



## ***The Client's Role in Website Design & Development***

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### **Introduction**

Building a new website or redesigning one requires significant client input to be a success. This may be a challenge, as key client personnel who have approval authority are often very busy managers, executives or small business owners. For best results, it's imperative that client management with approval authority be involved in key steps from start to finish. It's quite helpful to identify a single point of contact to obtain internal approvals and give direction to the web design firm.

Although websites are now pervasive for large and small companies, we are often asked to explain our process and what is required from the customer. Following information is intended to better inform and prepare clients regarding our typical process to facilitate a faster, smoother, and more effective effort.

### **Typical Design Process**

Perhaps the most critical point is that the final project is strongly shaped by input received (or not received) by the client. It must be a cooperative and interactive effort throughout. The work at later stages builds upon information and decisions made in earlier steps. Thus, changes at later stages are often more time consuming and may incur additional fees. For that reason, we require written client approvals at key steps to insure that we are on the same page before proceeding. The minor inconvenience of written approvals far outweighs the risk of miscommunication and costly revisions at later stages.

Our typical process consists of the following stages:

1. Define
2. Design
3. Develop
4. Deploy

### **Stage 1: Project Definition**

Stage 1 emphasizes documenting client requirements as written design specifications which are presented to client for review and approval before assignment to a design team.

Key client input revolves around the purpose and goals for the website, design criteria and a detailed outline of content and functionality. We utilize a web worksheet to collect this information from the client and convert the data and information from discussions into draft Design Specifications for review and client approval. Additional information is likely required for large sites or those with shopping carts, databases, or custom programming.



Primary client duties at this stage are to provide input (worksheet, etc.), review and approve design specs, and provide required files.

**Client duties:**

1. Complete the Web Worksheet as best you can. Comments on benchmark websites are very helpful. (e.g. We like these things about website A, but don't like this or that.) They need not be competitive websites. We'll help fill-in gaps and answer questions.
2. Review and approve the design specifications. Some of it is technical jargon. Feel free to ask questions.
3. Provide design input such as logo file, style preferences (font, color, "look & feel"). We also need suitable image files for the logo and any available photos you wish to use. If existing photos are not available, we need input regarding images to be used for the home page. We can provide links to websites with a wide variety of royalty-free stock images to help the client identify suitable graphics. It's also helpful to have draft text for the home page, to use for initial design prototypes.

**Note about content:** *In most cases, our clients provide us with the text for each page in a Microsoft Word document. We can arrange for copy writing assistance, if required, for an additional fee.*

**Stage 2: Web Page Design**

Stage 2 consists of creating two or more prototype designs from scratch for review and feedback by client. Initial designs are simply images of a home page design, typically prepared using Adobe Photoshop software. Links and special effects are not enabled. Draft text or Latin is used. Based upon client feedback, the design is modified until approved by client. Then a custom web template and navigation is used to convert the design into a web page using Macromedia (now part of Adobe) Dreamweaver software.

Key client input revolves around review and feedback for initial design concepts. We focus on the design elements common to all of the web pages, such as the header at top of the page, navigation, and color scheme. We do *not* focus on text details at this stage, so please don't be alarmed to see Latin or sample text used.

We can often combine features from different design concepts. It's helpful for the client to select one design concept as the base and indicate suggested changes. (e.g. *We like home page layout 1 but use the photo and navigation buttons from layout 2.*)

Your chosen design will then be converted to a custom web design template to provide a consistent look for all of your web pages. A properly implemented template is imperative to allow future changes to be made cost effectively, especially for large websites. A template allows us to make one time global changes to certain elements on all pages using the template, instead of touching each web page *individually*. This is very important when you add a new page to the main website navigation, for example.

Our standard process includes building one web template for the home page and a second one for all other pages. (*Unless otherwise specified in your contract, that's what it is included. Creating additional web templates for certain pages may incur additional fees.*)



Primary client duties at this stage are to provide feedback and approval for design concepts plus content for each page.

**Client duties:**

1. Review and provide written feedback for initial designs. (Email your comments and/or fax a copy of the layout with legible notes.)
2. Approve final layout when you are satisfied. (This is the image of your home page, without working links.)
3. Review and approve the Splash page. (This is your home page layout with rollover effects for the links and navigation.)
4. We also need all of the content for your web pages at this stage, before we can move on to build out the pages. Content includes text and images for all pages. For shopping carts we require details for all products to be loaded into the cart, category names, details for your merchant account and shipping preferences.

**Note about templates:** *We use a fully custom web design process. We do not simply use pre-existing web templates, or minor modifications, for your project. Many “designers” and web developers use purchased off-the-shelf web templates and may not have the skills required to change the HTML code to properly modify them. Sites based upon existing web templates also run the risk of looking very similar to other websites based upon the same purchased web template.*

*Promises of very low cost websites or those which can be built in less than 2 weeks are often simply using a purchased template or one previously designed for another client. Some templates are downright primitive. Purchased templates are often best suited for home based businesses, hobbies or organizations on a very tight budget. Many home businesses upgrade to a full custom website when their finances permit, after a year or two.*

**Stage 3: Web Site Development**

Stage 3 involves using the custom design to build out the rest of the site, including Flash animations, web forms, photo galleries, custom programming and other features as specified in the contract.

Key client responsibilities at this stage are to insure that all content has been provided, and to review and approve each page, including a functionality check for web forms and placing an order through a shopping cart.

**Client duties:**

1. Review and provide written feedback for initial designs. (Email your comments and/or fax a copy of the layout with legible notes.)
2. Approve final layout when you are satisfied. (This is the image of your home page, without working links.)



3. Review and approve the Splash page. This is your home page layout with rollover effects for the links and navigation.
4. We also need all of the content for your web pages at this stage, before we can move on to build out the pages. Content includes text and images for all pages. For shopping carts we require details for all products to be loaded into the cart, category names, details for your merchant account and shipping preferences.

#### **Stage 4: Web Site Deployment**

Stage 4 includes a pre-launch inspection by client & fine tuning. Upon client approval and final payment, the site is made live. Additional marketing activities to drive web traffic may follow. Regular website updates are also suggested, to keep the content fresh.

Key client responsibilities at this stage are to assist with final inspection and testing prior to launch. However, the process does not stop when the new site goes live. Regular ongoing attention is required to keep content fresh, drive traffic to your site, and review the success of your marketing campaigns.

#### **Client duties:**

1. Final approval and payment prior to launch.
2. Appropriate notification to employees, customers and media to announce the new site.
3. Support for marketing your new site to drive targeted web traffic, and using web statistics to monitor your progress. (We can provide you with marketing, web statistics and maintenance services.)
4. Arrangements for ongoing site updates, such as a maintenance contract and monthly reviews.

#### **Conclusions**

The web design and development process requires active participation of client decision-makers at key steps from start to finish. Using a single point of contact with the design firm is suggested and it's very helpful if this is also a decision-maker. Written client approvals at key steps are helpful to avoid miscommunication which could cause delays or added fees.

Many managers and business owners have learned that the web is a powerful business tool which must be managed. When properly utilized it can help to enhance credibility, educate customers, provide customer service, generate leads, and boost sales. Executives who still don't "get it" are falling behind the competition.

#### **About the Author**

Art Burkhardt is CEO of SAVVY SITES® Web Design, a custom web design and marketing firm based in San Diego, California. Mr. Burkhardt has a B.S. degree in engineering and over 20 years of high tech business development and marketing management experience with Fortune 500 and international corporations. Prior to co-founding the company in 2002, he was VP of Global Marketing for the Electronics unit of Henkel Corporation, a German technology and consumer goods company with sales exceeding \$10 billion annually. He may be reached at [aburkhart@savvysitesinc.com](mailto:aburkhart@savvysitesinc.com).