



Ensuring Project Success

**Pre-project Design Checklist for
Setting Clear Expectations Early
in the Design Process**

Pre-project Design Checklist

Overall Objectives

1. IDENTIFYING KEY OBJECTIVES OF SITE

- What is it supposed to do?
- Who will really visit it and what for?
- What is the marketing plan?
- What is your sustainable differentiated competitive advantage vs other online competitors?
- Where is it used in sales cycle?

2. CLIENT LIKES AND DISLIKES

For the designer: Think about client needs beforehand - seasonality, quarter or year end for sales people, and holiday shopping seasons for E-commerce companies.

Gauge client interest and patience level on:

- Approval cycles
- Revisions and re-dos
- Budget overages
- Timing of the project(s)

How do or will the client and/or designer measure success?

- Front-end Metrics
 - Web traffic
 - Time on page(s)
 - Engagement with assets
 - Videos

- Back-end Metrics
 - Leads
 - Add to carts
 - Sales
- Qualitative Feedback can be effective. Consider Surveys and Focus groups.

Consider the internal business process for your client

Key pieces which need to be agreed upon, scoped, and in some cases completed, or on their way before you can/should start. Some of the below can take some time. Carefully gauge any internal holdups here which can delay or prevent a successful completion to your project.

Brand identity and logos

- “Strong” homepage – the main page of a site should be something everyone agrees on.
- Lead times for web assets -product and services content, marketing videos, flash designs
- Structure and Navigation
- Beta/Usability Testing, Compliance Testing, Link/Spell/Content checking

3. CHECKLIST FOR TRUST-BUILDING SITE DESIGN

Build Trust by Mitigating “Perceived Risk” with Privacy elements

- Understandable Privacy Policy with abundant clear links to it
- Seeking Only Pertinent Personally Identifiable Information

Building Reputation

- Testimonials from Others Who Took the Requested Action
- Build Reputation through Associative Branding with Third Party Trust and Reputation Seals

Maximizing Site Quality

- Graphic Design
- Structure Design
- Content Design
- User Experience Design

- Alignment
 - Address Target Customer Needs
 - Type of Information Consumption
 - Stage in Sales Cycle

- Accessibility

Consider the Target Customer and their:

- Hardware and software versus what you are building
- Screen Resolution
- Load times
- Browsers
- ADA compliance

4. ADDITIONAL CHECKLISTS

- **Client questionnaire**
- **Brand Identity and Logo**
- **Pre-Launch**

5. ADDITIONAL RECOMMENDED RESOURCES

- **Smashing Magazine**
- **A List Apart**
- **Freelance Switch** (for Independents)