

Web Strategy: Planning for Success

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Introduction

The Web Strategy template is a practical road map that will guide the planning process for developing web products. The methodology is applicable for:

- Launching a new web site
- Undertaking a web re-design
- Building a new feature or function of an existing web site
- Developing an Extranet
- Initiating an Intranet.

This guide provides a strategic web development process, ensuring that the site will deliver targeted, measurable results in a manner that is integrated and aligned with the organization's core business and communication objectives.

Web strategy is particularly important given the organizational challenges associated with developing high-value web sites. Web development calls for focused communication leadership delivered in partnership with key internal partners in areas such as Information Technology, Information Management, Information Systems and Subject-Matter Experts. Given the horizontal nature of a web project, communicators must be equipped with a clear direction in order to integrate the contributions of internal and external partners toward a specific, achievable result.

The infinite possibilities inherent in the web heighten the need for strategic direction in development. Unlike print publications with pre-defined constraints (page size, length, printing process), web sites have no boundaries of time or space, which often leads to organizational inertia as various parties spiral in an inward-looking exercise of tinkering, re-writing and re-designing without a clear direction toward a high quality result that is delivered within budget and on schedule.

This template offers a methodology to drive toward successful web projects using best practices in strategic communications planning and project management.

Using the Web Strategy Template

The template provides a structure to guide the strategic planning process and help you develop web products that are aligned with organizational and communication objectives.

Simply copy and paste the template architecture and populate the categories of information based on the specifics of your organization and project.

Web Strategy Template

Objectives

- Organizational
- Communication
- Web

It's important to ensure that the web objectives are aligned with the organization's overall corporate and communication objectives. For example, a charity might have an organizational objective to raise funds, a communication objective of raising the profile of a cause, and a web objective of facilitating fundraising and awareness-raising.

Strategic Considerations

- Issue landscape:
 - Technical
 - Cultural
 - E-Communication

Web projects tend to be horizontal in nature—that is, that they affect players across an organization. Given this structural context, it's important to chart a comprehensive view of the issue landscape, capturing technical issues (e.g.: server infrastructure, technical support, information management), cultural issues (e.g.: level of integration of technology in a company or among client groups) and e-communication (e.g.: impact of other electronic communication activities such as e-newsletters, Internet, extranet or intranet sites).

- Challenges and opportunities for:
 - Clients
 - Partners
 - Employees

To maximize its benefits and validate the alignment of the web project within an organizational structure, it's important to have a broad approach when analyzing challenges and opportunities for various groups of potential clients/partners. Map out the potential link between the web project and the needs/challenges/concerns/priorities of various groups that may be affected by the new initiative. This will be significant in enhancing internal buy-in, and can be a useful way to identify opportunities for innovation or partnership. For example, if part of your organization has an objective to sell a new product, the web site might include a pilot for an e-commerce function promoting that particular item. Alternatively, if your organization is trying to solidify a partnership with an external organization, perhaps a secure part of the web site could be developed to facilitate sharing ideas or documents.

Delivery Model

- Accountabilities and Responsibilities
 - Technical infrastructure
 - Content management
 - Approvals
- Budgets
- Timelines

A strong project management framework is critical for any web project. Plan and document the basic elements of the delivery model. Consider potentially outsourcing parts of your requirements, or look for opportunities to leverage existing resources through cross-training.

Audience Definition

- Key Audiences:
 - Primary
 - Secondary

Generally a web product has very broad reach, but the quality of its performance as a communication and marketing tool increases when its audiences are well defined. For example, a primary audience might be customers and secondary audiences might be partners, industry analysts, etc.

- Audience's Information Needs:
 - Current context (off-line communication)
 - Static
 - Transactional

Be sure to build the web product with the audience's needs in mind. What is the context of communication for the audience members? Are they overloaded with information? Are they anxious for new information? Will the "consumers" of your web product be using the site for static research or information purposes? Are they looking to the web site to complete a transaction such as filling out a form or making a purchase?

Leveraging Marketing/Communication Context

- Defining existing marketing/communication context for the web site
- Identifying opportunities (addressing gaps, cross-promotion, building on success)
- Addressing risk exposure (inconsistency in brand or message)

It's vital that the web product fit within the marketing/communication context of your company. Track the environment in which the web site will evolve—is it very competitive? Are there gaps in existing materials available through other channels such as print? Are there any risks in terms of sending mixed messages or presenting a different brand? Validate the communication/marketing environment so that you can develop your web product strategically.

Innovation

- Opportunities for innovation (content, design, functionality, delivery model)
- Leveraging the innovation off-line

Explore a broad range of possibilities for linking the web product to non-web activity. For example, if you are running a promotion, you could reference your URL for contest rules to drive traffic to the site. An intranet might be used as a resource to facilitate internal communication following an important all-staff meeting. Adopt a broad perspective on your web product and watch for opportunities to make win-win linkages between online and off-line communication and marketing activity.

Partnership

- Opportunities for partnerships
 - Online
 - Off-line

The web is very conducive to partnership. Be proactive in identifying opportunities to co-brand with a business partner or supplier, for example. There are many opportunities for collaborative models, ranging from reciprocal links from each organization's sites to marketing promotions, which help drive traffic to web products.

Managing the Web Lifecycle

- Content management system
- Accountabilities for content generation, approval and archiving
- Change management system to validate accuracy of content (online and off-line)

The web is essentially a living document, so it's important to have a planned approach to managing the cycle of content. There are content management software packages that help automate this process. The key is to identify centers of accountability in a change management context. For example, if you are advertising a toll-free number for information about a product recall, it is critical that the *same* information be available simultaneously online. There are change management software packages and consultants who can help build systems to facilitate this process.

Risk Management

- Risks associated with technical infrastructure
- Reputation management
- Quality control

Your web site may be the most visible representation of your organization, which means that it carries a certain level of risk. For example, if a government department advertises a new online service for paying taxes, the technical infrastructure has to be solid to ensure that the agency is not negatively impacted by bad press and citizen complaints. Similarly, managing your reputation by ensuring a high degree of quality is important. Ensure that there are sound systems in place for content approval (accuracy and timeliness), translation (as appropriate) and management (updating information frequently, particularly if the details are time-sensitive, ex: pricing).

Evaluation Framework: Beyond Web Hits

- Meaningful indicators of internal and external performance
(e.g., agility, integration, efficiency)
- Measurement tools
(e.g., web stats, web traffic patterns, transactions, link to off-line activity such as advocacy or sales)
- Alignment with business objectives
- Alignment with communication objectives
- Achievements/lessons learned
- Opportunities to calibrate strategy

Techniques for measuring web sites have historically been very limited in their value because they tracked only the numbers of hits. Focus on integrating the performance of your web product to your organization's objectives. For example, if you are providing customer service, does the web information reduce the burden of inquiries to your call centre? Are there cost savings? Have you secured new clients as a result of the web site? Ensure that you identify opportunities to calibrate the web strategy as needed, based on successes and lessons learned.

Resources

Whatis?.com – Directory of technical terms

<http://whatis.techtarget.com/>

Tomalak's Realm – a daily source of links to Internet and technology news

<http://www.tomalak.org/>

The ITIL and ITSM Directory – Central information on Information Management

<http://www.itil-itsm-world.com/>

Information on Web consultations

<http://www.publicus.net/articles/consult.html>

CIO – Gateway to information on Web governance

<http://www.cio.com/>

New Knowledge Base Editor's Digest – a free monthly alert on Information Architecture

<http://iaslash.org/>

Webword.com – a usability blog

<http://webword.com/>

HCI Index – Human-computer interaction links

<http://degraaff.org/hci/index.html>