


Home.

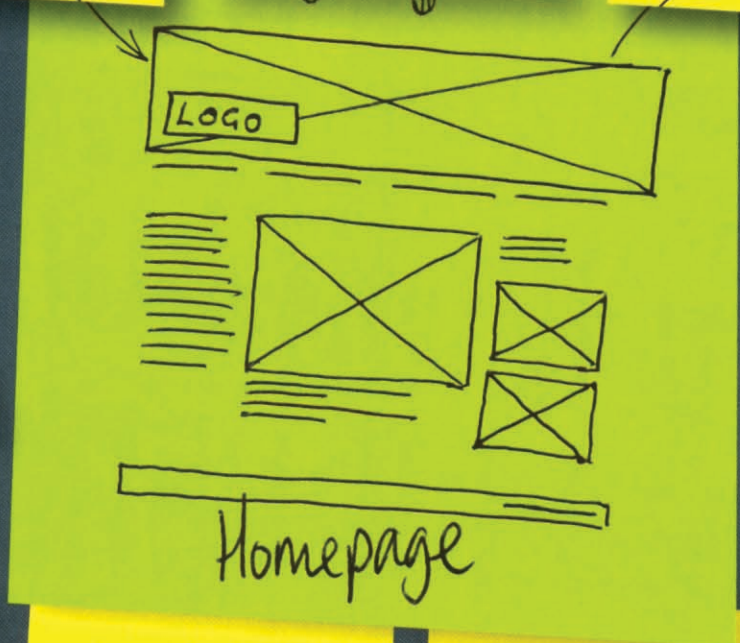
Contact

latest work

Animate?
Do we use flash?

Humour?


Header
RSS feed



show

offer direction
via Google maps.

Portfolio

office tour

Photosynth
or Flash?

Archive
Do we need
one?

Advert
make space
for MPU.

Blog

shop!

Footer
vCard.

Newsletter
Sign-up
the fold.

YouTube?
Twitter?

Flickr
Portfolio?

404 error page
(make it funny!)

Bespoke flash
or Youtube
video?

Horizontal Scroll



Forms
must degrade
well.

we Us

+ **Words** Craig Grannell is a journalist and designer who has authored various books on website design. snubcommunications.com

+ **Image Knight Design Studio** is a Bristol-based graphic design agency.

* Plan the perfect site

We all want to hit the ground running when we start a new project, but a little forethought can reap huge dividends in the long run. **Craig Grannell** talks to experienced web developers about how an intelligent approach to planning can help save time, money and your sanity ...

Many web designers give scant regard to planning. Instead, they steam on in, basing a project's cursory preparation on previous work, and hoping no problems will rudely smash them in the face along the way. But as Andy Budd, creative director of Clearleft (clearleft.com), notes: "Planning is integral to almost every project – it's like asking how a blueprint benefited a building. You can't build a building without doing a blueprint, otherwise the result will be ineffective and fall down!"

He takes the architecture analogy further – it's a helpful parallel to web design planning. "There's a certain size of structure – say, a house extension – where rather than talk to an architect, you just get in a builder who's built dozens of extensions. The end result should be fine, due to the relatively low complexity and small number of likely problems. But the more complex a system is and the more variables, features and functions it has, the greater the chance of something going wrong. If you want a new house, you consult an

architect, but, unfortunately, most people on the web build websites like they're knocking together an extension. They don't have the necessary knowledge for planning and just hope what they create won't fall down."

Getting started

"No two sites are the same, and so there are no hard and fast rules when it comes to planning," says Simon Crab, creative director at Lateral (lateral.net). "But a process of defining and agreeing with the client what the site's objectives are is a good starting point. This agreement should cover 'what they think success looks like' – a tangible target everyone works towards." >>

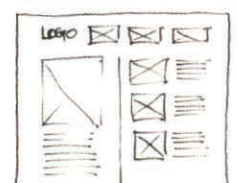
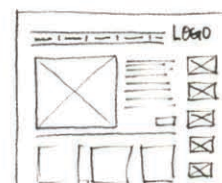
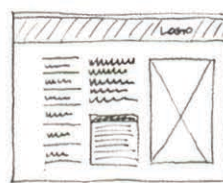
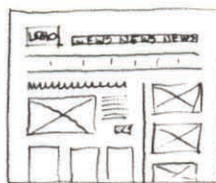
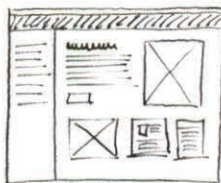
"Understanding what level of planning is needed for a particular project is key"

Huey Nhan



Left and above Planning aficionados at Clearleft show how it's done: myriad stickies evolve into feature maps and process flows during the various stages of creating a site

Right When creating the Arnold House School website, sketches enabled on-IDLE to rapidly work up ideas for layout and complex navigation for displaying a large amount of information



It's important at this stage to ensure that everyone's on the same page, agreeing the parameters of the project. "Your defined objectives create a scope that must balance what's required with what's realistically achievable," says Nicolas T Le Clairche, head of production at Delete (deletelondon.com). "Projects can slip or deliver an inappropriate result if all parties are not aligned – great project planning comes through collaboration underpinned with a great relationship. A thorough identification of the deliverables and their quality criteria enables us to determine the tasks, which are then estimated before being sequenced and scheduled."

Part of the scope should be the planning itself. "Understanding what level of planning is needed for a particular project and who will be reading the plan is key," argues Huey Nhan, production director at Digital Outlook (digital-outlook.com),

who reckons over-planning is a waste of time, but that under-planning can cause serious problems later. "Consider who you're working with. If your decision-makers are marketing directors, they might not have the time or patience to trawl through reams of details, so make sure you highlight important things that need attention and input. Information design is just as important during planning as execution."

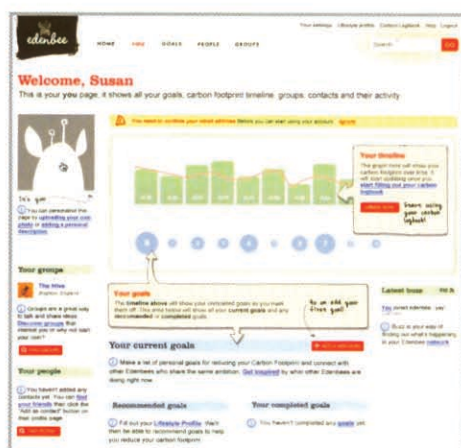
Once the basis of the project is nailed down, some time should be spent doing competitive analysis. Most obviously, it pays to check out other sites that have been made within the industry sector. "You can learn a lot from the successes and failures of other sites, and so we always like to do some form of competitor research or survey," says Budd. "However don't let the term 'competitor' fool you, because the sites you choose could be in different geographic or business markets, just as

long as the functionality is similar." Such research also enables you to avoid the pitfall of both you and your client somehow missing something really obvious that should have gone onto the site you're working on, but which features on all your competitors' offerings.

User-defined

By this stage, you and your client should have a decent understanding of the website's aims, but not everyone then stops and thinks who the website is really being created for. Although the client is paying you, it's their clients – the end users – who are arguably the most important link in the chain. "It's always a good idea to talk to those who'll be using the final site, be that internal stakeholders, external customers or just members of the public," says Budd. "As such, we like to set up interviews, sit in on focus groups, and where possible run ethnographic studies. This usually feeds into the creation of user personas that help guide the decision-making process."

It's important not to make too many assumptions prior to involving users. Siim Vips, CEO at Modera (modera.com) warns: "In many cases, analysis is done based on the know-how of the development company in co-operation with



In the frame Wireframes are used for testing site architecture and basic page layout. Then comes the site's graphic design

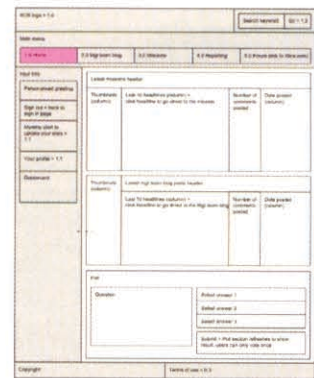
"Projects can slip or deliver an inappropriate result if all parties are not aligned"
Nicolas T Le Clairche

the client. If the knowledge is there, the site will be a success, but if not, it will be a disaster." What you instead need to do is fully research the needs of the site's potential users and then map those onto the needs of your clients. "If your users have needs that your client's site isn't fulfilling, you're giving the competition a competitive advantage," says Budd. "Similarly, if you're trying to make your users do something they don't want or need to do, they'll lose confidence in your brand and patience in your site." And with a high proportion of sites now hinging more than ever on user actions and content, users' needs and effects on proceedings must increasingly be taken into account. "Designing social media projects brings new challenges to designers and information architects used to predefining the user environment," explains Crab. "You must plan to deal with the aesthetic and functional management of unpredictable content and behaviour."

Site maps

With an understanding of what the site's meant for, who's going to use it, and what people will be doing when they get there, you can start looking at the information that's going to be provided, how it's to be accessed and the basics of how it will be displayed. "To work out information architecture, a combination of site maps, process flows and user paths is used," says Budd. Nhan argues that the first of those things is perhaps the most important tool for establishing how your information architecture will work – even for large sites. Some designers, he says, skip site maps these days, thinking complex sites are too difficult to represent in this manner. "What you should do in such situations is break your site map down into sections for review," he says. "But never skip creating site maps, because they help you simplify the user experience by keeping perspective wide."

Marc Peter, creative director at on-IDLE (on-idle.com), starts site maps with paper sketches, before moving them to software for emailing to various stakeholders. "We also ensure all elements



Paper view Digital Outlook's wireframe for Xbox enabled the project's details to be agreed on paper before a line of code was written

present on all pages, such as footers, logos, calls to action, and so on, are listed," he explains. "This then provides you with a base idea of the types of template the site will need, such as 'home', 'general content', 'contact', and 'listed items', and these can subsequently be worked into wireframes that identify the structure of each template – and therefore, effectively, each page of the website."

Peter notes that if particular attention is paid at this stage of the planning process, it's usually simple to avoid one of the most common errors on websites: bad navigation structures. "Often,

"Never skip site maps, because they help you simplify the user experience"
Huey Nhan

you'll find sites have visible and working top-level buttons, but at the third, fourth or fifth level, the design begins to fall apart and the browsing experience becomes cumbersome."

Budd advocates workshops for making sense of this aspect of planning: "Stakeholder workshops are a good way of discovering business goals, prioritising functionality and setting a roadmap for success. As such, all of our projects are punctuated with various planning meetings and workshops that often involve brainstorming ideas based on the user research and personas, creating affinity maps or content hierarchies, and mapping out the interactions using rough paper prototypes or wireframes. As you can imagine, a lot of sticky notes are used during this process!"

Wireframes

Budd considers wireframes essential for working out interaction design and a key tool in an interaction designer's toolbox, akin to a movie director's storyboard or an architect's blueprint. "They enable you to communicate ideas in a visual medium and check they make



Interview Clearleft's creative director Andy Budd provides insight into the planning of Edenbee.com



Andy Budd

Job title Creative Director
Company Clearleft
Areas of interest User experience design and development
URL www.andybudd.com

Edenbee describes itself as a "vibrant online community working to tackle climate change by measuring your carbon footprint, suggesting ways to reduce it, and showing the difference you make". The people behind it had never worked on a site before and so a clear planning process was instrumental in determining the aims of the project and building strong foundations, explains Andy Budd. "We sat down with them, and they had a

rough idea about what they wanted to achieve, and an implementation of an idea they'd had," says Budd. "We examined this, took a step back, and started exploring what it really was Edenbee wanted to achieve: their ultimate goal."

Communication is paramount to any successful site – especially a large social networking concern – so Clearleft worked with Edenbee to determine what it was they wanted to communicate, what the best medium was for this to be facilitated, and how to get users involved. "The process required a lot of brainstorming, from which we built and planned a solution to fit Edenbee's needs. This was far more productive than doing what a lot of people do and offering a knee-jerk reaction, or picking the first thing they can't see a problem with."

Edenbee and Clearleft spent a couple of days in Clearleft's Brighton studio collaboratively working

out the shape of the system together, in a room with large white walls that ended up peppered with sticky notes, diagrams, sketches and process flows. "It was through this collaborative planning that Edenbee really got an understanding of what was possible on the web, and together we figured out how the website would work," says Budd. "There was plenty of wireframing, note-making, prototyping and discussion, looking at initial ideas and trying to find flaws."

The most important element of this kind of planning on a large project, suggests Budd, is to try to pick out problems before anything is built. "Once you've built a flaw into a system, there's no going back; you've committed yourself," he argues. "It's so much easier to do things on paper and in person than to program something and then think, 'Oh bugger, I've screwed up.'"

Top five Planning checklist

1 The client

Are you involving the client from the off, or rampaging onwards, forging your own path? If it's the latter, stop. The best sites result from planning alongside the client, understanding what they're trying to communicate and bringing your insight and knowledge to the table in order to facilitate this. Only through co-operative planning can you fully understand your client's aims, and your client fully understand the potential of the internet.

2 The users

Simon Crab reckons knowing who you're designing for and understanding their behaviour is the most important aspect of planning. "It's surprising how many briefs we get where the target audience is defined as 'everyone,'" he adds. If you, or your client doesn't know who you're aiming a project at, find out and get them directly involved. "This should be done at the start, before any lasting decisions have actually been made," recommends Andy Budd.

3 The budget

Budgetary considerations are important. Many designers eschew planning because they haven't quoted for it. If this is you, slap yourself and ensure all future quotes include adequate costs for the required planning. Also, from your client's budget, you can calculate what it's possible to create, cutting down pie-in-the-sky ideas, or figuring out how to maximise your resources by, say, planning to make good use of freely available APIs and libraries.

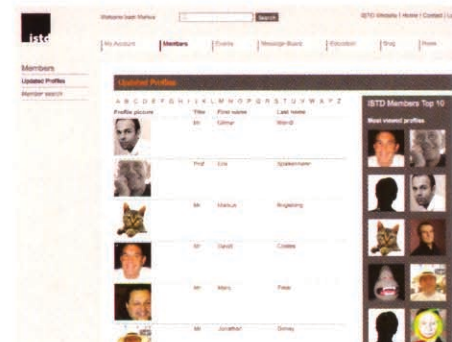
4 The technology

There are numerous technological considerations when planning a website – hosting, Flash, HTML, platforms, devices, whether a site will be static or dynamic or administered by the client – but according to Crab, the main issue that has an impact on technology choices and site structure is accessibility. "In general, it's best practice to follow accessibility guidelines even if it's not defined in the brief," he says. "This always results in cleaner, extensible and well-structured code and content."

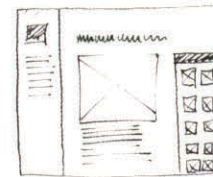
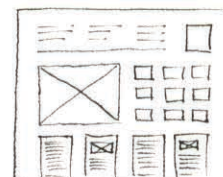
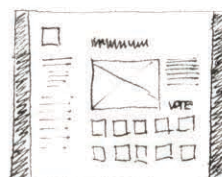
5 The future

Ultimately, the main reason people plan projects is to ensure things don't go wrong in the future. As Nhan reminds us, "Future-proofing is becoming more and more necessary as clients look for greater value for money that also comes with longevity and adaptability." In other words, ensure your plan isn't just for getting a site online, and that it also includes scope for evolution, growth and new technology.

ISTD Members



Quick on the draw For the ISTD Members microsite, on-IDLE sketched variations for page designs, to fashion templates that could cope with all types of content display required



sense before any costly development or production commences," he says. "Such things are cheap and it's easy to make changes on paper or to quick HTML prototypes, but it's harder and more expensive to do this once a site has been designed, programmed and implemented."

Crab is also fond of using wireframes during planning, although Lateral doesn't create them prior to working on initial graphic design components – instead, design-free wireframes are used in parallel with structure-free design concepts. "The idea is to communicate the structure and

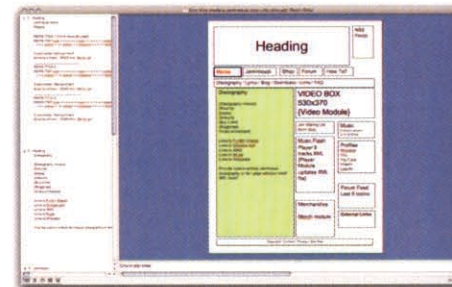
"We find it useful to show designs outside of structure during the planning process" Simon Crab

functional aspects of the site in tandem with an explanation of the design language – typography, colour and layout," he explains. "We find it useful to show designs outside of structure during the planning process – this tends to avoid the 'can you move that box over there a bit' and 'make the logo bigger' type of feedback and forces clients to concentrate on the purely aesthetic or structural aspects of the design accordingly."

Le Clainche works in a similar fashion, but suggests the balance between structural composition and aesthetic components in a plan can be tailored depending on the complexity of the site. "For larger builds, we translate requirements into a high-level site map, which is then refined into detailed section structures and wireframes," he begins. "But for marketing communications, we take a more creative approach, using scamps and mood boards as a rich way to translate ideas and metaphors that are structured into a site map and more detailed wireframes." This, he argues, helps

bring the site to life for key project stakeholders and presents additional ideas or approaches. Additionally Miro Walker, CEO at Cognifide (cognifide.com) notes how extra visual design can be used when planning sites with certain clients: "Although graphic design can come relatively late in the planning process, if your wireframes are of a high quality and the client is able to engage with them, less experienced clients benefit from an earlier focus on design considerations, as this helps them understand the planned end result."

Once a website's goals, structure and information architecture are defined, planning ultimately shifts towards the final piece of the planning puzzle, technology, and there are numerous things to be mindful of. You must investigate likely browsers and platforms users will visit the site with and plan accordingly. For example, if the site is for a company intranet where employees are saddled with an ageing browser, the technology at your disposal and the standards you employ may differ from those used for an all-singing, all-dancing site for users at the cutting edge. It's also important to fully understand any ramifications for hosting and performance, regardless of whether you're directly involved with hosting the site or not. "You must also consider scale, load and performance – how many users there are, what the usage pattern is likely to



To the point No one ever claimed that PowerPoint was the most glamorous of applications, but its ubiquity enables planning documents (such as this one from Modera) to be shared and edited by a large team



Block party Layout grids enable page structures to be determined prior to even working up wireframes. Using Lego is added Clearleft genius

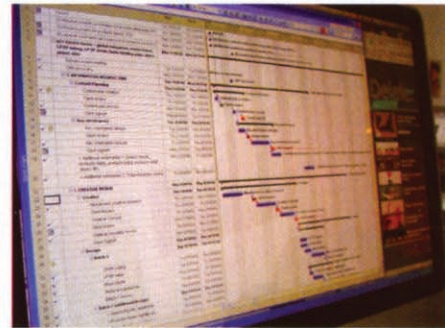
Tool time

Everyone we spoke to agreed planning is the key to a successful website, but less unity was apparent regarding the tools you can use to help achieve this. However, a number of designers cited various Microsoft products as being useful. Many rely on Office. Visio typically gets the nod for site maps and wireframes (with various Omni tools taking the strain on Macs). And Word and Excel are regulars for content outlines, summaries and research.

“For the preparation of the ‘Product Breakdown Structure’ (PBS) or ‘Work Breakdown Structures’ (WBS), a spreadsheet is a great tool to structure the information, which can be directly imported into Microsoft Project, the industry’s standard planning and tracking tool,” says Le Clainche. This application is a bone of contention, though, with Walker yelling “No Microsoft Project!” arguing that “Gantt charts are the work of the devil and generally paint a false and rapidly out of date picture, while being complex and detailed enough to appear accurate.” The main thing is to ensure your planning software actually helps you plan and works for you, rather than

taking up time and providing the mere illusion of successful planning.

It’s worth noting that the use of popular tools is as much down to ubiquity as quality. “The easier it is to edit and update a plan by a wide range of people, the better,” says Walker. And we shouldn’t forget the most ubiquitous tools of all. “Nothing beats a pen and paper,” concludes Budd.



Project management Microsoft Project is a much-used planning and tracking tool for website development. Delete swears by it, while Cognifide swears at it

be, and whether downtime for maintenance is acceptable,” says Walker.

The joy of tech

With many modern sites going beyond mere text and static imagery, planning must take into account rich media components. “Video, animation, image galleries and downloadable files all affect bandwidth costs and require a specific hosting environment to be able to cope with them,” says Peter. “For example, if the site is likely to use streaming video, you need to consider whether the site’s own server will host this or whether a third-party supplier will do so, because this has both a financial and technical implementation impact.”

Peter also notes that how data is managed changes the way a site has to be built, and such

things need to be decided prior to touching a line of code, in order to minimise costs. “You need to figure out whether the site will use data from sources other than its own database, and how these sources will be integrated into the site technically and visually,” he says. “Furthermore, you must determine whether the site will be content-managed, and if so by whom, because this defines whether a publishing workflow is needed, thereby potentially altering the required hosting environment.” And even if the site is static, you still need to plan how updates are possibly going to be made in the future. Are you or the client going to deal with this? Are you and your client both on the same page about this, and if the client is to do the work, do they actually have the technical knowledge that’s required? Will you support them if they don’t?

“You need to figure out whether the site will use sources other than its own database”
 Marc Peter

Another technical consideration to plan for is that if the site is an overhaul rather than an entirely new entity, you need to decide how you’re going to transition everything over. Will there be a defined, pre-warned period of downtime, to give you a chance to move everything across, test everything and then make the site live again? And how will existing pages that users will have bookmarked (and, for that matter, search engines will have indexed) redirect to equivalent replacement ones?

Of course, even when all these considerations – from the initial understanding of the site’s aim through to where and how it will be hosted – are determined, your journey’s only just begun, because then it’s time to implement the plan and build the site. As Walker reminds us, “An important thing to consider is that a plan is a living document.” So don’t think you can tick a checkbox that says ‘complete plan’ at any time. After all, a plan needs room to evolve and adapt in the same way as the very best robust yet flexible website – one built from a good plan, naturally. ●

www.forum.netmag.co.uk Do you build enough planning into your project management? Discuss at forum.netmag.co.uk

Below Using easily editable sketches can be key in building a strong website foundation

Right Modera’s planning for jamiroquai.com

