SMARTT

Intent into Measurable Results

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Web Planning Workbook

By Martin Wong

Contents

Introduction

"Measure twice, cut once."

A website is a significant investment. Yet studies show that 25% of all IT projects fail and companies can go over budget by as much as 60%. Too often the website fails to meet stakeholder needs while technology decisions come as afterthoughts that make life difficult for maintenance. The main reason is poor planning and execution.

The Smartt web planning process helps businesses and organizations plan and execute successful website development projects so they can maximize their return on investments.

The following workbook uses simplife, non-technical language to describe the process Smartt follows to perform web planning.

You can use it as a self-planning guide before using our web development or web planning roadmap services.

Let's get started!

Exercise #1: Your Business Objectives

What cannot be described, cannot be measured. Defining your business objectives clearly helps you stay on track throughout your web planning and development process so you get the most out of your investments.

Step 1: Choose Your Objectives

Objective	Sample Metrics	Current	Desired
1. Get more sales leads through a contact form	# of leads		
2. Get more sales leads through phone calls	# of phone calls		
3. Sell through e-commerce	Revenue, # of purchases		
4. Build awareness of your organization	#Visits to About Us, # of brand searches		
5. Build awareness of a particular brand or service	#Visits to brand or service page		
6. Provide information about your products and services	#Visits to products and services pages		
7. Distribute information to supporters, customers, stakeholders	#Visits to information section #Return visits to information section		
8. Connect to social media	# of likes # of followers		
9. Build relationships	#Returning visits #User actions on sites		

10. Educate your prospects and clients	#Visits to educational material #Return visits to educational material		
11. Build up database of contacts	#Contacts in database		
12. Manage an event	#Visits to event page #Registrations for events		
13. Gather market research	#Surveys filled out Revenue improvements from implementing actionable insights		
14. Provide support information	#Visits to support pages #Support phone calls		
15. Show proof through testimonials and case studies	#Visits to testimonials pages #Case studies		

Step 2: List Your Other Objectives:

Objective	Sample Metrics	Current	Desired
1.			
2.			

3.			

Step 3: Pick 1 Primary Objective

	OBJECTIVES:	**METRICS:**
PRIMARY OBJECTIVE:		

Step 4: Pick 3 Secondary Objectives

	OBJECTIVES:	METRICS:
SECONDARY OBJECTIVE #1:		
SECONDARY OBJECTIVE #2:		
SECONDARY OBJECTIVE #3		

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Exercise #2: User Objectives

A successful website tries to see things from the customer's perspective. What do they care about and what are they trying to achieve?

Step 1: Choose User Objectives for Current Website

- ☐ Find contact information
- ☐ Buy products online
- ☐ Book an appointment
- ☐ Get a quote
- ☐ Check account information
- ☐ Register for event
- ☐ Look at photos
- ☐ Share /publish content
- ☐ Learn about your organization
- ☐ Leave feedback
- ☐ Learn about a particular product of service
- ☐ Interact with other users

- ☐ Learn about your team
- ☐ Download partner / distributor material
- ☐ Get latest news
- ☐ Interact with social media
- ☐ Get educated
- ☐ Read testimonials
- ☐ Download case studies
- ☐ Download whitepapers
- ☐ Seek technical support
- ☐ Seek live help
- ☐ Read reviews

Step 2: List Other Objectives:

Objective	Sample Metrics	YES/NO
1.		
2.		
3.		

Step 3: Pick 1 Primary Objective :

	OBJECTIVES:	METRICS:
PRIMARY OBJECTIVE:		

Step 3: Pick 3 Secondary Objectives

	OBJECTIVES:	METRICS:
SECONDARY OBJECTIVE #1:		
SECONDARY OBJECTIVE #2:		
SECONDARY OBJECTIVE #3		

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Exercise #3: Wish List and Desired Improvements

What do you like about your current website that you wish to keep, and what would you like to see improved?

What You Like	What You Would Like To See Improved

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Exercise #4: Competitive Research

Create a listof competitors. Pick 3 and write down what you like the most about their websites.

Competitor	What You Would Like About Their Website

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Exercise #5: Audience Definition and Research

Defining your target audience helps you focus your marketing budgets on the most profitable customers,based on your business model.

B2B Ideal Customer

Description	Information
Industry:	
Sub-Industry:	
Location:	
Size:	
Number of employees:	
Years in Business:	

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Key Challenges:	
Needs/Desires:	
Budget Range:	
Responds to (Decision Making Criteria):	
Services Required:	
Success Factors:	
Internal Resources Available:	

B2C Ideal Customer

Description	Information
Age:	
Gender:	
Education:	
Income Level:	
Marital Status:	
Geographic Location:	
Challenges solvable by your products and services:	

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Exercise #6: Define Your Buyer Personas

A buyer persona is a fictional sterotypical profile of a decisionmaker who will be involved in the purchase of your service or product. For B2C companies, this person will most likely to be the end-user. For B2B companies, this person may be a composite of many decision-makers or influencers of the sale. Buyer personas help you focus your marketing on the emotions and desires of key decision makers. Use the template below to create as many personas as necessary.

Buyer Persona

Description	Information
Basic Demographics Age: Gender: Income: Family Information: Job Title:	
What do they see? What does their environment look like? Who surrounds them? Who are their friends ? What kind of advertisements do they see every day?	
What do they hear? What do their friends say? What does their spouse say? What do their family members say? Who really influences them, and how?	

What do they really think or feel? What is really important to them that they may not say in public? What motivates them? What keeps them up at night?	
What do they say and do? What is their attitude? What are they telling others? What are they doing that is contrary to what they say?	
What are their fears, frustrations, pains, and urgencies? What are their biggest frustrations? What obstacles stand between them and what they want to achieve? What risks might they be taking?	
What are their wants and aspirations? What do they truly want or need to achieve? How do they measure success? What are some of the strategies they might use to achieve their goals?	

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Exercise #7: Define Your Sales Cycle

Your Buying Cycle is the process you typically go through before a prospect finally becomes a customer; this can includeiterations of education, social proof, and vendor comparison. Defining this process can help you target your prospects during each stage with specific offers or content that will "push" them to the next stage.
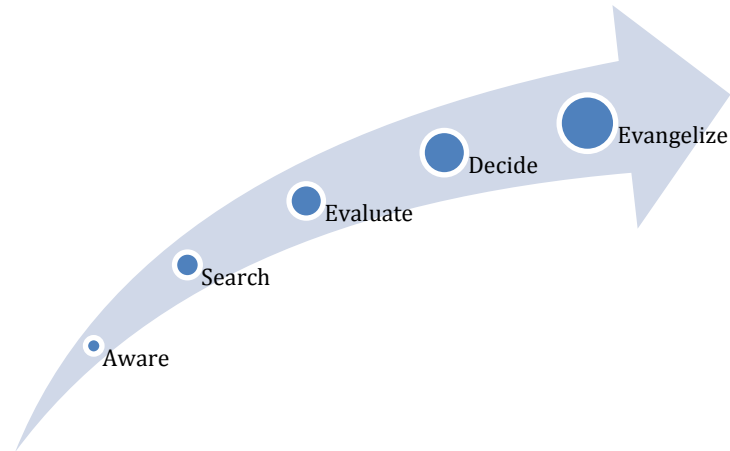
The Buying Cycle

Aware: Customer becomes aware of their needs or problems.

Search: Customer searches for potential solutions to fulfill their needs.

Evaluate: Customer evaluates the different options to fulfill their needs.

Decide: Customer decides on a solution.

Evangelize: Customer becomes an active user of the product or service.

Buying Cycle for Your Products or Services

	Aware	Search	Evaluate	Decide	Evangelize
What Your Customers Seek					
Potential Concerns					
Potential Questions					
Good Answers					

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Exercise #8: Define Your Keywords

Keyword phrases are words your customers type into the search engine during a particular buying stage. You need to brainstorm and discover your keywords so that you can use either search engine marketing (SEM) or search engine optimization (SEO) to help your website appear in search results whenever a customer types in those keywords.

Types of Keywords

There are 6 main types of keyword phrases, each specific to one of more buying stages of a customer:

Keyword Type	Buying Stage(s)	Search Objectives	B2C Examples	B2B Examples
General Keywords	• Aware • Search	• To look up generic information about a certain topic or industry • To look up something they have heard about from a friend or from the news about a certain topic or industry	• "bodybuilding" • "whey protein"	• "selling online" • "e-commerce" • "Internet marketing"
Problem-Based Keywords	• Search	• To search for potential solutions to a specific problem • To search for second opinions on an answer to a specific problem	• "trouble gaining muscles" • "can't lose belly" • "CLA to lose gut"	• "PPC campaign losing money" • "tracking social media ROI"
Symptoms-Based Keywords	• Search	• To search for information on obvious or underlying symptom	• "skinny with gut" • "skinny fat" • "big belly"	• "high bounce rate"
Question-Based Keywords	• Search • Evangelize (They seek support)	• To search for answer to a question • To seek support for a product already purchased	• "shouldI workout at night?" • "exercising at night"	• "how to use social media in B2B" • "how to track phone calls

			• "best time to take CLA"	through analytics"
Product Names + Part Numbers	• Evaluate • Buy	• To find vendors for a specific product • To compare prices for a specific product	• "superwhey 100" • "super CLA 200"	• "Smartt P.A.C.E. workshop"
Brand-Based Keywords	• Buy • Evangelize	• To find navigational path to a website in mind • To compare known vendors	• "bodybuilding.com" • "amazon.com"	• "Smartt"

Keyword Planning Table

General Keywords	Problem-Based Keywords	Symptoms-Based Keywords	Question-Based Keywords	Product Names + Part Numbers	Brand-Based Keywords

Exercise #9: Advanced Content

Your customers want different content at each stage of their buying cycle:

	Aware	Search	Evaluate	Decide	Evangelize
Articles	✔	✔			
Case Studies			✔	✔	
eBooks		✔	✔		
Photos	✔	✔	✔		
Testimonials			✔	✔	
Infographics	✔	✔			
Videos	✔	✔			
Webinars	✔	✔	✔		
Self-Assessments		✔	✔		
Whitepapers	✔	✔	✔		
Product/Service Info			✔	✔	
F.A.Q.			✔	✔	✔
Shipping/Return Information			✔	✔	✔

Check the ones that you should include on your site.

- ☐ Articles
- ☐ Case studies
- ☐ eBooks
- ☐ Photos
- ☐ Testimonials
- ☐ Infographics
- ☐ Videos
- ☐ Webinars
- ☐ Self-Assessments
- ☐ Whitepapers
- ☐ Product/Service Info
- ☐ F.A.Q.
- ☐ Shipping/Return Information

Exercise #10: Content Audit

Audit your current content to decide which content pieces to add, modify, or delete, keeping in mind the target persona and buying stage each piece addresses. Create anExcel table or use the table below.

Content Item / Page	URL	Targeted Persona	Buying Stage	Keep/Delete/Modify

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Exercise #11: Information Architecture

Create a new sitemap that shows the pages you're planning for your site. You may need to create an external Excel file if you have many pages.

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Exercise #12: Google Analytics Conversion Goals

Conversion Goals

Here are some popular conversion goals that apply to most businesses. See if they apply to your business. You can view your current Analytics goal by clicking on "Conversions" on the side navigation bar.

	Currently Exists?	Necessary?	URL/Location:
Contact page			
Contact form submission			
Lead form submission			
Newsletter signup			
E-commerce transaction			
Add to cart			
User account signup			
User login			
Blog comment submission			
File download (list all)			

Conversion Funnel

A conversion funnel is the path that a user must take in order to complete a major conversion such as an E-commerce transaction. Setting up funnels in analytics will allow you to see where users are dropping off and how you may be able to lower the dropout rate. Use the table below to plan your first conversion funnel.

	Exists?	Necessary?	Location:
Step 1:*(Example: Add to Cart)*			
Step 2:*(Example: Shipping Info)*			
Step 3:*(Example: Billing Info)*			
Step 4:*(Example: Confirm Order)*			
Step 5:*(Example: Thank You)*			

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Exercise #13: Features List

Document the list of features that support that the customer's user experience and are required to fulfill the business and user objectives of the site.

1. Document Current Features

Current Feature	Location	Notes:	Keep on New Site? (Y/N)
Example: Search field	Every page, on right sidebar		Yes, need to be on every page but not necessarily right sidebar; depends on design

2. **New Features**

Current Feature	Location	Notes:	Keep on New Site? (Y/N)

Exercise #14: Technical Considerations

Identifying important technical considerations helps you define the true scope of the project. If you need help filling out this section, consider using Smartt for your web planning.

1. **CMS Platform + Plug-Ins**

Recommended CMS platform:	(Example: Drupal or Wordpress)
Reasons:	
Pros of platform:	
Cons of platform:	
Steps to mitigate cons of platform:	
Successful organizations using recommended platform:	
Release cycle:	

2. Recommended Plug-Ins/Modules for Platform

List all plug-ins or modules that should be included to customize your chosen content management system.

Plug-In	Description	Licensing Costs

3. Social and 3rd Party Integration

List all 3rd party integrations that should be implementedwith your website. (Example: Marketo and Google Tags Manager)

Recommended Social and 3Rd Party Functions:	How to Implement:

4. RSS/XML/Sitemaps

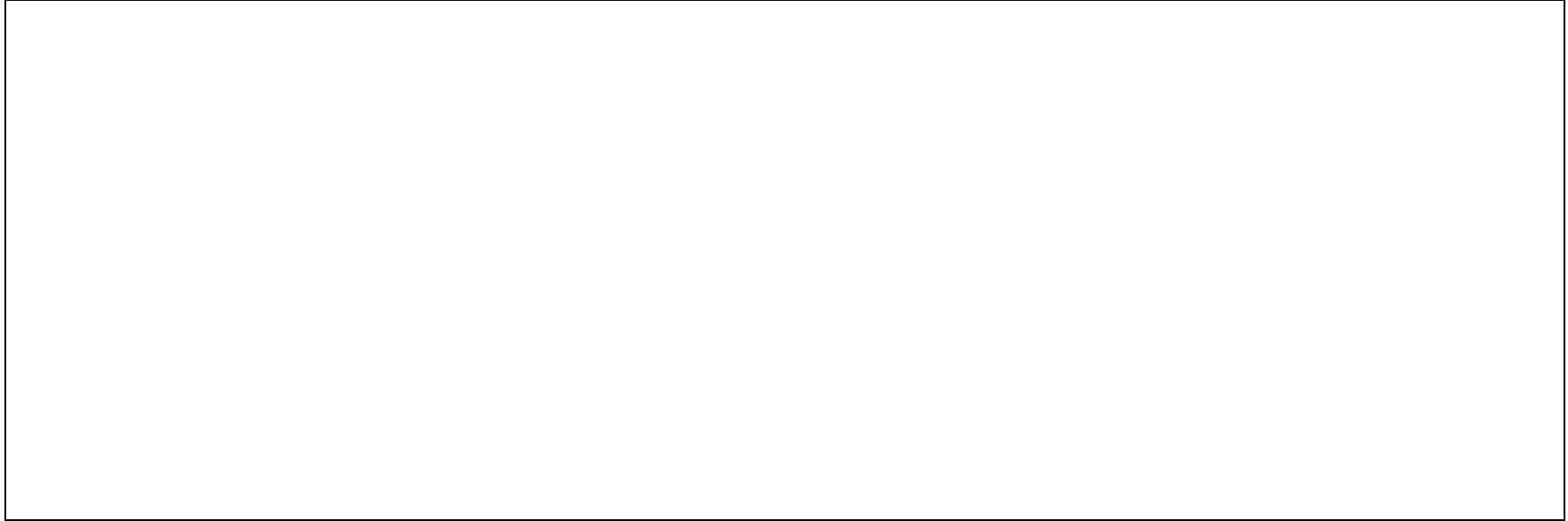| Recommended XML/Sitemap Functions:	Reason:	How to Implement:
RSS Feed		
XML Feed		
Static Sitemap		

5. Browser Compatibility

Which browsers should your website support? You can use Google Analytics **Browser & OS** statistics to see which browser visitors use when they come to your site.

	Versions supported
Internet Explorer	
Firefox	
Chrome	
Safari	
Opera	
iOS Safari	
Opera Mini	
Android Browser	
Opera Mobile	
Chrome for Android	
Firefox for Android	

6. Other Considerations

List other technical considerations that may affect the scope, budget, and direction of your project.

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Exercise #15: Design Goals

Document design goals for the site, including sample sites, colors, brand positioning, style, and images.

Step 1: Other Sites for Reference

Find 3 sites that you like aesthetically and document why you like them.

URL	
Like:	
Dislike:	
Screenshot:	

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URL	
Like:	
Dislike:	
Screenshot:	

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URL	
Like:	
Dislike:	

Screenshot:

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Step 2: Brand Guidelines

Provide a copy of your current brand guidelines.

Brand Guidelines Location:	

Step 3: Style / Tone

Describe the kind of style or tone you would like your website to convey.

Style / Tone Adjective #1:	
Style / Tone Adjective #2:	
Style / Tone Adjective #3:	

Step 4: Potential Design Challenges and Opportunities

Describe potential design challenges and opportunities you would like to examine.

Potential Challenges	Solutions and Opportunities
(Example: Putting a "human face" to a technology company)	*(Example: Use a video background to convey brand image)*
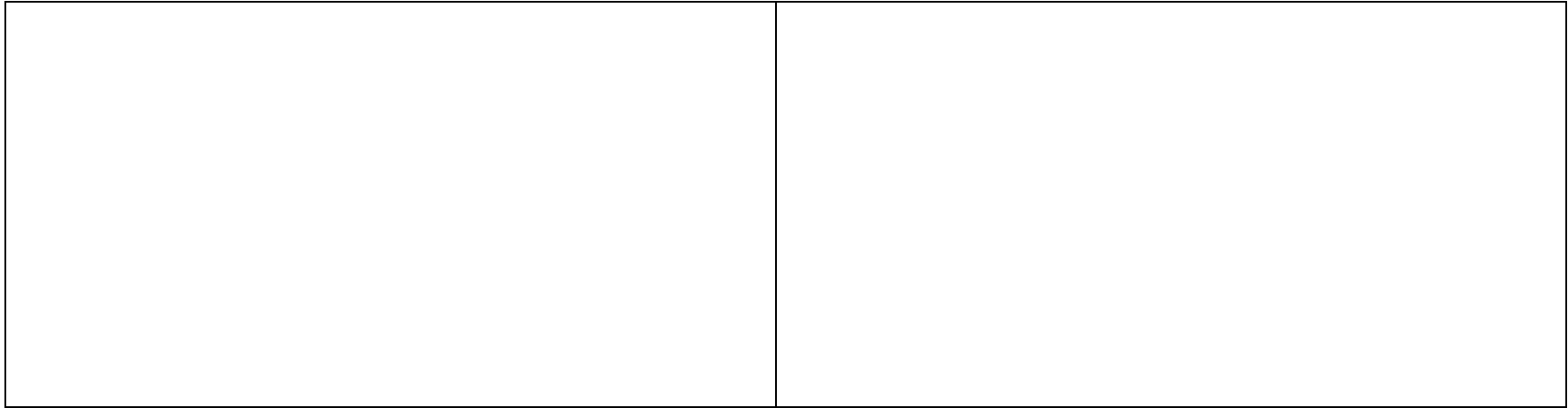
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Exercise #16: Related Web Peoperties

Your web design project may affect social media platforms that need to be branded with updated visuals. Take the time to document any platform that should be included in the scope of your web design project.

Step 1: List Your Related Web Properties

Web Properties	URL / Notes	(Required?) YES/NO
1. Branded Facebook Page		
2. Branded Twitter Page		
3. Branded YouTube Page		
4. Web Banners		
5. Landing Pages		

Step 2: List Your Other Related Web Properties:

Web Properties	URL / Notes
4.	
5.	
6.	

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Exercise #17: Creative Brief

Combine your ideas into a single, simple, creative brief that guides the design process once it starts.

1. Why should the website exist, from the consumer's point of view?	
2. What do we want people to do as a result of the website and what are the metrics?	
3. Who are we talking to?	
4. What is the single most persuasive idea we can convey?	
5. Why should they believe it?	

6. What do people now think/feel about the brand?	
7. What do we want them to think/feel?	
8. What personality will distinguish the brand?	
9. What is the tone of the website?	

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Exercise #18: Project Brief

Summarize your website plan into a project brief that defines the scope and boundary conditions of the project.

KEY PROJECT DETAILS:	
Project Name:	
Background :	
Objectives:	
Project Scope:	

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Project Lead:	
Team Members:	
Stakeholders:	
Critical Deadlines:	
Mandatory Requirements: (these must be delivered)	
Risks & Impediments:	

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Working With Agencies

Agencies provide valuable support and consulting for your marketing programs. With experienced gained from multiple projects, agencies offer expertise in technical and creative areas that go beyond the resources of most marketing teams. We highly recommend partnering up with an agency that can help you with strategic planning and ongoing measurement of your marketing activities.

How to Pick a Great Agency

Picking the right agency can mean the difference between success and failure for your marketing activities. Here are a few things you should look for in an agency partner:

1) **Gives You Measurable Results:** Your agency should hold itself accountable by continuously tracking and optimizing your results.

2) **Focuses on Your Business Priorities:** The days of just dumping a big budget into marketing are gone. Make sure your agency can start small and work in an iterative manner to focus on your business priorities.

3) **Helps You Set a Realistic Scope:** Your agency should help you restrict your marketing plan to a realistic scope. Your monthly package should be based on your size, needs, and budget.

4) **Is End-User Focused:** Your agency should be a "customer advocate" and take your customers' viewpoint so they can maximize the effectiveness of their recommendations.

5) **Willing to Share Their Knowledge:** Your agency should be willing to educate you.

How to Be a Great Client

Great agencies with experience and competencies across multiple disciplines are in scarce supply and great demand. They will only take on clients who are a good fit. On average, Smartt turns down 3 out of 5 clients who approach us for help. Here are a few tips on how to make your organization an irresistible account for great agencies.

1) **Determine your specific goals and objectives (and their reasons)**
   Being specific about what you are trying to achieve helps us determine if it is something we can deliver. Knowing the reasons and motivations behind your goals and objectives help us understand your priorities and create alignment.

2) **Let us know your timeline and budget:**
Knowing your timeline and budget allows us to prioritize the tactics, activities, and technical features based on business value and potential ROI. This also helps us align the right skills, expertise, and personnel to help you fulfill your objectives.

3) **Start small:**
Many of our best clients have first tested for 'good fit' with us by starting with small projects: a website audit, a workshop, or a small campaign.

4) **Connect us with decision makers:**
Our clients generally see better results when they give us access to decision makers as early as possible. This helps our experts gain stakeholder support and agreement early on so your initiatives are well-communicated from the start.

5) **Share data and metrics:**
We work best when we are presented with data and metrics. The more we know about your current situation and results, the better decisions we make, the better work we can do.

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About Smartt

"Transparency, leadership, and collaboration are values that guide us.
Measurable Results is the motto that drives us."

Smartt is a digital consultant agency that offers integrated support in Branding, Web Development, Digital Marketing, and IT services. We help client execute results-driven roadmaps with transparency, technical leadership, and cross-functional collaboration so they can achieve better business results.

Why Clients Work With Us

We have specialized skills and expertise: Clients tell us it's a challenge to bring together all the resources necessary for a successful IT or digital marketing program. Our well-coordinated interdisciplinary team offers marketing, business, and technology skills. This means clients can free up internal staff to do what they're great at while leaving the project details to us.

We deliver measurable results: Agencies are often concerned about pitches, billable hours, and awards. IT firms are often concerned about fulfilling deliverables. Smartt focuses on delivering measurable results to every project and engagement, no matter how big or small.

We help clients align their business priorities: Smartt understands both the practical and political issues involved in developing digital and IT strategies. We come to you not with theories, but with pragmatic experience from managing high-value projects. We first work with your executives to build a strategy that achieves C-level buy-in. Then we execute projects in collaboration with internal teams to achieve measurable results.

We help clients manage complexities: Technology and the Internet are constantly changing. Smartt's interdisciplinary team and approach mean we can help you simplify, plan and implement complex technical projects based on ROI. Let us manage the people and the project while you get insights and measurable results.

Next Steps

To learn more about how our services or training can benefit your business, visit www.smartt.com or call us today at (888)-407-6937 for a no-obligation discussion about your needs. We'll provide you with our candid feedback as well as potential costs.