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# Website Implementation Projects: A Start to Finish Guide

A new website begins as a dream, filled with aspirations and new initiatives. But a web project is never as easy as flipping a switch. In this document, we will help provide context to the different phases of the web implementation process, all while guiding your dream toward the reality of a new website.

# Your Guide to a New Site

This document is intended as a general guide to a comprehensive website implementation project — specifically, a website powered by a content management system (CMS). The goal is to provide you with an idea of what to expect when planning an implementation.

Keeping that in mind, we understand that every organization, budget, or schedule will follow a unique set of steps within this process. You will likely pick and choose a bit.

The steps throughout this guide are in general order, where in some cases they will be segmented, long-running, or nonlinear. This framework is our best approximation of the order of events.

That said, we've grouped the individual steps into four broad stages:

- 1. Strategizing**  
Understanding your organization, website and its users.
- 2. Planning**  
Making concrete plans for how the new website will look and function.
- 3. Implementing**  
Building the website itself and integrating with external systems.
- 4. Operating**  
Transitioning the team to a running state and beginning on cyclical improvements.

This document is written in second person perspective, referring to “you” — the organizational owner of the website to be rebuilt. We understand that this is a



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comprehensive list in which many of the items you will contract out for. You will likely have many firms involved to help you complete the work described in this document.



# Creating a Strategy

## Know the scope of what you want to do

The first step with any implementation is understanding how deep your project goes. Is this a full teardown? A CMS swap? A redesign? Are you trying to fix a specific problem, or is the organization just not happy in general? Different projects have vastly different scopes and require different skills, teams, budgets, and schedules. If you are planning a complete rebuild you may find yourself tackling all of the steps in this document. However, if you are planning to re-use content, code, and design elements, you will find your project focuses on only a few of these steps.

## Set your expectations

An often-unspoken truth: these projects aren't an exact science. While you have a vision in your head of the perfect result, know that this vision will likely never be completely fulfilled. Your goal is to get as close as possible and avoid disaster. To some extent, your website will always need some type of maintenance — this is perfectly normal. The web is always changing. So is your website, continuously and incrementally.

## Know your type of website and channels

A blog is not the same as a campaign microsite, and neither are anything like a social network. Different types of websites need different types of solutions, projects, and systems. Additionally, your website isn't your only channel. You need to be aware of all the different places your content is published. Too many projects try to shoehorn a particular type of website into the same process or – worse – the same CMS. You need to understand the tone and flavor of your desired end result and how this affects the process to get there.

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## **Plan from start to finish**

The “start” is right now (seriously: right now, while you’re reading this). The “finish” is when the site is launched and stabilized, with a team trained, working with it, and — ideally — with analytic proof that it’s providing results. In general, you start far earlier and end far later than you think. Though, it never really ends — all that happens is that the project becomes a product, and it keeps moving.

## **Formalize your vision**

There’s a tremendous amount of change and upheaval that happens during a technology project. It’s important to keep in mind the goals that set you out on this path at the beginning. As you start the project, what’s your “vision”? Imagine the project when it’s completed. How is it helping your organization? How are all of the intended audiences using the product? How are administrators using the product? Formalize this and revisit it throughout the project to ensure that your vision is still valid and that your project is still steering toward it.

## **Know your audiences and their desired outcomes**

You’re building a website for humans. Whether you acknowledge this or not, you are building this website to persuade humans to do something — take a specific action, or alter their thinking in a specific way. You need to know the audiences that will visit your website, what they want to accomplish, and what you want from them. At the risk of drama, this is all that matters — who are your target humans, what do they want or need, and what do you want them to do or think?



# Planning the Site

## Develop a site plan

Agile project management seeks to start early, and iterate quickly. This has some benefits, but most organizations want some idea of budget and a schedule before getting started. You need a formal plan. Just like a contractor needs a blueprint, you can't get any idea of scope without getting your arms around the entire project. The trick is to strike the right balance between the classic, pre-planned “waterfall” project and the newer agile methodology. Plan enough, but not too much.

## Know your content — what do you have and what do you need?

Once you know your audiences and what they want, you need to determine what content and functionality they need to make it happen — and to persuade them into action. A content audit shows you what you already have, what you could afford to get rid of, and what is needed to reach your goals for the website. And remember, words and images don't appear from the ether. They take planning, schedule, and budget.

## Know your analytics

Is it possible for you to know if your website is working? You can measure behavior, but it's the interpretation of that behavior — and its connection to your goals — that helps you determine your website's effectiveness. Planning your analytics early on in the process often has a persuasive impact on your content, design, and organization. In some cases, it might even clear up murky questions about goals and purpose.

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## **Organize your content**

Once you know what content you need, that content needs to be organized to maximize findability and usability. You need to examine the full scope of your content and audience goals, then predict how users will attempt to find what they need. Once you have provided for what they need, you need to examine the content domain for ways to encourage users to take the actions you desire for the website to provide value.

## **Model your content**

Broad ideas of content need to be deconstructed into smaller units of information to maximize re-usability and maintainability. For example, a “Blog Post” needs to be broken down into “Title,” “Subtitle,” “Date”, “Author,” etc. You need to analyze your content for types, patterns, and values in order to turn it into a collection of labeled data at a level of granularity that’s enough to provide benefit, but not too much that it imposes unnecessarily on your editors.

## **Plan for the team and training**

Many people will come into contact with the website during development, both in a production and managerial capacity. You need to determine who these people are, what stake they have in the process, how they can communicate and affect the end result, and what to do with their objections. Are they simply advising and offering opinions, or do they hold ultimate veto power over decisions? Who arbitrates disagreements? What are the lines of communication?



# Implementing the Site

## Develop your design

Design is both a marketing and usability imperative. A good design reinforces the information architecture and content strategy work you've done, while reinforcing your brand and giving the user the emotional impression you want to impart. Additionally, good design can be componentized, so that future changes fit into a holistic system with a minimum of one-off design additions. Done well, design becomes a tool to enhance task completion, emotional response, and long-term site development.

## Know your integrations

Whenever your website connects with another information system, that's an "integration." This can range from very simple (ex: a link or hosted login form) to the extremely complex (ex: completely recreating another application inside your website by remotely calling its API). As a general rule, integration with other systems takes longer than you expect, costs more than you expect, and is one of the largest risk components in an implementation.

## Select a CMS, Part 1: determine requirements

Taking into account all the work you've done so far, what do you actually need a CMS to do? There are hundreds of features, all available at varying levels of functionality and polish. Additionally, your organization will have a unique relationship with the CMS, depending on factors like your organizational "distance" from the development team, the expected lifespan of the website, the number of editors, and dozens of other inflection points. These need to be distilled into a set of requirements, weighted by what's absolutely necessary and what might be helpful, but isn't required.

## Select a CMS, Part 2: manage the process

Equipped with the knowledge of what you need in a CMS, you need to find the right system by planning and managing a vendor selection process. You need to communicate requirements, schedule demos, compare pricing options, etc. Clearly, every vendor thinks their product is the perfect solution, so you need to cut through marketing fluff and sales posturing to determine how a vendor's features will specifically relate to your project and organization.

## Select an integration partner

Almost every CMS has to be implemented for a particular website, meaning it has to be installed, customized, and programmed to support the specific requirements of the desired end result. Who is going to do this? If you can't do it in-house due to staffing or skill issues, you will need to find a partner that knows your selected CMS, knows your type of project, is experienced enough to implement it, and fits your budget.

## Implement the site

Let's assume your content is defined and organized, your design is ready, you've selected a CMS and a partner to implement it. Now someone needs to actually build the website. This is usually one of the biggest and most expensive components of the entire process. To whatever extent possible, it needs to be broken down into pieces to provide transparency, manageability, and accountability. These projects tend to be complex, long-running, and involve many people and agendas. Successful projects have strong project management to provide clear direction and communication in the face of deadlines and complications.

## Migrate and populate the content

Once a house is built, someone needs to move all your possessions from the old house to the new house, or you need to buy new possessions and have them



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delivered. Similarly, content needs to be moved into your new website. New content can be developed to fit, but existing content will need to be extracted, transformed, and redirected in order to function correctly in a new environment than the one into which it was born.

## **Plan for hosting**

A website needs to run in a reliable environment, and options range from your own data center to a neutral third-party hosting provider all the way to the CMS vendor themselves. You may have options (ex: an open-source CMS) or you may be locked in (ex: a SaaS CMS managed by the vendor). But either way, you'll need to understand and establish billing, administration, and support processes.

## **Deploy, test, and launch**

During development and after launch, you will continually need to test code changes and gracefully move them from a private environment into the public environment hosting the running website. This will happen constantly during the development process, then less often as the website is stabilized in production and post-launch bugs are worked out. However, this process becomes even more important post-launch since problems will become very public, very quickly.

## **Stabilize the running website**

You will likely have a list of items for post-launch implementation. As you get closer and closer to a launch date, some items will get pushed off to a “Phase 2” status. And once launched, the site might also be subjected to a load and user patterns that you didn't predict, highlighting issues and opportunities for improvement. For a period of time after launch, you'll perform minor releases to “stabilize” the website to eliminate drama and unplanned issues.



# The Post-Launch Landscape

## Plan for post-launch operations

Once your new website launches, there's a laundry list of things that need to happen on a continuing basis. Some are proactive tasks to head off problems or optimize results, others are reactions to events to which the team will need to respond, and others are broader strategy issues to guide the organization as the website grows and evolves over time.

## Transition from project to product

There's a mindset and process shift from the project of building a new website to the ongoing product that the running website represents. Organizationally, you need to ensure you have a support agreement with your development team, and you need to clarify the lines of communication and escalation paths. You need to ensure the basic tools for consistency and reliability are in place to make sure your website is properly functioning.

## Maintain and improve

The launch date of your new website is not the finish line, it's the starting line. This is where the real work begins. Once the website is launched, you need to determine what needs to be fixed or changed to match real-world conditions, and have a plan for how your website will evolve over time. You need to form a steering committee, set a review schedule, secure an annual budget for improvement and operations, and begin a series of smaller project cycles to improve and maintain the effectiveness of the website into the future.



**Planning a new project? We can help.**

We've got more than a decade of experience helping clients with large-scale website implementation projects. We are always willing to talk to anyone, especially when it comes to the things we're passionate about. We'd love to talk to you about your project.

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