



# **Guide To An Effective Website Development Process**

## Initial Onboarding (1-2 Weeks)

Client signs a contract and pays a deposit. Following this, they fill out onboarding documents, including:


**Client Survey:** Ask about business in general, goals for website, target audience, competition

<https://designtlc.com/client-survey/>

**Website Credentials Form:** Acquire logins for relevant properties like Domain Registration, Website Hosting, CRM and Social Media URLs

**SEO Questionnaire:** Competitor websites, Google Analytics, ask about any SEO development history, keywords and competition in order to do some initial keyword research for the new website

**Content Inventory:** Use a Google Sheet and list all front-facing pages on the existing website (if there is an existing website to begin with), with a description of content and images on each page:

	GEDS Content Outline			
	<a href="http://www.geds.org/">http://www.geds.org/</a>			
PAGES/STRUCTURE		TEXT/CONTENT	IMAGES/VIDEO LINKS	Move to New Site?
Header	Logo, Statement, Apply to Grace Link			Yes - May want to add quicklinks? Or a link to parent portal
PAGES:				
Home	Navigation Bar across top of the page	About Grace, Programs, Admission, Community, Support Grace		
	Picture		I love Grace Watch out Video	Yes - keep video - open to placement thoughts
	News			yes
	Calendar			yes
	Grace Blog			yes
About Grace	Picture		I love Grace	
	Page tools (email, print, text size)			
	Grace Promotional Video	<a href="http://www.geds.org/uploaded/images/Grace_Final_Cut.mp4">http://www.geds.org/uploaded/images/Grace_Final_Cut.mp4</a>		
	Search Media Bar			
Side Bar: Grace Blog	Picture		Kid Smiling	
	GRACE BLOG			
	GRACE GRYPHONS BASKETBALL AND THE RISE OF THE UNDERDOGS	(Links back to the same tab)		
	Pictures (11 basketball team pics with descriptions)			
Welcome from the Head of School	Picture		Adult with kids	

**Complete Content Inventory:** In addition to the “manual” inventory, use a tool like [Screaming Frog](#) or [DynoMapper](#) to pull a list of urls for the current site. This is used to anticipate the amount of content to be migrated to the new site and/or the number of redirects which may be needed upon site launch.

## Timeline & Teamwork

In the Google Sheet, create a tab with a preliminary/rough timeline.

Dates	
	<b>CONTENT</b>
3/29/17	Present Content Outline
3/30-5/17	Develop messaging/content/IA
5/24/17	Draft wireframe
6/26/2017	Final Copy/Photos/Content Due
	<b>DESIGN</b>
6/16/2017	Present design concepts - home page, one inner page
6/20/2017	Get feedback on Design
6/26/2017	Incorporate feedback and present again
	<b>BUILD</b>
6/27/2017	Client approval to design*
7/3-7/20	Develop/code custom theme on staging server
7/3-7/20	Build out pages, widgets, navigation and forms
7/20/2017	Present staging site to client
7/21-8/4	Enter additional website content/edits
7/24-26	Final Browser & Mobile test
8/4/2017	Final Client feedback
8/7/2017	Incorporate feedback and present
	<b>DELIVERY</b>
8/7/2017	Get final sign off on website*
8/8/2017	Estimated website launch
8/8/17	Create documentation/training**

## Teamwork Project Management System

For complete/intensive website projects, you may use a project management system like [Teamwork](#) which allows you to schedule and assign tasks, store files and links, and communicate with a messaging tool.

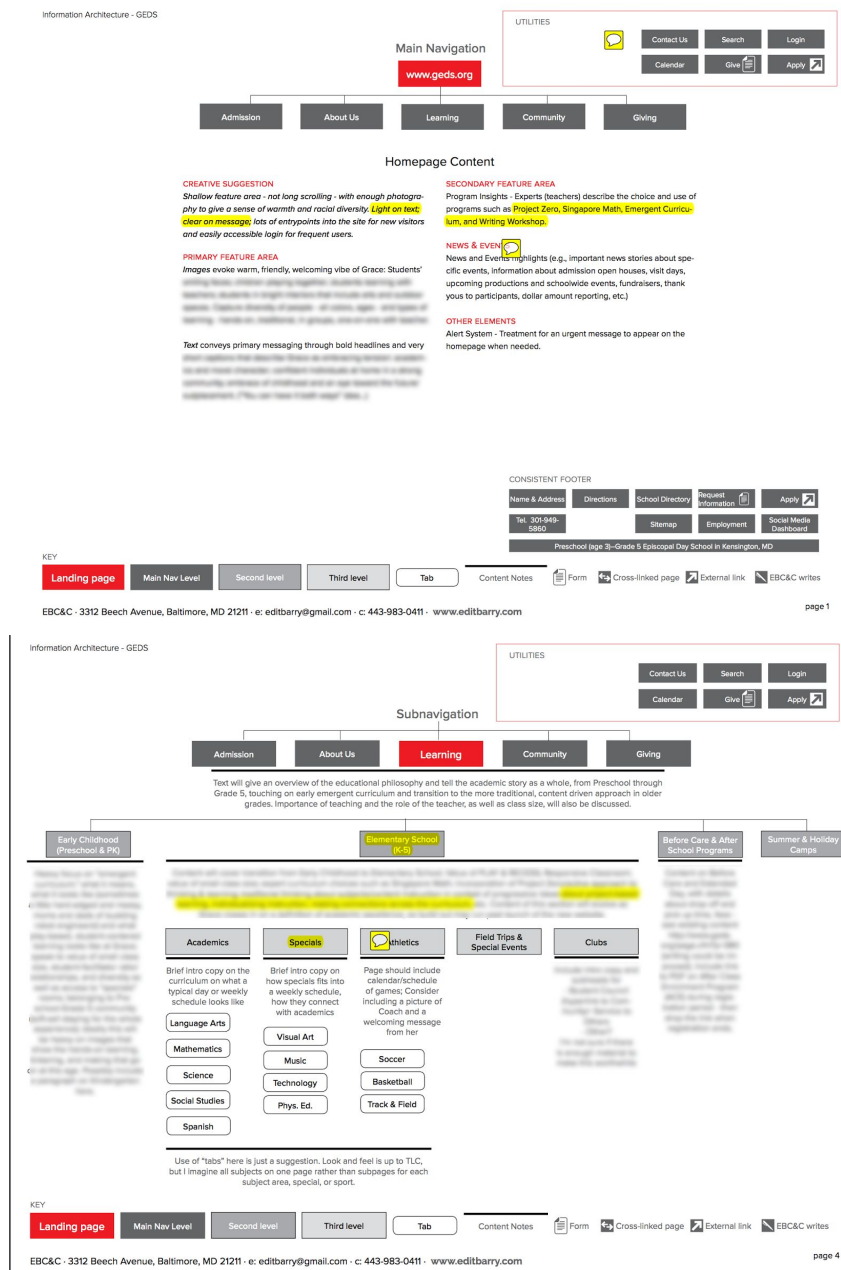
The screenshot shows the Teamwork Project Management Dashboard for Grace Episcopal Day School. The dashboard is organized into several sections:

- Navigation Bar:** Includes tabs for DASHBOARD, EVERYTHING, PROJECTS, CALENDAR, STATUSES, and PEOPLE.
- Project Header:** Displays the project name "Grace Episcopal Day School" and a star icon.
- Left Sidebar:**
  - Categories:** A list of file categories with counts: All Files (35), Documents (0), Important files (0), Photos (0), and No Category (35).
  - File Space:** Shows storage usage: "This project uses: 76.45 MB" and "Free Space: 856.08 MB". A progress bar indicates 17% usage.
  - Total Used:** 167.92 MB
  - Total File Space:** 1 GB
- Main Content Area:**
  - Overview:** A summary of the project's progress, including tasks, milestones, messages, files, time, notebooks, risks, links, billing, and people.
  - Files:** A list of files uploaded to the project, including:
    - Tuition and Fees 2017-2018.docx (1.75 MB)
    - Tuition and Fees 2017-2018.pdf (363.52 KB)
    - Recommendation Packet Grades 2-5.pdf (632.83 KB)
    - Recommendation Packet PS-Grade 1.pdf (666.92 KB)
    - calendar\_2017-08-31\_2017-11-01.pdf (19.94 KB)
    - grace\_rendering.jpg (3.59 MB)

## Teamwork Project Management Dashboard

## Information Architecture & Initial Content Development (6 weeks)

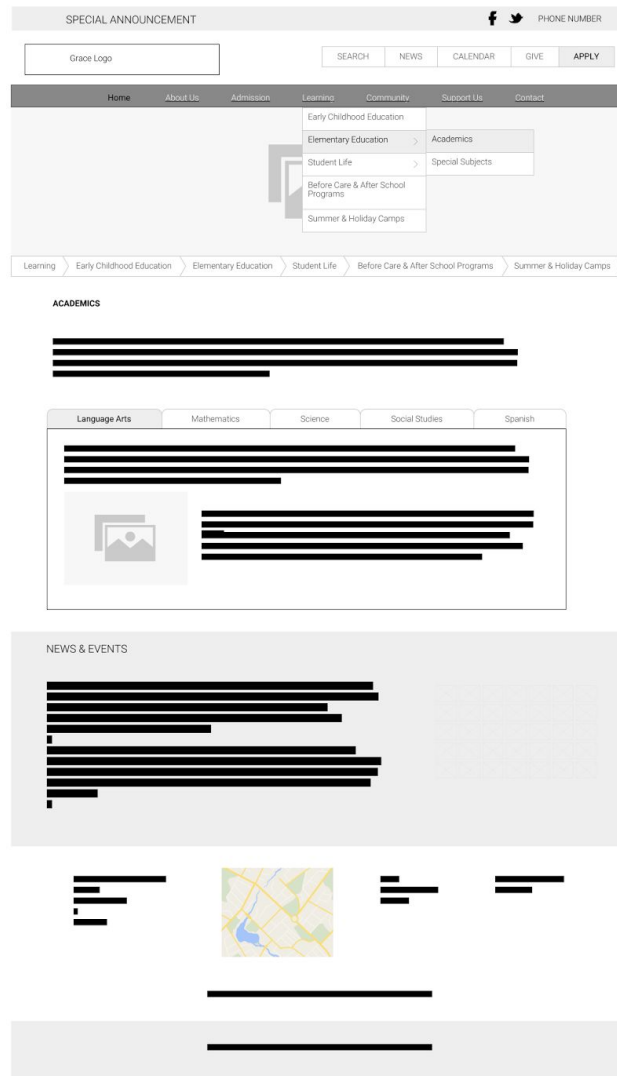
Working with the client and, ideally, a content writer, the next step is to develop a well thought out [Information Architecture](#) (IA) for the website. Ideally, the writer suggests clear direction for navigation as well as messaging, tone and even made some creative suggestions for the website design.



### Examples of Information Architecture Document

## Wireframe (3 weeks)

Once the IA document is approved, wireframing can begin. A wireframe is a visual representation of the IA, broken into pages. [Wireframeapp.io](https://wireframeapp.io), helps make wireframe development easier with drag and drop elements, live sharing and easy editing. A wireframe is not a design, but aids in the design process by organizing and prioritizing content



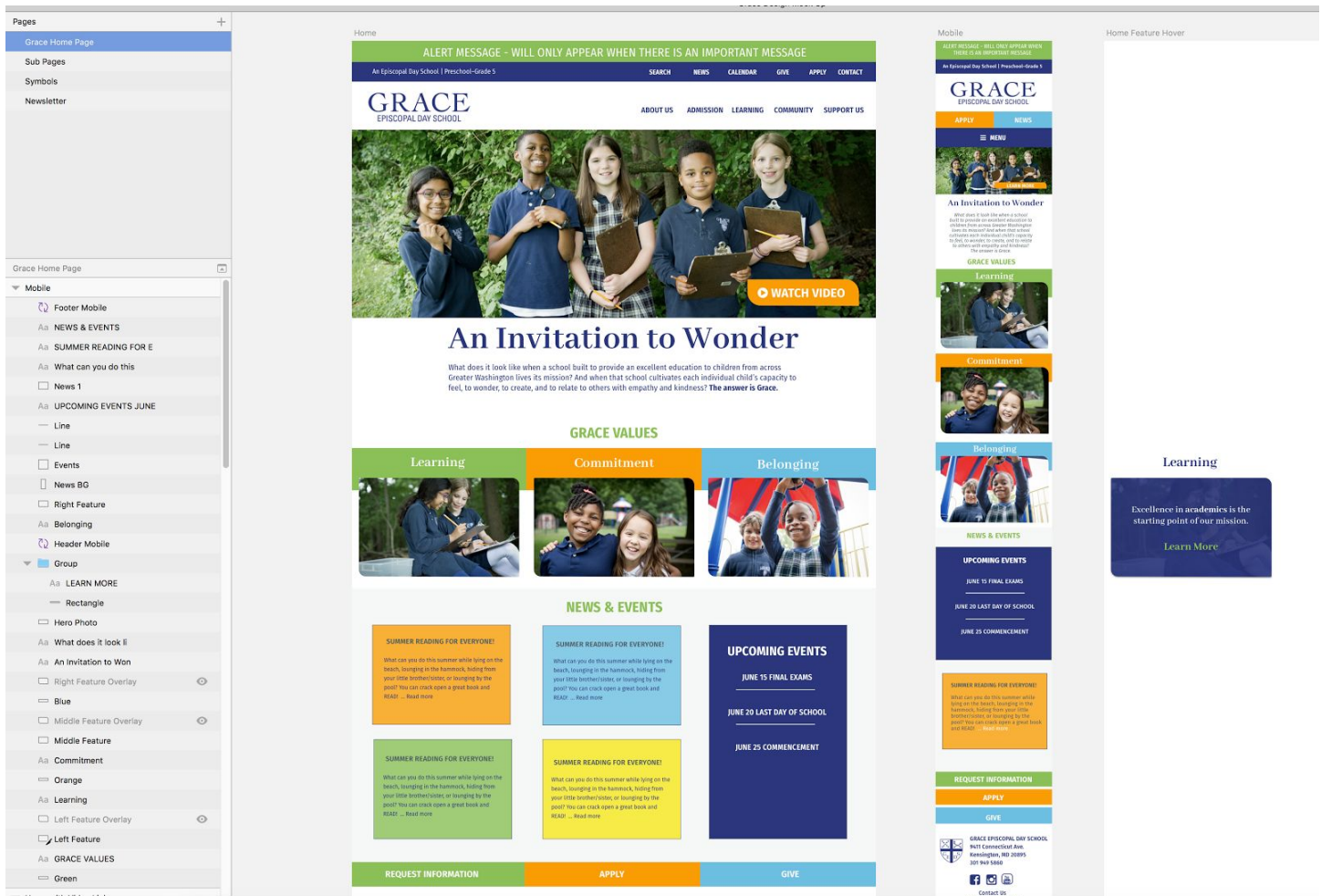
***Example of wireframe***

## Design (3 weeks)

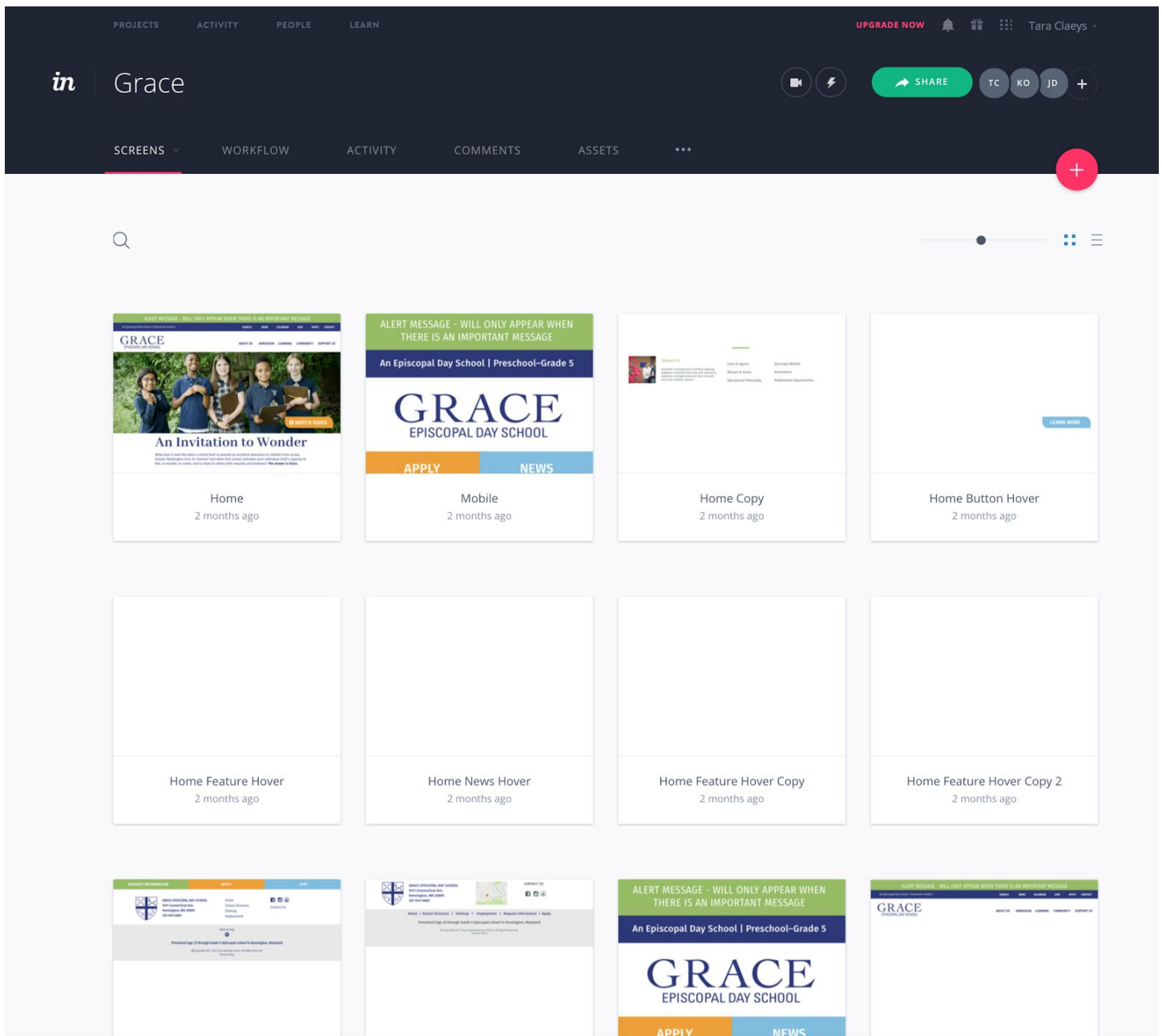
Use [Sketch](#), Photoshop or whichever software you are familiar with to create webpage design prototypes. The elements from the prototype can be exported for use on the web. Sketch also connects/syncs to [Invision](#), which is a prototyping tool that allows the presentation of the mock-up designs to more closely resemble an actual website and includes some interactivity (hover effects, links, etc.). Invision also has a live share and commenting feature which makes the presentation process more professional.

If the client has a logo, it is best to use or create an svg version of the logo. Use the [SVG Support](#) plugin for WordPress, which allows easy implementation of svg graphics using the media library.

For design ideas, we look at competitor websites and other websites in the same or similar category, as well as some unrelated websites, for inspiration.



Website Design in Sketch











*Website Prototype in InDesign*

Once the design is tweaked and client feedback addressed, the design is approved. This signals the official start of development and coding on a staging server. You may want to start development to some degree before this point, if there are elements in the design you want to check out before presenting to ensure you can deliver the functionality/effects. **Design approval is a key milestone.** The design is like the blueprints of a house. Once the foundation is laid and the walls are framed and painters have painted the walls, it is a significant request to ask walls to be moved, foundations to be expanded, and walls to be repainted. A significant request is a change order, which increases the cost of the project. If the design is based on a well thought out IA and wireframe, the chances of changes after design approval are small. If the IA and wireframe steps are skipped, it is more likely that the design will need changes because the content will change as the client “sees” the website unfold. This is why the content planning, architecture and wireframe steps are so important.

## Final/Complete Content Development (6 weeks)

Every word of content does not have to be finalized when the design is approved, but it should be close. The first couple of weeks of development are typically spent building the “frame” of the website. The content of all the rooms - the text and images - will be needed once the frame is up. The more thorough and complete this content is, the faster and smoother the building process will be. Here again, working with a professional writer who knows how to format and provide clear, concise copy, makes the process go smoothly and the end result better. Minor edits will likely be made before launch, but loading in copy that is organized and approved is the ideal process.

In addition to the copy, images for each page of a website can be a huge undertaking, especially if there are a lot of pages and a lot of images to choose from. Create another sheet in your Content Inventory Document to list the content, including images, for a website. This helps identify content that is missing and prevent images from being duplicated. The images can be shared with the client in a Dropbox or Google Drive, and ideally should be named for where they will go to make the process less confusing.

		GEDS Content Outline			
PAGES/STRUCTURE		APPROVED COPY PROVIDED?	H1 Page Title	PHOTO/IMAGE(s) - List File Name/Number in Google Drive	Image
Header	Logo				
PAGES:					
HOME		y			4 slides:
TOP LEVEL UTILITY MENU ITEMS:					
	Search opens a search form				
	News Link to News Page				
	Calendar Link to Events Page				
	Give Link to Donation Page (what is donation platform?)				
	Apply Link to TADS				
	Contact Link to Contact Page				
ABOUT US		y	As Head of School, my favorite way to introduce new people to Grace is to share what I love about us.	Photo of Jen greeting student: About-Us-Main-Option-2.jpg	
Facts & Figures		y	Facts&Figures	Students with Magnifying Glass: About-Us-Facts-and-Figure.jpg	

*Final content outline*

## Development (8 weeks)

Start with a comprehensive style guide to help code the child theme. This makes theme development (style.css) smooth and consistent. If you are using sass, this is also a helpful guide.

<b>Website Project:</b>	Grace Episcopal Day School				
<b>Main Theme Colors:</b>					
<b>Color Name</b>	<b>Hex Code</b>	<b>Color Name</b>	<b>Hex Code</b>	<b>Color Name</b>	<b>Hex Code</b>
Dark Blue	#2B367C	Yellow	#F8E71C		
Green	#8BBF57	Gray	#4D5C62		
Orange	#FA9D05				
Light Blue	#6DBFE2				
<b>Class/Item</b>	<b>Text Color</b>	<b>Font Family</b>	<b>Font Weight</b>	<b>Font Size ?</b>	<b>Text Hover Color/Effect</b>
Body Font	#4D5C62	Fira Sans	400	14	
Link Text	#FA9D05				#6DBFE2
H1	#2B367C	Abhaya Libre	700	48	
H2	#2B367C	Abhaya Libre	600	30	
H3	#2B367C	Abhaya Libre	600	24	
H4	#2B367C	Abhaya Libre	600	18	
H5	#2B367C	Abhaya Libre	600	14	
H6	#2B367C	Abhaya Libre	600	12	
Main Nav	#2B367C	Fira Sans Condensed	600	21	#8BBF57
Secondary Nav/Utility Nav	#fff	Fira Sans Condensed	700	18	#FA9D05
Mega Menu					
menu-intro	#8BBF57	Abhaya Libre	700	1.2em	#FA9D05
.menu-intro .menu-item-description	#4D5C62	Fira Sans	400	.7em	NA

Once the content is loaded into the site, each page gets attention for specific design/style and is also reviewed for mobile responsiveness. This process often begins around the same time that the staging site is presented to the client, so that they can see the direction of individual page styling and content and provide any feedback before it gets too far along.

Development moves forward to address any issues found by the client on the staging site, to add additional images and content and make other tweaks to design for various screen sizes and browsers.

## Final Pre-Launch Tasks (1-2 weeks)

In the last days before launch, the client will likely send edits. Have the client use a Google Drive/Google Sheet for this, because changes can be tracked and new change requests can be added.

Website tasks final stretch			
File Edit View Insert Format Data Tools Add-ons Help  Start timer All changes saved in Drive			
A	B	C	D
	Facts and Figures	Wooded 11-acre campus — do we want to pull back on the 11 acres now?	
	Facts and Figures	NAIS = National Association of Independent Schools	
About Us	Facts and Figures	Links open in same window	
	Facts and Figures	Hands-on, project-based learning (Preschool-Grade 1) with emergent curriculum (Preschool and Prekindergarten); Math in Focus (Singapore Math) introduced in Kindergarten	
	Facts and Figures	Under Specialists: no period at end of sentence. Please change sentence to Full-Time Reading Specialist and Full-Time Math Specialist work with students in all grades	
	Facts and Figures	Under Mascot, change to Gryphon (singular)	
	Strategic Plan	Slow loading .... check? Maybe just my computer today.	

Creating [301 Redirects](#) is important to ensure that pages from the former site are not lost when the new website is launched. This can be done with a plugin, or with code to be placed in the .htaccess file. Check to ensure the best version of PHP is running on the site (currently 7.0).

<a href="https://geds.org/calendar/(.*)">geds.org/calendar/(.*)</a>	<a href="https://geds.org/events/">https://geds.org/events/</a>
<a href="https://geds.org/uploaded/(.*)">geds.org/uploaded/(.*)</a>	<a href="https://geds.org/">https://geds.org/</a>
<a href="https://geds.org/javascript/(.*)">geds.org/javascript/(.*)</a>	<a href="https://geds.org/">https://geds.org/</a>
<a href="https://geds.org/page.cfm?p=407&amp;viewdirid=(.*)">geds.org/page.cfm?p=407&amp;viewdirid=(.*)</a>	<a href="https://geds.org/about-us/staff-directory/">https://geds.org/about-us/staff-directory/</a>
<a href="https://geds.org/page.cfm?p=674&amp;eid=448">geds.org/page.cfm?p=674&amp;eid=448</a>	<a href="https://geds.org/news">https://geds.org/news</a>
<a href="https://geds.org/page.cfm?p=441(.*)">geds.org/page.cfm?p=441(.*)</a>	<a href="https://geds.org/events">https://geds.org/events</a>
<a href="https://geds.org/page.cfm?p=362(.*)">geds.org/page.cfm?p=362(.*)</a>	<a href="https://geds.org/about-us/employment-opportunities/">https://geds.org/about-us/employment-opportunities/</a>
<a href="https://geds.org/page.cfm?p=364(.*)">geds.org/page.cfm?p=364(.*)</a>	<a href="https://geds.org/learning/early-childhood-education/">https://geds.org/learning/early-childhood-education/</a>
<a href="https://geds.org/page.cfm?p=674(.*)">geds.org/page.cfm?p=674(.*)</a>	<a href="https://geds.org/news">https://geds.org/news</a>
<a href="https://geds.org/page.cfm?p=689(.*)">geds.org/page.cfm?p=689(.*)</a>	<a href="https://geds.org/community/">https://geds.org/community/</a>
<a href="https://geds.org/page.cfm?p=367(.*)">geds.org/page.cfm?p=367(.*)</a>	<a href="https://geds.org/learning/elementary-education/">https://geds.org/learning/elementary-education/</a>
<a href="https://geds.org/page.cfm?p=365(.*)">geds.org/page.cfm?p=365(.*)</a>	<a href="https://geds.org/learning/early-childhood-education/">https://geds.org/learning/early-childhood-education/</a>
<a href="https://geds.org/page.cfm?p=604(.*)">geds.org/page.cfm?p=604(.*)</a>	<a href="https://geds.org/admission/tuition-fees/">https://geds.org/admission/tuition-fees/</a>
<a href="https://geds.org/page.cfm?p=369(.*)">geds.org/page.cfm?p=369(.*)</a>	<a href="https://geds.org/learning/student-life/">https://geds.org/learning/student-life/</a>
<a href="https://geds.org/page.cfm?p=368(.*)">geds.org/page.cfm?p=368(.*)</a>	<a href="https://geds.org/learning/elementary-education/special-subjects/">https://geds.org/learning/elementary-education/special-subjects/</a>
<a href="https://geds.org/page.cfm?p=350(.*)">geds.org/page.cfm?p=350(.*)</a>	<a href="https://geds.org/learning/">https://geds.org/learning/</a>
<a href="https://geds.org/page.cfm?p=351(.*)">geds.org/page.cfm?p=351(.*)</a>	<a href="https://geds.org/support-us/ways-to-give/">https://geds.org/support-us/ways-to-give/</a>
<a href="https://geds.org/page.cfm?p=360(.*)">geds.org/page.cfm?p=360(.*)</a>	<a href="https://geds.org/about-us/governance/">https://geds.org/about-us/governance/</a>
<a href="https://geds.org/page.cfm?p=25(.*)">geds.org/page.cfm?p=25(.*)</a>	<a href="https://geds.org/admission/affording-grace/">https://geds.org/admission/affording-grace/</a>
<a href="https://geds.org/page.cfm?p=353(.*)">geds.org/page.cfm?p=353(.*)</a>	<a href="https://geds.org/learning/">https://geds.org/learning/</a>
<a href="https://geds.org/page.cfm?p=354(.*)">geds.org/page.cfm?p=354(.*)</a>	<a href="https://geds.org/about-us/staff-directory/">https://geds.org/about-us/staff-directory/</a>

*Example of 301 Redirects*

## Launch

On launch day, ideally, work with the client's IT company to change the DNS settings. If there is no IT provider, change the A Record for the domain. Avoid touching the main name servers and/or MX (mail) records if at all possible.

After the DNS has been changed, monitor the propagation with a tool like <https://www.whatsmydns.net/>. Ensure the SSL certificate is installed on the live domain. Change the settings on the staging site and do a complete Search/Replace to change all the staging urls on the site to the live url. Check the robots.txt file and other settings in Google Search Console and ensure the site is working in Google Analytics.

## Post Launch

1-2 weeks after launch, meet with the client to do a tutorial in person or via video call. You may choose to create a PDF with some specific instructions for general as well as site-specific tasks. This provides an opportunity to make any minor edits with the client and show them how to make changes, upload images, write blog posts, etc.

This is also the time when you can move clients on to a maintenance plan - it is a good idea to offer options for levels of website care.

Lastly, do a debrief to compare your estimated to actual hours spent. This is helpful in creating future website proposals. It is a good idea (even if it is hard!) to track your time as accurately as possible using a tool like [Toggl](#).

## Celebrate!

**Share the good news on social media and document what worked and what you would change to improve the process next time.**