

blend 

PROJECT COMPLEXITY ASSESSMENT

Web Operations Management Checklist

BY BLEND INTERACTIVE



Introduction

It's easy to look at a new web project and begin dreaming.

Dreaming of content possibilities — of all the landing pages you can create, and all of the blog posts you can write, and all of the customizability and targeting you can push forward. Dreaming of finally getting your arms around your assets — better image names, more effective page titles, fewer legacy and archived pages. Dreaming of the perfect project, where your design works no matter what, where your CMS is a free flowing machine that has tapped into your mind, and where you are no longer the slave to the IT department, or the constricting templates built several years back.

And you'd be right to dream, because that's what new projects are about. Dreaming.

But, slowly, reality is going to seep in, and you're going to discover more questions than answers. Are you staffed well enough to meet your aspirations, and are you clear enough on what those aspirations mean for larger company culture? Who manages the front-end? Who manages the back-end? Who manages anything, really?

Over the life of our company, we have asked a lot of these questions — and, we have experienced some of them ourselves. Questions that clarify the operating guidelines of a project, and questions that too often are asked too late in the project.

These are the questions we need to further our understanding of an organization's ability to maintain and direct a website after launch. But, more than that, they are questions that help define and strengthen the governance of a new — or old, or revamped — website.

This is our Web Operations Management Checklist, and this is what you need to know to make your website run perfectly on day two after launch.

You got this.



Checklists

Roles and Responsibilities

At its most basic role, we need to know who is ultimately responsible for the overall effectiveness of the website. This may be a person or a group of people, or it could be an entire department, such as IT or Marketing.

- Who is ultimately responsible for the overall effectiveness of the website?
- Who answers for the achievement of the defined metrics and Key Performance Indicators (KPIs)?
- Who is ultimately responsible for the content of the website?
- If different parties are responsible for different content areas, who is responsible for the information architecture of the website — the overall organization of all the content?
- Who is responsible for the design of the website? Who can decide to redesign the website?
- Who is responsible for the technical functioning of the website?
- What groups are involved in the website content management process? What are their high-level responsibilities?
- Who is responsible for different, specific types of web content? In what different sections of the website?
- What is the procedure for getting new content developed and deployed?
- If someone wants content on the website that falls outside the scope of established governance, who approves and manages these initiatives?

Content Development

Whether it's one person or a team of writers backed by a managing editor, someone has to create content.

- Who is going to manage the editorial content direction of the website? Who decides the general type of content the website will focus on?

- Who is going to develop new content for the website?
 - Do these editors need training in writing for the web? Do they have the editorial skills necessary to develop content? Do they have the technical tools they need to write content?
 - How will these editors develop more advanced media? Can they edit images? Can they edit video? If they need more advanced capabilities in these areas, where can they go?
 - Do these editors have time to develop this content? Is this responsibility an official part of their jobs, or is it in addition to their other responsibilities?
 - Will editors have access to subject matter experts, and to what level of editorial freedom will they have to interpret more detailed content for site users?
 - Is there a need for translation, and what method is in place to create multilingual content?
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Strategic Planning

Beyond simple content changes, strategic planning dives into the what and when of a content project, often determining long-term future goals and functionality changes.

- How are new goals for the website going to be developed?
 - Who ultimately approves those goals by weighing them against business needs? Is this the work of a trusted, small group, or does this need to be walked through more levels of management? Is a steering committee required?
 - Is there a need for representative personas? Is there a need for a user advisory group?
 - How is progress against these goals going to be measured?
 - What documentation is required to get approval for strategic planning? What tools are needed to illustrate future states?
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Analytics

Analytics, at its base level, is simply a pile of numbers and graphs. The trick is how those numbers are interpreted — and how they match up to organizational goals.

- How is website performance and traffic going to be monitored?

- Who has access to this information?
 - What metrics or KPIs are of value to the organization? How are they going to be measured?
 - How will this information be reported and used within the group? How often? F What information will be reported outside to the core team to the larger organization? How often?
 - Who is monitoring submitted search terms — both external and on-site — and are they providing guidance on how to update site structure and content based on these terms?
 - Is A/B testing going to be used? User testing on the live site? Eye tracking? Any other user behavior testing? Who is responsible for this work?
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Style Guidelines

Humans write in a way that is fluid and personal, based on their own training and dialect. Unfortunately, this may not always match up with an organization's voice. What processes are in place to ensure many people can speak with one voice?

- What visual or voice style elements are allowed on the website?
 - How do these style elements relate to the company's overall goals and traditional marketing materials?
 - Who approves the use of non-standard visual elements?
 - What usability requirements exist for the website? How will these be audited?
 - What accessibility requirements exist for the website? How will these be audited?
 - What metadata is required for efficient reuse of content? Example: how should an image be tagged and classified in the event it's used in more than one location?
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Workflow and Approvals

Even though content is “created,” it doesn't mean that content is “alive.” Each organization should have a grasp of the legal, organizational, and domain-specific needs for each page and chunk of content.



- How does a content idea get initiated and completed? How does an identified need for content get fulfilled?
 - Is there a schedule in place for content auditing?
 - Is there a schedule in place for on-site content creation?
 - Is there a schedule in place for off-site content creation, such as blog posts, social media or other content?
 - Is this workflow different for content needs that originate outside the normal team? Who acts as a liaison with the rest of the organization?
 - Which people or groups need to approve content changes and in what order?
 - Who implements these policies into enforced workflow?
 - Who can approve web content changes for each different type of content?
 - Can we supersede this approval chain if necessary?
 - How is content staged? How do we get content to a location where approvers can view it?
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Content Review

Ongoing maintenance of existing content helps ensure that the site does not hide any embarrassing, redundant, outdated, or trivial content.

- When will content be reviewed for relevance and accuracy?
- How will review of this content be assigned, and how often will review happen?
- How will this need for review be communicated?
- Is there a practical automated solution for any part of this workflow?
- Will auditing follow a routine, section-at-a-time process, or will it be an occasional full scope audit?

Archiving

Not every piece of content will be relevant forever, which means we need to determine the best way to scrape away the cruft without losing legacy content connections.

- How will old content be archived, and what parameters are set for content to be set for review?
 - When needed, how will this archived content be produced for review?
 - After archiving, how long is content retained?
 - If necessary, can a copy of the website as it existed at a specific point in time be produced?
 - Who manages redirects from archived content toward new, relevant content?
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Content Logging and Audit

A site is constantly moving and changing, and with that comes updates to code, content, and functionality.

- How are changes to website content tracked?
 - Who can access or request this information?
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Permissions

In most cases, certain site functions are locked down to certain site users — reviewers, editors, administrators, and super-administrators.

- Who has access to what content?
- Who can dictate changes to this access? Who can dictate new features within an existing access level?
- Who manages this access? Who ensures that the technical permissions applied to content matches the permissions dictated by the organization?
- How often will permissions be audited?

Training

A new site — especially those run through a complicated CMS — requires more than just people and content: it also requires a certain level of functional knowledge transfer from the experts to anyone else who might use it. Training is crucial for maintaining features and workflow as job descriptions change and editors join or leave the team.

- What training is required for different identified roles?
- Who conducts this training?
- What documentation is in place for the CMS and content style guides? Where are these located, and who has access to them?
- What documentation is in place for the web team itself? How does a person understand the workflow of the website if, for some reason, they are separated from the process by location or job description?
- Is training handled through text and images, or does it also include videos, webinars, or training materials?
- Are training materials public, or are they hidden behind a login?
- What method of knowledge transfer is needed for handing off content from one outgoing editor to an incoming editor?

Form Handling

When a user enters content into a form, it often seems to fly way into the ether, never to be seen again. What processes are in place so we don't drop contact and lose form information?

- What “contact points” are on the website? In what places can users of the website contact the organization?
- Who manages these contact points? Who responds to contacts initiated through the website?
- What workflows exist for these contact points?
- What do submission responses, such as “Success!,” convey about where content is going and when/how it will be accessed and responded to?

- How is functionality tested? How do we ensure the contact points are functioning correctly?
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User Generated Content

Though not every site dabbles in user generated content, any site with reviews, forums, and even some forms will need a plan in place to monitor, approve, and clean up user generated content.

- In what places can users — meaning people who are not part of the web team — generate published content?
 - What approvals, if any, does this content have to go through?
 - What abuse reporting procedures are in place?
 - Who gets abuse reports?
 - What is the approval process for removing abusive content?
 - What is the technical process for removing abusive content?
 - What is the logging process for tracking repeat offenders?
 - What is the approval process for banning a repeat offender?
 - What is the technical process for banning a repeat offender?
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Technical Support

Finally, when it comes to issues of technical management — servers, uptime, development access, etc. — who is permitted to make changes and approve decisions?

- What one person or small team is ultimately responsible for the uptime of the website?
- How will uptime be monitored?
- What is the notification and escalation plan in the event of downtime?
- Who can initiate programming changes?
- How do programming changes get completed?

- What systems and tools are in place for programming changes?
- How are errors and exceptions handled? Where are they logged? Who is notified?
- Who controls the DNS for the website?

Conclusion

This list is daunting. And it should be — the level of thought required to launch and maintain a successful site is not trivial, and unfortunately we see too many organizations hoping to get by with a bare bones set of parameters.

But, that doesn't mean it's impossible. In fact, it's very possible.

Without knowing an organization's details, it's impossible to create a one-size-fits all governance plan. Walking through this checklist is a good start — it gives you a bit of framing around the things you may never have considered. There's even a good chance a lot of the questions on this list aren't relevant to your situation, and that's perfectly okay. Better to ask now than to wonder later.

Regardless of whether you have all the answers or are struggling to find your way through even the most basic questions, good luck. We'd love to hear how you're doing.

Overwhelmed? We can help.

It can be hard to wrap your head around the complexity of a new project. We can help. We've got more than a decade of experience helping clients figure out their organizational needs, and we are always willing to talk to anyone, especially when it comes to the things we're passionate about. We'd love to talk to you about your project.



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