Conceptual Design

- Strategy
- Research
- Communications Planning
- Architecture
- Blueprints
- Wireframes ➢ Design sketches
- Content Map

Strategy

"A good web strategy fits in with the overall business [or communications] strategy. It's usually best to start with a focused, service oriented site and keep expanding from there. If you define the audience as "all teenagers" or "all people surfing from noon to 1 P.M.," you will have to launch something the size of CNET to be successful."

--Dave Siegel, Secrets of Successful Websites

◆ Understanding your audience and your organization's goals is critical.

Why is research important?

1. **You'll save time and money. Keep you on Critical Path.**
   - It may feel slower, but it will actually move the project along more efficiently, if not faster.

2. **Managers don't know what your users want.**
   - This is how sites commit the sin of using the organization's perspective. Your job is to make sure that doesn't happen.

3. **You need to ask some questions, because there are things you don't know.**

Research methods

- ◆ Evaluate existing sites
- ◆ Interview clients
- ◆ Interview users
- ◆ Examine log files
- ◆ Surveys
- ◆ Focus Groups
- ◆ User testing

Research/Strategy Process:
How I Begin (our little secret)

1) Evaluate existing site

1. Goals & audience
2. Content & architecture of site
3. New content desired by web committee
4. Other marketing and promotional materials
5. Similar organizations

2) Interviews & Research

10. Good time to get "buy-in", chance for them to question you as well.

How I Begin (our little secret)

3) Revisit my evaluation

4) Draft communications plan for project

5) Architecture (conceptual design & content mapping – next week!):

- Map existing and new content
- Draw up architectural blueprint that is flexible & expandable
- Conceptual sketches

Research Methods:
Interview Questions

1) What are your goals and objectives?

-vital step

Defining goals:

- get everyone in organization involved
- get agreement on content and purpose, but you build it
- determine who your key players/decision makers are
- formal or informal definition of goals?

Interview Questions

1) Goals & Objectives:

-mission or purpose of the organization?

-short- and long-term goals of the site?

-who are the intended audiences?

-spend some time on this getting them to list all the potential audiences

-rank them so that you can put the messages and goals in order

-recognize that audiences differ

Compile the answers:

-if you have a lot of answers, get them into organized lists

-get people to rank the answers in importance

-filter that into a final list to get approved

Interview Questions

2) What is your budget for the project?

- Your budget will determine who you can add to the project team. Some of your choices are:

  communications analyst

  web developer, programmer

  graphic designer, graphic user interface specialist

  marketing, writers (content)

  usability experts, info. architects, etc

Interview Questions

3) Has the time line for this project already determined?

- subset of the budget problem. Often time is your limiting factor.

4) Who has the authority to sign-off on the project?

Interview Questions

5)   Have you done a market analysis in the past two years?

6)   Who are your top 5 competitors?

Another important part of your strategy. You have to get the client to do this, and you should have already done this yourself.

What do you like?

What do you hate?

What would you like to emulate?

What are the "competitors" doing?

Interview Questions - IT questions

7) What technology issues do you know need to be addressed?

8) Who will be responsible for the day to day operations of the web site? What hard/soft/wetware will be involved?

Interview Questions - Promotion

9) Who will be managing Internet promotions and publicity?

- not like field of dreams – you have to promote the site (another lecture)

10) Do you have a domain name currently?

Other Research Methods

- ◆ Content Analysis
  - ▪ How does it fit into possible hierarchies?
  - ▪ What topics, audiences and other organizational structures would it fit under?
  - ▪ Who owns it? Why did they create it?

Other Research Methods

- ◆ User Research
  - ■ How do existing visitors use site?
    - ● Page Statistics
    - ● Log analysis
  - ■ Surveys
    - ● What is useful, what isn't?
    - ● What would they like?
    - ● What frustrates them?

Other Research Methods

- ◆ **User Research (continued)**
  - ■ Focus Groups?
    - ● Probably not, but you might want to check something from your survey
  - ■ User Research Sessions
    - ● Interviews – personalized survey, chance to get focussed information
    - ● Card sorting
    - ● User testing

Okay, now what?

◆ Go back to my assumptions, the client's assumptions, and see where we were wrong. (Usually we are, somewhere.)

Use research to inform your comms plan or strategic marketing plan

- ◆ Communications planning is the next step, not information architecture

- ◆ Need to know what you're going to say, and how you're going to say it.

- ◆ Simple communications plan, or sometimes called a strategic brief:

Parts of a Comms Plann

◆ **Background:**

◆ **Your chance to outline the history that has led up to the need for the comms plan, and also your chance to pitch your solution.**

Parts of a Comms Plann

Communications goal:

What are my/my client's goal? You have to distil the main goal. You should try to put this into a simple declarative sentence:

- To provide a website that encourages customers to purchase widgets.
- To provide a website that helps customers get their widgets serviced.
- To provide a website that reinforces the customer's decision to buy our widgets.
- To create a website that strengthens the Widget Company brand.

Generally, there are three main goals:

- Telling something (information)
- Selling something (ecommerce)
- Entertainment

Parts of a Comms Plann

Audience:

◆ Who is my target audience?

◆ broad audience (www.uwo.ca)

◆ narrow (www.webdeveloper.com)

◆ all the grey areas in between (salon.com)

Parts of a Comms Plann

Objectives:

Are there specific objectives (or sub-goals) that you need to meet?

- ie., UWO: let people know about new programs
- explain new policies
- keep students abreast of important dates

Parts of a Comms Plann

Key Messages:

What are the messages/themes that will best communicate my goal?

- great place to put your tagline – from Krug
- All the news that's fit to print
- widget.com: better widgets faster

Could be called a positioning statement.

If dealing with a client: who can help me with these? Do they have marketing people who have already figured this out?

Parts of a Comms Plann

Strategy

You can outline what you're going to do and how. Also, the timeline.

Budget

Explain your budget and how you're going to spend it.

Parts of a Comms Plann

Potential Issues

Your chance to explain the problems you face.

Timeline or Timeframe

When what is going to happen.

Other Parts of a Comms Plann

COMPETITION

Describe major direct and indirect competitors, their positioning, strategy, strengths and weaknesses, if known.

Other Parts of a Comms Plan

CREATIVE DIRECTION:

Describe what creative aspects have already been discussed with the client, or are already apparent to you as the account executive. Tone: upbeat, playful, serious, etc. Photos? Illustration? Type only? What samples in our portfolio, or otherwise, did the client particularly like? This section is briefing the illustrator/photographer/designer.

Other Parts of a Comms Plan

COPY: Describe anything already determined about the text, or verbal content, of the project. Who is responsible for research? Who is writing final copy? Are we proofreading or editing it? What must be included? What headings or subheadings? What must be mentioned or included? Who will be quoted? To what end? This section is briefing the writer.

Conceptual design

This is the process of going from your strategy and communications planning into an organized, structured plan for the site, and includes:

- ◆ brainstorming
- ◆ scenarios
- ◆ wireframes
- ◆ blueprints
- ◆ content mapping.

Brainstorming

- First part of the process, usually done with a group of interested parties (assumes the site isn't just for yourself)

- whiteboards are a helpful tool

- visualize your ideas, see the connections, erase stuff you don't like. Good process

- problem of recording decisions isn't - just write it down or even take a pic of it when you reach consensus on issues

Scenarios

- Draft short (two or three) paragraph descriptions of how different members of your audience can accomplish different tasks:
  - This is something that you will have done before a brainstorming meeting to suggest ideas, or something that you do before a second brainstorming session.
- record reactions to these scenarios

Organization

- look at the site from a very high level - what are the basic content groupings that you are going to need/have
  - this you do after the brainstorming sessions

Organization

Figure out what the sections or sub-sites are going to be

- this is also where you figure out what kind of organization scheme is going to work best for the site: exact or ambiguous? What kind? Alpha, chrono, geographical or topical, task-oriented or audience specific?

Organization

Most likely the structure will be a hierarchy with some elements of database or hypertext

This isn't the same as mapping all the content, but it does help you figure out your overall structure and therefore, file structure.

Blueprints

Depending on circumstances, you may actually bring a draft of the blueprint to your brainstorming session, or have it with you when you are figuring out your organization structure.

- These will be high-level blueprints.

Blueprints

- ◆ How do you make high-level blueprints?
- ◆ Draw by hand, use software (Word, Photoshop, Visio)
- ◆ These show the top levels of the hierarchy
  - ■ (ie., the home page, the main sections of the site, utilities, and anything else you can access from the home page)

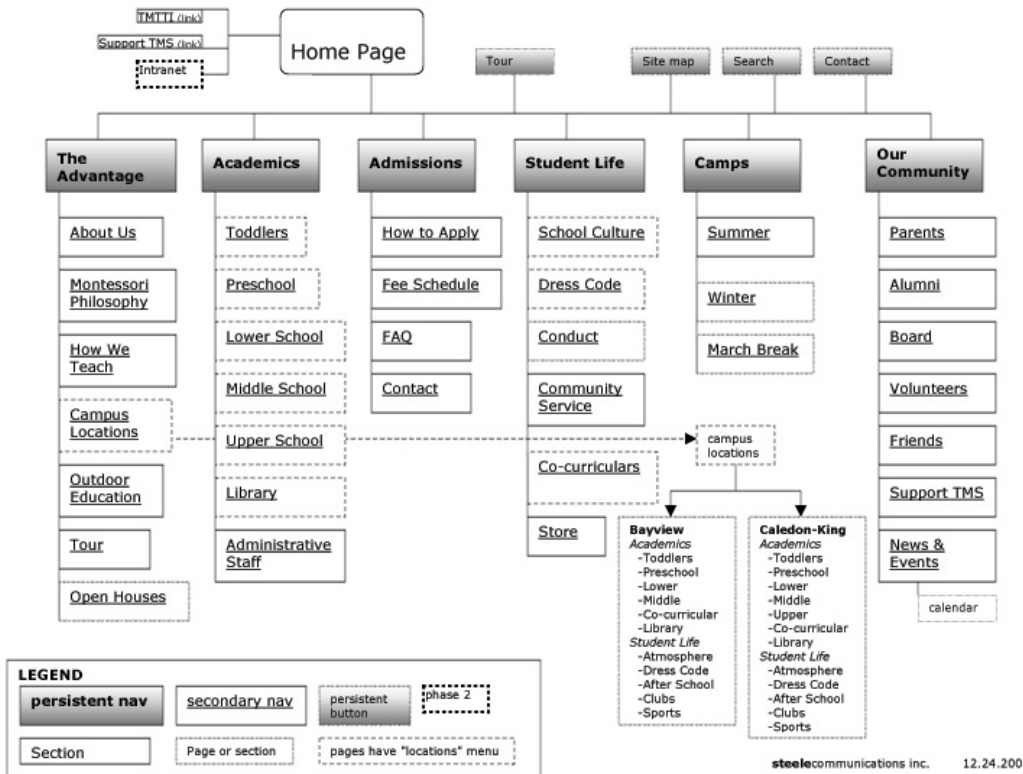# Blueprints

◆ These should be presented in person (even a well-done legend may have some areas of confusion)

◆ If that's not possible, a one-page text document to explain anything the blueprint can't.

Blueprint

- ◆ Static site, showing top level and secondary level

- ◆ Cross-linked pages also shown

Blueprints

- ◆ Keep them simple
- ◆ Utilitarian and changed often

- ◆ As you move into project, more details
- ◆ Details are added to each level
  - ■ Modularized – each section, database, etc.

  [used brainstorm ideas to create blueprint]

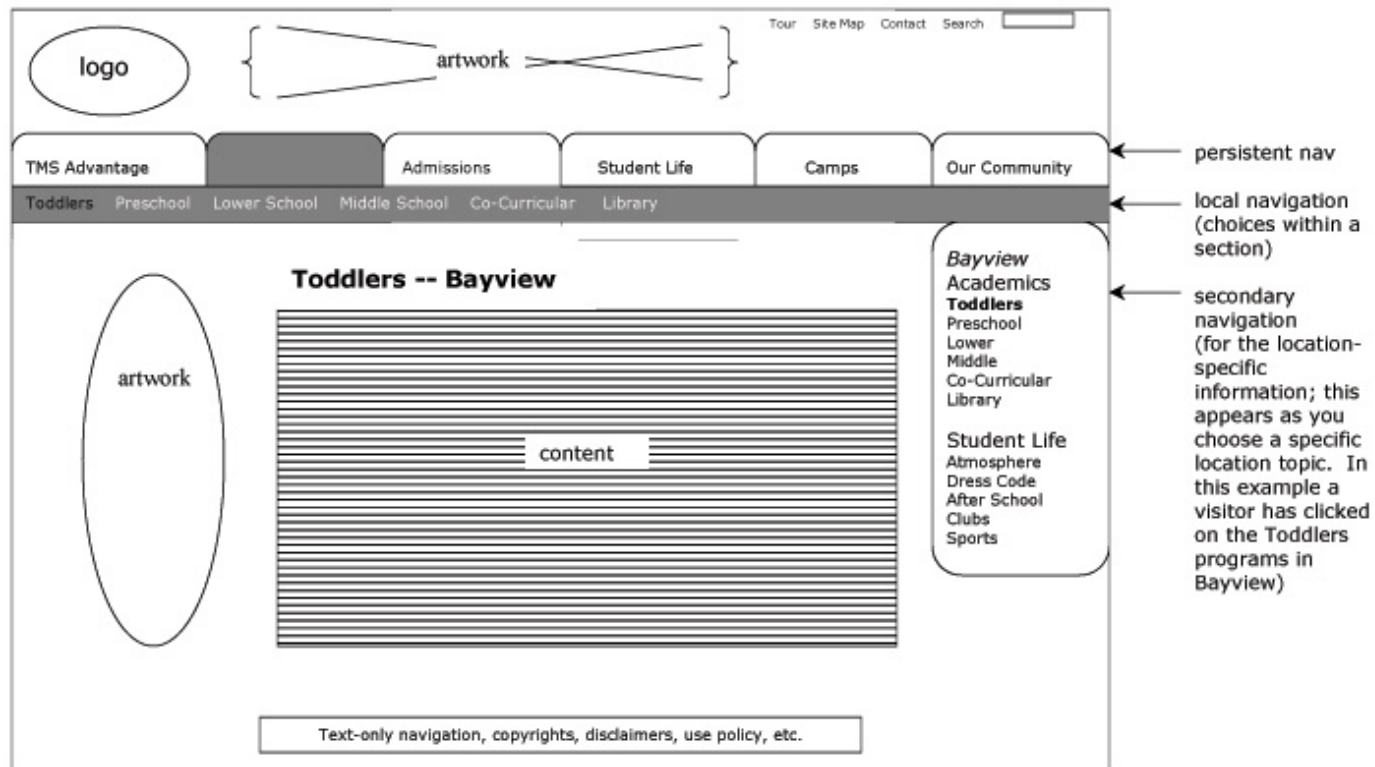# Wireframes

- A visual way of showing how architecture (blueprint) will be presented on a page

- These are rough sketches and you can do them by hand or more formally (usually the second is better)

- They show the key navigation and content elements

Wireframes

TMS Sketch 1.3: section template-with location

logo	artwork	Tour	Site Map	Contact	Search

| TMS Advantage | Admissions | Student Life | Camps | Our Community | ← persistent nav |

Toddlers Preschool Lower School Middle School Co-Curricular Library ← local navigation (choices within a section)

Toddlers -- Bayview

artwork

content

Bayview
Academics
Toddlers
Preschool
Lower
Middle
Co-Curricular
Library

Student Life
Atmosphere
Dress Code
After School
Clubs
Sports

← secondary navigation (for the location-specific information; this appears as you choose a specific location topic. In this example a visitor has clicked on the Toddlers programs in Bayview)

Text-only navigation, copyrights, disclaimers, use policy, etc.

Wireframes

Show site's important pages:

- ◆ Main pages
- ◆ Major categories (sub-sites)
- ◆ Templates applied consistently to many pages
- ◆ Not just pages:
    - ■ Search or application interfaces (example in book is good)

Wireframes

- ◆ Designers will initially be suspicious
- ◆ Explain they're just a step, not "real" design
- ◆ They are good because they help people visualize and they give:
  - Labels
  - Navigation

Wireframe to Sketch

- ◆ Really, I don't see any difference
- ◆ Big fan of "low-fidelity" wireframe
- ◆ If you are going to go high-end, I'd almost rather see a web prototype

Rules

- ◆ Consistency
- ◆ Callouts
- ◆ Include project title, version number dates
- ◆ Tie wireframes to specific blueprints if possible

Content Mapping

List the discrete pieces of important information, separating content from the containers.

- IE., not every piece of content gets its own page.

Content Mapping

- Good list of questions for determining this:
  - What is the smallest section of content that needs to be individually indexed?
  - Can this document/info be segmented into multiple chunks that users might access separately?
  - Will this content need to be re-purposed across multiple documents (database)?
  - How would this content be indexed for search?

Content Mapping

Your site map should make it really clear what piece of content goes where, and where it sits in the hierarchy.

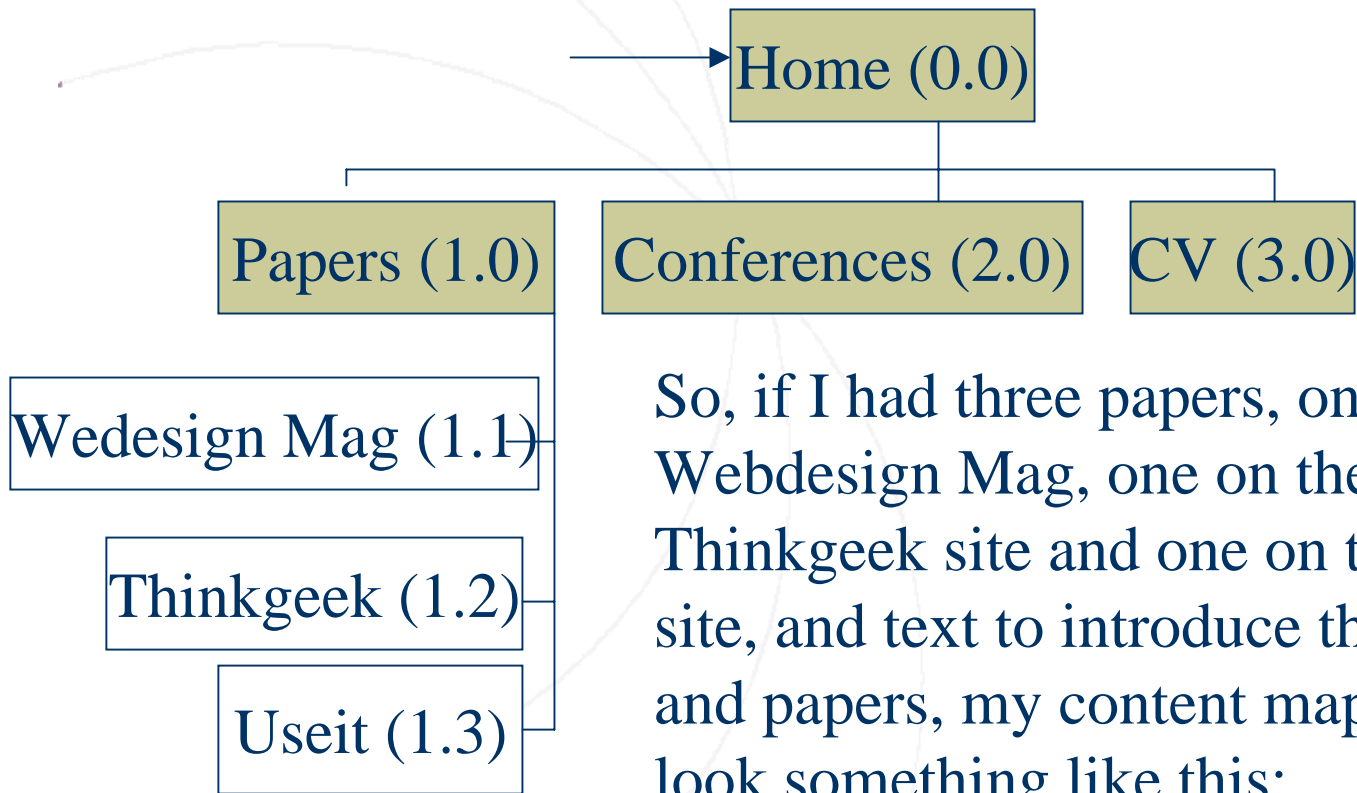- List existing content
- List new content

Content Mapping

- Organize content chunks by destination section and page

- I like to use coded numbers for this.

- Each section gets a number

- Each subsection gets a number

Simple blueprint → map

Home (0.0)

Papers (1.0)   Conferences (2.0)   CV (3.0)

Wedesign Mag (1.1)

Thinkgeek (1.2)

Useit (1.3)

So, if I had three papers, one on Webdesign Mag, one on the Thinkgeek site and one on the Useit site, and text to introduce the section and papers, my content map might look something like this:

Simple Content Map

Content chunk   /papers/

    Introductory text → 1.0   index.htm

    Capsule review – thinkgeek → 1.0   index.htm

    Capsule review – webdesign mag → 1.0
       index.htm

    Capsule review – Useit → 1.0   index.htm

    Paper – webdesign mag Paper → 1.1   wdmag.htm

    Paper – Thinkgeek → 1.2   think.htm

    Paper – Useit Paper – Think → 1.3   useit.htm

Content Mapping

◆ Finished content map includes:
  - Content chunks
  - Destination
  - Folder and filenames

  - It can also include the actual content. When I've worked with distributed projects, this can actually help the designers and pixel grunts and takes out the guess work.

Web Proposal (assignment 2)

1. Communications Plan

2. Blueprint (architecture)

3. Wireframes or sketches

4. Detailed content map, including folder and filenames

   - Other stuff: color palette, images, content for the site, etc.