ENGINESS

How to Plan & Launch
Your Digital Project

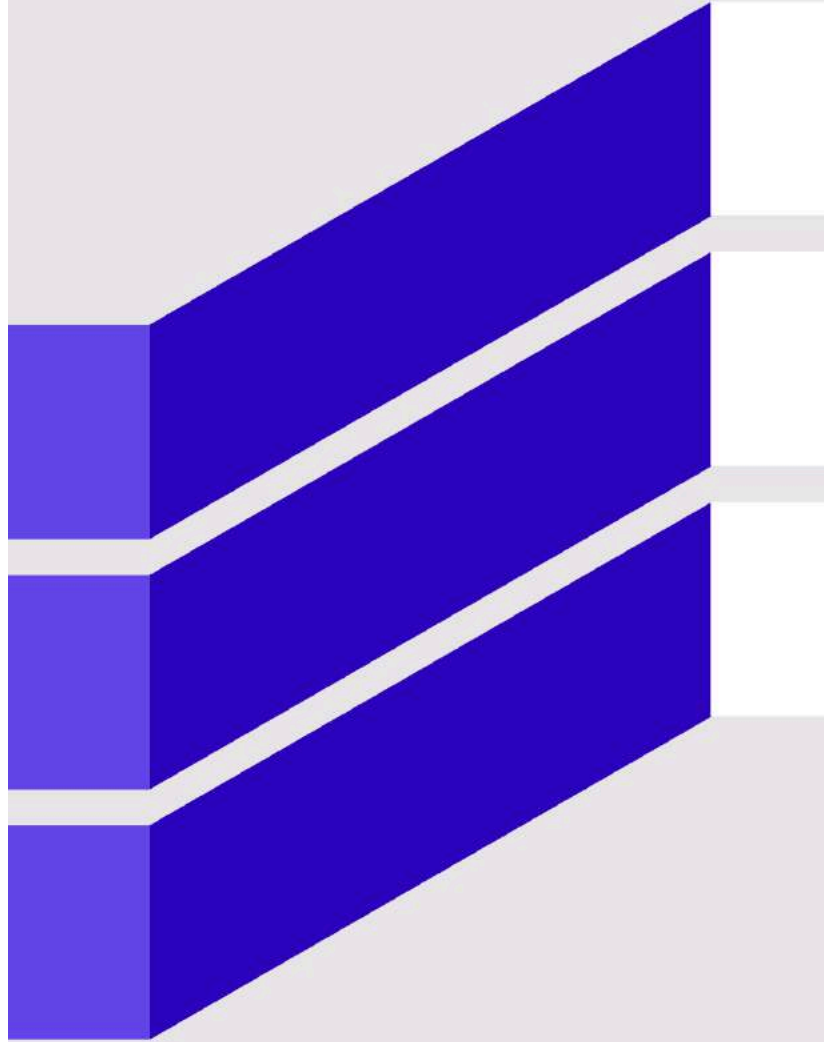
Enginess
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e: info@enginess.io
w: enginess.io

This guide explores how to ensure success on your digital project, right from the start.

Whether you're planning for an enterprise website, mobile app, or a unique business application, this guide will help you stay on track and achieve your goals.

In the following pages, we cover:
- Establishing clear goals for the project
- User testing, stakeholder consultation, and buy-in
- Common pitfalls that digital projects are prone to
- How to keep your project moving forward
- What to do after the project launches, including A/B testing, when to evaluate success, and the idea of iterative design

Questions? Let us know: info@enginess.io

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Who are We?

Enginess is a Toronto-based digital consultancy. We shape strategies for business processes and deliver solutions that enhance customer experience, improve efficiencies, generate new market opportunities, and redefine value creation for industries.

We consult, analyze, and design user experiences that exemplify your business requirements, user needs, and industry demands. We also perform implementation, focusing on system and information architecture, usability and programming, all with an eye to achieving better business outcomes.

Over the past 17 years, we've built a strong reputation for consistently delivering high-quality customer service, and for our ability to handle complex digital strategy and development assignments.

Find more of our insights at the links below:

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Part 1: Building a Business Case

Before you begin your project…

Before you even begin to begin to think about redesigning your website or launching a new mobile app, you need to evaluate why you want to do it at all.

To build a solid business case for your digital project, you'll need to do three things:

1. Articulate why you're doing it
2. Evaluate your existing platforms and KPIs
3. Use points 1 and 2 to set clear goals for your new digital project

Articulate Why You're Doing It

Take, for instance, a website redesign project.

'Because it's been a while' isn't a good enough reason to initiate a redesign process.

Nor is 'the CEO wants it'.

A website redesign project without a clear justification is destined to be disappointing for everyone (including the gung-ho CEO). So you'll need an actual reason.

The same could be said for a mobile app or other business application. Just because it's a trendy thing to do, doesn't mean it's right for your business.

The best way to turn 'I just think it's time' into a legitimate reason is to conduct a thorough SWOT analysis.

There are many templates available online for SWOT analyses, and a basic example is provided below to get the ball rolling.

Strengths

- Advantages possessed by your organization

Opportunities

- External factors that may contribute to your organization

Weaknesses

- Areas in your organization with room for improvement

Threats

- Problems/risks caused by external factors that will affect your organization

You'll want to include as many stakeholders as possible in this process, as well as some front-line users if you can (call centre personnel, customer service reps, marketing coordinators – anyone who either interacts directly with the management of your website or hears on a daily basis what customers are currently struggling with).

You'll also want to bring in metrics and numbers from your existing platforms – websites, apps, etc. – but we'll get to that in a minute.

With your SWOT analysis complete, you should have a much clearer idea of why you're planning this digital project in the first place. Maybe your company leaders feel your current website is underperforming, or maybe there's a recurring customer problem that a mobile app would solve.

Using your SWOT analysis and metrics, you should be able to articulate why your company is going to be better off at the end of your redesign.

Evaluate Your Existing Platforms and KPIs

This is really part of your SWOT analysis, but it's worth focusing special attention on.

Before you do anything, you need to know where your current platforms stand. Look at your key performance indicators (KPIs).

Depending on the existing objective for your project, these may include:

- Site traffic (everyone)
- Time on site (everyone)
- Traffic source (everyone)
- Conversion rate (everyone)
- Abandonment rate (ecommerce)
- Average Order Value (ecommerce)

- Lead/Order Ratio (lead generation sites)
- Content-specific conversion – how many people download whitepapers, slide decks, etc (lead generation)

Or some of the following:

- Cost per lead/acquisition
- Time per session
- Ad impressions per session
- Goal value per visit
- Unique visitors
- Time to complete objectives

- New visitors
- Page/session engagement rate (bounce, pages per visit, duration)
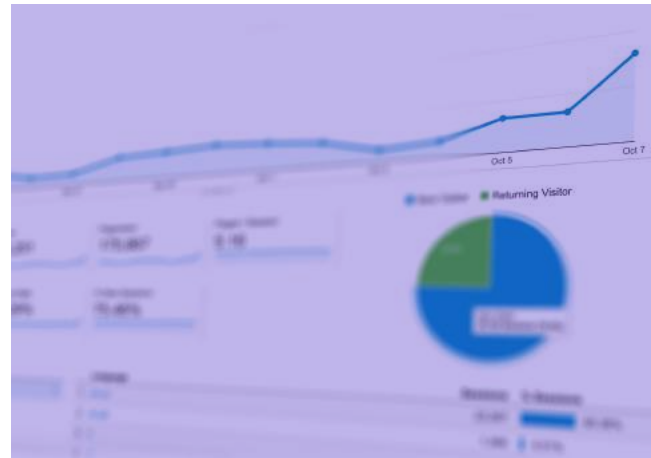- Email subscription rate
- Social shares

This list is by no means exhaustive, but is meant to offer a sense of areas you may want to consider exploring.

If you're planning to update an existing platform, such as a website redesign, you should already have some form of analytics tools already in place so you can review your

existing data. If not, we strongly recommend you begin tracking before you begin a redesign of any sort – how else will you know if making a new investment helped?

This review process will allow you to identify where you are weak in your KPIs, and where are your strengths. There's also value in looking at your product in the context of the larger world, examining your market share, competitors, what they excel at, and so on.

This is harder to do, granted, but can be valuable as you progress through the phases of your digital project, if for no other reason than you might be able to filch some golden nuggets without all the work.

What your KPIs tell you (and what they don't)

KPIs tell you what you're good at and what you're bad at. They are useful for helping you flesh out the strength and weakness sections of your SWOT.

Your KPIs **do not** tell you where there is opportunity for improvement.

Let's say your website is converting at 5%. There is no evidence from your KPIs that this can be higher or lower. It's important to bear this in mind because it's going to be up to you to decide what you're think needs improvement and what doesn't.

Your KPIs are a benchmark, nothing more, nothing less.

Set Some Goals

Now that you've completed your SWOT analysis and you've carefully evaluated your KPIs, it's time to set some goals for your project.

Goal setting is arguably the most important step in your entire process. It's the step that sets up everything else, gets all the stakeholders and dev and design teams on the same page, and generally informs decision making for the project to come.

What makes a 'good' goal?

There are good goals and bad goals.

You want your goals to be actionable, you want to be able to measure them (or have an agreed measure), and you want them to be really clear about why that's your goal.

Here's an example of a bad goal for an ecommerce site:

"We want more conversions."

There's no action or way to measure it. Also, doesn't everyone?

Here's what it should look like:

*"From our SWOT analysis, we know we're not hitting our
KPIs for conversions.*

*Diving deeper into our metrics, we found our abandonment
is very high, despite out positive site time. From this,
and talking to customer service reps, it seems our
customers are struggling to navigate their way first to
the product they want and then through the checkout flow.*

*Our goal is to increase conversions and decrease
abandonment by streamlining navigation and the checkout
process.*

*We will measure success first with user testing, then with
conversion rates, a predicted decreased checkout time, and
with decreased cart abandonment. "*

See the difference?

The latter goal provides:

- The problem, and hypothesized cause
- The solution that they're going to implement
- Four ways to measure it, three of which are quantitative

Summary of Part 1

The first step in planning a digital project – be it a website redesign, business application, mobile app, or otherwise – is establishing why you're doing it, where your platforms currently sit and perform, and what your goal for the launch of the project is.

Next, we cover user testing and how to get stakeholder buy-in.

Unsure where to start when building a business case?

Enginess specializes in helping organizations build business cases for their digital projects – including website redesigns, CMS platform selection, CRM integrations, business and mobile applications, and more.

Don't overlook this critical step of your project.

Get in touch with any questions you might have:
info@enginess.io

Part 2: Gaining Stakeholder Buy-In

In Part 2, we're going to continue discussing the strategy phase of the project, looking at how you can gain buy-in from stakeholders, which stakeholders you should be talking to, and how you can use user testing on your existing platforms to inform decision making going forward.

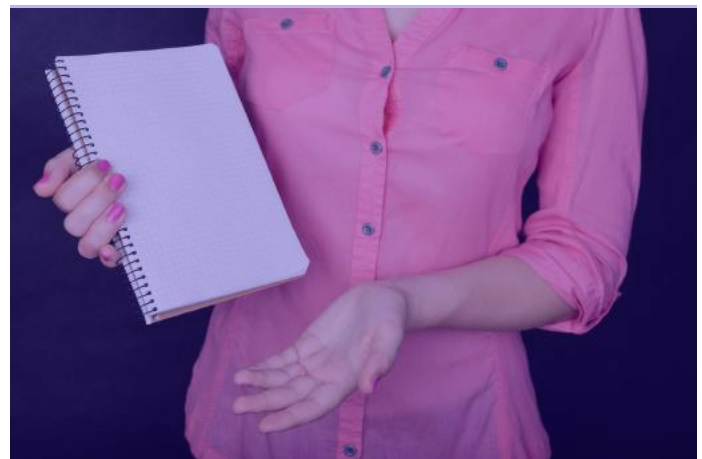At the end of this stage of your digital project, you should have:

- A clear objective and goals for your project
- A good idea of why your current digital platforms aren't working
- A shared vision between all the various stakeholders

A quick note: The activities mentioned in Parts 1 and 2 may not occur chronologically. Oftentimes with projects, we find that these activities, like setting goals, establishing a shared vision, and user testing the existing site, often overlap. How these various steps fit together will depend on how your specific project unfolds.

Stakeholder Buy-in

Having a detailed and concise plan, with objectives and measurable goals, is key to a successful digital project.

But maybe even more important than that is getting critical stakeholders on board with your plan.

First, you need to make a clear list of everyone who you need to receive input from for your project, as well as everyone whose support you need for your project to achieve success.

These people are probably going to be divided into two camps: frontline staff and decision makers.

Frontline staff

Your frontline staff are people who interact with your website, app or business platform every single day. End-users are great, but that might be beyond the scope of your project for right now.

Other great people to talk to are customer service reps (a wealth of info about pain points), marketing coordinators or other entry-level marketers (they're the ones usually making updates to the respective platforms), webmasters, and IT techs. Basically, whoever touches the platform on a day-to-day basis should be consulted.

A quick 15-20 minute phone interview is usually enough to give you an idea of where the problems are for your workers and your customers.

Decision makers

Decision makers are, predictably, senior-level figures who are signing off on decisions that affect the frontline people and end-users. You're probably looking at:

- Whoever commissioned the project
- Marketing directors
- IT directors

Really, this should be whoever asked for the project, and whoever is going to own the project going forward.

The goal with the decision makers is a little different. Yes, you want to get insight and input into the redesign process – after all, conversations or workshops with them are going to inform your high-level objectives for the project that in turn are going to be the nucleus of your detailed goals.

But you also want to clarify exactly what the point of the project is.

This is where establishing a shared vision is extremely important, and it's why we recommend a workshop for this particular step. Getting collective involvement and building a team, and thus a team consensus, will make it far easier to get everyone to sign off on the plan.

And the reason that signing off on your project plan is so key? So you always have a document to go back to down the line.

Eventually, every project runs into the same problem: someone wants to add something that wasn't scoped. And it's hard to say 'that's out of scope' without a reason.

By working hard to establish a shared idea of the final product, you can nip this in the bud before you start, rather than have to scramble hard at some point down the road. This isn't to say that you should be absolutely inflexible and the plan is written in stone, but rather ensure that there is a plan, which some elements will just not be a part of.

You can't pack everything in a single project – knowing what you're getting to in your launch phase will make the project run smoother for everyone involved.

What's Wrong With the Existing Platforms?

It's dated, it's been a while, I think maroon just isn't my colour – these are all not good reasons to initiate a new digital project.

You need to phrase it as solving specific problems.

Take, for instance, a website redesign.

The best way to get to the bottom of what's wrong with your existing website is actual user testing. We mentioned that, when you're talking to stakeholders, end-users tend not to be a part of the conversation. Well, this is where they become part of the conversation.

We recommend at least some user testing prior to starting an overhaul for an existing platform, like a website redesign.

Why?

- Economics
- Helps you scope
- Uncovers unknowns

Let's look at those in more detail.

Economics

There are many different shapes that user testing can take these days, like remote testing, formal testing, paper prototype testing – the list goes on.

Discovering a usability issue with your existing platform at the beginning of the project and avoiding it in the redesign project from the start will be much less expensive than trying to fix it later on. That's why we always recommend at least some user testing at the start.

Helps you scope

Talking to your frontline users will only get you so far. Seeing how users behave, what they struggle with, and where they fail is a sure-fire way to know exactly what needs to be changed to improve the user experience, which will almost definitely be a key part to at least one of your goals.

It's impossible to know what you don't know.

Uncovers unknowns

You don't know what you don't know.

Maybe your users find one particular piece of your navigation befuddling but never told anyone about it. Maybe some of your users don't like the way your checkout process works because it doesn't reassure them it's a secure page.

Who knows.

The thing is, much of what you uncover can likely be fixed during the project at little to no extra cost. At the very least, those insights can inform the rest of the project process.

Summary of Parts 1 & 2

That brings us to the end of our early strategy phase. By now, you should have:

- Talked to both your decision makers and front liners
- Talked to your end-users
- Looked at your metrics and existing KPIs
- Developed high level objectives
- Developed detailed goals
- Shared all of the above information, established a shared vision of how the redesign is going to go and what is and is not going to be addressed

It's a long road to start a redesign. But the more time you spend building an awesome strategy, the better and smoother your redesign is going to go.

Next, we look at some common pitfalls that redesigns are subject to, and how you can avoid them.

Getting stakeholder feedback shouldn't feel like herding cats

Enginess facilitates discovery sessions that uncover critical business insights, ensuring your digital project achieves its goals and delivers a strong ROI.

Get in touch with any questions:
info@enginess.io

Part 3: Project Roadblocks

Even the best laid plans are bound to hit a few speed bumps, potholes, or solid brick walls.

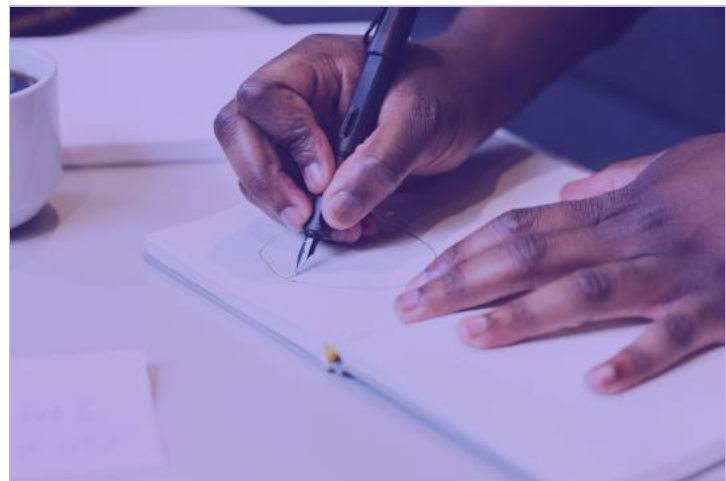Here are some of the most common roadblocks your project might hit, and how you can work through them.

New Content

Updates to existing platforms, such as website redesigns, tend to focus exhaustively on the look and feel and the user experience of the new website, and oftentimes content is left behind.

When you're redesigning your site, it's worth thinking about what content you're going to be rewriting (because it's probably going to be at least some), and setting aside **more time than you think** you need to do it.

If you're mostly re-skinning your website (changing the look but keeping the core

components the same) then you might not be rewriting that much.

But if you have a more wholesale redesign going on, you'll likely be producing quite a lot of new content to match the new brand and the shared vision you've so laboriously established.

Content that's likely to need some attention includes:

- Static web content (like About Us, Team – things that change slowly)
- Navigation content (no nav is perfect – in your user testing, you will likely have found problems that different content can help solve)
- New dynamic content (like a blog)

How to Avoid Content Roadblocks

Start early. Really early.

Content is often left to the very end of a digital project, filling in the blanks left by design and development.

However, there's been a change in conventional thinking that makes a lot of sense: bring the content in early.

The less Lorem Ipsum you use, the better. Content will help inform the design and the user experience and can offer valuable insight into troubleshooting tricky spots.

So get the content on board early, and you'll avoid needing to take a detour right before you launch.

Second, a redesign is a great opportunity to stockpile a lot of dynamic content, like blogs, infographics, videos – whatever your content strategy is producing.

Your Design Looks Great… But it's Impossible to Manage

No matter how great your site or app looks, it needs to be easy to update and adapt to different circumstances.

Without too much trouble, you should be able to:

- Add new content, records, and media
- Change element sizes
- Add more elements and rearrange them on pages

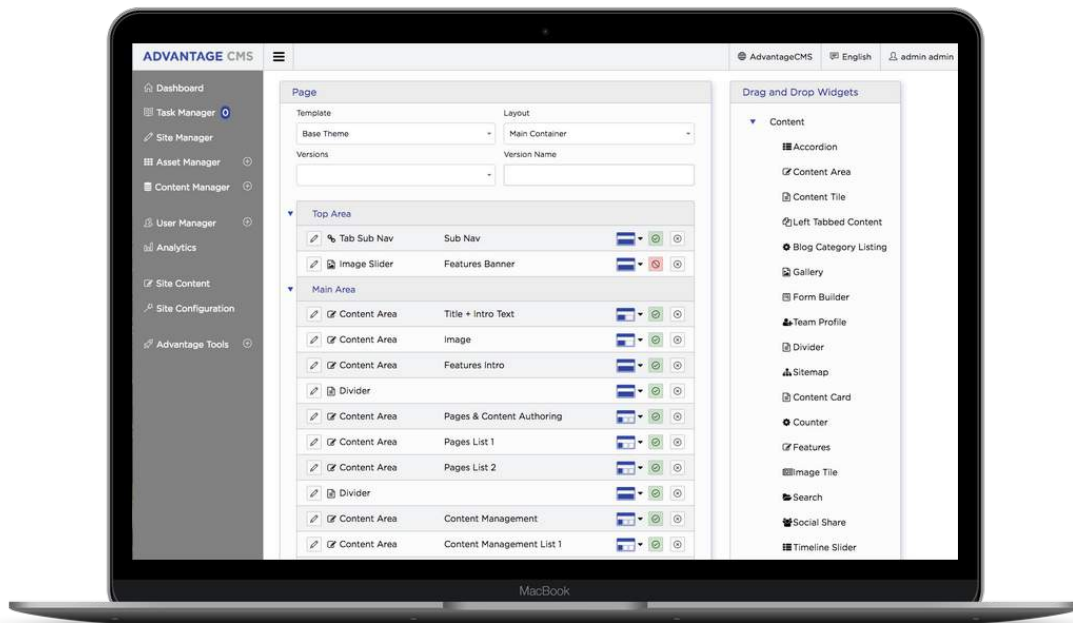You need to do at least some of the things on that list on your own without calling in the cavalry.

Your early conversations with your frontline staff will inform you of which tasks need to be dead simple. But beyond those obvious things, it pays to spend a couple hours dreaming up different scenarios you could run into down the road where you'd need to make changes quickly and easily.

For example, let's say you are redesigning your website, and your home page has a CTA on it to "contact us". Can you easily locate and change that copy, the colour of the button, and other CTA tweaks?

If not, it might be worth chatting to your dev team before they disappear.

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How to avoid update roadblocks

First, ensure your platform – be it an app, website, portal, or otherwise – is built on a content management system (CMS). It will make everyone's lives easier, and means you don't need to know how to code to make simple updates.

A content management system (CMS) interface

Second, put it to the test – identify a few small changes that will likely be routine for your team and try them out prior to the end of the project, to make sure it's easy and fix any problems that come up (while you've still got the team in place to fix them).

SEO Disasters

One of the most common problems that teams have when they redesign their website is they don't adequately prepare for search engine optimization (SEO) migration.

All the high quality, organic traffic a site has cultivated over time can vanish, leaving the new website with a fraction of its former traffic. It's a nasty problem to have.

Fortunately, there are many things you can do to preserve your page authority, your URL quality, and your position in search engine results in general.
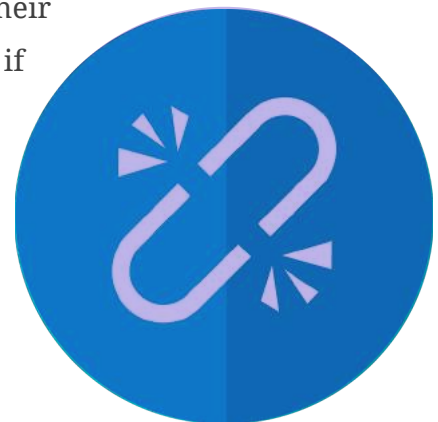
How to avoid an SEO disaster

First, if your URLs are going to change (and they likely are, if your navigation or information architecture is being restructured) then you have to tell search engines where the old URLs are moving to.

You'll need to find all the old URLs by crawling your own site and then turn those findings into a big list of URLs to migrate or redirect.

Second, you'll need to use 301 redirects to forward traffic to their new destination. 301 redirects preserve your page's SEO, and if you perform a link analysis to find out where your critical inbound links are coming from and where they're linking to, then you can make absolutely sure they are redirected.

Remember: much of your site's authority (and thus your SEO) comes from inbound links. Make sure these valuable links find new homes post-redesign, with a handy 301 forwarding address.

Summary of Part 3

Even the best laid plans are prone to problems. No matter how much strategic planning you do, there's always going to be something that rears up and surprises you.

But if you've built a little extra time into your schedule and you fix problems as they arise (when everyone's around) rather than leaving it until next time, your new site is going to do a great job for you, your organization, and your KPIs.

In Part 4, we cover how you can keep your redesign on track (and on budget).

Don't let a roadblock turn into a show-stopper

According to SmartInsights, 40% of new website/CMS projects end in failure. 50% of mobile app projects don't achieve success.

The best way to mitigate the risk of a failed project is working with a partner you can trust and that has a track record of success.

Enginess provides enterprise-wide digital process reengineering and delivers scalable web-based and mobility applications that achieve an organization's goals.

Get in touch with any questions:
info@enginess.io

Part 4: How to Keep Your Project Moving Forward

In Part 4, we look at how you can keep your digital project on track as you progress through the project.

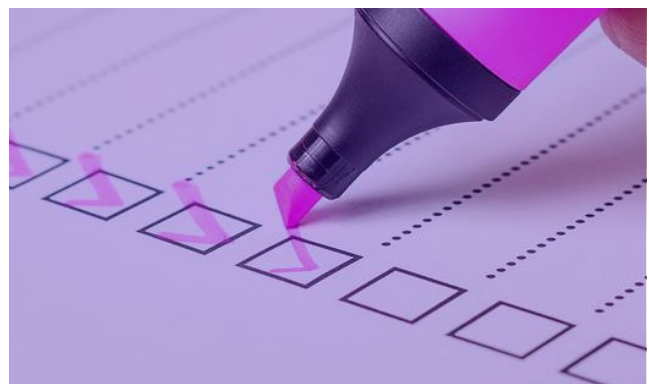To keep everything moving smoothly, we suggest you:

- Appoint an internal project manager
- Communicate, communicate, and, oh you should communicate
- Stick to your plan

Let's look at those in more detail.

Appoint an Internal Project Manager

At Enginess, we're lucky to get the chance to work closely with internal teams as well as independently on projects. This versatility has given us a unique perspective on when and how projects go wrong, as well as when they go really well.

To avoid the former, we recommend appointing an internal project manager. If your redesign is working with multiple single-function shops – for instance, a design studio, a development shop, and maybe a UX consultant or freelancer – there are many moving parts. But ownership of said parts can be a problem.

Having one contact linking all the various teams reduces the potential for even little problems to arise, like a slightly pushed out deadline or a minor design change, from slipping between the cracks.

Even if you're working with a supplementary resource and your own internal team, it's still worth having someone to act as that vital linchpin between everyone.

For example, let's say you've hired a development shop to supplement your own design and IT resources on your project. They're probably not located on-site.

If there is a development challenge, or the designers want to request a change, it speeds things up to have a point person just down the hall who you can talk to.

Basically, having someone around the office that knows exactly where the project is at, who is responsible for the project, and who has a bird's eye view means that external teams and internal resources stay focused and on track to hit each and every deadline.
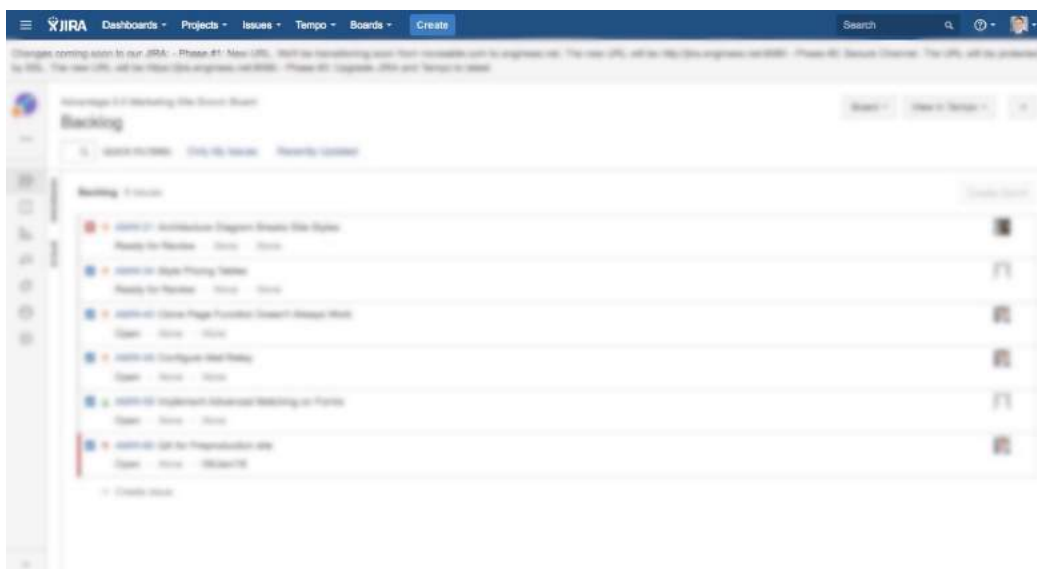
Communication

Digital projects, such as website redesigns or mobile app launches, are like any large project – there are many different areas of expertise that need to be filled, and different components that need to all come together at the same time.

It's a big ask, and to achieve the lofty goal of an on-budget, on-time project delivery, communication between teams is absolutely key. We suggest using some form of PM application — we use Jira.

First, it keeps everyone on task better than if you just leave it to the experts (to-do lists and micro-tasking are powerful motivators).

Second, communication between team members enhances collaboration, which is great for troubleshooting the tricky problems that are bound to come up.

Finally, by using some form of shared communication platform, it keeps everything in one place for everyone to see, which is invaluable to receive feedback early and often, and it means less time is spent searching for that one email or attachment.
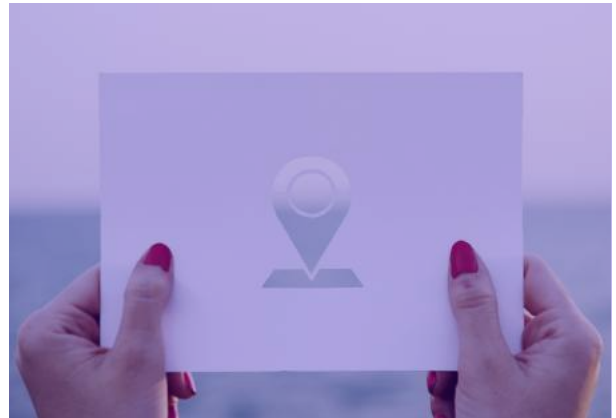

Project management software (Jira) interface

Stick to Your Plan

We're not suggesting your original strategy document shouldn't have some flexibility. After all, what if you think of a great idea halfway along that is going to revolutionize your entire project?

Rather, as you get deeper and deeper into your project, it's easy to lose sight of what you're actually trying to do.

Stay focused on your core objectives, and the core objectives of the stakeholders you corralled. Make it clear to the entire team that changes need to come with some justification – justification that's goes back to the original objectives of the redesign.

For example, let's say a designer wants to rework the way the logo interacts with elements in the navigation bar. That's great, but if it's going to take an extra two or three hours, then there needs to be an idea of how it's going to enhance the core objectives.

Maybe the logo is distracting from the navigation, or maybe users think it's an actionable button when it's not. Both of those are valid reasons to invest the time. What isn't a valid reason is 'I don't know… just isn't working for me.'

Maintaining your objectives and goals, and reiterating them regularly throughout your project (this can be as simple as writing them on post-its and putting it on every team

member's computer) helps keep things moving forward, so you approach your final deadline with excitement, not panic.

Summary of Part 4

As you go deeper down the rabbit hole of your digital project, it's understandably easy to forget what your big-picture objectives are, and why you're doing the project in the first place.

By appointing a key team member to keep disparate teams connected, utilizing project management communication tools, and constantly referring to and following your core plan to achieve your objectives, you can keep your project running smoothly on the right path towards a strong finish.

In Part 5, we talk about what to do in the mysterious post-launch period of your shiny new digital platform.

Project management shouldn't be an afterthought

Enginess's project managers have combined decades of experience and hundreds of successful launches to their names.

Get in touch with any questions:
info@enginess.io

Part 5: After The Dust Settles

By now, your digital project should be closing in on the final few steps. You've pushed hard through your last sprint, your development team is wrapping up, you design team is waiting with anticipation to see their creativity come alive, and you're just happy it's over.

Well, not quite.

In the final section of this guide, we are talking about what to do after your project launches — first, so that you get the most out of your investment, and second so that you can prolong the shelf life of your new platform.

Straight After

By now, you've probably realized that, no, there's no rest for the wicked. After launch is an incredibly busy time for the project team, and the development folks in particular as they address the dozens of (hopefully minor) bugs that all the testing in the world can't catch.

Things like images not displaying correctly, missed content during a CMS migration, or any other minor mishaps that aren't anyone's fault but are just the way it goes.

This is a reminder as to why it's critical not to schedule your launch hard against an important sales date like Christmas.

So that's the first task – debugging your new site, app, or other platform. And to help with this, we strongly recommend a round of user testing on the pre-production site or app just prior to launch. If you've been consulting exhaustively with users and having your design team iterate as you go, then you shouldn't uncover any shockingly huge problems.

What you might find, though, is a couple of bugs that only really come out when the user uses it. Because as good as we are at bug catching, watching how someone actually engages with your site or app will uncover the tiny details that make for an awesome user experience.

The second reason we recommend testing is that if you do find something drastically wrong, your development team and design team are still around and fully engaged in the project.

Six months down the line, it's difficult to wrangle the troops, and may carry associated costs. Two days past launch, though? They're still living and breathing your website.

Don't Panic! Your Metrics Will Bounce Back

One of the most frequent issues seen by clients after a website redesign is that metrics and objectives have suffered.

After months of work to fix these sorts of problems, it can be disheartening to see yourself seemingly worse off than before. But don't despair!

Metrics after a redesign take a little while to bounce back and climb higher than ever before. Your existing user base has to re-learn your new site, Google has to index your new sitemap and redirects, and no matter how amazing your UX is, this will take a little bit of time.

So be patient. We recommend waiting three to six months before getting riled to solve what's probably a blip rather than a trend.

Down the Road

After you've launched your project, and gotten over the initial bugs and metric fears, it's time to look forward.

Not the next huge redesign, but rather towards a different design philosophy – iterative design and constant testing.

Iterative design is something we talk about a lot, but at its core it's simple. It's about small changes that improve your platform and user experience, iterating (improving) on each old version, a tiny bit at a time.

It has a number of benefits, including:
- Avoiding a huge redesign project
- Keeping your site or app looking great all the time, rather than depreciating between total redesigns
- Allowing you to constantly tweak and improve your platforms to hit your KPIs

One way to think about it is like a car. You can buy a new car, never take care of it, wait for it to break, and then buy another new. Or you can buy a new car and routinely care for it, making it last for years and years and never have any problems.

User Testing and A/B Testing

A huge part of iterative design is user testing and A/B testing. To constantly improve your user experience, you need to be talking to your users all the time. Even remote usability testing through a third party to test a new design feature would help.

And while this might seem expensive at the outset, it's actually not.

Jakob Nielsen argues that, for a lot of testing, you only need five users, which brings the cost down significantly. And if you're only testing one feature or a small subset of the site, five users are quick and painless to test.

The other side of iterative design is A/B testing and multivariate testing. These are different manifestations of the same thing – namely, changing something and seeing how it does compared to the original.

These are fast and easy ways to see:
- Which CTAs drive the most conversions
- Which keywords get the most traffic
- Which headlines get the most clicks
- Which checkout flows have the least abandonment
- And about a million more things.

If you use both, you get not only big picture stuff from user testing, but also feedback via numbers and metrics on minute details that users probably don't even notice.

For example, A/B testing might tell you that your CTA does better when it's red than when it's orange. That is an insight that would never come out of user testing.

And that's it!

Congratulations – you have successfully launched your digital project and changed your philosophy so that you won't have to completely overhaul it for a long, long time.

Conclusion

This brings us to the end of our guide to planning and launching your digital project, whether it be a website redesign, CMS re-platforming, mobile app, or otherwise.

These can be big and complex projects, but with the right planning, the right team, and an awareness of what can go wrong (and what to do when it does) they can be handled very smoothly.

And with care and maintenance over time, consulting with users, and regularly tweaking with A/B and multivariate testing, you can prevent your platform from needing a wholesale makeover for a long, long time.

We hope you've enjoyed this guide, and that it equips you with valuable information you as you embark on your next digital project.

If you want to speak about your project, we would be glad to help in any way we can.

Contact us:
Mike Phillips
t: 416 346 1684
e: mphillips@enginess.io