# How to Create a Strategic Plan or "Blueprint" for Your Web Development

A Guide to Scoping Your Website Projects

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# About this Whitepaper

**What?**

This whitepaper presents an overview of the typical project scoping process used to help clients map out their website project, defining what it will do and how it will fit in the company's larger digital marketing strategy.

**Why?**

The purpose of this whitepaper is to help readers develop a more comprehensive overview of the planning process before going into development, ensuring that the website offers support for every user, both visitor and admin.

**Who wrote this?**

Bear Group is a development firm based in Seattle, Washington. Since 2007, Bear Group has worked with marketing teams to help build websites that fit into existing strategies, support goals, and help their companies thrive.

**How can Bear Group help?**

We work closely with our clients to provide technical leadership and planning to map out web strategies and execute on those development plans. This can mean a single project that's just a puzzle piece in a larger digital marketing strategy, or a holistic systems review and mapping of an entire web strategy.

From that scoping work, we're often then involved in:

- Working with graphic/brand teams on interactive design, design guides, and front-end responsive theme development.
- Custom websites and enterprise CMS development to support publishing strategies.
- Provide eCommerce development for branded merchant experiences.
- Marketing Technology and Backend eCommerce integrations (ie: Salesforce, Marketo, ERP Systems).
- Provide ongoing support for everything we build.

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# Your Website is the Center of Your Online Strategy

Today, websites are both simple and complex. They should be intuitively simple for your customers to understand and navigate, but also act as a central experience for many different audiences, including external customers, internal staff, partners, and vendors. The site will mean different things to different people, and the marketing team in almost all organizations is responsible for handling the website (once the domain of the CTO or corporate IT).

A website is central to any business's digital existence. A well-done website is one of the best investments that a business can make, can be amortized over 3 or 4 years, and you can know exactly how many people you are reaching.

The website is going to be one of the most crucial parts of your marketing strategy. A prime location for your customers, stakeholders, and leads chiefly interact with your brand, many of your digital marketing efforts are geared towards directing traffic to your website.

The CMO's we work with tend to be great at segmenting and understanding their audiences, the visual experience, and the overall brand presentation and messaging. But what's often missing from their skillset is the ability to write a technical scoping plan, or "blueprint," that will deliver on brand promises and marketing goals without creating snarled code, disjointed integrations, or long-term headaches.

So how do you create a technology blueprint? How do you parse through what you need, to create a website that's supportive of your business *and* your users at the visual, messaging, and system level?

> You need a plan that focuses on more than just website design, but generates a blueprint for the systems powering your site.

Managing a successful website is all about hammering down the right strategy, creating a blueprint that efficiently fits together everything that your website depends on while also serving a unique user experience.

In this whitepaper, we'll walk you through a typical project scoping process that considers your current tech stack, your goals for your website, and your capabilities in order to map out the right blueprint.

> Your website isn't just a marketing resource. As the internet gateway to your business, it's depended upon by every department in your organization.

# Project Scoping: Creating Your Blueprint

On the web, there's always a bigger picture. Your website is not an island, and every other moving part that interacts with it should be and, will **need** to be acknowledged, as you move forward. For a website that needs to be all things to a lot of different people, all things need to be considered.

Initially, before we build our clients' websites we try to understand as much about their business as possible. For developers, actually writing code isn't the most difficult part of the project.

It's understanding how you want us to build your website, where you need things to connect, how you're going to be managing everything that touches your website, what your customer's journey looks like—these are the details that are unique to each business.

Below, we've included an example of a typical process that we use to guide our project scoping discussions. Before a single line of code is written, here are the questions that you should consider.

# Build for Your Business

## 1. Your business overview.

A softball question, but it's important for scoping the right type of system. How do you describe your company, your size, your product mix, your selling strategy, your content strategy, the space your business occupies, and your competitors? Do you identify your business as B2B, B2C, B2G, B2H, or all of the above? Basic information about the company is important, and can immediately change recommendations. For example, some tools are great for managing B2B lead flow where you know most customers personally, while other tools are better at profiling and organizing consumers you will never meet.
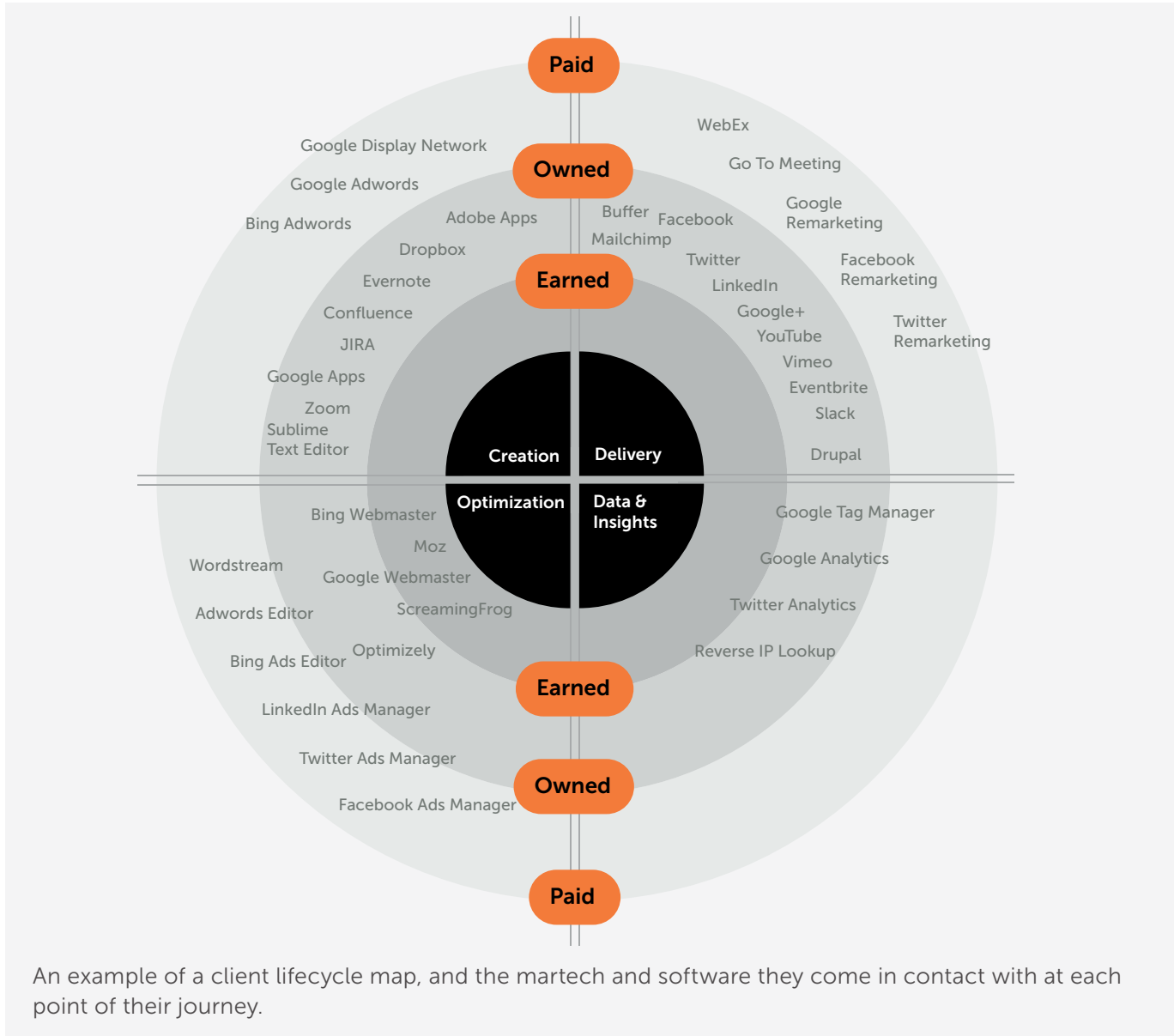
## 2. Your customer base.

What do you know about the customers who are already dependent on your website? Walking into a conversation on web technology, you should have your target audience(s) defined. That desired experience and baseline expectation for a website can really vary by target audience.

This demographic makeup is actually more important than if you sell B2B or B2C. From the graphic design / UX perspective you'll want to consider the impact a transition to a new website will have for your customers. We've all experienced this—you become comfortable navigating and locating items on a website,

and then they redesign and you have to relearn where everything is. No matter how bad you feel your current site design is, customers have become used to it. You want to be sure that the new experience you present them with is a welcome one that makes a familiar customer journey easier, instead of introducing new hurdles.



An example of a client lifecycle map, and the martech and software they come in contact with at each point of their journey.

## 3. Define the total set of stakeholders for your website.

In addition to customers experiencing the front-end of the website, what other teams, individuals, or systems are going to be interacting with the site? How frequently will they be interacting with the website, and what experiences are they expecting?

Often those internal stakeholders get the least amount of budget set aside for their needs, but they live in the system every day and can be the loudest critics.

# Knowing What You Want Your Website to Do for You

Get the goals, buglist, and features out on the table.

## 1. Start from your marketing plan.

Any scoping project should begin with an understanding of the bigger picture of your marketing strategy, setting the right tools in place in order to deliver on marketing tactics. It's a matter of matching tools to your written marketing plan and objectives. What can your website and martech tools do to support the campaigns and ideas your marketing team has?

For example, adding content marketing or email automation as marketing tactics means you're going to need a strong CMS, ties with your social channels, and automated forms to gather leads or convert.

## 2. What's on your wish list?

We can't remember a client who didn't have a wishlist for their website. Often it's improving the look and feel or messaging so it reflects the brand better, or making it easier to manage. A feature list of things that would improve operational or customer experience on the current website exists in most organizations (whether written or not).

This might include items like an integration between online orders and an ERP system, a better mobile responsive experience for customers, or providing a simpler set of administration screens for day-to-day content editors.

## 3. What's on your punch list?

It's exceptionally rare for us to work with a client who doesn't already have an existing website in some form. Typically, there is an existing punch list of items for their website. This punchlist can raise big questions—Are you on the right platform that can support what you are trying to achieve?—or require a litany of small tweaks, such as updating typography, fixing a broken mobile experience, make images easier to change out, or addressing cross-browser bugs.
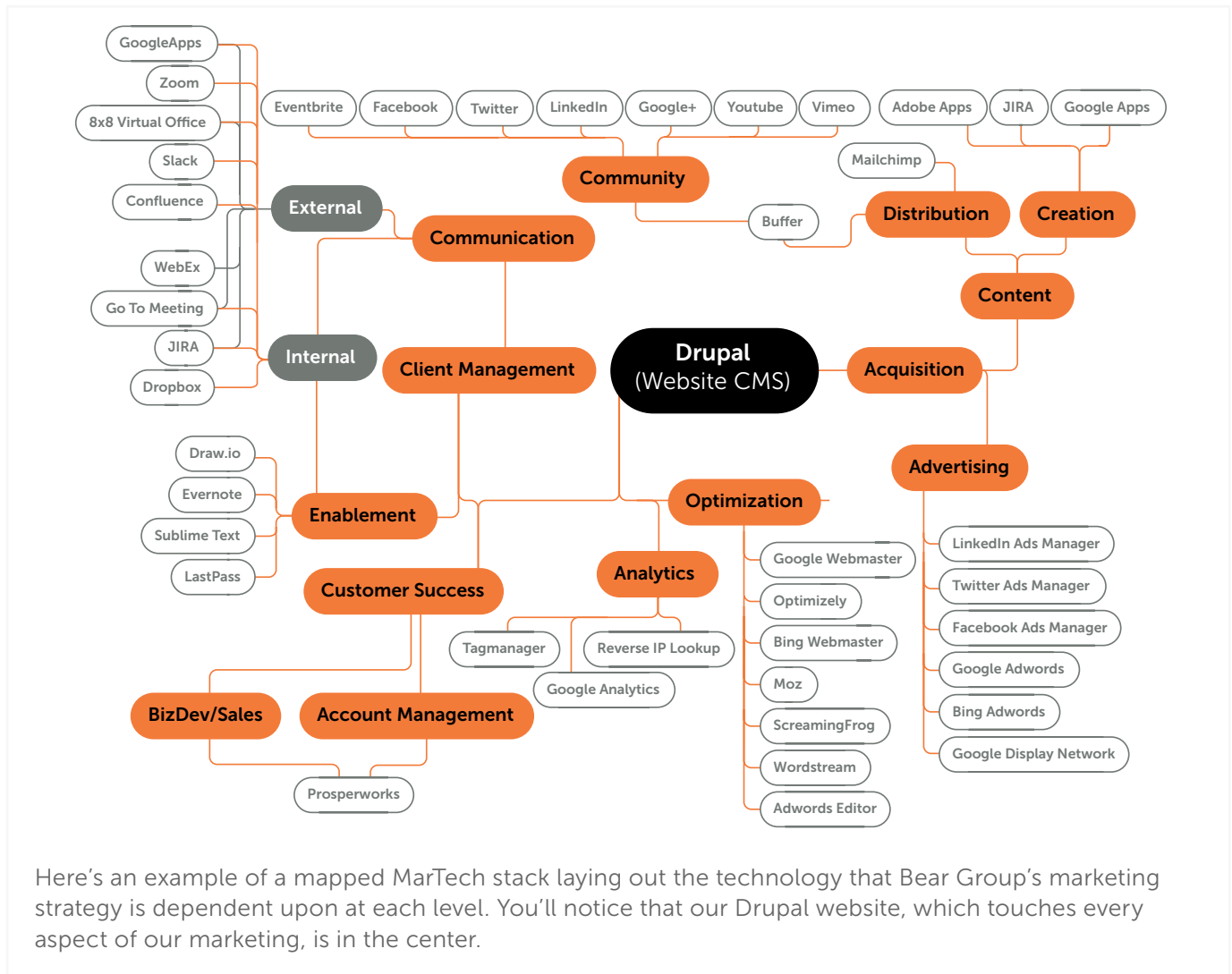
It's beneficial to have this punch list of items as you go into scoping sessions. Sometimes it makes great sense to dive in and clean them up, other times it's better to bundle them and be sure they're addressed as part of a larger update.

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# What Your Website Needs to Talk To

Locate the integration points, because they are a big driver of cost.



Here's an example of a mapped MarTech stack laying out the technology that Bear Group's marketing strategy is dependent upon at each level. You'll notice that our Drupal website, which touches every aspect of our marketing, is in the center.

## 1. What kind of tech is in place?

Most marketing teams and their companies have an assembly of tools and technology already in place. That will include third-party tools, hosted tools, internally built tools, and spreadsheets - some might be integrated, others are data silos. Often in first meetings with clients they aren't sure about the entirety of the tech in place. It's usually an interesting conversation about what tools were used then abandoned (but still linger around), which tools

are part of everyday work, and which tools are so behind the scenes they're not even aware of their use. It's likely that your organization is running 30 such tools or more—it's not uncommon for us to encounter a company with over 50 different technologies and tools in place, all being integrated with their website.
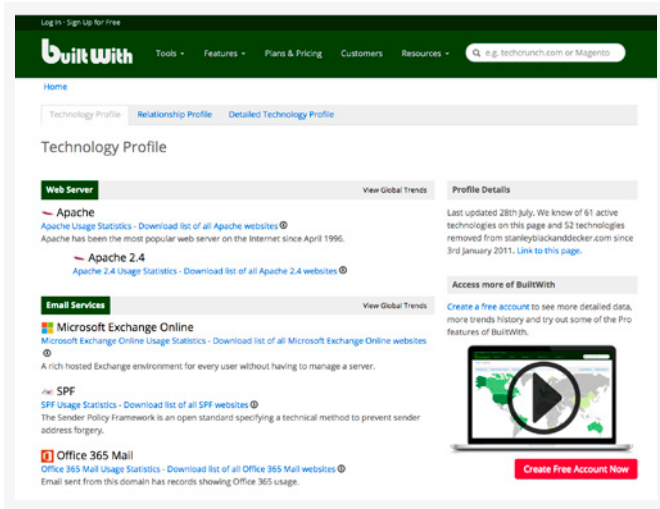


A starting point for the scoping process is drawing the "map" that shows the tools in use and customer data flow

If there are core technologies you are reliant on—a CMS, an ERP, a CRM—it's likely you have a set of vendors involved who are experts in those chosen platforms. These also have large switching costs, so if your company has adopted, say, Salesforce, you would need to work that into the plan (not try to change out all core tech at one time).

Often your website is at the center of that map. Many tools, especially any that need customer interactions, (think CRM lead forms, landing pages) or present data back, (social channels, CRM profiles) require an integration point with your website.

Other times tools should connect directly to one another (your CRM tool with your Automated Email Marketing system). It's great to have a map showing the movement of customer data, integration state and other vital information.

## 2. Where are the tool gaps?

Another outcome from drawing a technology map is that it will identify where there are gaps between your marketing tactics, and the tools you have in place. For example, we've seen clients who have a separate webform to capture leads, then download those to CSV (when they remember), and upload them into their email marketing tool, when they could easily integrate that in a few days time to automatically populate and keep the email marketing system current.

Or, as another example, a company that hasn't been using their web analytics to make decisions. Often the tool is in place, but perhaps they don't have access to reporting or it's not being sent to them.

Part of the scoping process is to look for those gaps, and scope solutions that will include tools or data integration to make them smoother.

## 3. Are there tools that you can't change?

In most cases, clients come to scope a web project with systems that are embedded into the organization. Almost 100% of the time, it's the wrong decision to try and simultaneously change these tools (even if that means dealing with legacy systems—and we've seen many companies on 30-year-old tools).

What we mean is that homegrown Point-of-Sale tool, your older SAP or Oracle ERP system, or Salesforce CRM or other tool that's highly embedded into the organization's fabric. Sadly, it's often the companies that jumped into tech early who made massive investments in these systems, and they really run the operations. Yes, that might mean some pain points are not avoidable. However, in all cases we've found good ways to identify the "must live with it" systems. This helps to keep your website project discrete, manageable and doable. Projects where clients have attempted to solve too many problems in one bundle can fail, or have dramatic impacts on the organization and destabilize your company.

Part of scoping a successful project is to clearly define the guardrails, and what will not be included in scope.

## 4. Will you need to migrate old information from another website?

Your current site and systems, especially if it's an ecommerce platform, will have years of accumulated data. If that's the case, part of this scoping process should also involve evaluating what you'll need to carry over from your old website to your new website, and ways to approach the migration.

It's almost always easiest, from a development perspective, to set up a clean, empty system. At the same time, that might mean customers need to reset their logins, or lose critical order data or profiles. It's a conversation that is part of the scoping process—is the expense of migration (which is always high) more or less than the pain of data being lost?

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# Positioning Development in Your Marketing Strategy

We've scoped and built hundreds of projects, here's a few takeaways and how we position the actual development work that comes from this scoping process.

## 1. Pulsed development (Roadmaps)

One of the huge advantages of the web, and digital marketing in general, over all other forms of marketing is that it can be modified. That means you can do your initial release, but take in customer experience feedback, analytics data, usability, QA, and improve the experience for higher conversion or new features to meet growth objectives.

Part of planning is also looking ahead and setting a roadmap for expanding and updating your site and systems. Not only does it have to accommodate your growing business, but the internet itself is also dynamic, and maintaining any kind of high-performance strategy will require periodic updates. It's almost an uncomfortable thought, engaging in a project that will never be entirely done, but having a roadmap helps and the scoping process will make sure you're not adding systems that will become a barrier to growth and add to "technical debt."

We strongly encourage clients to think about their websites and marketing technology in a "pulsed" approach. Often web technology projects aren't continual—but they're more of a "pulsed approach", revisited on a monthly or quarterly basis.

## 2. Maintenance

Maintenance addresses your security, necessary updates to API's, patches for core platforms, and system upgrades. In order to have a secure, high-performance website in perpetuity, maintenance for every system in your map—even the SaaS platforms—will need to be a part of your roadmap.

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## 3. Plan for an overhaul

At certain key points, too much pulsed roadmap work will start to make your website feel fragmented—even with the best planning. Technology is moving quick, and it can be impossible to predict the kind of impact it will have (think about how the iPhone changed the web).

Your site and infrastructure has a 3-5 year shelf-life at the data layer level.
The front-end of your website will be less than that, 3 years at the max.
You should plan and budget for that frequency for major system changes.

## 4. Stay open-source when you can

If you value flexibility, access to your data, and are planning for the next unknown tech (AI?), we always recommend open-source solutions. As soon as you lock up data in a proprietary system, you are locking your data and growth to another company's platform. Switching can mean a do-over instead of a migration between systems, and integration can become very difficult.

## 5. Add strategies one at a time

In the early years of our business, we had clients who would come in and turn on every feature of their CMS, opening up 5 content types, a forum, blogs, customer profiles, and image galleries. What they learned was that it wasn't the tech that was the hardest part (we could spin up a blog in a few days) but the underlying content marketing strategy required to run all these features. A successful blog requires a writing team, editorial calendar, established voice and tone, and content generation planning.

More recently—as clients have boarded the marketing automation bandwagon—after we set up integrations they realize that, compared to the one-off newsletters, an automation pipeline requires much more effort. Again, tools sometimes are easy, but coordinating strategy, team, and execution is hard.

## 6. The Internal Team

People are needed to run tools and run marketing programs. If you're going to have a great roadmap for your technology, include the people responsible for each tool, and identify who will be driving each strategy. Putting all of it on your digital marketing manager is going to spread them very thin. Our enterprise customers often have dedicated analytics, email, social, customer service, automation, CRM, and ERP teams. As an organization grows, specialization will happen—don't put in the tools without the people.

# Moving Forward from Project Scoping

Project scoping is the most important part of any website build. It's where decisions are made about the tech you're going to be building on and the systems that will need to be integrated. It determines the total cost of the project and how many people you're going to need to maintain it once it's finished.

The purpose of this stage is to get at the information—implementation, ongoing execution, business objectives—that will determine the success of your website 6 months down the road, or even a year later.

Your website is at the center of your marketing strategy, as well as your online presence. Tracking where it needs to fit, how data will pass through it, will require a map. Taking the insights from the time spent scoping in this first phase, you should have a better understanding of all the moving parts in your strategy. Considering all the moving pieces that gravitate around your website will give you the most accurate picture of what it's going to have to be, enabling you to take a step beyond that and focus on what you'd like it to be.

In the last few years, website technology has come a long way to support a new, more technical CMO, evidenced by the surging amount of Martech software available.

In many cases, your website is the most visible representation (globally) of your brand, and it

makes sense that its management has come into the hands of the marketer. It's likely that you live and work within your website everyday, and the last thing you want is your control of your most integral tool to be inhibited by technology.

As you're evaluating next steps, keep these questions in mind:

1. Will your new system require any new training?
2. How are you going to be using this website?
3. What elements do you want to have control over?
4. What will you need developers to do?

There's a common misconception that custom comes at the cost of management—we can tell you for a fact that this is untrue. You can have a website that is both customized for a unique user experience, as well as a unique management style and workflow, and your project scoping phase should help with this. The blueprint that comes out of your scoping phase should make this clear to your systems architects.

# Loop Back To Your Marketing Strategy

Every online strategy is different and maps to a unique business situation. There isn't a single course of action that can be taken that guarantees success. Brand image, reputation, number of product lines, company size—these are all important factors that most online strategies orient around, but, ultimately, it all comes down to business objectives.

The goal of the technical scoping phase is to produce a blueprint that not only informs how you want to move forward with your immediate website build, but provides a complete perspective of what you need to technologically support and maintain a growing digital marketing strategy. By the end of the scoping phase you see your online presence in its entirety, the steps you need to take to optimize, and current gaps that may have been overlooked. Armed with this new perspective, the scoping and planning phase will help you reign back, considering all the moving pieces that your website is going to need to accommodate in order for it to do everything that you're going to need it to do.

You might have come in looking to just build your website, but you will have exited with a thorough understanding of your entire web presence, and what your website's role is at the center of it.

> This is what a website is in 2017, a multi-faceted tool handled by everyone and managed by the CMO. The idea that a website just needs to feature some cool stories and a few nice links is a decade old, and this shift in what a website is and can be is especially marked by who's now in charge of the website.

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