



Defining Website Requirements

Overview

Creating a successful Website requires substantial exploration, planning, and the orchestration of a multitude of elements. Website development is an on-going process that begins with initial planning and continues throughout the life of the Website. This process requires a critical view of business and marketing processes as well as a user-centered design approach that strategically considers usability, features, functionality and content. The beauty of Website design is that it is truly never finished, with continuous opportunities for improvement.

It is important to develop a team of diverse stakeholders to participate in the requirements development process. A kickoff meeting should be scheduled to help identify the high-level objectives for the Website initiative. Subsequent meetings, requiring additional exploration will help to clarify the scope and provide greater detail. Once the requirements are complete, the firm is then able to generate a statement of work (SOW) and request for proposal (RFP).

The Statement of Work document should outline any issues and provide details about the project that are currently known. The Request for Proposal document should outline those issues needing clarification through outside vendors.

Defining Requirements – The Statement of Work

To ensure the success of a Website initiative, it's essential to take the time necessary to identify all of the requirements for the site. High-level areas for exploration should include:

- 1) Business objectives
 - Define objectives
 - Benefits to the company
 - Business processes
 - Existing Website evaluation
 - Measurement and critical success factors
 - Identification of stakeholders
- 2) Target audiences
 - Defining the customer
 - Defining the customer need
 - Defining the customer experience (use cases)
 - User interviews and surveys - contextual inquiry – watching users use the existing site. (If real users are unavailable, the use of personas can be very helpful.)
- 3) Competitive analysis
 - Identify opportunities for differentiation
- 4) Marketing and Maintenance
 - Resource identification
 - Site management requirements
 - Mechanisms for driving traffic to the site

Following are various questions that may be considered and outlined in the Statement of Work document within each main category outlined above. Those questions within each category that are not currently understood are areas that may be included as services needed in the RFP document.

Define Objectives:

- What do you hope to accomplish? What are your goals for this new site?
- What is budget for the project?
- What is the deadline for the project?

Benefits to the Company:

- How will this Website align with the company's overall growth strategy?
- Can this initiative provide additional products or services for customers?
- Can this Website provide additional customer service or value-added features to existing customers?
- Will this help the company to reach greater efficiencies?

Business Processes:

- What business units and/or processes will the Website serve?
- How will this align with existing business processes?
- Will this Website help streamline any existing business processes?
- Will this require new processes or personnel?

Existing Website Evaluation:

- What works with the current Website? What doesn't?
- What is missing from the current Website?
- How could the current Website be improved?
- Are there other Websites that are currently doing what you hope to accomplish? What are they and why do they work?

Measurement and Critical Success Factors:

- Define success for this new Website. Define failure.
- How do you envision measuring success?
- How often will you evaluate the success of the site and how do you plan to address shortcomings?
- How do you anticipate measuring site traffic and what is the plan for interpreting and acting upon results?

Target Audiences:

- Define the needs specific to each audience segment – how will they use the site and what will they need?
- What do they expect to find on this Website?
- What are their limitations and/or aptitudes for using the Web?
- What are their typical Web usage habits?
- Which platform(s) do they use?
- What is their general level of technical proficiency?

NOTE: It is advisable to actually meet with users by conducting interviews or focus groups to better understand their overall needs. By working with users, much more comprehensive and realistic scenarios can be developed.

Additionally, the development of an Audience Guidelines document can be helpful particularly when working with multiple vendors on a large Web initiative. This document will ensure that all vendors are properly aligned and developing for a cohesive and appropriate end result. Vendors who benefit from this document include designers, usability specialists, content developers, programmers and marketing strategists.

These Guidelines could include the following type of information:

- Audience demo and psychographics
- Audience technical proficiencies
- Audience Web usage habits

Content:

- Who will be responsible for the site content?
- Does this content already exist elsewhere?
- How frequently will this content be updated or enhanced?
- How do you intend to keep site updated? Internal or external resources?
- Do you need external resources to help develop content for the site?

Design:

- What are the existing marketing guidelines and brand standards? In what ways will the new Website need to conform?
- What characteristics and/or personality attributes do you wish to convey on this Website?

Features & Functionality:

- Define each piece of functionality (user interactivity) that the Website will contain.*
- Define any points at which the Website will interface with external applications or systems.
- If incorporating e-commerce transactions, define the payment processing mechanism.

*Card-sorting procedures can help to categorize and prioritize features and functionality.

Technical:

- Where will the Website be hosted? Will site be on a dedicated or shared server?
- On what type of server will the Website be hosted?
- Will technical resources be available internally or contracted externally?
- Will the Website require a content management system?

Resource Identification

Identification and formation of a project team incorporating both internal and external resources. Identify all roles and indicate where you have identified a need for external resources. Some of these include:

- Project leader
- Project manager
- Usability specialist
- Content developer
- Information architect
- Graphic designer
- Developer/programmer
- Subject matter specialists

RFP

The RFP document should include a summary of the statement of work document along with a clear definition of the scope of work needed by your Website development team. Additionally, an RFP should facilitate the competitive procurement process with the following principle goals:

- To effectively create the competitive environment
- To clearly define the service being procured
- To enable to objective evaluation of vendor responses
- To harness the competitive environment to achieve the optimal terms, conditions, and pricing for the project.

A typical RFP outline may include the following:

1. Background
2. Scope of Services
3. Term of Contract
4. Pre-Submittal Meetings
5. Proposal Requirements
6. Amendments to RFP
7. Proposal Submission
8. Communication Guidelines
9. Evaluation Criteria
10. Award of Contract and Reservation of Rights
11. Schedule of Events

Evaluating Vendors

Once requirements, SOW and RFP are complete, vendor selection begins. Some questions to ask might include:

- Who are your current clients?
- How long have you worked for these clients?
- Can we contact your current clients for references?
- What types of projects have you worked on?
- What was your role in each project?
- What was the outcome or result of this project?
- What types of services do you offer?
- Do you conduct user research?
- Do you do user and task analysis?
- Can you conduct market analysis?
- How do you conduct competitive analysis?
- What are the capabilities of your technical team? Of your creative team?
- Do you assist organizations in setting measurement standards?
- Do you have skills in information architecture and navigation design?
- How have you helped clients with branding initiatives?
- Can you provide usability testing?
- What content management tools could you provide?