organizations when creating a new site.

We at Visibooks trust you’ll find *The Visual Learner’s Guide to Managing Web Projects* helpful. If you have suggestions to improve it or success stories to relate, please send them to improvements@visibooks.com. Best wishes on your Web publishing projects!

Plan

- 1. Assess your Web site**
- 2. Identify the decision-maker**
- 3. Select the Web team**
- 4. Conduct an initial meeting**
- 5. Define the audience and purpose**
- 6. Resolve the success criteria**
- 7. List the resources available**
- 8. Choose the right software**

Assess your Web site

The first question to ask when beginning a Web project is, “Should we revise our existing Web site or build a new one?” Building a new Web site is something most Web-savvy organizations have done every year to 18 months. For instance, both Microsoft.com and Sun.com have been rebuilt several times since they were first launched.

To determine if your organization should build a new Web site, evaluate your current site, and compare it to effective sites built by other organizations.

Evaluate your current site

Evaluate your organization’s current Web site by asking these questions:

Is it consistent?

Is the site’s look consistent with your organization’s corporate identity: brochures, ads, letterhead, business cards, etc? Is the look of each page consistent with the look of every other page in the site?

A site that looks consistent with an organization’s identity lets people know they’ve come to the right site. A site that looks consistent from section to section provides familiar surroundings to people when they click through it.

Is it well organized?

Is the site logically organized into no more than seven main sections?

People naturally process information in groups of three to seven, so sites that present content in “bite size” chunks make people feel comfortable and in control.

Is navigation clear?

Does the site incorporate a navigational system that shows people “You are here,” as well as where they can go?

When using a Web site most people want to find specific information quickly. Clear navigation helps them do that.

Is it simple?

Does the site avoid flashy, complex features that get in the way, such as Frames, or links that open new browser windows?

Using Frames—putting more than one page on the screen at a time—makes a site difficult to update. Links that open new browser windows disable the browser’s Back button: the way most people return to previously-viewed pages.

Is it audience-tested?

Was the site tested by its prospective audience before it went “live?”

Audience testing allows an organization to be certain that its site contains and does what people want.

Did your site pass the test?

If you answer “no” to at least one of the questions above, your organization can benefit from building a new Web site.

Compare your site to others

You also may want to compare your site to effective Web sites operated by other organizations. The IBM and Oak Post Web sites are good examples:



ibm.com

IBM used its ample resources and experience to build an excellent Web site. The look is crisp and consistent throughout, and pages load quickly. It contains thousands of pages, but is still easy to navigate. The IBM Web site comprises a high standard against which to compare your organization's site.



oakpost.com

However, an organization doesn't need to budget millions to build an effective site. For instance, this site operated by furniture store Oak Post is consistent and easy to navigate. It was built for less than ten thousand dollars, and is maintained by internal staff.

Tip: Building a new site saves time and effort

Revamping an old Web site is troublesome and time-consuming. Digging into unfamiliar code, changing things that may not have been done correctly the first time, and making old layouts fit new ideas takes a lot of time and effort. While it seems efficient to build on an existing site structure, site renovation is actually more difficult than creating an entirely new site.

Improving existing sites is a nightmare

Kyle Shannon, chief creative officer, Agency.com, New York City:

“There is a category of project that is always more trouble than usual. We call them ‘refugee sites.’ These are sites that are already up, but the client wants to improve them. On the face of it, refugee sites seem easy to do because the content is already there... The reality is that these sites are a nightmare. We have to go in there and repair the HTML, re-code the site based on the architecture we create. Refugee sites are significantly more time-consuming and more expensive...”

Shoba Narayan, “Projects From Hell and the Wisdom They Bring”
Internet World: www.internetworld.com/print/1997/10/27/undercon/19971027-projects.html

Identify the decision-maker

Determine who has the final say

An organization's Web site may represent several divisions or offices, each with their own ideas and goals. Getting them all to agree on what the site should do, contain, and look like can be extremely difficult.

People in charge of building a Web site shouldn't try and facilitate agreement among a site's different constituents. Instead, they should deal directly with the person responsible for the site's success. This Decision-Maker should have the authority to make final decisions about the site. Getting approval from one person minimizes confusion and delays.

Identify subordinate decision-makers

Sometimes an Art Director, Communications Director or IT Manager must approve work that relates to their area of expertise. Make sure these people are identified right at the beginning of the project.

Tip: Avoid committees

For a Web project to be successful it's almost always necessary to have one person with final approval authority. The cliché "a camel is a horse designed by committee" exists for a reason; many professionals in creative fields won't work on projects without a single decision-maker giving approval.

Ringing the bell

"Some years ago, we were invited to compete for the Rayon Manufacturers' Association account. I duly presented myself at their headquarters and was ushered into a pompous committee room.

'Mr. Ogilvy,' said the chairman, 'we are interviewing several agencies. You have exactly fifteen minutes to plead your case. Then I will ring this bell, and the representative of the next agency, who is already waiting outside, will follow you.'

Before launching into my pitch, I asked...'How many people must okay the advertisements?' Answer: the twelve members of the committee, representing twelve manufacturers.

'Ring the bell!' I said, and walked out."

David Ogilvy, *Confessions of an Advertising Man*, Athenaeum, New York, 1963

Interact with decision-makers according to personality type

If a committee absolutely must approve work on a Web site, expect things to move slowly. Approvals will require consensus, and building consensus takes time. The best bet for getting good work approved by a committee is to tailor interactions with it to the personality type of its highest-ranking member. Present ideas and suggestions in a way that is comfortable to that person, and they'll move through the committee more smoothly.

Not only is personality profiling useful in getting work approved by committee, it also helps interactions with a single decision-maker as well. In Web projects, often what gets approved isn't the best work, but work presented in the best way.

A cautionary tale about personality type

“I was building a Web site for a firm that produces accounting software. The company's logo was colorful, so I assumed that they would want a colorful home page design. I created one, then submitted it for approval.

The firm's president, an accountant, told me that they didn't like it. The next I heard from him, he directed me to the site of another software company, and told me to build them a site that looked just like that one.

His response was typical of details-oriented people, as most accountants are: go with the tried-and-true. If I had walked him through the design process, explaining exactly how I arrived at that design, he may have gone with the first design which fit better with their corporate identity.”

Ernie Winters, independent Web developer

The personality profiling charts on the following pages can be used to understand people's motivations and preferences, then form effective strategies for interacting with them throughout the site-building process.

Use the following chart to determine a person's personality type:

	Ego-oriented	Results-oriented	Relationship-oriented	Details-oriented
Personality	Talks, laughs loud. Not a good listener. Friendly, enthusiastic demeanor.	Communicates clearly. Courteous demeanor.	Asks questions. Easygoing, relaxed demeanor.	Asks clarifying questions. Quiet. Serious, businesslike demeanor.
Clothing	Flashy clothes, bright colors.	Appropriate clothes, nothing flashy.	Comfortably dressed, tends to under-dress.	Meticulously dressed. Shoes shined. Perfect makeup.
Office	Cluttered and unorganized. Pictures, posters, slogans on walls.	Clean, work-oriented. Maybe pictures, probably not.	Posters, personal mementos in office. Office may be cluttered.	Well-organized. Diplomas, awards on wall.
Typically found in:	Sales, PR, Entertainment, Politics.	Management, entrepreneurial roles.	Upper management, large organizations, HR.	Accounting, Law, Architecture, Writing, Purchasing.

Once you've determined a person's personality type, interact with them accordingly:

Ego-oriented	Results-oriented	Relationship-oriented	Details-oriented
<p>Inspire Tell good stories.</p> <p>Be enthusiastic Be upbeat.</p> <p>Be flexible Let discussions wander, meetings go longer.</p> <p>Have fun Be fun rather than "all business."</p> <p>Write good reports Put details in writing after meeting.</p> <p>Illustrate Show pictures, colorful charts, models.</p> <p>Praise</p> <p>Establish personal contact Be a chum.</p>	<p>Be decisive Outline available options and recommend one.</p> <p>Show results Show exactly how you've helped others, what they can expect.</p> <p>Be persistent</p> <p>Persuade</p>	<p>Get consensus Get everyone in team "on board."</p> <p>Seek harmony Avoid conflict.</p> <p>Cultivate a personal relationship Become a confidante.</p> <p>Compromise</p> <p>Cooperate</p> <p>Make suggestions</p>	<p>Be thorough Document everything. Give lots of detail.</p> <p>Be tidy Make sure everything's orderly and accurate.</p> <p>Show expertise Give evidence that you know your stuff.</p> <p>Strive for quality Make it good rather than fast.</p> <p>Give guarantees Put guarantees in writing.</p> <p>Use logic</p> <p>Show examples</p> <p>Make detailed plans</p> <p>Be consistent</p>

Select the Web Team

Learn team roles

Building a Web site involves a wide variety of disciplines—editing, layout, graphics, programming—and very few people are good at all of them. Also, many Web sites quickly grow beyond a size that one person can manage and maintain. That's why most Web sites are built by teams, rather than by a single person.

A typical Web team includes these positions:

Site Coordinator

The Site Coordinator is responsible for organizing a site's content, developing a work plan, managing the site's construction, and keeping it consistent. Ideally, the Site Coordinator will have some Web publishing experience, but it's not necessary. Project management skills and the ability to organize information are more important.

Site Builder(s)

The Site Builder creates the site's pages and links them together. People who have worked on print publications often do well at site-building. It's good to have more than one Site Builder on a Web team because this distributes the workload and furnishes a backup.

Editor

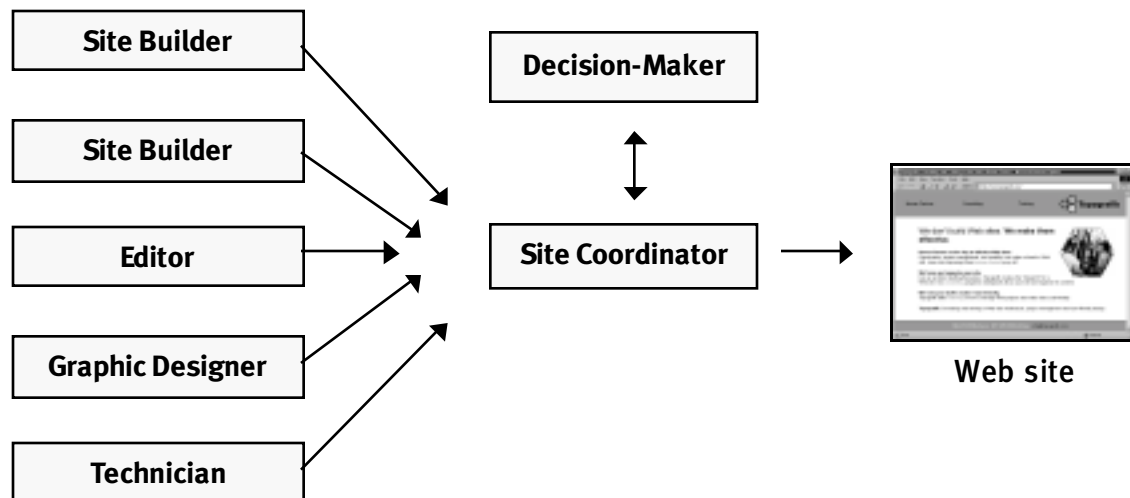
The Editor writes the site's text and edits it to be clear and concise. The Site Builders then incorporate the Editor's text into pages. Often the Site Coordinator and Editor are the same person.

Graphic Designer

The Graphic Designer creates the site's look and feel, and produces graphics for it. If your organization has an in-house graphics person who produces print graphics, this person can be trained to do Web graphics as well.

Technician

The Technician makes sure that the site's Web server, forms and functionality work as intended. Network administrators and technical support staff typically do well at this.



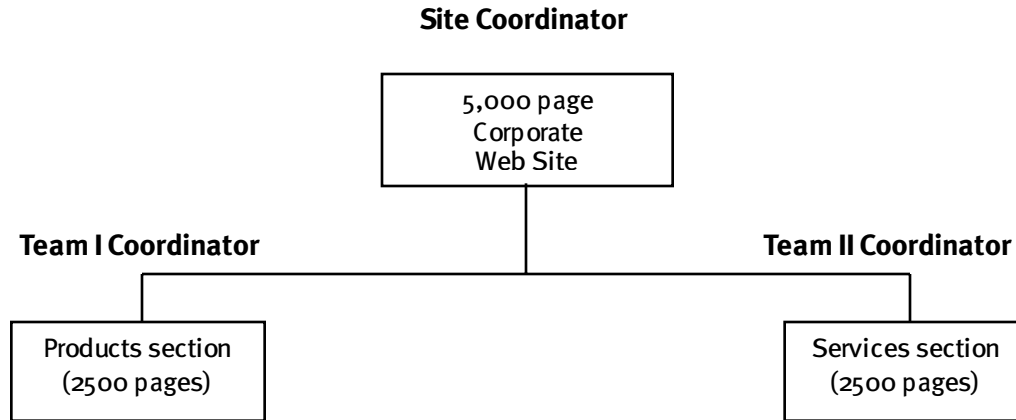
Determine size of team

Software developers have learned that putting more people on a project actually slows work down. Large teams require more management and coordination, which drains enthusiasm from the team and effort from the project. Web projects work the same way: To make them run more smoothly, keep your team as small as possible.

One person can do two or even three of these jobs if they have the skills and the site isn't large. However, one person can't do all of them. People skilled in several of these disciplines are rare, and even then the amount of work required to do them all can be overwhelming. Make sure the Web team includes at least two people.

Teams shouldn't include more than eight people: sociologists have found that humans tend to work best in groups of two to eight. A five-person Web team should be able to build and maintain a site of around 250-2500 pages.

If your organization's site will contain enough content for many thousands of pages—or grow to that size—distribute the work among several teams. Each team can work on one or more of the site's main sections.



When operating multiple teams, one person from outside the teams should be responsible for the entire site. Just as a newspaper has an Editor-In-Chief with final say on what gets printed in the Sports or World News pages, a Web Site needs a Site Coordinator responsible for integrating the work of individual teams. Each team should then have its own coordinator.

Determine if outside help is needed

When building a Web site, most organizations require some sort of outside help. This can be as simple as talking with a Web hosting company about uploading pages, or as extensive as hiring an outside design firm to develop page templates.

The chart below lists common situations in which outside help is necessary, along with solutions to the problems they present.

Situation	Solution
<p>Warring fiefdoms Your organization contains several divisions, each of which considers itself the most important. No division is preeminent, but each tries to dictate the site's content.</p>	<p>Bring in an arbiter Someone from outside the organization can be brought in to “referee” meetings, break logjams, and give an unbiased perspective. If the arbiter keeps the site's audience and purpose in mind, it can be built according to what external users want rather than what internal politics demand.</p> <p>Information architects and user-experience consultants—people who specialize in the organization of Web sites—do well in the role of arbiter.</p>

Situation

No IT staff available

Your organization doesn't have any full-time Information Technology staff. Or it does have IT staff, but they're too busy with their current duties to help with the Web site. Or the IT staff is unfamiliar with Web applications.

No full-time graphic designer

Your organization doesn't have a full-time graphic designer on staff to design the look and feel of its Web site.

Solution

Host site with a responsive ISP

Most Internet Service Providers will help with routine tasks such as getting a site's e-mail response forms to work. Full-service ISPs can assist with the technical aspects of large, sophisticated sites, such as programming and database integration. The key in each case is customer service.

When choosing an ISP for Web site hosting, ask for references from its clients. Good client references indicate good service. Keep in mind, though, that in any ISP the most technically-proficient employees are typically the ones least inclined toward client interaction. The clearer your instructions to them, the better work you will get.

Hire a professional designer

A professional graphic designer can be brought in to design page templates. In-house Site Builders can then create the site's pages based on these templates.

Just as brochures designed by a graphics firm look more professional than the homemade variety, a professionally-designed Web site will exhibit a more polished look. Make sure the designer hired has substantial Web experience: Web design requires specialized knowledge that can't be learned by working in print or multimedia.

Tip: Use IT staff only for technical work

When organizations first began publishing Web sites, Information Technology staff were the only people with enough technical knowledge to do the work. Network administrators, technical support staff and programmers got the job. Now that Web publishing is less technical, limit the involvement of IT staff to the technical aspects of site-building, such as server administration, database integration and enabling e-commerce functions.

IT staffs tend to be very busy with technical work—too busy to put up Web pages. Also, most IT people prefer technical work: a Web server administrator would rather fine-tune Linux code than sit in meetings. IT people were hired for their programming and networking abilities, not for their design and writing skills. Play to their strengths, and save them for technical work.



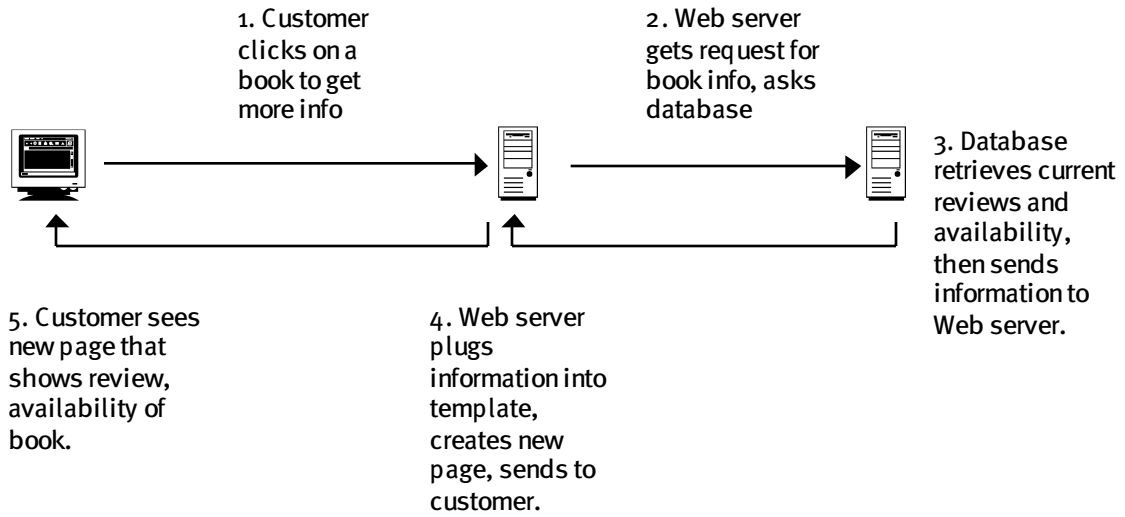
Site built by IT staff



Same site rebuilt by communications staff

Rather than use IT staff for Web publishing, use them to develop Web applications. For instance, IT staff could be used to connect an organization's Web site with a database.

The online bookstore at Amazon.com is an example of a Web site that includes this type of Web application:



Building a site like this still requires a Site Coordinator and a Web-savvy Graphic Designer. However, the team building and maintaining it should contain mostly IT staff. The Site Coordinator organizes the site content and work, the Graphic Designer designs the site's look and templates, and IT staff build the site's functionality.

Conduct an initial meeting

Before work on the organization's site actually begins, it's good to hold an initial meeting of everyone involved with building it. The members of the Web team, outside consultants or contractors, and the Decision-Maker should all be there.

Explain the process

The Site Coordinator should explain how work on the site will progress (according to the Plan—Train—Organize—Build—Maintain process), the role of audience testing, and other aspects of site construction described in this book.

Manage expectations

This is also a good opportunity to answer common questions about site construction, such as how long it may take. This initial meeting should give the people involved with the Web project realistic expectations of what it will take to build the site, and a clear idea of how work will proceed.

Initial meetings produce a better site

“When we built our first Web site, it didn't go well. We just gave our brochure to someone inside the organization and had him start building the site based on it. We got a site that loaded slowly, with strange navigation and blurry graphics. Our members didn't like it.

Now we're building a new site, and having several up-front meetings before work begins on it. We're getting a lot of input as part of the process, and we're getting a much better site.”

Pamela McElrath, Communications Chair, Greater Richmond Technology Council

Define the audience and purpose

The most important part of any Web project is defining the site's audience and purpose. An organization can have talented, well-trained people working on its site, but without a clear vision to guide them, the site will be ineffective. Before a site is built, the people in charge should have a good idea of who'll be using it and what it should do.

Lack of focus cripples site

“A college I know sent almost a hundred of their faculty and staff to a week of Web training. These people went back and built some decent pages for their offices and classes, but the whole site was still confusing. I wasn't sure if it was for the students or the people who worked there. This college may have spent a lot of money on training, but they still had a crummy site.”

Troy Telenko, Business Development Manager, ACT Training Corp.

Ask the right questions

At the beginning of a Web project, the Site Coordinator should sit down with the Decision-Maker and ask:

Who will be using the site?

What should the site do for the organization?

Getting definitive answers to these questions isn't always easy. Sometimes defining the site's purpose requires clarifying the purpose of the organization. Sometimes redesigning a Web site involves redesigning corporate strategy. Even if this takes weeks or months of high-level wrangling, don't proceed until the site's audience and purpose are clear. Answering the questions above is crucial to building an effective site.

Web teams and corporate strategy

“Sometimes the answers won't come from corporate strategists, managers, or directors. They'll come from a more humble source: the...members of the web team who are, incidentally, often fairly junior members of the organization.”

Louis Rosenfeld, “Information Architecture and Corporate Strategy: The Tail Wags The Dog”
WebReview: www.webreview.com/wr/pub/1999/06/04/arch/index.html

Determine if more than one site is necessary

During discussion of the site's audience and purpose, several audiences may be identified. Several different purposes may be uncovered.

For instance, people planning a health care Web site may want it to serve both new mothers and the elderly. However, the concerns and preferences of the Pediatric and the Geriatric are very different. Mothers would be better served by a site built just for them, as would older people.

A Saturday Night Live skit once advertised a product as both "a floor wax AND a dessert topping!" An effective Web site is not. If the audiences and purposes to be served are divergent, consider building a separate site for each.

Get audience input

Once the site's audience is identified, the Site Coordinator should ask a few of the people in its audience to serve as an Audience Test Group. This group doesn't have to be large: seven or eight people is fine. Just make sure the sample is representative. For example, if a site will be used mostly by women, at least five of the eight group members should be women.

The members of the Audience Test Group should be asked what they want to do and find at the site. After all, they're the people the site is meant to serve. If what they want from the site differs from what the organization thinks it should provide, more discussion is necessary.

Sample Audience Group Selection Report

Site Audience

The audience for the site is likely to be:

- More married than not
- More women than men
- Most have children
- Range in age from mid 20s to mid 60s.

The target demographic for the site is, in order of prevalence:

- Married women with children
- Married men with children
- Single women with children
- Married men and women with no children
- Single women with no children
- Single men with children

As for computer experience, the site's audience is considered to reflect the professional segment as a whole: About 70% use a computer at work, and approximately 80% of those have e-mail. Almost all of e-mail users are familiar with the Internet, but only half of those are proficient in Web navigation and likely to shop online.

Selection of Test Group

Eight prospective users of the site were selected to participate in a test group. These users comprise a representative sample of the total site audience in terms of age, gender, and marital status. The test group participants were:

- CC, a married woman in her 30s with children. She uses the Web often, and likes to shop online.
- KN, a married woman in her 30s with children. She is comfortable using the Web, and shops on the Web occasionally.
- FE, a married woman in her 40s with children. She is a Web neophyte, and has never shopped online.
- JB, a married woman in her 50s with no children. She uses computers occasionally.
- CS, a widowed woman in her 50s with grown children. She uses e-mail, but isn't an experienced Web user.
- CK, an single woman in her 30s with an e-mail account who uses the Web on the job.
- BM, a married male in his 60s who is new to computers, but enthusiastic about them.
- RR, a married man in his 30s who is familiar with computers and an active Web user.

Resolve the success criteria

It's important at the beginning of a Web project to resolve the site's success criteria. The Site Coordinator should talk with the Decision-Maker to answer the question, "What will make it a successful site?"

For example, an association might have these success criteria for its Web site:

- Serve as the prime means of communication with members
- Enable members to register for events online
- Be easy to update by in-house staff

When the success criteria are resolved, they should be written down, along with the audience and purpose. Then the Site Coordinator should have the decision-maker sign and approve this document.

Tip: Document all approvals

Putting a site's audience, purpose, and success criteria down on paper with the decision-maker's signature helps avoid the wasted effort that comes from mid-project changes. If a fundamental change is suggested during the site's construction, the Site Coordinator can point to what was approved to get work back on track.

Document approvals throughout the site-building process. Have the decision-maker literally "sign-off" on approved material to provide tangible proof.

The pros depend on documentation

"We document everything we do with a client. Before we do any work, we write a detailed work order and have the client sign it. Then we get their signature on designs and mock-ups at several different points during a project. Getting signatures keeps everybody happy and on the same page."

Catherine Shaw, Web Project Manager, Mediastudio

List the resources available

Now that the site has focus and direction, the logistical aspects of building it can be addressed. Like any other project, creating a Web site requires three basic things: time, people, and money. The Site Coordinator should discuss the logistics of site construction with the Decision-Maker:

- **When should the site be finished?**
- **How much time does each team member have to work on the site?**
- **How much money is budgeted for the project?**

Allocate time for the project

When talking with the Site Coordinator about when the site should be finished, the Decision-Maker will likely ask, “when can it be finished?”

As a general guideline, Web development firms take at least three months to build most Web sites. Planning and organization take time, as does getting approvals at each stage of development. Add time for construction and testing, and three months is just about the lowest time estimate given by Web pros for building a site.

However, while three months is the lower limit for professionals, an organization building a Web site in-house should add at least a month to that. In-house Web staff will have other duties besides site-building, and will take longer if the work is new to them. So for building a site in-house, four months is a good starting point from which to begin planning.

Using four months as a beginning, add two months. No project ever runs as planned, and when the inevitable delays and problems crop up, those extra two months will be needed to deal with them. In his book *On War*, published in 1832, strategic theorist Carl Von Clausewitz recommended that military staffs allow for a 1/3 margin of error in their planning: A leader who thinks it will take 2 days to march somewhere must allow for three days. This general rule works well for Web site planning, too: If four months is the lower limit to build a site in-house, allow for six.

Allocate time for team members

An average Web site takes Web development firms around 200 hours to build. If your organization's Web team is composed of people who have never built Web sites full-time, allow 250 man-hours or more. If there are five people on the Web team, that's at least 50 hours per team member.

Also, when it's time for a team member to work on the site, that team member should be given at least twenty hours a week to work on it. If site construction is less than a half-time project, distractions and intrusions from other work tend to crowd it out.

Maintaining a site after it's built takes time, too. When allocating people's time for a Web project, remember that time will be needed daily, weekly, monthly, or at some other interval for site updates and maintenance. After the site is built and the site maintenance guide is created, time for maintenance can be estimated more accurately.

Budget for software, hardware, outside help, training

Site-building and graphics software costs between \$100 and \$500 per computer for each Web team member. Also, make sure that each member has a reasonably up-to-date computer to run the software.

If the organization doesn't have an in-house graphic designer, set aside \$2000-\$10,000 to pay a professional graphic designer to generate design models and templates for the site.

Good training is essential for people to be effective at Web publishing. For people who have the time and inclination to learn it, the how-to books and online resources listed at the end of this book offer an inexpensive way to acquire top-notch skills. However, many people need classroom training with a live instructor to get started. Quality Web training in a classroom costs \$175-\$325 per person per day. If an organization trains five people in the recommended five-day curriculum, it should plan for a total training cost in the \$5000-\$8000 range.

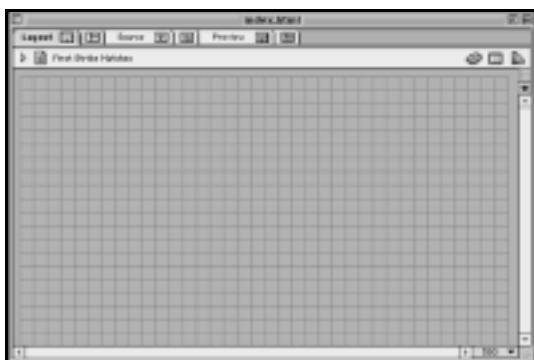
Choose the right software

Choose site-building software

When the Web first gained popularity, Web sites were built by hand-coding HTML. Hand-coding remained essential because point-and-click site creation programs weren't sophisticated enough to produce commercial-quality Web sites. The first versions of FrontPage, Dreamweaver, Fusion, et cetera made creating sites much simpler than hand-coding, but sites created with them looked simpler as well.

Now the current crop of point-and-click Web publishing programs can be used create high-quality sites. While it's still helpful to know HTML, it's no longer necessary. Here are overviews of the most popular site-building programs:

Adobe GoLive



Most of Adobe's programs are meant to be used by professional graphic designers, and GoLive (version 5; \$285) is no different. Its spare interface will be familiar to long-time Adobe users, but people who aren't graphics professionals may find it challenging to learn. Once mastered, however, Go Live's advanced features can be used to create professional-quality sites.

Macromedia Dreamweaver



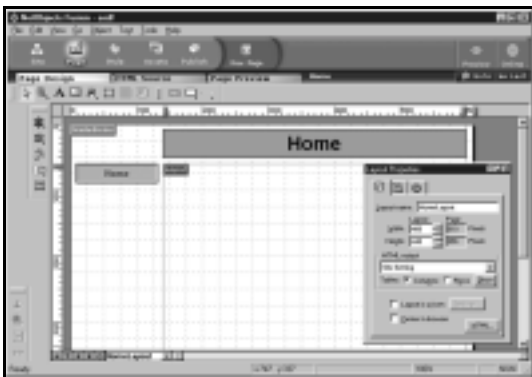
Dreamweaver (version 4; \$299) is one of the easiest to use site-building programs, and the clean code it generates looks consistent on a wide variety of computers. Templates are easy to create, and pages can be changed repeatedly with no ill effects. For these reasons, Dreamweaver has become popular among organizations building Web sites in-house.

Microsoft FrontPage



FrontPage (version 2000; \$149) is the default choice for many organizations using Microsoft Office. Its interface is similar to Word, and the current FrontPage 2000 is a vast improvement over previous versions. However, it retains some quirks: graphics can be difficult to insert, and altering the layout of a page can change it in unintended ways. Also, it generates proprietary HTML code that doesn't work well with all browsers. The proprietary format can be switched off, but when it is some functionality is lost.

NetObjects Fusion

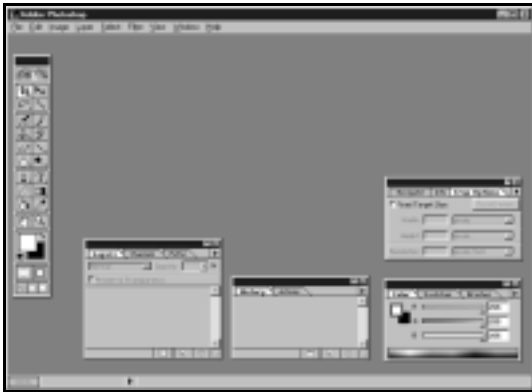


Probably the easiest site-building program for novices to learn. Fusion (version 5; \$300) arranges its functions in a colorful, user-friendly interface. Its clear controls allow people to lay out Web pages with precision. But to gain precision, Fusion sacrifices flexibility: pages created with it can't stretch or contract to fit the size and resolution of the monitor used to view them.

Product	Pros	Cons	Best for:
GoLive	Powerful	Confusing for most people	Professional graphic designers
Dreamweaver	Creates pages that accommodate different computers and platforms Straightforward interface	Lacks wizards	Organizations that want the best all-around site-building program available
FrontPage	Familiar Microsoft interface Comes with Premium version of MS Office “Wizards” that lead users through some complex tasks	Proprietary features, code Quirky functionality	Organizations that must use Microsoft products
Fusion	Easiest for beginners to use	Sacrifices flexibility for precision in page layout	Rank novices

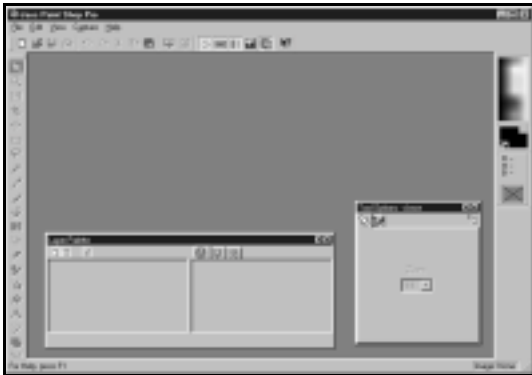
Choose a Web graphics program

Adobe Photoshop



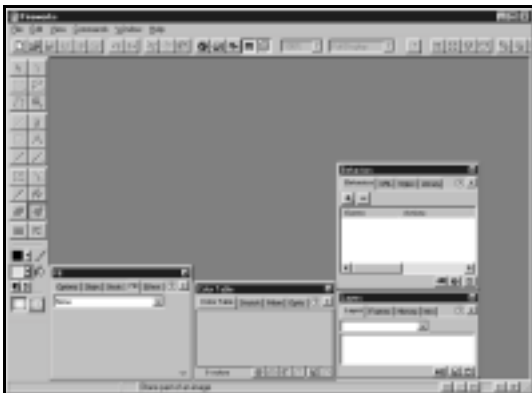
Photoshop is the standard for creating Web graphics. It is the most widely-used Web graphics program, and its latest version (6; \$609) includes a variety of Web-oriented features. Geared towards professional graphic designers, its capabilities are overkill for creating and formatting basic Web graphics. For basic Web work, Photoshop LE, a limited version, does a fine job. Also, the LE version costs less than \$100.

JASC Paint Shop Pro



Paint Shop Pro (version 7; \$99) does most of the things Photoshop can do, but costs under \$100. Its low price and relatively uncomplicated interface have led many site-builders to use it for adding graphics to sites.

Macromedia Fireworks



Fireworks (version 4; \$199) is a purpose-built Web graphics program, with a sophisticated interface similar to Photoshop's. It has extensive drawing capabilities, and works well in both creative and basic Web graphics applications.

Product	Pros	Cons	Best for:
Photoshop	Extremely powerful Plenty of books, guides, online resources available Third-party plug-ins extend its functionality	Steep learning curve Expensive	Professional graphic designers
Paint Shop Pro	Inexpensive Excellent Web functionality	Not quite as powerful as Photoshop	Site Builders who aren't full-time designers
Fireworks	Combines drawing and image editing tools Sold in discounted package with Dreamweaver	New program without extensive support	Graphic designers who want a program tailored to the Web

Tip: Try before you buy

Adobe, Microsoft, Macromedia, and NetObjects all offer free trial versions of their site-building and graphics programs. Before an organization decides which to buy, it should download trial versions so the Web team can evaluate them.

The trial software may be downloaded at:

Adobe GoLive 5

www.adobe.com/products/golive/main.html

Adobe Photoshop 6.0

www.adobe.com/products/photoshop/main.html

Adobe Photoshop LE

<http://www.adobe.com/products/photoshope/main.html>

JASC Paint Shop Pro 6

www.jasc.com/psp6.html

Macromedia Dreamweaver 3

www.macromedia.com/software/dreamweaver

Macromedia Fireworks

www.macromedia.com/software/fireworks

Microsoft FrontPage 2000

www.microsoft.com/frontpage

NetObjects Fusion

www.netobjects.com/products/html/nf5.html#

Tip: Implement content-management systems in large, fluid sites

Some organizations have extensive Web publishing needs. They need to put thousands of pages of documentation on their Web sites, or update hundreds of pages every day, or enable hundreds of employees to post information to sites. In situations like this, site updates require a content-management system.

There are many systems on the market that enable people to post information to a Web site without touching a site-building program. These systems include extensive permission control, ensuring that a person authorized to update one section of the site cannot change other sections. They also automate the approval process, allowing remote review and approval of documents before they're posted to the site.

Content-management systems tend to be expensive. They require professional configuration and installation on the Web server. They also work best when a site is built to work with a particular system, so it's best to choose one and implement it right from the beginning of a site-building project.

Here are several companies that produce Web content-management systems:

Interwoven

www.interwoven.com

Merant

www.merant.com/pvcs

Reedy Creek Technologies

www.reedycreek.com

Versifi

www.versifi.com

Dispatch

www.dispatch.net

Vignette

www.vignette.com

Train

1. Plan the curriculum
2. Prepare the Web team
3. Find a good instructor
4. Conduct training

Plan the curriculum

A common practice among organizations is to order how-to books for their Web publishing staff and say, “Okay, you’ve got two weeks to learn this. Go.” Or they send their Web publishing staff to a two-day HTML or FrontPage class, then put them to work on a site. This usually does more harm than good: cursory Web training teaches people just enough to be dangerous.

Training through books

If your Web team’s training is done through self-study books, take care to choose good ones, and give your team sufficient time to practice. Most how-to books are too text-heavy, containing too much “tell,” and not enough “show” to be really helpful. Use Visibooks, or the Hands-On Training books by Lynda Weinman. Also, give the Web team members at least a month to work through the books and practice what they’ve learned.

Web-based training

Web-based training is often inexpensive, but it’s not very effective when teaching computer subjects to beginners: it’s difficult for people to learn *from* the computer while they’re working *on* the computer.

Classroom training

Classroom training costs more than books, but it can be very effective, especially for people who aren’t computer-savvy. Students learn by making mistakes, and having a live instructor handy to correct them puts many people at ease.

If you send your people to classroom training, send them to several days of classes. Building Web sites is complex work, and four or five days of classroom training is necessary to learn the basics well. Everyone on the Web team should get at least two, preferably three days of training in the organization’s chosen site-building program. Each Web team member should also receive a day of Web graphics training.

Day 1	Day 2	Day 3	Day 4	Day 5
Site-Building Program	Site-Building Program	Site-Building Program	Web Graphics	Site Planning and Usability (morning) Comprehensive Exercise (afternoon)

It’s also helpful to get at least a half-day of “soft skills” training in Web site planning and usability, the things that make Web sites effective. Another half-day can be spent practicing what they’ve learned.

An incomplete education

“Once I taught a two-day Web class at a government agency. I showed the students how to place existing graphics in pages, but there wasn’t enough time to teach them how to format graphics for the web. A few weeks after the class, I visited the sites they’d built, and saw that they’d included BMP files in their Web pages, instead of GIFS and JPGs. The BMPs didn’t show up in Netscape, and they took forever to load.”

David Pierpont, Web instructor, Telematique

Find a good instructor

The most important factor in training is the instructor, so when choosing a company to provide Web training, the Site Coordinator should talk with the company’s Web instructor. A good Web instructor has substantial site-building knowledge and good teaching skills, both of which are acquired through experience.

The complexities of Web work aren’t easy to master, so knowledgeable Web people have usually worked in the field for a couple of years or more, and built many sites. To see if a Web instructor is knowledgeable, ask to see some of the sites built by that instructor. The sites should be attractive, easy to navigate, and load quickly.

The ability to teach is developed in the classroom, so make sure that your instructor has taught for at least a few months previously. Even “natural” teachers need to have taught at least a dozen or so classes to hit their stride. Also, ask to see an instructor’s student evaluations. Students know a good teacher when they see one, and positive evaluations indicate that an instructor knows how to teach.

Cover relevant topics

Many Web books and classes cover arcane tasks and seldom-used features, such as laying out pages using Frames and adding scrolling marquees. Rather than learn everything that's *possible*, it's better to concentrate on learning what's *probable*. Make sure that the books or classes you choose cover fundamental tasks such as laying out pages using tables. Then have the Web team practice these tasks to reinforce what they've learned.

Here are guidelines for what your Web team's training should cover:

Site-building Programs (FrontPage, Dreamweaver, etc.) and HTML

The Basics

- Set up a Web site
- Format text
- Create links to new pages
- Create E-mail and external links
- Insert graphics
- Create a navigation system

Layout and Navigation

- Lay out pages using tables
- Create navigation bars
- Add subsections to site
- Place tables within tables
- Link to an external site using frames

Utilities

- Open an existing Web site
- Find and replace
- Check spelling
- Insert META tags
- Change HTML code

Interactivity and Teamwork

- Create Web forms
- Use style sheets
- Employ templates
- Upload sites to a Web server

Tip: Include an HTML overview

Although current site-building programs can be used to lay out sites with a fair degree of precision, sometimes manual code-tweaking is required to achieve a desired look or effect. Make sure that training includes an overview of HTML.

This overview should impart a basic understanding of how HTML works, and show how to make changes to the code of a page. Even if it only teaches Web team members how to delete a basic `<P>` tag, training in HTML will be helpful to them in their day-to-day work.

Web Graphics Programs

The Basics

- GIFs vs. JPGs
- Create GIFs
- Create JPGs
- Resize graphics
- Crop graphics

Formatting graphics

- Reduce the color palette of GIFs
- Balance image quality and file size
- Make GIF backgrounds transparent
- Convert print graphics to Web format
- Create thumbnails
- Lighten/darken

Creating Graphics

- Employ Text tool
- Drawing and painting (zoom, paint, pencil)
- Cut, erase, replace (pen tool, eraser, magic wand, select color)
- Employ layers
- Retouch (clone tool, blur edge, sharpen filter)

Site Planning and Usability

Planning

- Identify the site's Audience and Purpose
- Determine the resources available to build it
- Get approval for work

Organization

- Develop a work plan
- Gather and organize site content
- Conduct user surveys

Construction

- Proceed according to work plan
- Coordinate work of production team
- Test and review site

Usability

- Being clear and concise
- Chunking and group information
- Site blueprint

Maintenance

- Establish site update procedures and guides

Comprehensive Exercise

- Generate a site blueprint for a Web site of your choice. Then build a site based on that blueprint that includes:
 - At least 12 pages
 - A consistent, user-friendly navigational system
 - Links to external sites using frames
 - E-mail links
 - At least one original graphic on each page, and at least one illustrative graphic aligned with text.
 - A table-based look and layout that stays consistent throughout the site
 - A non-functioning response form

Train the Technician differently

The team's Technician should be familiar with the organization's site-building program and how to create Web graphics. However, since most of the Technician's work will involve coding and programming, HTML and JavaScript training may be substituted for classes in the site-building program.

Also, the Technician should learn at least the basics of Web server administration, such as how to upload files to a Web server, and how to install and configure an e-mail form-handling script.

Prepare the Web team

It's important to make sure that everyone on the Web team knows Windows well. A working knowledge of Windows makes it much easier to learn programs that run on it.

Assess the computer knowledge of team members

Each member of the Web team should be familiar with:

- How directories work
- File extensions
- Windows Explorer
- Basic word processing



A large percentage of people who take Web publishing classes aren't proficient with computers, even if they say they are. Before Web training begins, it's a good idea to give each member of the Web team a quick test. Ask them to perform the following tasks:

- Create a folder on their computer's hard drive
- Create a folder within a folder
- Name the file extension of a Microsoft Word or Corel Word Perfect document (.doc or .wpd, respectively)
- Copy a paragraph from one document and paste it into another.

Bring people up to speed

If a member of the Web team has trouble performing any of the tasks above, set aside a couple of hours for them to learn the basics of Windows file management. Have a Web team member who is proficient with computers walk them through Windows Explorer, creating folders and becoming familiar with file extensions. The person being trained should also be walked through the Cut, Copy, and Paste commands in a standard word processing program.

To retain what they've learned, people being trained should perform these tasks hands-on, using the computer they work on every day. When they can perform all these tasks on their own with no additional help, they're ready for Web training.

Conduct training

Schedule breaks and practice

Whether they're learning from self-study books or in the classroom, people need frequent breaks to rest and process what they've learned. Also, few students can learn anything new after about 3:30 in the afternoon, so long days can be counterproductive.

Students need breaks

“Sometimes I'd get frustrated trying to do something, but the more I struggled with it, the harder it got. Then I'd take a break and when I came back I was able to work it out... Learning to build Web sites was fun, but midway through the afternoon my brain was fried!”

Susan Armstrong, Web student

For classroom training, here is a daily schedule that works well:

- 9:00 Class begins
- 10:30 Break
- 10:45 Training resumes
- 12:00 Lunch
- 1:00 Afternoon session begins
- 2:30 Break
- 2:45 Training resumes
- 3:30 Instruction ends. Practice/Question and answer session starts
- 4:30 Class ends

Provide opportunities to practice

All of what it takes to build professional-quality sites can't be learned in a week or two. The finer points of Web publishing are learned through working on sites and talking with other Web staffers. Just like a doctor in residency or an apprentice plumber, people building Web sites complete their education on the job.

The Web team should be given the opportunity to practice immediately after training. With Web skills, it's "use them or lose them." If an organization can't put the Web team to work on its site right away, its Web team should be given a peripheral Web project to work on. When the team does begin working, the first pages it produces probably won't be impressive, but the quality of its work will improve rapidly with practice.

Encourage team members to enhance their skills

There are several popular Web sites that help people learn how to do professional-quality Web work. Here are some that Web team members can visit to increase their site-building knowledge:

Webmonkey (www.webmonkey.com)

A how-to site for people building Web sites, filled with excellent tutorials and resources. Its tutorials, on adding forms to sites, making graphic backgrounds transparent, and similar subjects, are clearly-written in plain English.

EchoEcho (www.echoecho.com)

Even more tutorials than Webmonkey, and all clear and detailed. Also, this site contains helpful statistics on the percentage of people using different browsers, monitor settings, platforms, and other technology used to view Web pages.

Project Cool (www.projectcool.com)

As its proprietors put it, Project Cool is "a network of websites sharing the common belief that anyone can make a great website if given knowledge, guidance and inspiration." An good section of the site is Sightings, featuring a different example of cutting-edge Web design every day.

Organize

- 1. Determine site content**
- 2. Structure content groups**
- 3. Create the site blueprint**
- 4. Create the work plan**

Determine site content

With logistical aspects squared away, the Web team can now address the question “What should the site contain and do?” A good place to start is by brainstorming.



Brainstorm

All the Web team members should meet in a conference room away from interruptions. Have everyone propose ideas about what the site can do and include. “Can,” not “should,” is the watchword when brainstorming: no idea is too silly, because the point is to generate as many ideas as possible. Be sure to have someone write down ideas as they’re proposed.

Evaluate

The Site Coordinator takes the list of ideas proposed and evaluates each for relevance according to the site’s audience and purpose. Each content idea and proposed feature is scrutinized according to the criteria “Will this be useful to the site’s audience?” and “Does it serve the site’s purpose?” Content and features that aren’t relevant are removed. Write down those remaining in a list.

Survey

The only way to be certain that a site contains what its audience wants is to ask audience members themselves. At this stage, show the site’s content list to the Audience Test Group. Ask each test group member if any content seems unnecessary, and what content is particularly appealing. Along with their answers, they may suggest good content ideas that weren’t previously considered. After speaking with the Audience Test Group, revise the site’s content list based on its members’ input.

Get approval

Show the content list to the Decision-Maker, make any necessary changes, then have the Decision-Maker sign off on it. Since this is the first document that the Decision-Maker approves, establish a precedent for timely approval.

Tip: *Limit approval periods*

Open-ended approval periods can slow down work significantly, so when submitting the content list, try to have the Decision-Maker agree to approving it within a certain period of time. If the Decision-Maker is the sole reviewer, two days is ideal. That way, if there are any changes to be made, the content list can be resubmitted and approved within a week.

If the Decision-Maker would like to solicit input from other members of the organization's management team, count on the approval process taking from one to two weeks. Whether the content list is reviewed by one person or many, try to set a limit of two days to a week for approval, and maintain that approval period limit throughout the site-building process.

Structure content groups

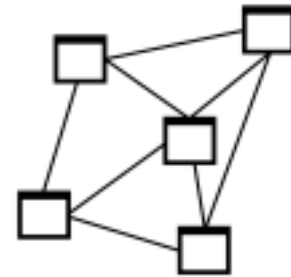
Understand the importance of structure in Web sites

When information is hyperlinked, as on the Web, it can become confusing and hard to find. The purpose of a Web site is to provide a logical, organized structure so information is easy to find.

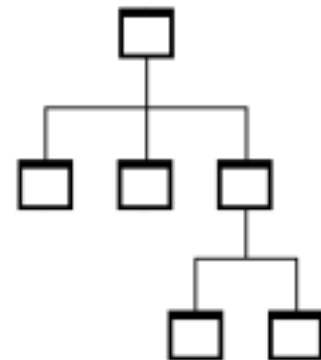
In **traditional media** such as books and video, pages and frames are viewed in sequence. Traditional media have a linear structure in which information is strung together like beads on a string, front to back, beginning to end.



Hypermedia, in which it's possible to jump from page to page and screen to screen, are non-linear. Unlike traditional media, hypermedia have no built-in organization. It's easy to get lost.



Web sites are organized hypermedia. Web sites show people where they are, and where they can go. Information is structured and organized so it makes sense.



Tip: Think user-friendly

Usability is becoming recognized as the most important factor in the success of Web sites. A site can look sleek and employ sophisticated technology, but if it's not user-friendly, people will avoid it. The converse is also true: a site can be simple, but it's likely to be well-received if it makes information easy to find and understand.

User-friendly success stories**IBM makes site easier to navigate, increases sales**

“The best result of the relaunch is that the IBM Web site is much easier to navigate...The company says in the month after the re-launch, traffic to the Shop IBM online store increased 120 percent, and sales went up 400 percent.”

Jim Battey, “IBM's Redesign Results In A Kinder, Simpler Web Site”
InfoWorld: www.infoworld.com/cgi-bin/displayStat.pl?pageone/opinions/hotsites/hotextra990419.htm

Schwab makes site easier to use, gains 1/3 more customers

“The redesign is mainly an attempt to make the interface easier to use...Officials said the focus has been on improving usability and simplifying navigation...With 6 million active accounts, Schwab last week disclosed that customer assets were up 36 percent for the year.”

Jeffrey Schwartz, “Schwab Redesign Stresses Usability”
Internet Week: www.internetwk.com/shared/printableArticle?doc_id=INW19990520S0006

Structuring site content is the first step in making a Web site user-friendly. In this and subsequent steps in the site-building process, strive to make the site easy for people to use.

The next several sections of this book include tips on making a site user-friendly. More information on Web usability can be found in the following Web sites and books:

www.usableweb.com

Keith Instone's collection of links and information about human factors in Web design.

www.useit.com/alertbox

Web usability articles by Jakob Nielsen, Web usability guru.

The Non-Designer's Design Book, Robin Williams

A good introduction to the basic principles of document design. It concerns printed documents, but applies directly to the Web.

Information Architecture for the World Wide Web,

Louis Rosenfeld and Peter Morville

A somewhat academic but informative overview of structuring information online.

Web Navigation: Designing the User Experience, Jennifer Fleming

Case studies and examples in user-friendly Web navigation.

Don't Make Me Think! A Common Sense Approach to Web Usability,

Steve Krug

A straightforward, informative look at what goes through people's minds when they're trying to use a Web site. Excellent resource.

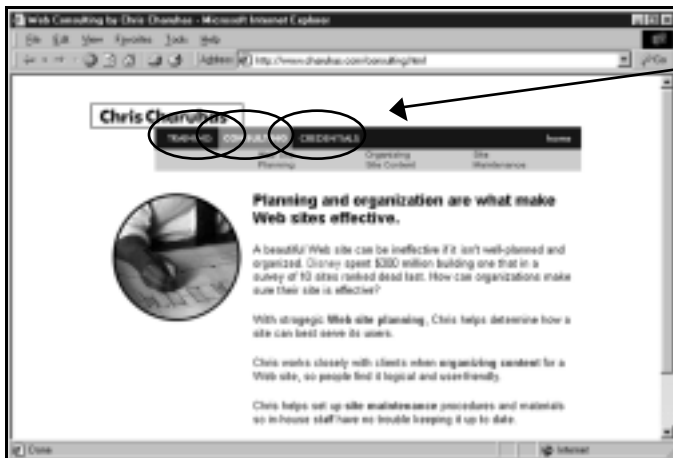
Determine content groups

Working with the site's list of content, the Site Coordinator organizes them into a hierarchy of related groups. At this stage, a sophisticated chart isn't necessary. A tree diagram sketched out with pencil and paper will do, because the site's content hierarchy will change frequently before it reaches its final arrangement.

Tip: *Chunk content into small groups*

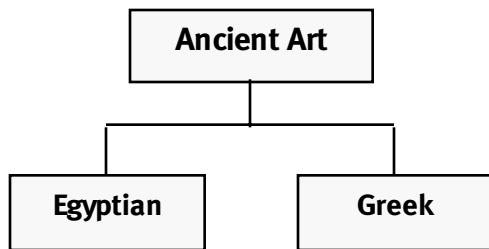
When confronted with groups of over seven items, people begin to get confused and forgetful. That's why license plates and social security numbers are segmented into groups of two, three and four digits: they're easier to remember that way.

To make it easier to grasp, arrange site content in groups of three to seven. The Web site pictured below chunks its main-level content into three groups:

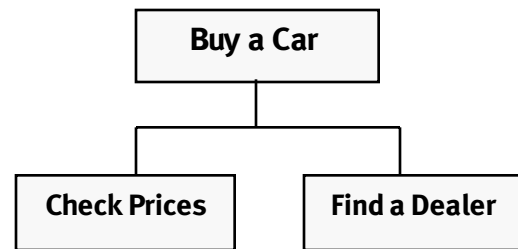


Three main sections let people feel in control, not overloaded with information.

Group content according to the things people want to find (object-based), or according to the tasks people want to accomplish (task-based). Examples of each are below:

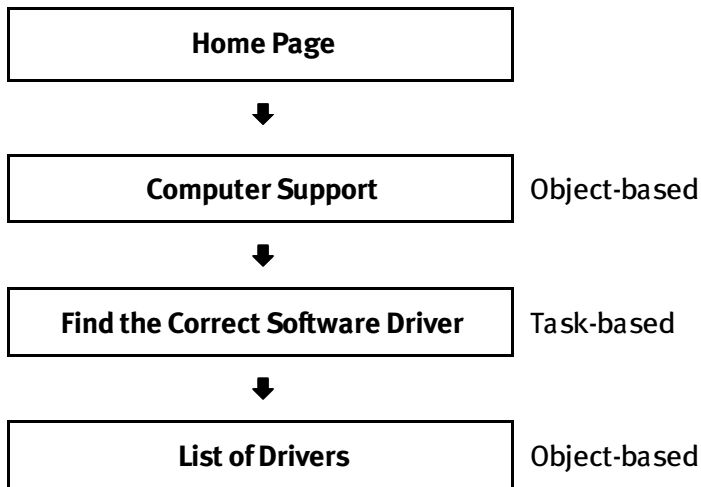


Object-based hierarchy

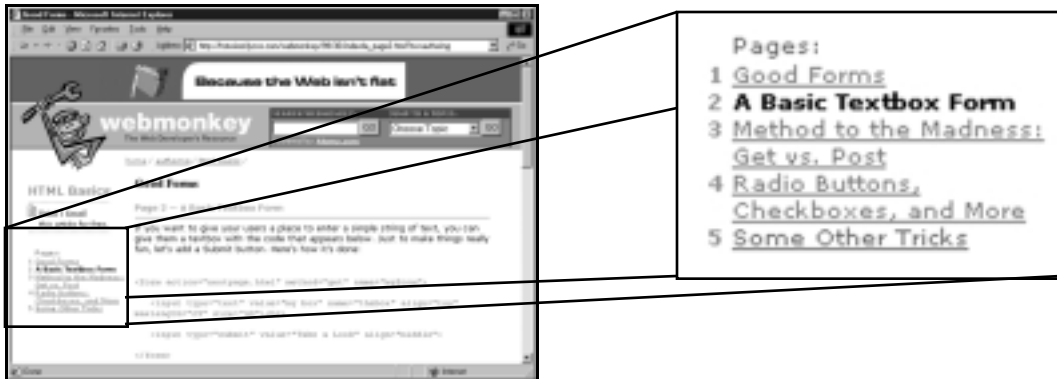


Task-based hierarchy

Both object-based and task-based groupings can be used within the same site. For instance, the content for a computer company's site could be grouped this way:



Sometimes sequential organization can also be used. For instance, articles can be broken up into several Web pages, with links to go forward and back among the pages.

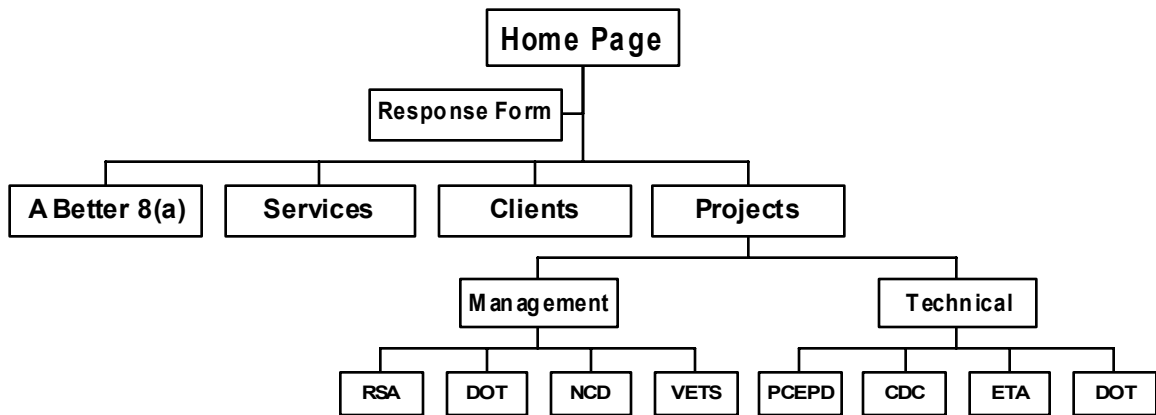


Create the site blueprint

The site blueprint is a chart showing how the site's content groups are organized. Next to the statement of audience and purpose, the site blueprint is the most important document used to build a Web site. It guides the Web team in building the site, just as the blueprint of a house guides its construction.

Besides guiding site construction, the site blueprint keeps the site organized over time. It shows where new pages and sections should fit into the site. The site blueprint is most often shown as a tree diagram.

This site blueprint...

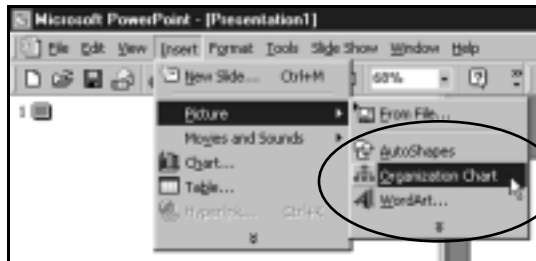


...was used to create this web site:



Put the site blueprint on paper

The Site Coordinator can create the site blueprint using a flow-charting or diagramming program. The Organization Chart module in PowerPoint is adequate for most sites. To produce a site blueprint with more sophisticated graphics, a flow-charting program such as Visio can be used.



Getting to the Organization Chart module in Power Point

Solicit audience input

Once the site blueprint has been created, the Site Coordinator should show it to the Audience Test Group—the small group of site audience members that reviewed the site's proposed content. Ask them:

- Does it show any content groups that you consider unnecessary?
- Does it leave anything out that's important to you?
- Does the arrangement of groups make sense to you?

Revise the site blueprint

Like the site's content list, the site blueprint should be revised based on the input of the Audience Test Group.

Get approval

After the Audience Test Group provides impressions of the site blueprint and it is revised accordingly, have the Decision-Maker review the site blueprint. After it's approved, make a copy of the site blueprint and have the Decision-Maker sign off on it.

Create the work plan

The work plan is a document that shows how work on the site should proceed. To create it, the Site Coordinator first meets with the other members of the Web team so everyone can reach agreement on their tasks.

Finalize roles and responsibilities

The Site Coordinator checks with the members of the Web team to make sure that the team members are comfortable with their roles in site construction. Usually the members of a Web team will perform the following tasks:

Editor

Writes and edits the site's text content.

Graphic Designer

Provides design templates and original graphics.

Site Builders

Take text and templates and build the site's pages.

Technician

Integrates forms and other interactive elements with programs on the server.

Site Coordinator

Keeps work on track, checking to see if things are done right and on schedule.

Draft the work plan

After defining the team members' tasks, the Site Coordinator draws up the work plan, which should include:

A task list

A list of all the things that need to be done to build the site: creating pages, writing and editing text, composing graphics, programming, etc.

A schedule

The dates when each of these tasks will be started, checked, and completed.

Approval points

Points during site construction at which the Decision-Maker and others must give approval.

Sample Work Plan

Step	Task	Date	Who	Notes
Site Blueprint/ Design Plan			Site Coordinator, Site Builders (2)	
	First draft	2/16/99	Site Coordinator, Site Builders	
	Web Team Review	2/17/00	Site Coordinator, Site Builders, Editor, Graphic Designer	
	Leadership Review/ Approval	2/29/00	Leadership team	
	Final	Mid March	Site Coordinator, Site Builders	
Site Content			Editor, Site Coordinator	
	All first drafts		Editor	
	Web Team Review		Site Coordinator, Site Builders, Editor, Graphic Designer	
	Leadership Review/ Approval		Leadership team	
	Final	Mid April	Editor	
Design Models			Graphic Designer, Site Builders	
	First drafts of templates		Graphic Designer	
	Web Team Review		Site Coordinator, Site Builders, Editor, Graphic Designer	
	Leadership Review/ Approval		Leadership team	
	Final	Mid April	Graphic Designer	

Step	Task	Date	Who	Notes
First Site Draft			Site Builders	
	First draft		Site Builders	
	Web Team Review		Site Coordinator, Site Builders, Editor, Graphic Designer	
	Pilot Team Test		8 Audience members	
	Revise		Site Builders	
	Leadership Team Test		Leadership team	
	Final	Beg. May	Site Builders	
Go Live		06/01/00	Site Builders, Hosting company	
Update		Ongoing	Web Team	Different team members will have different updating responsibilities.

Consider building a work site

A work site is a small Web site containing information about the site being built. Work sites provides a convenient place to get information about Web projects, letting the Web team, the Decision-Maker, and anyone else involved with the site stay current on its construction.

The screenshot shows a web browser window displaying a 'Work Site' for 'ACME Web Development Site Area'. The page is organized into several sections:

- Production schedule:** A table listing tasks and dates from Oct 12 to Dec 17.
- Meeting notes:** A section with a heading and a list of notes.
- Visuals:** A section with a heading and a list of image files.
- Contact information:** A sidebar on the right containing contact details for 'Mediastudio'.

Arrows from the text labels point to the following elements:

- Timetable:** Points to the 'Production schedule' table.
- Contact information:** Points to the 'Mediastudio' contact details in the sidebar.
- Links to site blueprint, design models:** Points to the 'Visuals' section.

If the domain of the Web site being built is www.yoursite.com, the work site could be posted to a subdirectory such as www.yoursite.com/project.

Build

- 1. Generate design models**
- 2. Prepare content**
- 3. Construct a working draft**
- 4. Conduct audience testing**
- 5. Post the site live**

Generate design models

Create a model home page

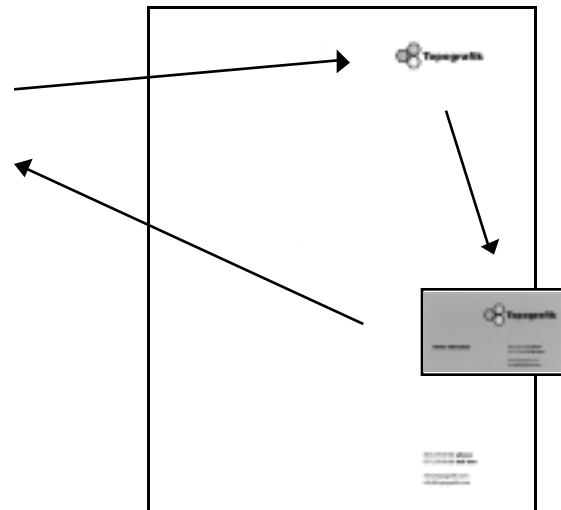
Designing a site's look and feel begins with the Graphic Designer creating a model of the site's home page. When designing it, the Graphic Designer considers factors such as:

- **The site's statement of audience and purpose**
- **The site blueprint**
- **The organization's existing visual identity**
- **The size of the site**

In the example below, the Web site's look echoes the look of the company's existing visual identity, as displayed in its business cards and letterhead:



Web site



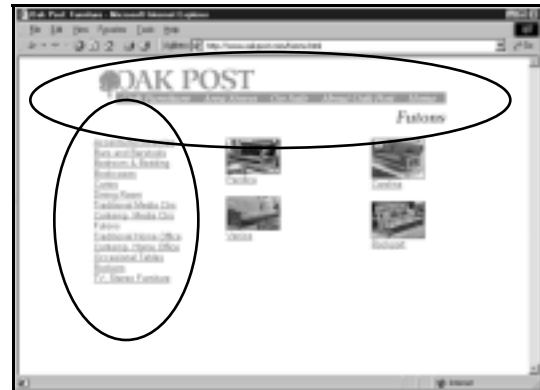
Letterhead, Business card

Also, the site's size will determine its layout to a certain extent. Large sites need both horizontal and navigational areas. Small sites can use one or the other.



Total pages in site: 6

Main sections listed in horizontal navigation bar



Total pages in site: 324

Main sections listed in horizontal navigation bar

Subsections arrayed in vertical navigation area

When the model is finished, it should be reviewed by the Web team to make sure it can be easily updated, downloads quickly, and includes a user-friendly navigational layout. It should also be shown to the Audience Test Group to solicit their impressions.

Get approval

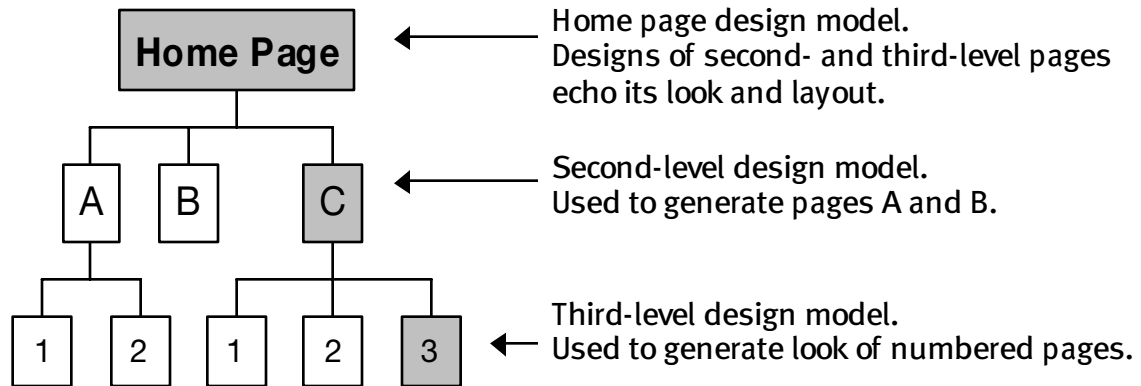
Before the Site Coordinator presents the home page design to the Decision-Maker, it's important to plan how it will be presented. Design is subjective, and whether a design is approved or not depends to a great extent upon the perceptions and personality of the reviewer.

When submitting site designs for approval, the Site Coordinator should use the personality profiling charts on pages 11 and 12 to present designs in a way that's comfortable to the Decision-Maker.

Create main- and sub-section models

After the design for the home page is approved, the Graphic Designer creates a model for the site's main section pages. The design of this model is based on the design of the home page.

When the design of the main-section model is approved, model pages are designed for the site's subsections. The designs of these are, in turn, based on that of the main sections.

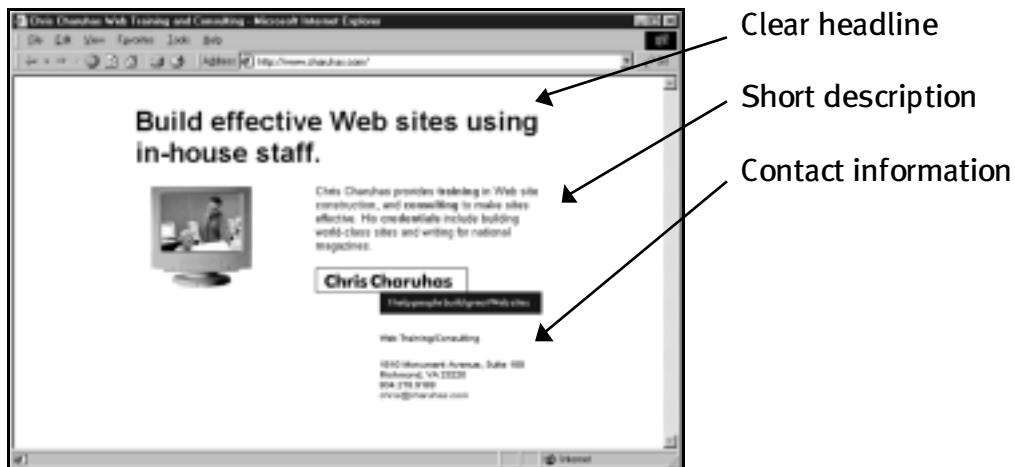


Tip: Incorporate user-friendly design principles

Clean layout

When designing the page models, the Graphic Designer should incorporate user-friendly design principles, the foundation of which is an uncluttered layout. Web pages present both information and navigation for people to keep track of, so design shouldn't get in the way.

The page below is an example of clean, simple layout that makes the page's information easy to understand:



CAPS

Color, alignment, proximity, and size, or CAPS, can be used to express relationships among groups of information. Related items can be the same color, size, or close together.

Color

Make one color mean one thing. In this case, “blue” means “navigation:”



Blue navigation bar

Blue links

Alignment

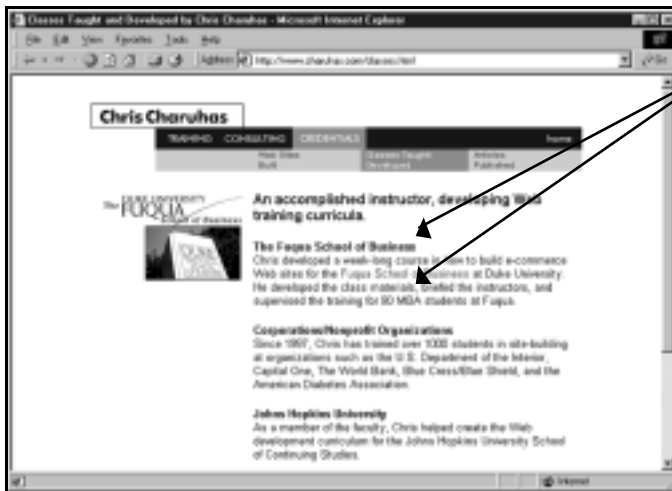
Align similar information along the same axis:



All content is aligned along the same line, clearly defining what is content and what isn't.

Proximity

Group related items close together. Employing subheadings above paragraphs is a good use of this principle:



Subheadings are placed directly above the text they describe.

Size

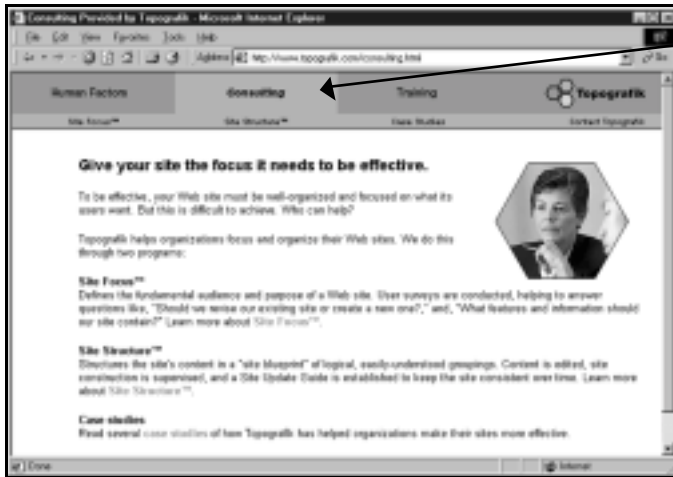
Differentiate important information with different size graphics or text:



Main headings are three times larger than body text.

Clear navigation

Navigation is an integral part of site design, so the Graphic Designer should make sure that page designs incorporate elements that show site users “you are here:”



Lighter area of navigation bar shows current section.

Also, links should be chunked on the page. Too many links in one place are confusing, so group them into categories of similar links:

Al's Fruit Company Web Site

Fruits We Sell

- [Apples](#)
- [Bananas](#)
- [Cherries](#)
- [Grapes](#)
- [Oranges](#)
- [Kiwis](#)
- [Kumquats](#)
- [Mangos](#)

Long lists can be confusing.

Bruno's Fruits Web Site

Domestic Varieties	Exotic Fruits
Apples	Kiwis
Bananas	Kumquats
Cherries	Mangos
Grapes	
Oranges	

Chunked links are easier to grasp.

Prepare content

Gather content

Once the site's content groups are organized, the Web team gathers the site's actual content. When it is collected from its various sources—brochures, reports, spreadsheets, CDs, etc—this content is put into digital format. Documents are saved as plain text files, and graphics are saved in TIF, EPS, PICT, or other digital format.



Edit content

The team's Editor takes the raw text documents gathered and edits them down to approximately half their original length. The Editor should use as few words as possible for Web text because:

1. **Reading text on a Web site is harder than reading text in print.**
Web text is usually read on a low-resolution computer monitor. Scrolling down a page makes it easy to lose one's place.
2. **People usually don't want text-rich information from Web sites.**
Most people visit Web sites to find specific information, so they tend to skim. Lengthy text passages prevent them from doing this.
3. **Succinct text is more easily understood.**
Salesmen have a saying that "the more words you use, the less they remember." People who build successful Web sites know the same thing.

A good example is this text from a company's capability statement...

ACME's corporate experience has been both diverse and wide-ranging. As a small, responsive organization, ACME has had the opportunity to develop itself in a uniquely different manner than that pursued by most other 8(a) companies. ACME recognizes the importance of the maintenance of a steady cash flow coupled with prompt and consistent payments to vendors, subcontractors, and especially its own employees. ACME meets these financial goals by continually maintaining accessibility to working capital in excess of one million dollars. In addition to sound financial practices, the combination of responsible business management strategies and employees' extensive technical skills have created for ACME a reputation of quality, reliability, and fiscal integrity unmatched by comparable 8(a) firms.

...that was edited down to this for use on its home page.

ACME
Management and technology
consulting on Health and Disability.

Why work with ACME on health and
disability projects? We're a better 8(a).

Construct a working draft

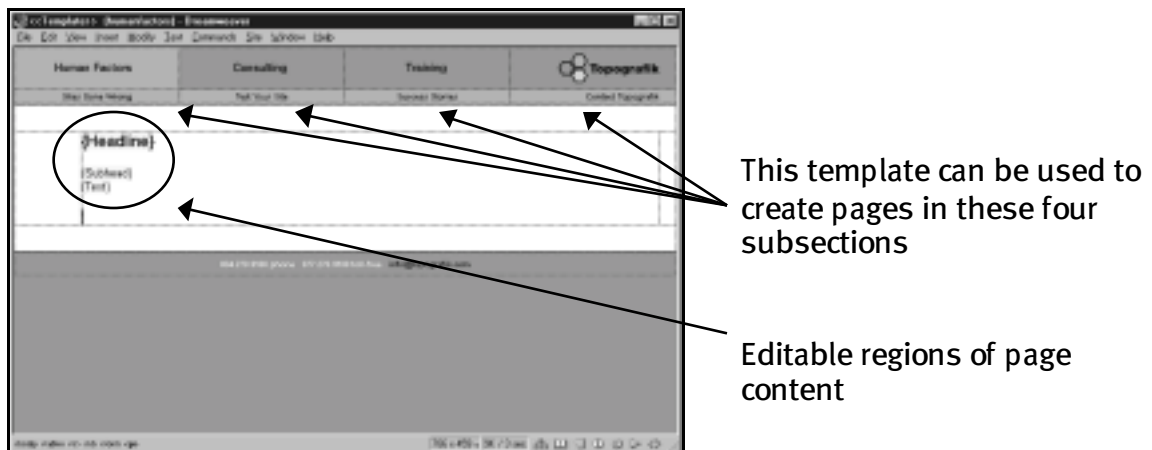
At this point, a draft version of the site is created. Work on the site draft proceeds according to the work plan, with the Site Coordinator supervising construction and keeping things on track.

To make pages in the site draft available for review, they can be posted to a test directory. For instance, if the Web address for the “live” site is **www.organization.com**, the working draft could be posted to **www.organization.com/new**.

Tip: *Employ page templates*

Using pre-fabricated page templates is an excellent way to keep sites consistent. Templates save work, make adhering to standards easier, and minimize mistakes. All current site-building programs allow the creation of templates, and most automatically update pages created from the template when the template is changed.

Using the design models, create a template for each section of the site. Make the templates available for use by the Web team in building the site draft.

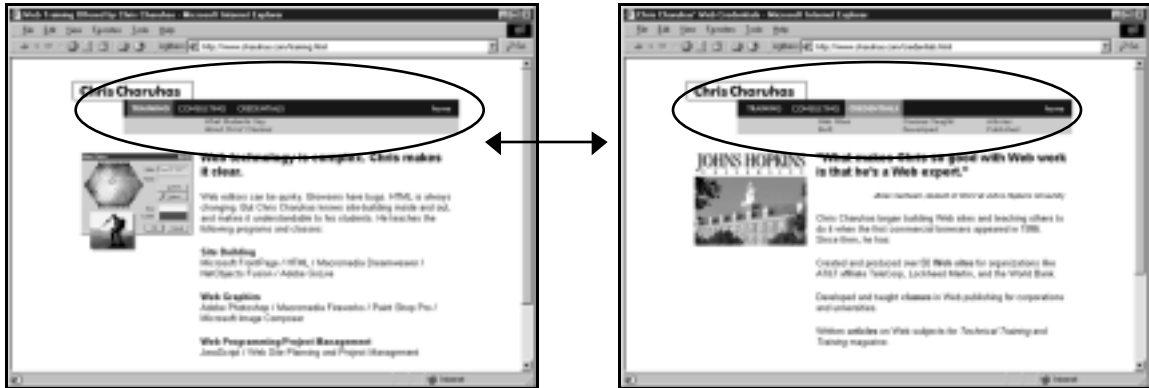


Page template in Macromedia Dreamweaver

Tip: Make design and navigation consistent throughout

Design and navigation should be consistent throughout the site draft. Sites that preserve consistency in design and navigation make people feel comfortable and in control.

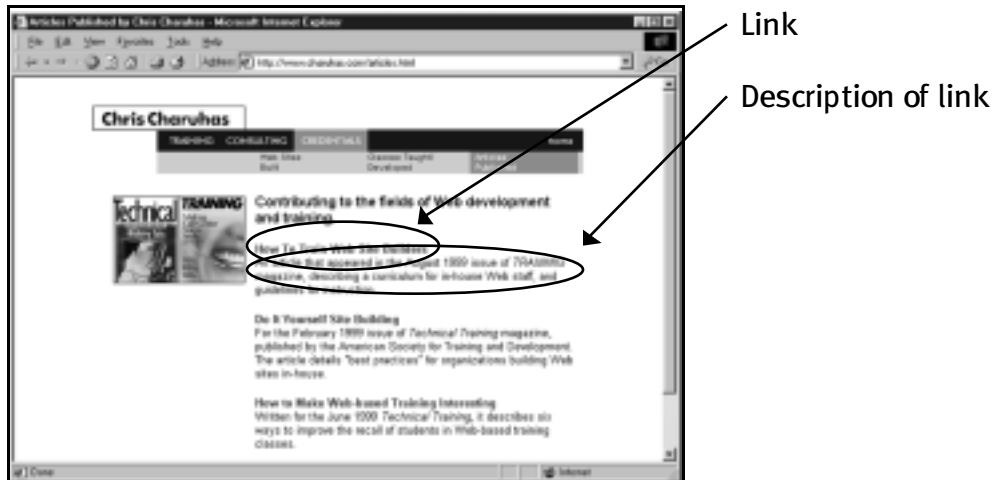
For instance, people naturally assume that if links are red on one page, then links will be red on every page, so keep the link color the same throughout the site. Just as people get used to a certain color that means “link,” they get used to links being in a certain order, so list links in the same order on every page.



Different sections, same navigation:
The links in these two sections of a Web site are in the same place, same order, same font, and same color.

Tip: Clarify site navigation

Provide descriptions below or beside links. This clarifies where the link will lead, aiding navigation:



Another way to clarify site navigation is to use verbs as links. For example, a link that reads [Subscribe to our mailing list](#) is clearer than one that just reads [Mailing List](#).

Troubleshoot the site

The look of a site can vary widely when viewed on different computers. To ensure consistency, view the site on a variety of different:

- Platforms (Windows, Mac, Unix)
- Browsers (Internet Explorer, Netscape Navigator)
- Screen resolutions (640x480 pixels, 800x600, 1024x768).



Page viewed on monitor 1024 pixels wide



Same page viewed on monitor 640 pixels wide

If the site draft doesn't look right on some systems, the Site Builders should fine-tune it until a consistent look is achieved.



Bobby

Note: Try to build the site to be handicapped-accessible. Bobby, at www.cast.org/bobby, lists guidelines for site accessibility.

Conduct audience testing

Set up the test

Arrange to have the Audience Test Group test the site draft. If possible, have them do this at a place outside the office to avoid distractions. Before the test session, interview each member to identify the tasks they want to perform, and the information they want to find.

Conduct the test

Have each group member click through the site for 20-40 minutes. As each member of the Audience Test Group attempts to accomplish his or her desired tasks, note if they were successful. If not, note the problems encountered.

Feel free to ask each tester questions such as, “Why did you click there?” and “What’s your reason for going that way?” However, don’t provide any help.

Summarize the results

After the audience testing is finished, compile the findings in a report. Each member of the Web team and the Decision-Maker should review this report. If a pet feature of the site was found to be unpopular or hard-to-use, the audience testing report can supply the objective proof needed to change it.

Sample Audience Testing Form

Name:	
E-Mail:	
Organization:	
What do you want to do at the site?	
Were you able to do what you wanted? What couldn't you do?	
What do you like about the site?	
What would you change about it?	

Post the site live

Revise the site

Now the site is almost ready to be uploaded to the server. Before it is, clarify links and designations that the Audience Test Group found confusing. Using the results of the Audience Group testing, change the site's functionality, layout, and navigation to reflect their preferences.

Get final approval

After the site has been revised, show it to the Decision-Maker and obtain final approval for it. Get the Decision-Maker to sign a document expressing final approval.

Upload the site

Upon final approval, publish the finished site "live" at the correct Web address. Click through the site to check links and download times. Correct any last technical problems encountered, and the site is done.

Maintain

- 1. Establish guidelines for structure and design**
- 2. Set update schedule**
- 3. Specify workflow for site additions**
- 4. Create a site maintenance guide**

Establish guidelines for structure and design

No Web site stays the same for long. As a site undergoes changes and additions, it can easily develop inconsistent looks among its sections, accumulate dead-end links, and accrue superfluous information. The key to avoiding this is to establish guidelines for the site's structure and design.

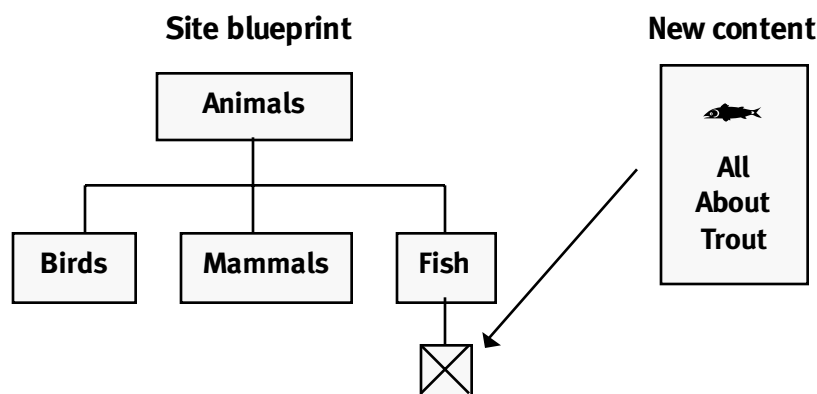
Implement design guidelines

Establishing guidelines for site design ensures that updates and additions to the site look consistent with the rest of its pages. These should include instructions for:

- How the logo should be displayed
- What colors and fonts should be used
- How navigation and content should be arranged

Include the site blueprint

The site blueprint, which diagrammed the site's content groups for its construction, can help determine where new content should go. When adding information to a site, look at the site blueprint and figure out into which content group it logically fits. Then post it to the site in the appropriate section.



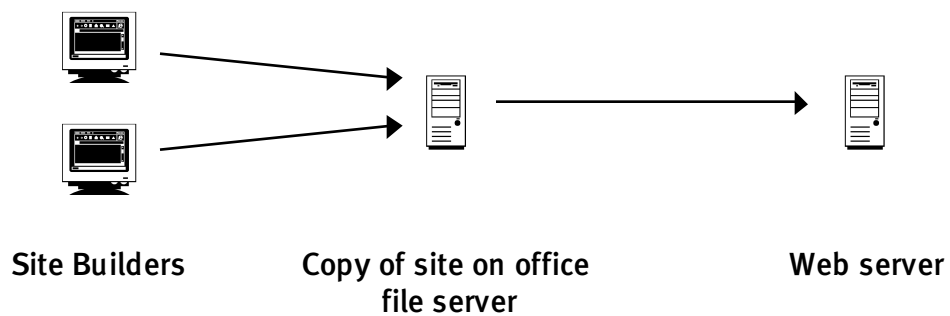
Set update schedule

Schedule page/section updates

Determine which sections and pages of the site need to be updated. Then determine when each needs to be updated: Daily, weekly, monthly, or every few months.

Work from a local copy of the site

Site updates should be done first on a copy of the site, best kept on an office's file server. Working from a local copy allows site updates to be tested before they're posted live, and also provides a current backup of the site in case of Web server failure.



Specify workflow for site additions

When new pages or sections need to be added to the site, workflow procedures should specify who will do the work and how it will be approved. The following workflow system streamlines site additions:

1. **Submit**
New information to be posted on the Web site is submitted to the Site Coordinator.
2. **Designate**
The Site Coordinator determines where in the site the new information should go, then delegates the task of posting it to a Site Builder.
3. **Test**
Site Builders create pages with the new information using appropriate templates. After sending them to the site copy on the office's file server, the Site Builders test them for link integrity and formatting.
4. **Post**
The Site Coordinator reviews the changes on the local file server. After approving them, the new pages are posted live to the Web site.

Tip: *Use workflow features*

All current site-building programs contain workflow features that allow permissions and tasks to be controlled and monitored.

Create a site maintenance guide

When the site's design guidelines and update procedures have been developed, set them down in a site maintenance guide. Having that information in one place helps the Site Builders who update the site keep it consistent.

Sample Site Maintenance Guide

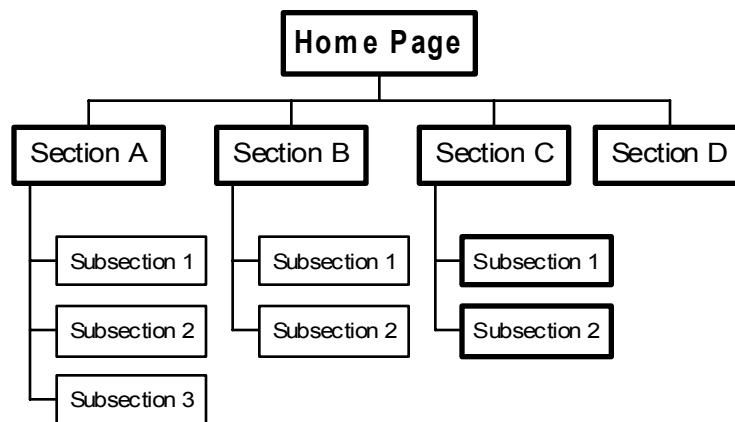
Site Maintenance Guide

Personnel

(Site Builder) updates the site. (Site Coordinator) approves changes to the site before they go live.

Schedule

On the first day of every month the home page is updated. The site as a whole is also reviewed for link integrity and currency at that time.

Site Structure

Design Guidelines

Links

Style: **Bold**
Color: Orange. Hexadecimal #FF3300
Visited Color: Same

Text

Body Text: Font: Arial, regular
Size: -1
Headlines: Font: Arial, bold
Size: +1 for second level, +0 for third
Subheads: Font: Arial, bold
Size: -1

Layout

Colors
Graphics Size
Placement
Navigation Bar Location

Templates: G:\Site\Templates

Web Project Scenario

Web project scenario

The following scenario traces the creation of a Web site from beginning to end. It details how an organization—a fictitious company called Mortgage Unlimited—employs in-house staff to build its Web site. The scenario is organized into sections that correspond with the previous sections of this book: Plan-Train-Organize-Build-Maintain.

The Site Coordinator's perspective

In the scenario, your perspective is that of the Site Coordinator. Common questions are posed as if the Site Coordinator asked them, and the other characters in the scenario respond accordingly. The members of the Web team also ask questions, which are answered as a Site Coordinator might.

Background

You're the communications director for Mortgage Unlimited, a home mortgage company. The company has a Web site, basically an online brochure built by an outside contractor, who updates the site every week.



You've reviewed your site and compared it to others, and you believe that it's lacking. You want to be redesign and expand it. You'd like it to contain information on loan rates that's updated daily. Since you'd need to train people for daily site maintenance anyway, you decide to train the company's staff to build an entirely new site.

After meeting with the company's general manager, you get approval to build a new site in-house.

Plan

Identify the Decision-Maker

You arrange a meeting with the General Manager and ask him if he'll be approving work on the site:



General Manager

“I plan on asking people what they think, but I’ll be making final decisions about the site.

I will want to run things past our lawyer, though. I’ve never done business on the Web, and I want to make sure everything is legal.”

Select the Web team

As the company's communications director, you assume the role of Site Coordinator and select the following people to build the Web site:



The company's **Publications Person**, who lays out the customer newsletter, will function as the Site Builder. Since he is the person in the office most experienced with computers, you designate him site Technician as well.



The **Marketing Coordinator**, who writes copy for print publications, will serve as Editor.



The **Graphic Designer**, who designs the company's brochures, ads, and catalogs, will perform the same job for the Web site.

Conduct an initial meeting

This initial meeting gives you a chance to answer questions:



“Will the site be done in time to print the Web address in our magazine ads? Submission deadline is three weeks away.”

Marketing Coordinator

You tell the Marketing Coordinator that most Web sites take three to six months to complete, because one person's providing the content, another's creating graphics, programming may be necessary, and it all needs to be reviewed and tested. This takes time, even with the most basic Web site.



“I’m used to laying out magazine ads and catalogs. Will I have to do special graphics for this Web site?”

Graphic designer

You tell the Graphic Designer that Web sites do require special graphics, but that he'll learn how to create them in a training class.



“Does doing business on the Web require taxes or licenses?”

Lawyer

You tell the Lawyer that Internet taxation is still being worked out in Congress and state legislatures, but that if she would research the latest laws to see which apply, that would be helpful.

Define the audience and purpose

After determining that the Manager will be the Decision-Maker for this project, you ask him who he thinks will be using the site:



“Let’s see... The people who get mortgages through us tend to be middle-income families. I guess the people visiting the site would be the more computer-savvy people in that group.”

Then you ask him what he thinks the site should do:



“I think the site should let people see our loan rates and allow them to do a loan application over the Internet.”

Resolve the success criteria

You ask the Manager what will make the site successful, and what he'll be happy with when the site is completed:



“There are lots of companies that do mortgages, but our rates are lower than most everyone else's. Maybe the Web site should stress that.

If it makes it easier for people to check our rates and do a mortgage application, I'll be pleased.”

You write down the audience, purpose, and success criteria for the site. You put these in a document and have the manager sign it. Then the Manager asks:



“By the way, what's involved with building the Web site? How much will it cost?”

List the resources available

You tell the Manager that the site will probably take six months to build, and that you'll need the help of the publications person, graphic designer, and marketing coordinator. You ask how much money is budgeted to build the site:



“We’re not so much limited by money as by time. There’s a lot of mortgage work to do, and we can’t have people working on the Web site full-time.”

You inform the Manager that to keep site work on the site moving, your Web team members should work on it at least half-time.



“We’ll have to see about scheduling, but right now I think that will work.”

Choose the right software

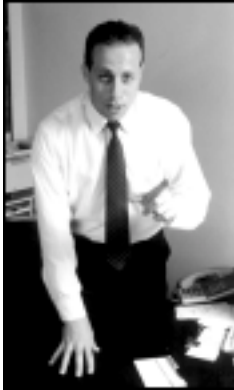
You download trial versions of site-building software programs and, together with the Publications Person who will use it most of the time, you decide which one to buy.

You ask the Graphic Designer if he needs new software for Web graphics, but he decides to stick with his existing software, which works well for Web applications.

Train

Plan the curriculum

You ask the Manager for a full week of classroom training for the members of the Web team:



“Having everyone out of the office for a week would leave a lot of work undone. Besides, training is expensive! Let’s use how-to books for the training.”

You decide to get a good self-study book about the site-building program your team is using. You provide each team member with a copy, along with an HTML how-to book and one on creating Web graphics. You also arrange to have every team member read *The Visual Learner’s Guide to Managing Web Projects* to make them familiar with systematic Web development.

You also know it’s important that your Web team practice what they’ve learned, so you set aside two weeks for the team to build a practice site from scratch.

Prepare the Web team

You know the Publications Person, Graphic Designer and Marketing Coordinator are good with computers because they use them every day. However, you don't use computers every day. You get by, but you're not proficient with them. You believe that, since you're leading the Web team, you ought to be able to use the site-building software well.

Before you go to training with your team, you have the Publications Person tutor you in computer file management.



“Thanks for letting me show you a few things about managing files on the computer. I think you’ll get a lot more out of the training, now that you’re up to speed with the basics.”

Conduct training

You and the Web team work through the how-to books over a three-week period, helping each other as you go. After you've finished the books, the team takes two weeks to build a practice site together:



← Web site for a fictional company, built from scratch by the Web team.

Organize

Determine site content

You have another meeting at which everyone brainstorms about what the site should contain and do.



“It’s seems pretty straightforward: the site should include information about our loan programs and rates and maybe some forms to apply for loans through the Web.”

The day after the meeting, you contact several of the company’s customers and ask them if they would like to serve as a test group during the development of your company’s site. Seven agree to serve on the test group, so you ask them what they would like the site to contain and do. Most echo the sentiments of this customer:



“I think that tips on how to go about getting a mortgage would be helpful. I remember that the process was confusing until your people explained it to me. I think visitors to your Web site would appreciate it, too.”

Customer

After speaking with the customers, you decide that the new Web site should include a “Helpful Tips” section, and add that to the site’s list of content.

Structure content groups

You ask the Marketing Coordinator if she can gather the company's existing print materials, such as brochures:



“I gathered our brochures, as well as some loan application forms. I also printed out a sheet of our current loan rates so they can go on the Web site.

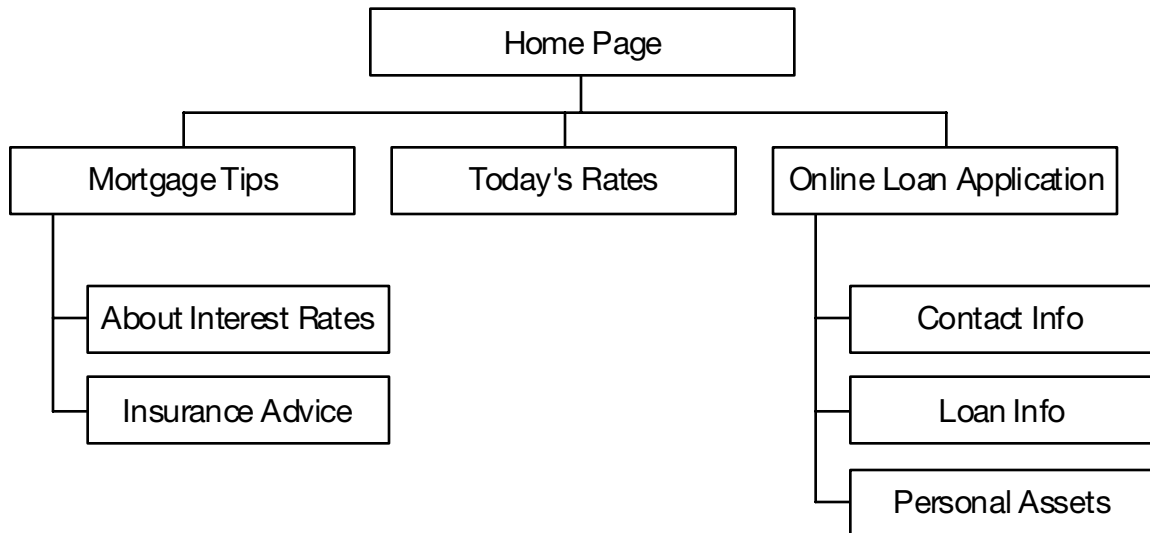
I put all the text on floppies, so it's easy to cut the text and paste it into our Web pages.”

The site's content list includes these groups:

- Online Loan Application
- Loan Information
- About Interest Rates
- Insurance Advice
- Mortgage Tips
- Contact Information
- Today's Rates
- Personal Assets

Create the site blueprint

You create a site blueprint that organizes the content groups:



You show the site blueprint to the audience test group, all of whom like it. Then you get the general manager to sign off on it, agreeing that the site will be structured according to this blueprint.

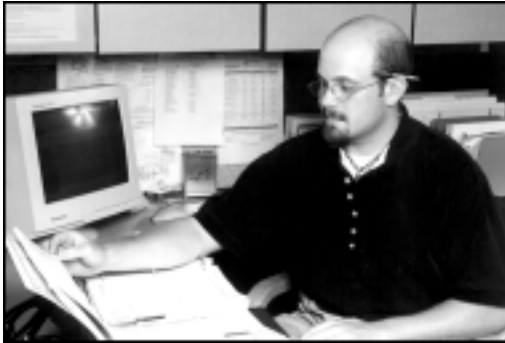
You distribute a copy of the site blueprint to each member of the Web team.

Create the work plan

You draft the following work plan and distribute it to each member of the Web team, as well as to the Manager.

Week	1	2	3	4
Task	Establish work site Begin designing model home page Begin writing and editing site copy	Get approval for home page design Begin designing second-level model	Get design model for second-level pages approved Finish writing site copy	Begin building site's pages Begin working with site hosting firm on enabling loan application form
Staff	Publications Graphics Marketing	Graphics	Graphics	Pubs Graphics

Week	5	6	7	8
Task	Continue building site's pages and forms	Complete site draft Post site draft on server for approval, testing	Test site Revise site based upon testing Obtain final approval	Post site live Establish Site Update Guide
Staff	Publications	Publications	Publications Graphics	Publications Site Coordinator



“This work plan is helpful. It lets me know how we’ll build the site, and when things are supposed to happen.”



“I’m glad I got to look at this work plan. It lets me know what I’ll be asked to sign off on, and when.”

Build

Generate design models

You give the site's audience, purpose, success criteria and blueprint to the Graphic Designer, so he can design a model home page.

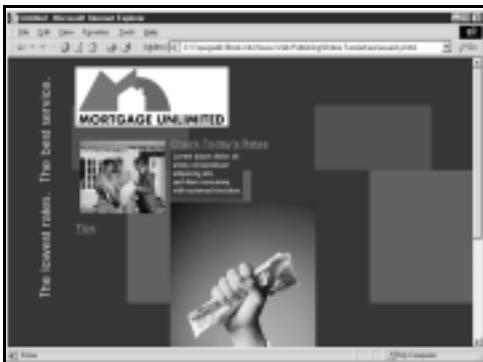


“Thanks for giving me the site blueprint. Let me come up with some different looks, and I’ll show you some designs in a day or two.”

Three days later...



“Here are some designs I've come up with for the site. Which one do you think works best?”



You think that the site with the dark background is colorful and striking, but busy. There's too much on the page to easily focus on important information.

The site with the white background, on the other hand, is crisp and clear. You choose it, and submit it to the general manager for approval. The Manager approves it and signs off on it.

Three days later...



“I created a design model for the second-level sections of the site. What do you think?”

The graphic on the right is nice, but is it worth waiting for? Other than visual interest, it doesn't provide much. You ask the Graphic Designer if he can replace the graphic with meaningful content—the loan application form.



The Graphic Designer puts an application form on the page:



You suggest that the form could be made a little more user-friendly by providing some contrast between the input boxes and the page background.

The Graphic Designer agrees, and produces this page:

You submit this page design to the Manager for approval:



“These designs look terrific! I can't wait to see the whole thing. But could you make a couple of changes?”

“Could we add more input fields to the form? I'd like it to include more information about the borrower.”

“Also, can we change the form background to blue? I've always liked the color blue.”

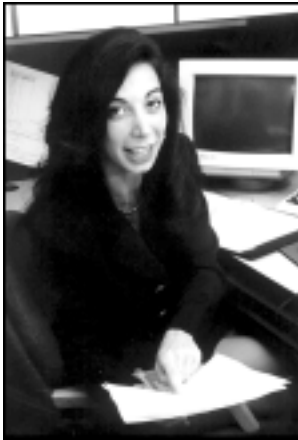
You agree to change the form, but explain to the Manager that the color blue is used nowhere else in the site, and would look out of place on this one page.



“I understand what you mean. I am partial to the color, but I realize it doesn't work here.”

Prepare content

As she's writing the text for the Mortgage Tips section of the site, the Marketing Coordinator asks,



“Here's some text from one of our customer support documents. Can we use it in the 'Mortgage Tips' section?”

Offentimes it can be a mistake to choose a mortgage company based solely on the interest rate offered by the company. Interest rate is one of many different factors that affect the determination when figuring the overall cost of loan programs. Borrowers can benefit from consideration of the total points or any other fees charged when the procurement of a loan is commenced by the borrower. When anyone is shopping for a mortgage program, the TOTAL loan points should be inquired about, without forgetting to ask about the inclusion of any origination fee. It is surprising to some borrowers, but when quoting loan points, some mortgage companies do not factor the origination point into their quotations. In these situations, a 2 point loan quoted by the company in question may in fact be a 3 point loan when the addition of a 1% origination point is taken into consideration. Borrowers must also be very careful to consider other factors, including the comparison of non-apparent fees that may be charged by the mortgage company and undertake a comparison of all fees charged at the settlement.

You review the text, and see that it's too wordy and unclear. It needs to be revised, so you have the marketing coordinator edit it. The Marketing Coordinator edits it down to:

Don't choose a mortgage company based only on interest rate. Interest rate is not the only factor determining the overall cost of the loan. You must also consider the total points or fees charged on a loan. When shopping for a mortgage, ask for the TOTAL loan points including any origination fee.

Surprisingly, some mortgage companies do not include origination points when quoting loan points. Therefore, a 2 point loan you were quoted may in fact be a 3 point loan when a 1% origination point is added. You must also compare the hidden fees charged by the mortgage company and compare all fees charged at the settlement.

This shorter version of the Mortgage Tips text is much clearer, so you give it to the Publications Person to be included in the site.

Construct a working draft

Work begins on the site draft. The Publications Person builds the site's pages based upon the models developed by the Graphic Designer. One week later, the site draft is completed and posted to www.mortgageunlimited.com/test.

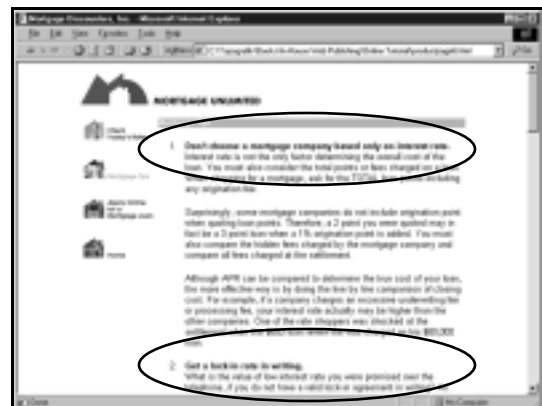
When the Marketing Coordinator sees the text she edited in the Mortgage Tips section she says,



“I’m not sure why, but even though the text is clear, the page is still a little hard to read.”

You suggest to the Marketing Coordinator that the page can be made easier to read by including subheadings before paragraphs. She writes a subheading for each section, then submits this new text to the Publications Person.

The publications person then revises the page to include subheadings:





“The page is much easier to read now. I like how you've taken the main ideas of the page and set them in large, bold text.

When I go to Web sites, I don't want to hunt for information. I want to find what I need and get on with the rest of my life. This page makes it easy to do that.”

The Publications Person informs you that by working with the Web hosting company, he was able to make the site's online loan application work:



“The e-mail processing script on the server is working. It's ready to be linked up with the online loan application form.”

The publications person goes on to say,

“If someone submits a form like this...

Name:	Joe Smith
Company:	ACME Mortgage Co.
E-Mail:	joe@acmemort.com

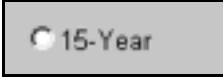
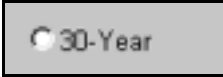
...you get an e-mail like this:”

```
Date: Thu, 25 Jun 1998
From: joe@acmemort.com
Subject: Loan Application

Name : Joe Smith
Company: ACME Mortgage Co.
E-mail : joe@acmemort.com
```

While troubleshooting the site, you notice that when an online loan application for a 15-year loan is submitted, a 30-year term is received.

The publications person checks the online form and finds out that, because of an error in the code, the server thinks the 30-year term button is the same as the 15-year:

Button	Code
	<code><input type="radio" name="15yr"></code>
	<code><input type="radio" name="15yr"></code>

The publications person corrects the problem.

Conduct audience testing

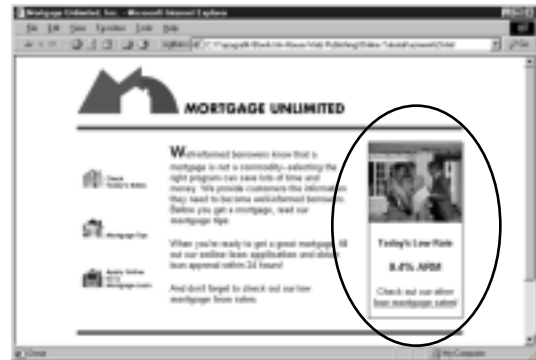
No other technical problems are uncovered, so you have the test group of customers click through the site draft. You observe each customer individually to see firsthand if they experience any problems.

One of the customers asks,



“Are these rates current?”

Despite the fact that one of the site’s buttons is labeled “Check Today’s Rates,” the tester still isn’t sure if the rates are still current. You make it easy for her by having the graphic designer and publications person change the home page to show “Today’s Rates” prominently, and in large text.



Now that you’ve made sure the site works properly and that it’s easy to use, you submit the site draft for final approval:



“I really like the site! Great job. I think it's ready to go.”

Post the site live

The full site is then posted “live” at its true domain.

Maintain

Create a site maintenance guide

You create a site maintenance guide that documents:

- **How the site will be updated**
Content: according to the site blueprint.
Look and layout: according to page templates.
- **Who will update the site**
The publications person, with the graphic designer designated as backup.
- **What will be updated, and when**
Loan rates get updated every day; other content updated as necessary.
- **How workflow progresses**
You, the Site Coordinator, determine where new content should go. The publications person updates the site. You review work done and approve it before posting live.

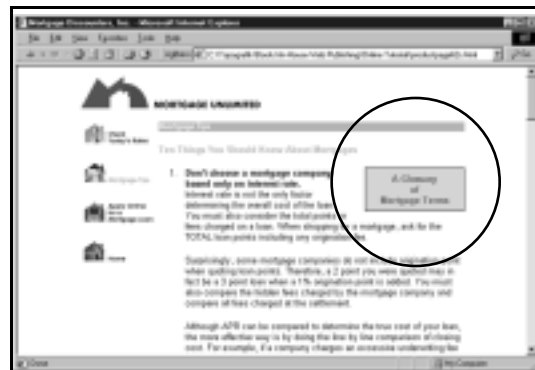
Two weeks after the site goes live, the Marketing Coordinator asks:



“You know, we’ve been getting a lot of e-mail questions asking for definitions of mortgage terms. People are always very appreciative when we explain what things like ‘loan-to-value’ and ‘debt ratio’ mean. Can we add a ‘Mortgage Terms’ section to the site?”

You think that’s a good idea. “Mortgage Terms” are the sort of information customers might look for in “Mortgage Tips,” so you decide to put “A Glossary of Mortgage Terms” on the “Mortgage Tips” page.

You have the publications person make that change to the site:



END OF SCENARIO

In this scenario, you traced the creation of a Web site from beginning to end. Your own organization can employ in-house staff to build its Web site in a similar way.



Site-Building Checklist

PLAN

Identify Decision-Maker

Primary Decision-Maker:

Define site's audience and purpose

Audience:

Purpose:

Resolve success criteria

Things that will make the Web site a success:

Determine resources

Time available:

Money:

Personnel:

Choose site-building staff

Site Coordinator:

Site Builder:

Site Builder:

Editor:

Graphic Designer:

Technician:

TRAIN

Prepare

- Select a capable instructor
- Select a site-building program
- Test Web team for Windows knowledge

Train staff

- Site-building program
- HTML
- Web graphics
- Site planning and usability
- Exercise/practice

ORGANIZE

Determine site content

- Brainstorm site content and functionality
- Evaluate for relevance to audience/purpose
- Conduct Audience Test Group survey
- Get approval

Organize content

- Gather content
- Group content
- Create site blueprint
- Conduct user survey
- Revise the site blueprint
- Get approval

Create work plan

- Create task list
- Establish schedule
- Include approval points
- Establish work site

Design look and layout

- Generate home page design model
- Conduct user survey
- Generate models for second, third, etc. levels
- Conduct user survey
- Get approval

BUILD

- Create working draft of site
- Conduct user testing
- Revise the site based upon user testing
- Get final approval
- Publish the site live on Web server

MAINTAIN

- Establish site update guide

Index

arbitrator	16
audience.....	24
Clausewitz.....	26
content.....	16
Content	34, 48
chunking	53
editing.....	71
evaluation of.....	48
gathering.....	71
grouping.....	50
management systems.....	34
organization of	55
Decision-Maker	20, 24, 25, 77
Design	
CAPS	67
consistency.....	74
frames.....	5
layout.....	65
models.....	64
user-friendly	51
HTML	29, 36, 39
Internet Service Providers	17
Personality Type	9
charts.....	11
Site Blueprint	56
Site Building	4
approval.....	49, 57
budgeting.....	27
checklist.....	119
documentation	24
initial meeting.....	20
resources.....	25
testing.....	76
work plan	58
work site	62
Site Building	
scenario	89

Site Maintenance	82
guide.....	85
schedule.....	83
templates.....	73
workflow.....	84
Software	28
Dreamweaver.....	29
Fireworks.....	31
free trial.....	33
FrontPage.....	29
Fusion.....	30
GoLive.....	28
Paint Shop Pro.....	31
Photoshop.....	31
Web graphics.....	31
Training	36
classroom.....	37
practice.....	45
relevant topics.....	39
self-study books.....	36
usability.....	41
Web graphics.....	40
Usability	
principles.....	67
resources.....	52
Web site	
revision.....	7
Web Site	4
assessment.....	4
audience.....	21
navigation.....	70
purpose.....	21
success criteria.....	24
uploading.....	79
working draft.....	73
Web Team	13
arbiter.....	16
editor.....	13
graphic designer.....	13
IT staff.....	18
optimal size.....	14
preparation.....	43
site builder.....	13
site coordinator.....	13
technician.....	14

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