emagine

Rules of Engagement

How to Plan Your Next Website Project

The Rules of Engagement

Introduction to the Rules

Background:
Until recently, the Internet was a place of chaos. Being exciting and expressive was the thing, not being functional and usable. Although all manner of sites, information and designs made their homes on the web, there was no place for traditional business rules. Breaking the rules was the battle standard and everyone rushed to raise it.

Companies knew they had to stake a claim to a piece of the Web, and most jumped headlong into the race with no clear plans. Capital was plentiful and nobody seemed bothered by the lack of accountability or return on investment. Strategy and methodology also found themselves on the outside looking in. In many cases, management led the rush with no clear idea of how to use the new tool that they had been given.

Those times are long gone.

Even before the September 11 tragedy, the Internet forced a change upon the economy as the dot-com's disappeared into a self-induced mass grave. In the aftermath, companies are reconsidering what their site means to the company and how they can use it to increase their market share and bottom line. As the dust has settled, B2B companies are realizing the immense potential that the Internet presents for them.

On the business side, budgets are being squeezed and CEOs demand returns to justify expenditures. Marketing departments are viewing the web site as another means to generate sales leads for their companies. Traditional business rules have returned with a vengeance. In short, businesses are now adapting their models to incorporate the Internet, so as to harness the limitless audiences they can reach.

Users have overcome the thrilling early days of "designtechnics" and splash pages. Speed and usability have become their doctrines. Reading is out, scanning is in. Users come to sites with innate knowledge of where page elements and navigation are supposed to be and what they are supposed to look like. At the first hint of confusion, they are off to your competitor's site, hoping to find the prize. When they leave, so do sales leads and profits, the worst scenario in today's business world.

Forty years ago, Peter Drucker stood up and issued the following business axiom: "The business of business is ***identifying, acquiring and retaining*** your best customers." Today's Internet world offers an unparalleled opportunity to do just that, **if your web site is efficient and usable**. This view should dominate your web site's life cycle.

Purpose:
This paper is a series of steps with one goal in mind: to build an efficient, engaging B2B marketing web site. Our experience in the Internet world lies principally with the B2B community. The principles and steps outlined in this paper can easily be applied to B2C or e-commerce sites. The Rules will not touch heavily upon databases, dynamic sites, content management systems or other technical issues. We are focused on the general construction principles that guide us as we work with our clients.

The Rules of Engagement are so named due to our belief that users need to be **engaged** with design, development and content that are targeted at them, not a general segment of the public. The general public doesn't come to a B2B site; people who are looking for something from that company come to the site. If you **engage** them with content and offers that they need, they will give their strategic data to you, allowing them to be qualified, incubated and ultimately converted into customers.

The Rules of Engagement have been a six-year evolutionary process. Each has been worked out over time, and together they have resulted in sites that are successful and effective. When our system is introduced to new or prospective clients, it is received well because they see not only how to build this tool, but also that it is built with a purpose.

Effective Web sites
The Rules are a simple strategy that, when followed, will produce a successful and effective web site. An effective web site is one that **attracts prospective customers and converts a certain percentage of them to sales leads**. If users are coming to your site but none are being converted, your site is not effective. At some point in the process you will sit down and set some realistic goals for the site, but they must be monitored closely. Keeping this in mind, it's time to learn the Rules.

However, before we start introducing our "Rules of Web Engagement," it's essential to take a quick look at the Ten Most Common Mistakes that happen to web sites...

Lack of Overall Strategy
These dinosaurs once roamed far and wide, usually looking pretty and flashy, but with no real purpose. They still exist in great numbers.
No Clear Objectives or Definition of "Success"
Someone decided that they needed a site and rushed out and got one. So it was built with no idea of what the company did or what to do if someone did wander across it.
No Integration with other Marketing Activities … Web Site is often an Island
Usually the site is excluded from marketing plans or ideas; hence it sits quietly, alone.
No Plan to Drive Prospects to the Site
If somebody stumbles on it by accident, it must be working.
Wrong People Deciding on Content
Sure, you know what your company does ...but what about the user?

No Strategic Capture of Prospect Data
A "Contact Us" form is not strategic. How are you obtaining the sales leads that drive your business?
No Solid Plan for Incubation of Leads
The form feeds to the secretary, who is too busy to pass them on to the sales manager, who is too busy to distribute them to the salespeople. *Nobody gets back to a lead that came looking for you and is willing to give his or her information to you.*
Misconceptions Based on Self-Focus-Group
You, the CEO and the secretary are not a representative sampling of visitors to the site. Besides, are you going to overrule the CEO?
Lack of Ongoing Activity Analysis
Now that it is built, is it justifying the expenditure and how do you know? How many people in your sales pipeline came from the site and how many have been closed or incubated?
No Content Management System
Surely somebody in your company has the time and knowledge to use an FTP program and knows HTML. Let's give that "hat" to somebody who has the time to learn it.
Overall Lack of Attention
Out of sight, out of mind ...just like your taxes.

Rule #1: Define the goals of the interested parties

Who is involved?
For a B2B marketing web site, there are two complementary parties who are involved in the site: the **users** and **your company**. The needs of both must be met in order for the site to be effective.

Every journey starts with a first step, and it is here that you must begin yours. At first glance this Rule can be overlooked; but in reality, it is the foundation upon which everything else is built. This Rule encompasses both your goals AND the goals of the users who are to enter. Fail in either area, and so too shall your site.

It bears stating the very obvious here: if your site cannot meet the needs/goals of the users who visit – or worse, they can't find the information – **you won't get them as sales leads**. They will simply disappear to your competitor's domain to find what they need. If you don't meet their needs, your goals are doomed. The Internet is full of sites, some of very well-known companies, which failed in this area.

To be successful, you must know the needs of your client. It sounds very obvious, but many a site has ignored this first Rule and doomed itself to fail.

Users:
Why are users going to come to your site? **What** are they seeking? **Who** are they? These are all very important questions that have to be answered. If you don't know those answers, you will be the proud owner of an ineffective web site.

Users come to a site for a variety of reasons: to learn about the company, perform some type of competitive analysis (note... thus indicating some interest in your products/services!), solve a problem, respond to an offer and receive news. Often there will be several types of users that visit your site: some may be first timers looking for basic information; some may be established customers who need to get very specific information; and others may be looking for in-depth technical information. Right away, we have established that we will have to provide several different tracks for visitors to take.

WARNING: this step may be the most important in the entire process. If you don't get this right here and now, you will be in serious trouble at the end of **Rule #10**. *Talk to people in your target audience, learn what they want and need, and don't rely on your perceptions.*

Your company:
Clients often tell us, "O*urs is a niche market; our customers know us and what we do."* They then proceed to give us a discourse on why these steps aren't important. They mistakenly believe that they don't need to define user's goals or isolate different paths for users. So they insist on navigation and content that looks good to **them**, but leaves visitors confused and frustrated.

Your needs are very clear (we hope): generate demand for services, capture that demand, educate your audience, prompt an action, reinforce your brand and most importantly, channel the user to his goal.

The most important goal of your site should be to **generate and capture demand**. To that end, you must know your audience and the needs they want to satisfy when they come to your site. End of discussion.

Goals:

- **Determine the target audience**
- **Break down the audience and identify each group's needs**
- **Understand your goals and what you want from each user.**

Rule #2: Build a rough architecture
Create a path for each segment of your target audience:
Based on Rule #1, we can begin to lay out the architecture of the site, based on the paths we are going to steer the user down. If we have a clear idea of why people come to our site, this step can be easy. If we are just throwing together an architecture based on our *perception* of how people see our company or our existing content (with no plan or goals), this is just another step in the wrong direction.

The system:
As long as you use some system, just do it! Whether you use Post-It notes or draw flow charts or fill “white-boards”, you need to lay out the paths in an orderly manner so everyone involved can follow them. Different companies will use different methodologies here. The final goal of this rule is that someone flowcharts the main paths that you want the user to travel. Don’t lose track of the fact that you are building paths – not pages – in this step.

It is here that an information architect, or a company that specializes in web strategy, is helpful. A view from outside the company is always good, because even if your market is small and you think your customers will understand what you do and where to go, odds are they won’t.

As you sort through the paths, your content needs will fall into place. At times it may seem as if there is duplication, but that may be natural. Customers taking different paths will still need information that overlaps their respective locations. Just organize the information into logical paths and don’t worry about replication of data at this point.

Goals:
- **Build rough paths for each segment of the target audience**
- **Identify what content you will need for each path**
- **Have a flowchart of each path**

Rule #3: Refine and consolidate the architecture
Get specific:
On the surface this Rule may seem a bit tedious, but taken in context it is as important as its predecessors. By spending some time laying out the user paths we want, our **navigation** will be a snap. By further creating each step in the path, we will refine what we need for content and pages.

In Rule #2 we created a rough architecture, based on the paths that we want the user to take. By profiling our audience, we can create “streams” to take users to the information they are seeking (and trap some strategic data along the way) ...rather than having them wander around the site, get frustrated and leave for the competition’s domain.

Identify the steps in each path:
Begin by examining each stream individually and deciding what information will be needed as users progress along. For each stream, *pretend you are a user and identify the information* you will need by asking questions that would help you. Based on your answers, the pages that you will need will begin to take shape.

Somewhere in the path, you are going to offer something to that user to get them to voluntarily give you their strategic data. This is the best time to decide what kind of offer would appeal to them and how you will get their data. Usually it happens near the end, as they are approaching their goal. This data will be used to incubate the user and eventually turn them into a sale. Here you will also identify what you are going to give them in return: product information, a newsletter, etc.

It is going to be different:
At some point, someone will voice the fact that the web site is not mirroring the organizational structure of the company. Resist the urge to immediately throw everything away and start over, using your company's corporate structure as a blueprint. To achieve your goals, the site must be built to correlate with the *users' tasks and needs.*

Remember, the **goal is to turn the visitor into a sales lead**. If you do not give them what they need in a form that is easily understandable, they will depart without fulfilling *your* goal, which is to convert them into customers. In order to do this, you must give them something that they need.

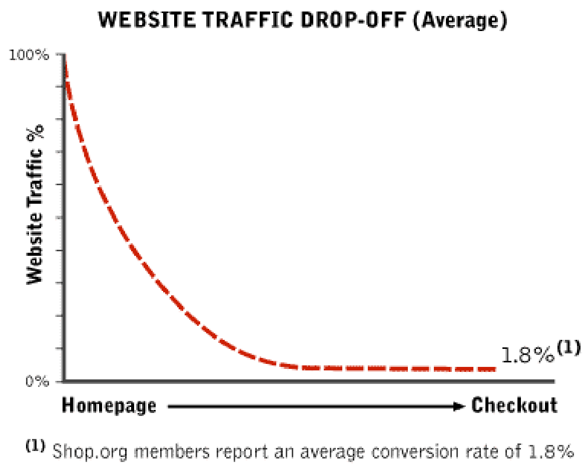
Goals:
- **Identify the pages in each stream**
- **Create an offer for each stream**
- **Identify what you are going to give them and how**

Rule #4: Navigation
The lifeblood:
Now that we have profiled our audience, their needs and the actions they are most likely to take, we can create our navigation. With the architecture of the paths in front of you, it is now time to create the **navigation** that will guide them around the web site. The navigation is the lifeblood of your site; so it is important to make your labeling say exactly what it is in terms the user will understand.

Keep it simple:
The most important thing about navigation is that it must be specific and clear. People on the Internet usually check their patience and reading ability at the door on entering. Nobody reads and processes information in the traditional sense ...nobody! Effective navigation is simple navigation. If you are vague, odds are your users will never even get into the path you have laid out for them.

Instead, most people will enter a site and immediately begin **scanning** feverishly for one of two things: anything that looks remotely similar to what they want, or something that looks like it can be clicked. This is how people make decisions about where they want to go on the Internet. It is a cold hard fact that many companies have yet to understand.

As the chart below shows, the longer it take to get from the homepage to an action page, the more people will get frustrated and simply drop out of the site. Across the Web, this is known as the “leaky bucket” effect.



Your navigation must avoid “company talk,” the jargon that most companies use to describe the products and internal processes that are the lifeblood of any business. Using your paths as a base, create your navigation labeling. Try and look at the labeling as the user would. You may think that your “company talk” is the industry standard, but odds are that some of the visitors to your site will have learned other lingo, or be decidedly non-technical. **Always aim for the lowest common denominator**.

Avoid complex and innovative navigation structures. Users have become very accustomed to the inverse “L”, where the main navigation runs across the top of a page and sub-navigation appears on the left. Flashy, tricky rollouts and sliding menus are cool and in certain cases very useful, but they all require some sort of visual trigger that needs to be operated to make them work. If your menu needs an action to use it, you have to tell them how to see it. If it isn’t apparent, the user won’t stay very long.

Provide **persistent**, constant navigation that lets the user know where they are at all times. This is accomplished by placing navigation and page title in the same location from page to page. Also, follow standard convention by repeating top-level navigation at the bottom of each page, giving a user who has scrolled to the bottom of a page an alternative to scrolling back up.

Good vs. great:
Good navigation helps the user find his information. Great navigation helps the user find information, but also satisfies *your* goal of getting information from them. In the best-case

scenario, your navigation will subconsciously guide them to an offer that solves their need as well as yours! That is **great** navigation.

Goals:

- **Create your navigation system**
- **Navigation labels should be clear and concise**
- **Avoid "company jargon"**

Rule #5: Deciding on the look, feel and imagery of the site
Make it appropriate:
Here you will decide on the overall look and feel of the site. You can get a general sense of how you want the site to appear before handing it off to a designer. The importance of this step is that it will help create a site that is *appropriate for the image of your company*. Your imagery and look should tell what it is your company does, even if there was no content or navigation on the page.

If your company is a telecommunications company, you aren't going to want a site whose imagery conveys the appearance of a comic, graphic-heavy site. More than likely you aren't going to want images of people on the beach, hiking across a snowy mountain or of cartoon characters. You will want to use **professional**, industry-appropriate images that convey a sense of what you do.

Splashy and flashy aren't necessarily cool:
Being creative simply for the sake of being creative **will fail**. Remember back to a year ago when splash pages led into every site? Remember how creative and cool they were, full of animation and action? Remember how you had to figure out if this was the site you were looking for because you couldn't tell from the images and message? And worse, you had to sit through the action or try to find the "skip" link. Oh, what fun that was!

Your look and feel, combined with messaging (titles, subtitles and content) had better tell what you do and how it can benefit the user – **immediately**. This is important on *every* page, not just on home pages ...because people can bookmark pages, come in through search engines, or follow a link that someone sent them. *They don't always come in through the front door*.

How many times do you hit a site that is full of really cool pictures, but they leave you with no idea of what the company does? Many sites today are guilty of just that problem. The look says nothing of what benefits the user can derive by using this company or its products, but it is creative and flashy. Leave no doubts: tell them what they want to know.

The following questions will help guide you:

- What is the primary message you are trying to convey?
- What are the secondary objectives and goals you want to achieve?

- How does your company differentiate itself from its competitors?

Goals:

- **Identify your general look and feel**
- **Decide if stock photography is suitable or custom pictures will be used**
- **Avoid being creative for creativity's sake alone**

Technical Note
Technical Considerations:
At this point in the project your back end development, database environments, middleware and content management systems can all begin to be developed. Most B2B companies are building sites that are dynamic, allowing them to control content and pages.

With the paths and pages well-defined, you can identify which pages you need to be able to control, and in what sections you may need to be able to add, delete and edit pages. Whether you build the systems in-house, use middleware or outsource the whole backend... once the navigation and paths are set, then you can begin the "back end" part of the project.

Other points to consider are:

- Data-driven or static?
- What language will the site be built in? (Cold Fusion, ASP, PHP, JSP, etc.)
- Hosted internally or outsourced?
- Hire a webmaster or outsource the maintenance?
- Who internally will be responsible for the site?
- What are the procedures if the site crashes?
- Will the site be searchable?
- What Search Engine strategies are best and who will handle it?

Rule #6: Develop your content
Specificity counts:
Here is a rule that almost all sites ignore. As pointed out in **Rule #4**, reading has quickly become a **lost art** on the Internet. Nobody does it, and yet companies still choose to simply throw content from their printed marketing literature onto web pages ...burying what the user is looking for under volumes of words that aren't getting read.

Since we have laid out paths for the user to take, we can look ahead and see what pieces of information we are going to need. Now we are going to start developing content for each page, based on those paths and on the goals of the users. The content you will write will be specific and tailored to each page on the path.

Shorter is better:
When writing content, always remember E.B. White's seventeenth rule in the Elements of Style:

Omit needless words. A sentence should contain no unnecessary words, a paragraph no unnecessary sentences, for the same reason that a drawing should have no unnecessary lines and a machine no unnecessary parts.

After you write the content, go back and get rid of words. Let it sit, read it again and ask if it is meeting the users' needs on that particular page. Does it speak their language? Someone will undoubtedly point out that you are coming up with completely different prose than the normal company printed literature uses. Politely send them away, because you are doing just that; you have *very precise content* to write.

Remember: users aren't going to sit through paragraphs of information that is obscuring what they are trying to get at. If it doesn't jump out at them as they scan the page, they are leaving.

The following questions will help guide you:
- How will content be created? In-house or outsourced?
- What department will create the content?
- What portions will be updated regularly?

Goals:
- **Create targeted content for each page**
- **Try to omit as many words as possible**

Rule #7: The Homepage
Don't put everything on the homepage:
Here is another test of your willpower and resolve. You have come this far; don't weaken at this crucial phase of the process. Remember, no matter how well-known you *think* your company is or how wide-reaching its dominance is, the homepage needs to do two things (and two things only): tell what you do and lay out the paths for your audience to take.

"Declaration of Self":
Write up what you do and/or what you make. And keep it brief and clear: it should take less than 5 seconds to read and comprehend. Too many sites don't adequately inform users what they do the very second they hit the page. As a result, users have to search to make sure

they are in the right spot. Forcing users to search for what should be obvious translates into the following equation:

frustration x wasted time = a quick exit

This is a proven formula that is still a dark secret to many corporations.

Another misconception is that because everyone knows who eBay, Amazon, UPS and Yahoo are, other companies believe they are equally well known in *their* industry. Let's go back to our favorite customer refrain: "Ours is a niche market. Companies in our industry know us and what we do."

The bottom line is that companies don't do research when looking for a new vendor or product... *people* do. When the CTO or someone else in upper management requests some research into new services or products, more often than not junior-level people will do the actual hard labor. They are the people who are going to look for you, and if they can't figure out what you do, you will be passed right by. If there are 50 companies in your market and 4 people at each are doing research, that's 200 people who need to figure out what you do in less than 5 seconds.

It is true that some CTO's may point people in the right direction or tell them where to go, but even if that number is a relatively high percentage – say 40% – that still means you need to be clear and obvious on your home page.

Set the paths:
Since we have a clear navigation and labeling system ready to go, this step is a breeze. On a piece of paper or in a software program, sketch out where you want the navigation to go and where you want your "Declaration of Self" to go. Make both very prominent and put them in places that users have become accustomed to seeing them. You have successfully completed your very first wireframe.

A **wireframe** is nothing more than a blueprint for the site design. By creating this document, you give your designer a better feel for what you are looking for, as well as ensuring that your look and feel are consistent with the areas to which you want to direct specific users. It will also help stop any non-essential creative ideas that do not really serve a purpose or function. Those once trendy splash pages that once dominated the entrance to every site are a great example. They served no purpose other than to make users search for a way to shut the movie off.

Goals:

- **Say who you are and what you do**
- **Lay the paths out prominently**

Rule #8: Create the Interior pages
Keep it consistent:
Now, based on your navigation and paths, build the wireframe for each of the paths. Remember to keep the main navigation consistent with the navigation on the home page. This step is the reason that you did the legwork back in **Rule #4**, laying out the path and what needs/info the people are going to be looking for. The pages in a path become the secondary navigation that you will need.

Most users have become acclimated to seeing the main navigation across the top and sub-navigation to the left. Since we want users to move freely and quickly, it pays to adhere to these conventions. Build one wireframe for each of the paths; it will become the template for each path. Try to differentiate the paths by the use of images, themes, headers and color. If the background/color scheme of one path is blue, make another green. Once imagery is chosen, keep the images in the path a consistent theme.

Goals:

- **Build the pages for each path**
- **Be consistent with placement of navigation, color and images**

Rule #9: Edit the content and create actual pages
Build the pages:
Go back to the content that you created in **Rule #6** and look at it again. Go through it and make sure that it is specific to the page and path that it has been created for. Cut as many words out of it as you can, keeping in mind that you are dealing with scanners, not readers. Short and simple.

Have other people, preferably in the audience you are anticipating, read the content and get their suggestions. Letting people from your company read it is a bad idea. They will undoubtedly point out that it is missing lots of company jargon and other useless information. You need to appeal to your *audience*, not the marketing department.

Once that is done, begin putting the content into the pages and build each path.

Goals:

- **Check your content for specificity**
- **Build the pages**

Rule #10: Usability testing and error testing
Don't avoid it:
This is the part that many companies try and circumnavigate. It is the most boring and tedious part of the whole process. It is also very important, as a site that breaks down repeatedly will not only put egg on your face, but the wrath of the CEO squarely on your shoulders.

One good solution to usability and error testing is to build two separate groups (the Romans and the Huns) to test it. The Romans should be made up of your **target audience**. They will help with the usability aspect. If they can't understand the paths you have developed, or the content that has been written, then you need to backtrack and look at the content/paths that you thought were appropriate.

The Huns, on the other hand, should be made up of people (random, non-targeted) who will just blow through the site, ripping and tearing at it. The idea here is that these people will use the site in ways you didn't think of! The people who build sites don't always take into account that users don't always use it the way they THINK it should be used. Huns will try to do things that you thought nobody would try; they will find flaws and bugs nobody else could.

The setup:
Each group should be set up on computers with multiple browsers (Internet Explorer, Netscape, etc.). They should conduct **separate trials on each browser** on both Windows and Mac platforms. Don't let them just randomly click through the site in a carefree manner. Let them meander awhile, but then create specific things for them to do/achieve. Have survey sheets made up so they can rank important features/attributes of the site (loading time, ease of use, messaging, navigation, etc.).

After each is done, you should have a list of things that need to be fixed, tweaked or just plain redone. The site should have been looked at via different browsers on different platforms, which is important (as many a developer has discovered) because code and browsers and platforms don't always play together nicely.

Bottom line: Make sure it works – **and works well** – before you let the public play with it.

Goals:
- **Create two separate groups to test the site in different manners**
- **One group should be looking at content, labels, etc.**
- **The other group should try and break the site**

Rule #11: Revisions
The moment of truth:
After the Romans and the Huns are done playing with your site, there should be a list of minor technical issues that you need to address before putting the site on the Internet. If you have followed the Rules and followed them well, your site is just a **few small fixes** away from completion.

If by some small chance, the Romans are completely confused by your design and content, then you must backtrack through the rules. Hopefully, a small change in the labeling will clear up the confusion, or perhaps the imagery isn't what they thought was appropriate.

But if nothing appeals to them, it usually means you had the wrong target in mind; and that means you will have to start over again . . .

Goals:
- **Identify and solve problems**

Rule #12: Goals
Measuring the results:
Now we must put some thought into the goals of our site and how we can measure them. Doing this allows us to justify the site's investment, determine what sections of the site are working effectively, and see if our target audience is finding us and which channels are most effective in getting them to visit the site.

ROI can be complicated to calculate if your company doesn't have the proper information. By whatever means your business uses to justify its investments, try to calculate how many sales the site will need to generate to pay for itself. At this time you should create goals for the site, whether it is the number of unique visitors that hit the site in a period of time or the number of sales leads it produces.

Sales leads are our favorite goal, since we believe that is what the site should be returning to us. Knowing the number of visitors that have entered the site will help us determine what percentage of visitors we have converted into sales leads. At first the goals may seem out of line, but you should also make plans to consistently review the goals so as not to make them either unreachable or too low.

By determining where visitors came from (search engines, banners, etc.) you can determine how effective incorporating the web site into the marketing effort of the company has been. This can help you determine where you need to step up your efforts in driving activity to your site.

The log files can also tell you where the traffic is going on your site. This is important when looking at the pieces of the site as a whole. Determining which pages are the most heavily trafficked allows you to revamp the lightly-viewed pages and decide if they are as important as they once were thought to be.

Goals:

- **Identify and solve problems**

Conclusions:
Putting together an effective B2B marketing web site is a matter of doing your homework and then organizing the architecture to reflect the nature of your target audience. By applying a systematic approach, your web site can and should return viable sales prospects to you and your sales force.

It is paramount that you know who is coming to your site and what they are looking for. Without this information, you cannot tailor your site to meet their needs and, in return, get their strategic data. Although a small percentage of users will be ready to buy, most will need to be incubated before they are ready to commit. These are the prospects that will make your business successful.

A methodical design, aimed at helping facilitate the desired flow of information to each user, will keep them engaged. Through the use of specific content, appropriate imagery and precise navigation, the site will make very clear what your company does and what products and services it can offer them.

By following the Rules, your company can avoid the “Ten Most Common Web Site Mistakes” and help increase the number of qualified sales leads that come to you from the Internet. More and more people are turning to the web to do research; by following the Rules, more and more of those people can become your satisfied clients.