

Guerrilla Web Strategy

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Hi, I'm Leeanne Lowe :)

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- 1. Control Scope*
- 2. Save Time*
- 3. Reduce Costs*
- 4. Good Client Relationship*
- 5. Effective Online Presence*
- 6. Better at Your Job*

Utilizing my Guerrilla Web Strategy approach you will:

- ensure you keep control of project scope
- save time on design and development
- reduce your costs
- maintain a better and more trusted relationship with your client
- create more effective online presences for your clients
- ultimately be a better web designer

This is not graphic design

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I'm sure everyone here is already on the same page as me when I say that starting a web project by looking at the design is wrong – a website is not a graphic design project.

We need to help clients understand this; that web designers are not (just) graphic designers – they are strategists, information architectures, and UX specialists.

The first stage of any web project is not about what colour palette, page layout, or graphic treatments. It's not about brainstorming for the big idea.

It's about a client's business needs and the needs of their customers.

It's about you and your client understanding and agreeing upon what success looks like – before you start talking about what the website will look like.

In fact, we are not really covering visual design or user interface design at all today.

We are covering what you need to do to get to the point where you can create effective visual and user interface designs as part of an overall online presence.

Discover

Research

Client Needs

User Needs

Define

Overall Strategy

Scope

Content

Architecture

Design

Interaction

& Interface

Visual Design

Develop

Prototyping

Coding

Testing

Revisions

Deploy

Documentation

Training

Launch

Measure

This is the standard project workflow path that an online presence takes.

Even if you don't do all of the things within this process – you are doing some of them, and (hopefully) in this order.

The Discover and Define stages that we'll be looking at:

- define the purpose and direction of the web presence
- clarify the project scope
- direct the content and information architecture
- ultimately informs all remaining stages in the process

More on this later...

But lets talk for a moment about what a organization's 'web presence' is.

Website

A web presence is not just a website – it's everywhere and every way your client represent themselves online.

That's because clients need to be where their customers are – and more often than not, it isn't at their website.



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What's happening online outside of a client's website is becoming more important in terms of customer relationship building and online marketing, than the main website itself.

That's why things like...

- how pages are represented to and on search engines (how people will find your client)
- communicating to the right social networks and online communities (where their customers hang out)
- having something as simple as an RSS feed (because really, who goes to a company's site to their blog or news anymore - that's what Google reader is for!)
- and other online promotion like email marketing, pay-per-click ads etc

Cannot be an after thought

So I'll keep using the term 'web presence', not website, because by web presence I mean a company's entire online activity.

Ultimately we are not just designing websites, we are helping clients use the web more effectively - **creating an online presence worth caring about.**

Websites generally exist to serve one of two purposes: to make the company money or to save the company money.

Jesse James Garrett, *The Elements of User Experience*

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What I'm really saying here is that a web presence needs a reason to exist beyond the client wanting one and you wanting to get paid to create one.

It needs a solid strategy.

*Strategy is the foundation for
creating any successful experience.*

Adaptive Path (www.adaptivepath.com)

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Companies fail – or at least don't succeed to the extent they could online because they don't address two key questions:

- what do we want to get out of this
- what do our users want to get out of this

They fail to have a strategy.

Web designers also fail when they don't address these questions, or don't focus the strategy around them.

A web presence of any size needs a strategy – and the success of that strategy needs to be measured (I'll touch on that again later).

*So what's
Guerrilla Web Strategy?*

Well essentially it's not.

The goal is still to define the purpose and direction of a web presence, this is just a quicker, less resource intensive, and therefore cheaper way of doing it.

1. Quicker

2. Less Resources

3. Cheaper

Over the years I looked at how hugely experienced (and very talented) people went about creating the websites I admired.

I would read about Competitive Analysis, Stakeholder Interviews, User Research, Strategy Workshops, and think it all sounded great, and someday, after I'd been very, very good, I might get clients that would pay for that.

In the meantime, I had clients whose ideas about their website included a Flash intro, ensuring the logo was big enough, and whose MD wanted his picture on the homepage and didn't like the colour blue (oh, and if it was possible could there not to be any scrolling).

Yet in the face of requests that made me want to kill myself, I still wanted to create sites for these clients that not only my peers thought were good, but that clients got real return-on-investment from, and users actually cared about.

The only problem was, if I had actually given proposals to clients that assigned money to developing a web strategy, I wouldn't have got the work (or they'd have asked me to take that bit out!).

So I started to look at what I was already doing to uncover project needs and formalized it to create a guerrilla approach web strategy.

Formalize what you're already doing

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In the life-cycle of any project you do research, you talk with the client about what they want, you have meetings with the client (even if its just over the phone), you send stuff to the client for review, etc.

What I am suggesting formalizes these normal tasks and client interactions to produce the strategy – done right you shouldn't have to do much more than you already are, but you will be getting much more out of it – a planned strategy with a documented solution.

If nothing else, you are ensuring that all opinions, ideas, and assumptions are considered, reviewed, and most importantly mutually agreed between you and the client.

1. Competitive Analysis

2. Decision Maker Interviews

3. User Research

4. Strategy Workshop

1. Competitive Analysis

aka Online Research

2. Decision Maker Interviews

aka Client Questionnaire

3. User Research

aka User Questionnaire

4. Strategy Workshop

aka Project Meeting

This framework is meant to gather as much raw data as possible about the project and its audience.

This kind of structured client collaboration should result in a better solution.

Before we go any further though, I would like to add a caveat (one that I can't stress enough) collaboration is great and you can develop a real relationship of trust with your client, but ultimately you are the designer, and while the client might be an expert about their own business, you are the expert about design and the web.

Do not let the client dictate or micro-manage you, say no when you feel that what is being asked or suggested will compromise the project.

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You look at the competition so you can understand the competitive landscape of the client's industry.

1. Review and assess the existing website
2. Review and assess the competitor and peer websites

Outcome: A list of key competitor/peer websites (3–5), each with some bullet points detailing the pros and cons of the site along with any other thoughts you might have that will be valuable to the project.

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Email each client decision maker (a defined, limited list of people who will be involved in the decision making process for this project) with a editable Word doc that poses a series of important questions surrounding the project, such as:

- how do you feel about your existing web presence and why do you feel like that way
- what business problems would you like your web presence to solve
- who are your customers; describe the different types of customer you have
- how do you think your company is perceived by your customers and what if anything would you change about that

Outcome: A collated list of the answers, along with your list of key follow-up questions that arise from those answers.

1. *Competitive Analysis*

aka Online Research

2. *Decision Maker Interviews*

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3. *User Research*

aka User Questionnaire

4. *Strategy Workshop*

aka Project Meeting

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Usually user research would be done to define the potential audience, which would be broken into manageable segments, divided by things like age and gender, or attitudes and perceptions, etc. User personas might be created to represent the different groups and imagine what they would want and how they would use the online presence.

But this isn't called Guerrilla Web Strategy for nothing.

So instead we get the client to choose the clients they can come up with to represent the different users, and ask those users a bunch of questions.

1. Have the client choose 3 – 5 customers that they feel best represent the range of customers they have (the customers will need to be briefed on the task by the client).
2. Email each customer with an editable Word doc that poses a series of important questions surrounding the client's existing web presence and what they would like to see in a revised web presence.

Questions might include:

- how do you feel about X's existing web presence and why do you feel like that
- what tasks would you like to be able to perform at X's website
- what information would you like to find at X's website
- what is your opinion of X as a company and why
- What social networking sites do you use
- How would you feel about receiving email communications from X, and what types of emails would be useful

The questionnaire should be as thorough as possible.

Outcome: A collated list of the user answers, along with your list of key follow-up questions to pose to the client that arise from the answers.

1. Competitive Analysis

aka Online Research

2. Decision Maker Interviews

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aka User Questionnaire

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Take all the data gathered, along with the questions that have arisen from it and go through it with the client. It would help if you had drawn some preliminary conclusions that you can share with the client to see their reaction.

Get their feedback on everything.

Walk them through some of the competitor websites – analyses and deconstruct the competitor sites (this is particularly helpful when a client is using sub-standard examples as the kind of site they are looking for). Show your own examples to show them what a well designed, well structured site looks like.

Talk to the client about what their site might look like – you could do rough sketches as you talk with them that represent some of the ideas being generated.

Take lots of notes!

If your client is too far away for a face-to-face meeting, simply do it over the phone (sending them reference materials before hand).

Define

aka Strategy Documentation

You'll have walked away from the strategy meeting with everything you need to create some documentation that lays out the goals and solutions for an effective web presence for that company.

You and the client are starting to understand what success looks like and now you need to record that in some documents you can refer back to.

- 1. Objective & Strategy Outline*
- 2. Scope Document*
- 3. Search Engine Plan*
- 4. Content Outline*
- 5. Site Architecture Chart*
- 6. Creative Brief*

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- List, in order of importance, client business goals
- List, in order of importance, user needs
- Apply appropriate strategies to each

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- What keywords represent the company
- What pages will target what keywords
- How will the other pages of the site support this (this may sound complicated, but a simple one pager with a descriptive table is all you need).

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What information – based on the business and user goals – needs to be at the site.

- 1. Objective & Strategy Outline*
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- 6. Creative Brief*

How is that information going to be organized

- 1. Objective & Strategy Outline*
- 2. Scope Document*
- 3. Search Engine Plan*
- 4. Content Outline*
- 5. Site Architecture Chart*
- 6. Creative Brief*

Review

aka Client Sign-off

With all the Solution Planning Documents prepared

– go over everything with the client and ensure you have their buy-in and firm agreement before moving forward.

At this point not only do you have a web strategy, you also have a defined and agreed contract of work that will inform the remaining phases of the project.

Measure

aka 'Is this thing turned on'?

Google Analytics is your friend.

Learn how to use it (that could be presentation all to itself!)

Define what indicators should be tracked to properly measure the effectiveness of the strategy you developed.

Set specific goals, use segments and custom reporting.

There are other methods of analyzing and gathering metrics, but Google Analytics is quick, comprehensive, and free. So its great in the confines of a guerrilla strategy.

You could also research and find other free and non-time consuming ways to effectively track success that will work for you and how you decide to implement the framework I am proposing.

Urm,
Why am I doing this again?

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I suppose you don't need to do it. But if you, the person tasked with designing and building the web presence doesn't, who will?

Clearly defining a strategy narrows the focus of a project to make it as effective as possible – it avoids wrong assumptions and confusion between you and the client, and hopefully avoids dissatisfaction on the part and the client and the user toward the end product.

Clients are often unable to form a clear strategy – if they even know they need one – because of things like a lack of time, experience, or organization – or all of the above.

Your clients – at least in the beginning – may not understand, want to pay for, or care about the process. But they will care about the results that come from a good website and overall web presence.

I do it because I want to provide the best possible solution to my clients – it's good for them, it's good for their users, and it's ultimately that's good for me because working this way means I produce better work and that gets recognized and brings in more work.

Question Time :)

Interesting, but not as much fun as Hammer Time

Thanks for listening!

View presentation again
www.lovelywebstuff.com/guerrilla-web-strategy

(aka One More Time with Feeling)