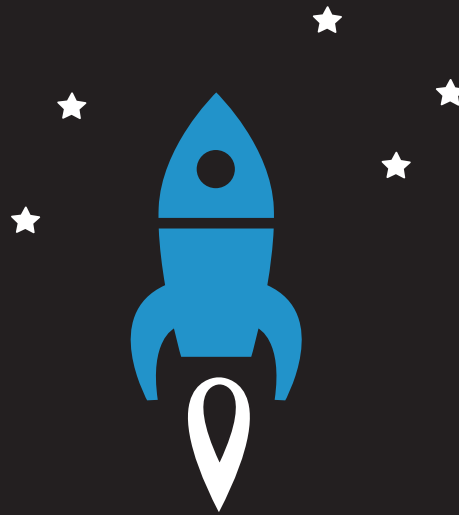


# The Perfect Website Launch

A guide for your next website project,  
from planning to deployment.



**PANTHEON**  
*Website Management Platform*



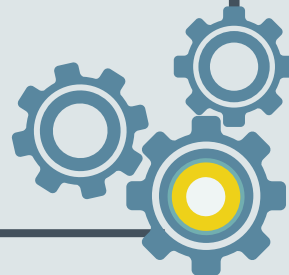
# Launching a website?

**60% of websites fail to launch on time.**

Today, websites matter immensely. But for all the time, talent, and money that goes into a new site, many web teams come across roadblocks that affect performance and delivery time. Whether you have an army of developers, designers, and contributors at your disposal or just a MacBook and a single client, you'll need to follow some essential steps to keep your website project running smoothly from kickoff to launch.

We gathered advice from developers, agencies, website owners, and creatives on what to cover as you build a website. They all gave fantastic input, but the underlying message was clear: **communication across teams is the biggest key to success.**

**If you're working at a company, at an agency, or as a freelance developer, follow this guide as you plan, manage, and code your way to launch day.**



# Planning for Your Website Launch

Great websites start with smart planning. Whether this is your first project or you've launched hundreds of sites, you'll need to begin by building a team and setting expectations. Create a solid project plan by deciding on goals, milestones, and responsibilities for each team member, making sure there's enough room for flexibility when inevitable surprises pop up. Start with these five steps before you do any actual development work:



## 1. Build Your Team

First, decide who will be involved in the project. If you need extra resources, now is the time to find them. If you're an agency, gather your team and assign people to the account. If you're a website owner, decide what will be done in-house and what you'll work on with outside partners. Be realistic in terms of budget and time—if you can't do it well and efficiently, **hire someone**.



From day one, I make a point of deciding on how communication will work with everyone involved in a project. Yes, I code, but I'm best at making strategic technology decisions and driving business growth.

—David Applegate, CTO, Wrestling Mart



We went through a big growth spurt, bringing on a lot more clients. Without really solid planning, it can become exponentially more painful as you get more projects and teams going.

—John Studdard, Managing Partner, Big Couch Media



## 2. Hold a Productive Kickoff Meeting

Once you have a team, get everyone into a kickoff meeting as soon as possible to create a project roadmap. Establish everyone's roles, project milestones, goals, and an approval process for moving things forward. Make sure each team member is set up and trained on any shared tools you'll be using.

### Set goals that let everyone win.

Website projects involve people with varied goals—some care more about aesthetic and usability, others revenue, and others performance. Set measurable goals for each area of importance, then make sure everyone understands what it takes to get there. Be sure to gather current numbers from apps like Google Analytics to create benchmarks for the new site. Useful data to track can include:

- ➔ Website traffic
- ➔ Conversion rates
- ➔ Search engine rankings
- ➔ Form submissions and leads generated
- ➔ Sales generated from site activity
- ➔ Engagement—time on site and bounce rates
- ➔ User journey—the path taken through the site
- ➔ On-page click analytics



Clients want to see results immediately. We want to be proud of our work. When those two things align, it's usually a product of really good communication and planning out goals and milestones.

—Joe Dooley, SEO Specialist,  
The CRUSH Agency



As a frontend developer, my goals are focused on UX and design. I'm confident in a project when milestones for each phase are laid out early and I have access to the technology I need to create a fast, engaging experience for the user.

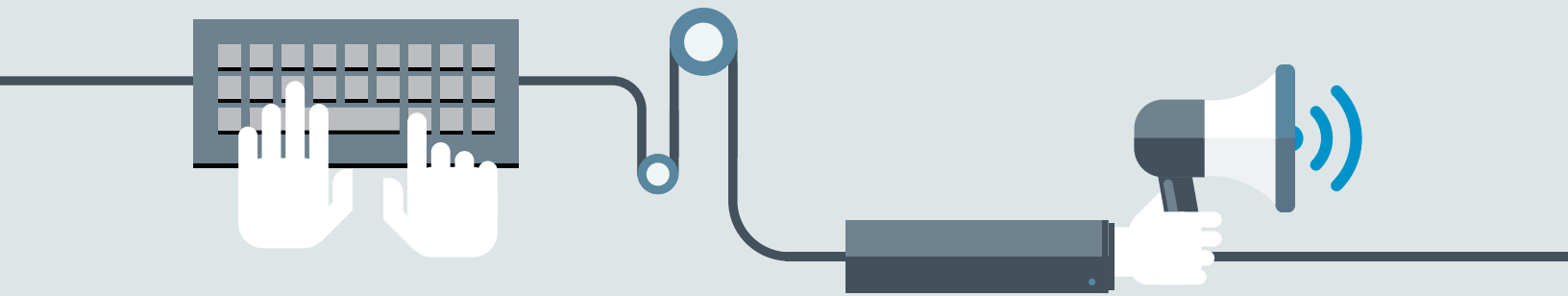
—Helena Zubkow,  
Frontend Developer



Breaking up the expectations of a project into smaller goals helps everyone involved have a tangible sense of progress, and have solid moments of reflection on how everything is coming together. The developer needs to think about these things as much as anyone else on the team, for their own sanity, as well as the overall project success.

—Duran Goodyear, Owner, Alphex Information Solutions





### 3. Lock Down Messaging

Before creating any site content, reach consensus on core messaging and style among every stakeholder. The website owner should be able to clearly explain their company’s mission, product or service, benefits and differentiators, and voice. If they can’t, you’ll need to spend time on this before defining the audience and main message of each web page.

#### Spend time on discovery to get the message right.

If you’re an agency, you can help your clients work this out during the discovery process. If you’re a website owner, this phase is just as useful for you. Identify buyer personas—profiles of each user type, what problems they might have, what they care about, and how you can relate to them. To go more in depth, add buying stages to any persona that’s also a potential customer. Finally, get everyone to agree on core messaging for each persona. You’ll be able to use this throughout the rest of the project as you make decisions on copy for each page or section of the new site.



I make sure my clients know exactly what they want to say about their company. That means starting with a single phrase: one that explains who they are. Then, based on that, creating a message for their different personas. It provides structure and sets the foundation for all other messaging down the road.

—Erica Lee, Owner, Strategic Lee Public Relations



Sometimes it’s not immediately obvious what our clients need. During the discovery process we make sure we understand what drives each team, why they’re using what they’re using, and whether what they’re asking for fits their long-term goals.

—Stephanie Canon, Managing Partner, Chapter Three



## 4. Do a Content Audit

Unless your website is for a new organization, there will likely be plenty of old content to use on the new site. Doing a content audit ensures that a) nothing valuable falls through the cracks, and b) nothing of poor quality makes it to the new site. While it does take time, it's a best practice to take inventory of all your existing material. Use the result to brainstorm, repurpose, and create high-quality website content.



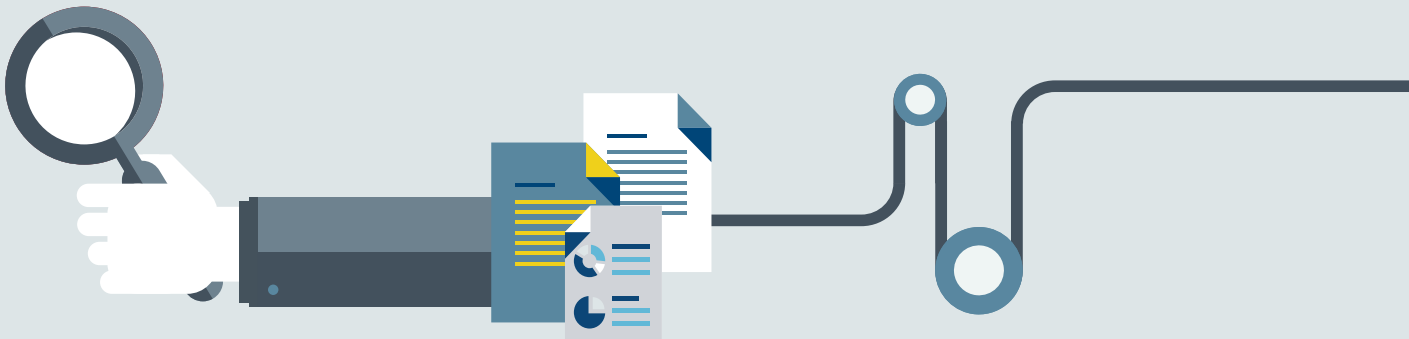
Despite the clear values of the content audit, very few marketers actually conduct one. That's because auditing content is a notoriously painful process. It can take weeks, or even months, to find, analyze, and document each asset your company has ever published online.

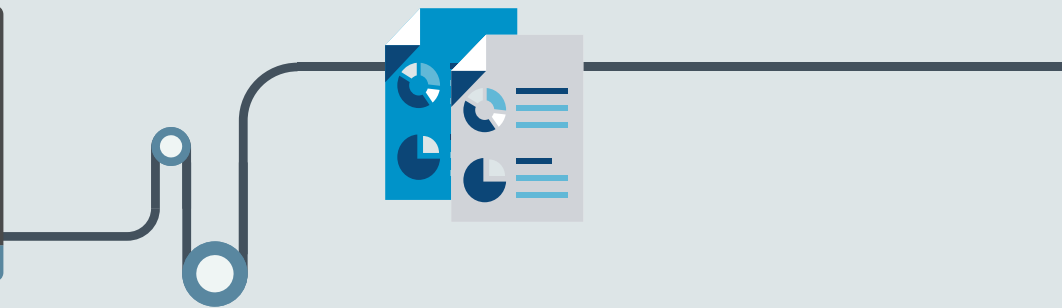
—Toby Murdock, Kapost



### A few tips on making the audit a success:

- ✓ Start with what's live on the old site—inventory links to each asset as well as corresponding landing pages or confirmation pages to reference when building the new site.
- ✓ Use an audit tool like [Kapost's Content Auditor](#). It automates and organizes major portions of the content inventory and audit process.
- ✓ Tag and organize everything. Taxonomies in Drupal and WordPress are incredibly useful, especially in the backend when developers need to surface categorized content.
- ✓ Marketers can find assets hiding in their marketing automation software. Content used for past campaigns should be included in the audit—sometimes these can serve as low-hanging fruit for quick repurposing.
- ✓ Track down sales content too. Datasheets, presentations, and collateral used throughout the sales cycle can often fall through the cracks and are important for maintaining cohesive messaging.
- ✓ Website owners can sync up with their support teams. Documents used for customer service often have more straightforward messaging and can provide clarity around what customers are really interested in.





## Mapping Site Architecture

Once it's time to get started on the actual site, you'll need decide on the correct information architecture (IA). Once everyone agrees on IA, the new sitemap can be used as a reference point for several roles throughout the project.

Why is it so important? The placement of navigation items and structure of pages illustrates both the importance of content and the expected user behavior on the site. Have a strong argument for why the site is organized the way it is, or risk revisiting the fundamentals multiple times throughout the project.



**In articulating an IA – and this goes for the creation of all discovery artifacts – time-box it. Perfection can be the enemy of good-enough, and good-enough is what we need to move the project forward, and trigger the next iteration. As we iterate, we learn; as we learn, we improve.**

—Andrew Mallis, Solutions Architect, Kalamuna



**Spend all the time you can afford on really understanding what your clients needs their site to accomplish. If you get that right in the information architecture, you have something you can always refer back to that resonates with everyone. That said, don't be afraid to improve it. You'll find out things later that are important to consider.**

—Jake Goldman, President & Founder, 10up



**Ready to build? Make sure you get together and ask the right questions of your team first.**





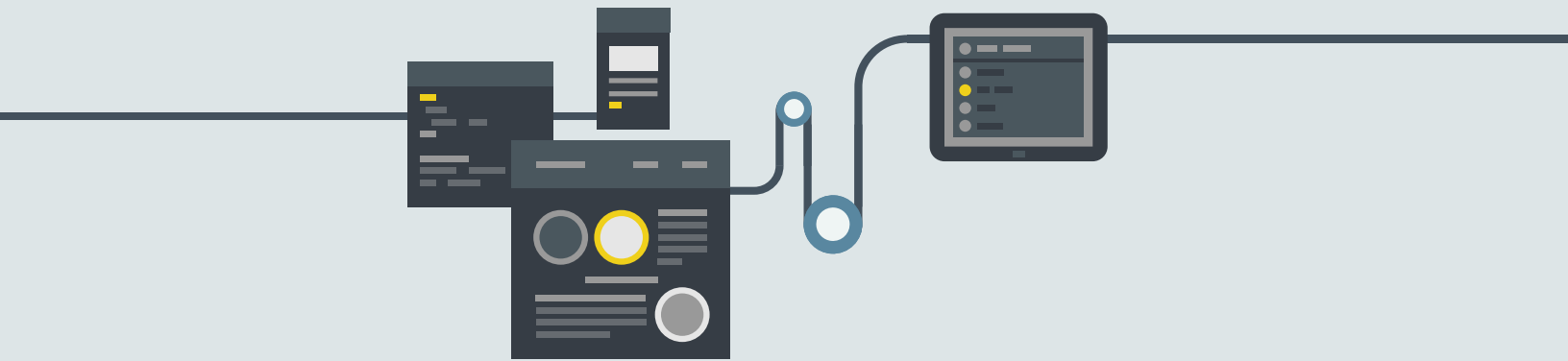
# 10 QUESTIONS

technical & non-technical  
teams should answer  
together

**Here are a few questions to pose with developers, project leads, and site owners all present in the room:**

- 1 Will we use an open source or proprietary solution to manage content?
- 2 Who will be responsible for pushing new content on the site?
- 3 Will it be easy to integrate technology like marketing automation?
- 4 What if we want to create a landing page for a campaign?
- 5 What if we need to add another website?
- 6 What if we want to bring out outside vendors?
- 7 What are some things that slow down workflow that we can avoid?
- 8 How can we all help make it safe and easy to make content updates?
- 9 How do we protect against security vulnerabilities?
- 10 What are some typical risks to site performance and uptime?





## Building Your Website

When it's time to build the site, make sure each team member has what they need to do their job well. Here are some tips on how to be as productive and successful as possible:

### Give Developers the Best Workflow Tools

Development teams of any size need tools that support continuous integration and agile development. Even a single developer can accomplish more when they can **code and test in identical environments**, or use version control to test new features. On a large team, having a clear view into developer activity, commits, and planned deployments keeps everyone informed. Investing in workflow tools will drastically decrease time spent bug-fixing and finger-pointing down the road.

### Don't Bog Down Your Team with Sysadmin Work

If you're still managing infrastructure for your website, the burden of sysadmin work is falling on the project's developers. For in-house dev teams, that means many hours and a lot of money spent dealing with servers—instead of making improvements to the website. For agency teams, it means losing billable hours every time a developer does DevOps work.

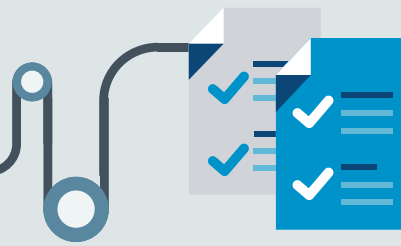
Developers can do their job far more efficiently by using a website management platform that automates DevOps. Consider foregoing basic hosting and using **newer technology that eliminates sysadmin tasks altogether**, letting the team focus on functionality, iteration, and great content.



**We have hundreds of sites to manage, all based on custom distributions in Drupal. We love not having to deal with any sysadmin stuff. We use a website management platform that automates it.**

– Michael Carpenter, Web Manager, Vancouver Island University





# Prepping for Launch

Several weeks before your planned launch date, start checking off your final to-do list. Train the team, test the site, and optimize for performance so you can celebrate on launch day.

## Get Everyone Trained on Your CMS

If you're not using a CMS, you're in for a long road of slow-moving content. Open source options WordPress or Drupal are your best bets—many people are already well-versed in them and they're easy for non-technical people to learn. Avoid issues after launch by training content contributors and marketing team members on how to make changes to the live site.

## QA Site Functionality with the Whole Team

Set aside some time before launch to review and validate each feature of your site. All team members should participate. Test all forms, links, redirects, landing pages, and social integration to ensure your site is flawless. Keep an eye out for 404s and double-check content as you go. Spending time on this before launch will inevitably save you embarrassment later on—whether it's a spelling mistake or a bad form.



**"You can do testing even before you launch. Set up a dev environment for users to go in and give their reactions. Your employees, friends, family, or a service like ours can all serve as a user base. Sometimes the most obvious things are hard to catch when you've been working on the site every day."**

– Stefan Rössler, Userbrain



## Do Some User Testing Before Going Live

If you want to be ahead of the game, build in time to do user testing before you launch. Set up an environment where logged-in users can interact with the site and provide feedback. This is different than having the web team QA—you'll want fresh eyes from people who have never seen the site in progress.

Think you're ready?  
Run through this technical  
checklist before you launch.

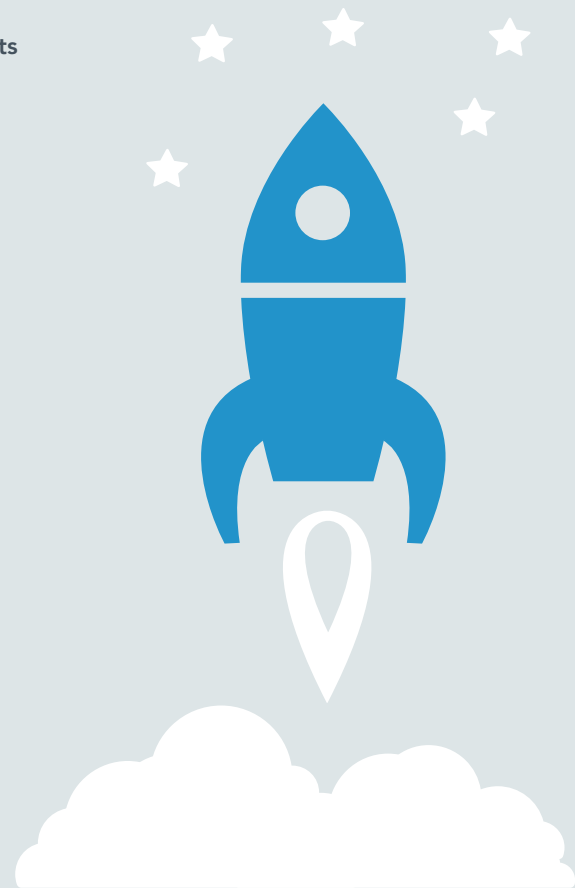




# Technical Launch Checklist

Once your site looks and feels ready, it's time to run through your technical checklist. Use the list below to detect possible performance issues and plan for things like backups, deployment, and releasing fixes after launch.

- ✓ Schedule backups for development, testing, and production environments
- ✓ Load test common user scenarios with a tool like Blazemeter
- ✓ Test performance with a monitoring tool like New Relic
- ✓ Ensure caching is properly configured for optimized load times
- ✓ Set up backend caching to improve performance for authenticated user
- ✓ Check for insecure and vulnerable code
- ✓ Ensure all plugins and modules are updated and secure
- ✓ Check for plugins or modules that are known to cause problems
- ✓ Detect large files that should be served by a CDN
- ✓ Check database schema for large tables and correct storage engine
- ✓ Test search functionality, performance, and index schema
- ✓ Verify domain and http/https redirection sends visitors to canonical domain
- ✓ Test DNS settings and lower the record TTL prior to host switchover
- ✓ Create a complete punch-list for deployment steps including DNS switchover
- ✓ Have a plan for releasing quick fixes to minor regressions in the new environment
- ✓ Have a plan for how the next phase of work after the launch will be developed, tested, and deployed



# Don't Let Roadblocks Slow You Down

When you're well on your way to launching a great website, the last thing you need is an unexpected delay. Here are a few tips to keep your project moving along at top speed:

## Don't Succumb to Perfectionism

From messaging to feature-building, resist the temptation to make things perfect before you launch. Know how long you're willing to spend on each stage and when it's "good enough". While it's important to deliver a product you're proud of, embrace the practice of constant iteration. Launch a great site, but continue to optimize and perfect the experience after launch.

## Beware the Usual Suspects

What slows a website down? It's often the same culprits. Build in extra time or pay extra attention to these common web project roadblocks:



**Integration with third party apps.** Build in extra time for QA and testing for apps that require integration with your site.



**Agreeing on final content.** Enforce tough deadlines and have an editor do a round before launch for voice and consistency.



**Differing opinions.** Whenever possible, let data speak for itself. If it's completely subjective, designate a decision-maker for each area of the project.



**DevOps disasters.** Use reliable technology that automates sysadmin work to avoid last-minute server issues.



**Building and testing new features.** Use continuous integration and workflow tools for rapid prototyping.



**Approval and billing delays.** Communicate regularly with stakeholders, agency, and website owner. Set milestones for deliverables.



A website has a lot of stakeholders weighing in on content. Make sure you set hard deadlines on final content, and secretly build in another week or two to stay on track.

—Anthony Kennada,  
VP of Marketing, Gainsight



Prototyping can take a while if you don't have great tools. We use Pantheon for instant prototyping for clients, turning high-level specs into a prototype within 3-4 hours. Anyone at Kalamuna can do this—not just developers. That's huge.

—Mike Pirog,  
Co-Founder, Kalamuna



You need clear project management structure for defining when and how stakeholders will meet and progress with work during the entire scope of the project. Schedule meetings with deadlines at project start to keep the project flowing and decisions driving progress.

—Brent Weaver,  
Founder, uGurus



# Launch Day! Website, Meet World

On the big day, rally everyone on the project for a successful launch. You know you can handle the traffic, your content is gold, and all functionality has undergone extensive QA. Thank your team for all of their hard work, go live, and toast to the perfect launch.

