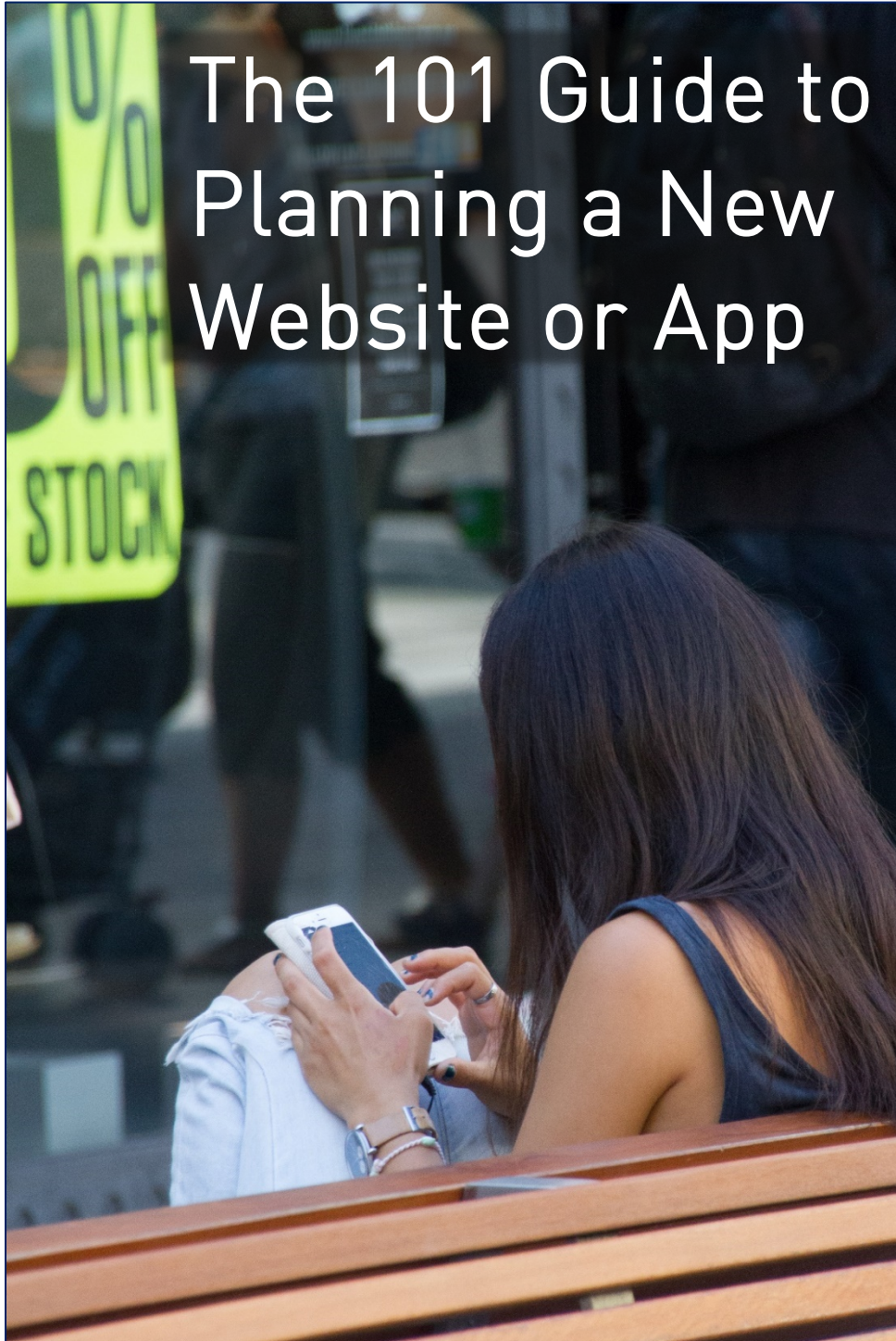




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# The 101 Guide to Planning a New Website or App

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## About this Guide

So you're thinking about having a new website or app developed?

Don't know where to start? Don't know what you don't know?

Had bad experiences before with developers?

You want to get some quotes but don't know how to go about that or how to compare them?

This guide explains what you need to be clear about when developing a new website or app, and what information you need to provide to a potential developer so you get the best outcome.

This Guide will help you to:

- articulate why you want the new website or app and what features you want in it
- identify your audiences, the challenges and benefits
- get reasonably accurate quotes from developers that can be fairly compared against each other
- reduce the angst of dealing with developers and making the whole process more effective and efficient
- minimise nasty surprises and the chance of an unforeseen budget blow-out
- maximise the return you get from spending all that time and money on the development.

You may not know or be able to find the answer to some aspects of the steps in the guide, but the effort you put in will be rewarded in the end. Even if your brief has some gaps in it, it will give your web or app developer a fighting chance of providing a fairly accurate quotation and of producing the right website or app for you and your customers.



Avoid costly and distracting conflicts with your developer by: knowing what you want to achieve with the new website or app; articulating your requirements clearly; and by presenting your terms and conditions to them upfront.

## Step 1 Research

1. Ask your customers what they want to see and do on your website or with your app.
2. Work out your business needs and how the website/app can assist – eg what new markets you want to enter, what products and services you want to promote
3. Get on to the Web and smartphone and see what your competitors are doing online.
4. Set your budget for developing and for maintenance after it's been launched.

Despite all your research, you may still not know exactly what you want, or don't want in your website/app. This may not become clear until you have engaged the developer, heard some ideas and seen some working prototypes.

The Brief may not get everything right. But the exercise of putting it together will help a great deal to crystallise yours and your online customers' requirements; what the end product should look like and how it is to behave; and what is expected of the developer.

### Legal advice and risk management

While you're researching and writing the brief, have your legal advisor prepare the terms and conditions that will be the ground-rules for how you and your chosen developer will work together.

It is likely that your legal advisor will want the T&Cs to cover issues such as the payment schedule and terms, IP, copyright, warranties, indemnity clauses and dispute resolution.

The terms and conditions should be included (as a schedule or attachment) in the brief you give to developers when requesting a quote.

Providing the T&Cs upfront is transparent and good risk management because it enables both parties to understand and agree on the T&Cs **BEFORE** you come to sign the contract. It helps to minimise misunderstandings and perhaps avert costly and distracting legal battles.

Don't be concerned that presenting your T&Cs up front may cause some potential developers to withdraw from offering a proposal – better find out early that they won't agree to your T&Cs than later!

## Step 2: Write the Brief

Your Brief to the website or app developer needs to provide them with answers to, or at least your best estimate about, a range of questions and issues that will determine how they quote and go about building it. Each heading below should be considered carefully and as much information provided as you can.

This outline is a high-level version of the brief I work through with clients for major website and app developments. My book, *Living Websites* (on Amazon as an e-book) provides an in-depth treatment of these issues.

### About your organisation

- organisation's mission statement
- describe the services/products you provide
- history of the organisation
- key challenges faced by you and your industry over the next 2-3 years

### Aims of the website or app

- what is the aim of the website/app?
- what do you want the website/app to achieve eg revenue, brand awareness?
- what would success look like to you and to customers in 2 years from now

### Target audiences – online customers

Research your audiences and state the categories of users (eg students, tourists, wholesalers) and provide as accurate a breakdown of their characteristics as possible eg age, location (state, national, international, rural, city), their level of experience using the Web, likely connection speed and choice of devices – eg smartphone, PC.



### Contents and maintenance

- content scope – how many pages or screens, images, maps, minutes of video, audio etc
- provide a sitemap showing the headings and sub-headings to be used and how they are related.
- content maintenance: How do you want to maintain the contents after the launch eg what control do you want over editing pages, text, images etc

### Features

Identify what you want users to be able to do on your site or app (eg complete a form, pay a bill, play a game). Explain the aim of each feature and describe it from two perspectives:

1. the user's perspective – what will they see and be able to do
2. your perspective – how do you want to edit it, monitor and maintain it.

As this is the Brief, you don't need to have the website contents ready or know how every feature will work on the site or in the app. But it's important to give the potential developer as much information as you can so they can provide a reasonably accurate quotation. It also helps you to really understand exactly what it is you're asking the developer to build and how that will impact your business and customers.

### Graphic design and usability

- if it's a website, state that it must be smartphone and tablet friendly
- if it's an app, state it has to operate on all recent versions of smartphones
- state the design is to be aligned to your brand, logo and company colours
- provide a list of do's and don'ts you want them to understand – eg no cluttered pages
- specify the criteria for page layout, navigation features and helpful devices you want on the pages – eg breadcrumbs
- specify that the design is to comply with industry standards and especially accessibility guidelines WCAG 2 – as issued by the World Wide Web Consortium – see [www.w3c.org](http://www.w3c.org)



One quick way to convey to the developer what you're thinking re the design, is to provide the addresses of websites or names of apps you regard as good examples of what you're seeking.

### Marketing and social media features

- explain your marketing plan and goals over the next 2-3 years and the role to be played by the website/app and social media
- identify the social media features you want to link to or feature (eg Facebook, YouTube and Twitter) and how users are to be able to access them via the site
- describe other marketing features eg web chat
- describe your requirements for Google keyword ranking and paid positioning
- describe what traffic and user monitoring and reporting you require – eg Google analytics on every page of the site



## E-commerce – shopping cart

If you want users to be able to purchase products or services on a website, you need to describe:

- the nature and number of products and services that are to be offered online
- how are the products/services to be displayed and whether it's with or without prices
- the selection (shopping cart) and payment processes eg secure credit card payments via your bank or PayPal
- what integration is required with your product catalogue or database, accounting systems, stock and inventory system etc



## Technical Issues

- State if you have any preferences or not for what they build the site in – eg WordPress, open source content management systems
- explain if the developer needs to integrate the app or website with any of your existing systems – eg product catalogue or database, accounting systems, stock and inventory system, customer databases
- Who will host the website, level of speed and any guarantees re minimum % of downtime – is it essential that it's up and running 100% of the time or is 98%+ OK
- Security level required of the website and app
- Website traffic usage monitoring and reporting requirements

Be realistic about the level of security, backup, speed and reliability you demand, because the more demanding you are, the greater the cost.

## Testing

- Explain what is to be tested, who the audience will be and under what conditions before the site or app goes live.
- State who will do the testing and when – better you or an independent third party conduct the testing
- Make sure the terms and conditions you provide with the brief state who pays for changes that are required as a result of feedback from the testing, and who signs-off that the changes are satisfactory.



## Training

Request that the developer state what training they recommend you or your staff undertake in order to be able to use the solutions they provide. Get them to outline the nature and duration of the training and cost. Provide an indicative number of staff that you believe will need to be trained.

## Project management

Explain the management structure - who are the decision-makers, their respective roles, internal decision-making procedures.

Project schedule: Specify the deliverables and milestones, your timeframe and any stages you specifically require in the development process.

## Instructions to potential tenderers

Explain to those you invite to tender how they should respond to the brief, your criteria for selecting a developer and your terms and conditions for working with the successful developer.

- Explain what they are to address in their responses – eg their proposed solutions to meet each of the features you state, their methodology, experience, and referees.
- Explain when responses must be submitted, where and to whom.
- State that they are to provide an itemised quotation in AUD \$ inc GST for – project management, design, programming, testing, training, providing licences to editing software or content management solution, hosting. Also get their hourly rates for helping you after the launch of the website or app.
- List your criteria for selection – see the checklist on page 6.
- State the process and timeframe for evaluating the responses and in what format tenderers are to respond – eg email a PDF version of their response.
- Provide your terms and conditions in a clearly labelled section of the brief – often the T&Cs are presented at the back of the brief. State that as part of their response, the developer must indicate whether they agree to all the T&Cs or to specify any that they will not agree to or wish to discuss or negotiate.





## Step 3: Finding developers

Send the Brief to at least three developers. You can find developers through a number of sources:

- Google – try searching for ‘website developer’, ‘app developers in [your city]’
- look at competitor websites or apps you like and find out who developed them
- look up Web industry associations online and see if they have a directory of registered developers
- ask business colleagues and friends
- find websites or apps that you like and are similar in scope to yours, and find out who developed them – sites and apps often have credits, or just email the site owner.



## Step 4: Review the proposals

Once you have received the proposals get your colleagues together and:

- 1 read the responses, checking them off against your criteria – see the checklist (pay attention to their response to your terms and conditions)
- 2 look at their company website and websites that they have developed to see if their body of work is relevant and of suitable quality
- 3 contact their referees to assure yourself that the developer is reputable and easy to work with
- 4 visit the potential developer(s) in their premises and have them present their proposal in person - this gives you the chance to meet their staff and to get a feel as to how they operate, how easy they will be to work with and how stable a company they are.

If you have trouble understanding their proposal or their spoken explanations, then warning bells should start to ring. If they can't communicate effectively at this stage in the project, then working with them is likely to be difficult and frustrating.

## Step 5: Sign the contract

The final step before commencing the development is to have both you and the developer finalise the terms and conditions and then to sign-off on them formally. Ensure that the signatories on both sides are authorised to sign on behalf of their organisations. Ensure that both parties have the signed copies of terms and conditions.

If for some reason you are contemplating signing their contract rather than them signing yours, have your legal advisor check it first.

### About the author, Steven Smith



I am business advisor who helps organisations make sense of the digital world - how to use digital technologies to remain relevant to customers, improve internal productivity and to be competitive.

I have run my own digital advisory company since 1995 and been a Director at KPMG Australia providing digital advice to clients across Australia. My observation is that organisations are struggling to meet digital customers' expectations, to understand digital disruption and transformation, and to set the right governance and management of their digital operations.

My passion is the Digital Age. What a fabulous era to live and work in: unprecedented opportunities for everyone to connect, communicate, participate, influence, understand and simply to have fun.

<https://au.linkedin.com/in/stevensmith1>



## Checklist for selecting a website or app developer

Selecting the right developer to undertake a website or app development is crucial to the success of the project. Fortunately, today there is no shortage of Web and app developers to choose from. The trick is picking the right one.

The ideal developer for your project would rate “YES” to all the questions posed in the checklist below. In reality, it may be very difficult to find one developer that achieves the perfect score. More often than not, the choice of developer will go to the one who is *most* suited to the project.

(This checklist could also be converted to a rating system where you give a score out of 5 for each criteria. The criteria are probably not all equal in importance, so you may wish to weight them according to importance to your project.)

### Solutions and extras

- Have they proposed suitable solutions for all your stated requirements?
- Are their content editing and maintenance solutions appropriate?
- Have they offered additional value beyond that which you ask for in the brief?
- Are their solutions proportional to your needs?

### Cost and value for money

- Is their solution affordable and value for money?
- Is their hourly-rate within the normal bounds for developers of their experience?
- Does their proposal indicate that they will add value to the project beyond merely providing what you specified in the Brief?
- Do the developers propose a cost-effective means of maintaining the website or app?

### Skills

- Do the core competencies of the Web/app developer match the type of site/app you have specified? (eg highly dependent on graphic design or e-commerce skills)
- Have they built websites or apps of the style and nature you require and for your type of organisation?
- Have they built websites using the proposed solution before?
- Do their reference sites or apps impress you?

### Client focus

- Was their written submission easy to understand?
- Do they understand your needs and the aims of the project?
- Do they seem to be good listeners?
- Are they good communicators?



### Management

- Are they happy to sign your terms and conditions? If they seek any amendments to your contract, are their amendments acceptable?
- Does their solution pose an acceptable level of risk – eg is it too leading edge?
- Is the business financially sound?
- Do they appear to be honest and professional?
- Have they been able to assure you that key staff will be available to work on this project through to launch?
- Do they propose a sound project management methodology?

### Referees

- Are the referees they cite relevant to your project?
- Do the comments from the referees give you confidence that they will meet your requirements in every regard?

*The information in this document is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavour to provide accurate and timely information, there can be no guarantee that this information is accurate or up-to-date. No one should act on this information without appropriate professional advice and only after an appropriate examination of your own circumstances.*