

Guide to

OUTSOURCING YOUR WEBSITE DEVELOPMENT PROJECT



expert
market

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ABOUT EXPERT MARKET

Expert Market is the premier B2B marketplace in the UK, Europe and US, bringing together businesses and office product suppliers in one place. We provide comprehensive information to help you make the right purchase decisions, and provide a free quote service when you are ready to find the best supplier near you.

Expert Market's strives to be a global marketplace for starting businesses and a one-stop shop for business managers who want to save time researching and comparing products and services.

Expert Market helps businesses develop and grow by giving you all the tools and information you need to make the right choices, without any of the hassle.

Find out more at expertmarket.co.uk



INTRODUCTION

WELCOME TO THE GUIDE TO OUTSOURCING YOUR WEBSITE DEVELOPMENT PROJECT.



In this guide you will find step by step advice on how to successfully outsource your website development project, as well as pitfalls to avoid and links to other resources and useful tools.

WHO IS THIS GUIDE FOR?

Whether you are small business looking to launch your first website, or an established web business on your fifth remodel, outsourcing your website design project can be a major task.

This guide will be a valuable resource to reference when partnering with an agency to create, launch or maintain a web project.

WHAT SHOULD I EXPECT FROM THIS GUIDE?

This guide outlines how to outsource your web project from beginning to end, with breakdown sections covering everything you need to consider before and during partnering with an agency.

This guide is divided into three main sections:

- **Section 1: Plan for Success**
- **Section 2: Choose the Right Partner**
- **Section 3: Deliver the Goods**

You will find plenty of advice and questions to get you thinking about what kind of website you want developed, as well as practical information on creating documents such as a brief, a scope of work and a project plan.



It is no accident that the first section, Plan for Success, is the most extensive. The more time and thought you put into planning your website objectives and criteria, the easier it will be to find the right partner agency and be satisfied with the results.

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Section 1:

PLAN FOR SUCCESS

■ CHAPTER 1: STRATEGY DEVELOPMENT

WHAT WILL THE WEBSITE DO? WHAT BUSINESS OBJECTIVES WILL THE WEBSITE HELP YOU ACHIEVE?

Before you jump the gun and start thinking about how you want your website to look, or the pages you envisage, you must be very clear on what you expect your new website to do.



“ DESIGN IS NOT JUST WHAT IT LOOKS LIKE AND FEELS LIKE. DESIGN IS HOW IT WORKS. ”

– STEVE JOBS

Don't expect an agency to magically come up with a website that you will love just because they are the experts. You have to be the expert when it comes to the strategy for your new web project.

Is the issue that you have an existing website that is not pulling in the customers or that looks outdated? Maybe you are planning to launch a brand new website. Either way it is best to be clear about what it is you want your website to achieve from the very beginning.

- Are you looking to attract new customers?
- Do you want your website to inform your audience?
- Is it simply a tool to list company information?

The quicker you can pin down what your business objectives are and how you expect the website to help you achieve these, the quicker you can develop a meaningful strategy.

Not only will this provide the blueprint for the brief you will later develop, it is the drive behind the whole project. If your website goals are murky in your mind, then you are likely to be disappointed by the final website delivered by an external agency.

HOW WILL THE WEBSITE DELIVER A RETURN ON INVESTMENT (ROI)?

At this stage you may not know what your budget is for your website project, making it hard to decide exactly what you need it to achieve in terms of ROI.

But you can start thinking realistically about your expectations. A return on investment will mean different things to different businesses, organisations or individuals.

If your website is an ecommerce site, an obvious ROI would be a scenario where your increased online sales eventually returns more than the cost of the project. For other companies the website will be expected to drive new business through enquiries. If you are a campaigning organisation then ROI could be the number of people signing up to your cause, rallied by your engaging new website. Whatever the case, you need to start thinking about your target audience and what it is you want them to do as a result of visiting your website.

LONG-TERM PLAN AND PURPOSE, WILL IT EVOLVE?

Is the project you are looking to outsource a final edition? It may be that this is phase one and that at a later date you will require your website to evolve. It is important that you look to the long-term objectives of your website as it may make the developer's job easier. It will also be cheaper for you at a later point when you shift up a gear and enter a new phase.

It is always better to have the option of evolving your website, rather than forking out for complete overhaul projects down the line as your business grows.

Further Reading

- [Website ROI](#)
- [Never Redesign Your Website Without This Strategy!](#)

■ CHAPTER 2: FUNCTIONALITY AND FEATURES

HOW WILL YOUR WEBSITE FUNCTION TO HELP YOUR BUSINESS OR ORGANISATION?

Once you have worked out the business objectives that your new website is going to help you achieve, then it is time to focus on the nuts and bolts - how exactly is your website going to function? By working out what type of website you need, you will find that you can start to brainstorm what functions your website requires.



WHAT TYPE OF WEBSITE ARE YOU LOOKING TO BUILD?

1. STATIC SITE



Similar to a printed brochure, a static site will usually provide standard information for an extended period of time. Generally it will be a smaller site with fewer pages.

2. CONTENT MANAGED SITE



A content managed website is built using a system of templated pages which enable administrators to have control over the content that is displayed. Many blog systems fall under this category.

3. ECOMMERCE SITE



This is fairly self-explanatory. An ecommerce site is an online shop, from which the visitor can browse and order goods.

4. WEB APPLICATION



A web application site allows for much more complex functionality, enabling your visitors to interact in more depth.

Of course some sites are a mixture of more than one type. [Threadless](#) is a good example of a website that is an ecommerce site, web application, and blog.

WHAT WILL THE WEBSITE NEED TO DO IN TERMS OF FUNCTIONALITY?

This is the time to start planning the functions you require. Does your website need donate buttons or banners? Do visitors need to be able to log in to the site in order to save a profile? Will you include a forum? A product gallery? Online demos? Don't get swayed by functions that you think will make your website seem cutting edge. Keep relating everything back to your specific website objectives.

Further Reading

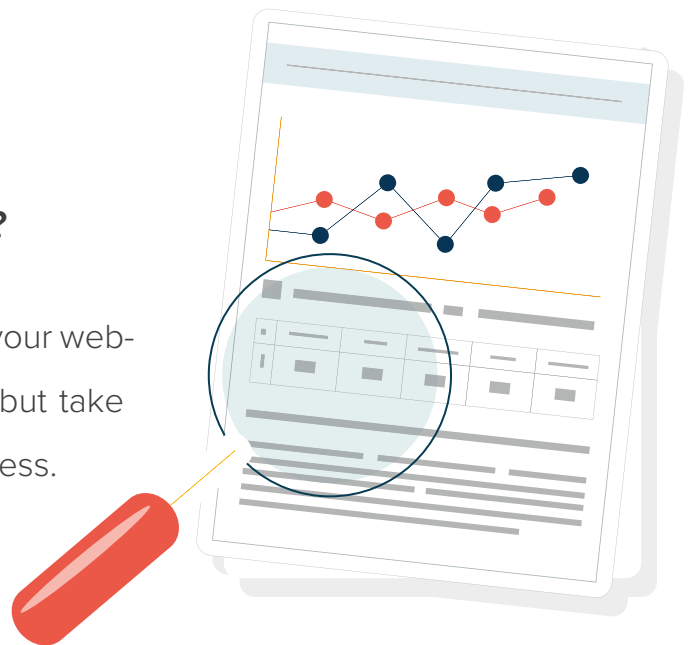
- [Types Of Websites](#)
- [12 Website Features You Must Consider](#)

■ CHAPTER 3: MEASUREMENT

HOW WILL YOU MEASURE SUCCESS?

Once you have a clear idea of the function of your website it is tempting to forge full-steam ahead, but take some time to plan how you will measure success.

Get it right now and you will ensure that when it comes to partnering with an agency, you are working off the same page.



“ IT TAKES AS MUCH ENERGY TO WISH AS IT DOES TO PLAN. ”

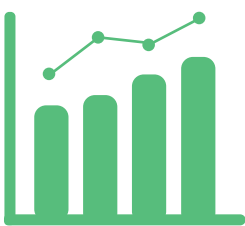
– ELEANOR ROOSEVELT

1. CONVERSIONS

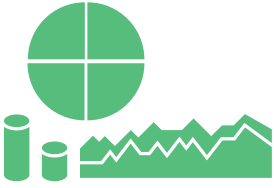


The whole purpose of a website is to get visitors to successfully complete some kind of action. These are called conversions. It might be buying a product or signing up for a newsletter - every successful conversion will help your business achieve its objectives. What are the important conversions on your site?

2. KEY PERFORMANCE INDICATORS (KPIs)



These are the measures that are going to help you to understand how you are getting along. Are you on the way to achieving your goals? You will have to figure these out for yourself but a few examples that may be relevant are form submissions (leads), cost per acquisition, and bounce rate.



Whatever type of website you are aiming to create, if you are looking for a free analytical tool, the chances are you are going to be using Google Analytics. The questions you have to consider now are, how often you will need performance reports and, who will be responsible for generating them? Do you really need to pay for a daily report on website stats? Bear in mind the saying, ‘a wealth of information creates a poverty of attention.’

Further Reading

- [Six Web Metrics / Key Performance Indicators To Die For](#)
- [Best Web Metrics / KPIs For A Small, Medium Or Large Sized Business](#)
- [How To: Get Started With Google Analytics](#)

■ CHAPTER 4: WIDER MARKETPLACE INSIGHT

**WHO HAS ALREADY DONE
WHAT YOU WANT TO DO?
HOW HAVE THEY DONE IT?**



It's not simply a matter of copying a competitor, you need to really get under the skin of what they are doing and how they are perceived.

Then go one step further, and do it better. Get on social media platforms and find out what people are saying about your competition. You may find complaints about their website's usability, poor content and design irks. Marketplace gold!

This is key information for you to develop a better product than your competitor, plus you have the advantage that you are learning from their mistakes at the initial stages of your website being developed.

CREATE A LIST OF REFERENCE WEBSITES

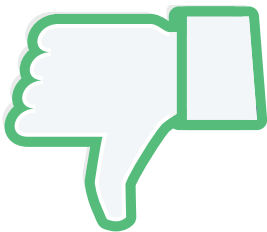
You can go as deep into analysing the competition as you want. You may just want to spend some time navigating their sites, or you may want to use tools that will unearth how they are performing on search optimisation, link popularity and visitor activity.

1. SITES YOU LIKE



Try to be objective and define what it is you like. What ideas can you lift? Be specific. Is the content interesting? Do you enjoy the experience of visiting the competition's website? Is it beautifully designed? If so, what is it that appeals to you? Is it the layout, the colour scheme, the images used? What does the tone tell you? Does their online brand make you weep with jealousy? Is it easy to navigate? Have you signed up as a member in a blink of an eye? Ask others in your company if they share your views.

2. SITES YOU DON'T LIKE



Ask neutral parties, friends and associates who care less than you, what is their experience of your competitor's website? Don't lead them. Just check in to see if they agree with you about the failings of the website and ensure that your criticisms are founded and not mean-spirited.

Further Reading

→ [Website Competitive Analysis Tools: 9 Ways To Check The Competition](#)

■ CHAPTER 5: CONSTRAINTS AND PARAMETERS

WHAT CONSTRAINTS DOES THE PROJECT HAVE?

You may find the deeper you go into planning the kind of website you want to outsource, the more you understand that you can't have everything you want.



It's time to understand your constraints and get realistic about what is possible. It's no good looking to build a rival to Google Maps with the budget for a five-page static website. Like everything else in life, you mostly end up getting what you pay for.

If you need a website with more sophisticated technology - say one that allows visitors to log in and save information to a personal account - it's going to take time and money to build. If you don't have these you may need to reconsider your requirements at this stage.

You are probably going to have to be flexible on one of these:

- 1. Budget**
- 2. Time**
- 3. Required Functionality**

Don't get down about it, just work out what is most important to you and what area you can afford a bit of flexibility. And remember that sometimes constraints can force something more innovative - necessity is, after all, the mother of invention.

■ CHAPTER 6: CREATING A BRIEF

DEEP BREATH!

You are about to pull together the document that will define your expectations for the new website. There is a lot of information that you need to convey but keep it succinct and to the point. The clearer you are at this stage the easier it will be to cut the wheat from the chaff when choosing an agency to partner with.



INTRODUCE YOURSELF

It's only polite! Keep it brief by stating what your company does. What is the size of your company? How do you describe yourselves?

SPECIFY THE FOLLOWING

1. PURPOSE OF WEBSITE

Is this a redesign or a new website project? If it's a redesign share a link to the old and explain what works and what you don't like about it. Why the need for a change?

What are your objectives for the new site? Who is the target audience and how will they be accessing your site?

2. ANTICIPATED FUNCTIONALITY REQUIREMENTS

What type of website do you require? If it is an ecommerce site, who do you bank with? Will there be advertising on the new website? From your research on competitors, can you highlight examples that you like or dislike?

3. HOW YOU WILL MEASURE SUCCESS

Do you have examples of existing marketing materials? Even if you want to scrap them, they can be a good starting point for you to explain what you want to move away from. Is there a certain mood you want your website to evoke? Do you have a colour scheme in mind, such as one that matches your existing logo? Provide some examples of website designs that you like, including those from industries other than your own.

4. TECHNOLOGY

Do you have specific requirements for technology? This may be the case if you already have a pre-existing hosting environment. Check with the IT team at your company if you are unsure. If not, it's still worth reading up on the various different technologies and programming languages so that you have a better understanding of what's available and what the respective advantages and disadvantages of each might be. You may want to consider requesting open source software. Popular open systems will allow you, if necessary at a later date, to more easily swap to other companies to provide website support or development.

5. HOSTING

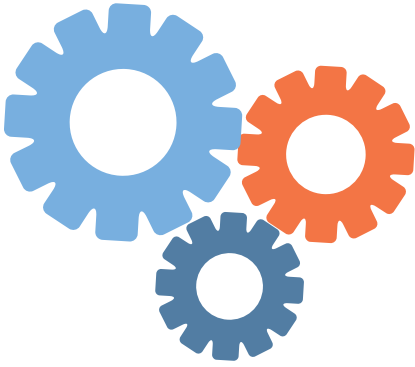
Do you already own the domain? Do you already have hosting? Does this have any implications for your project? If not, what type of hosting will you need? You can choose from dedicated, shared or cloud hosting.

6. CONTENT

Who will be responsible for generating content? Do you have corporate videos, images, logos to include? Even if you are not looking for an agency to provide content for your site, they will need to have some understanding of the type of content you plan to include, so that they can provide the appropriate framework for housing it all.



7. MAINTENANCE



Will you be maintaining the website in-house? Are you looking for an agency to not only develop your website, but also update and maintain it? You may need to consider how crucial it is for your company to receive a timely response if there is a problem with the website. Do you need 24-hour on-call assistance and are you willing to pay for this?

8. WEBSITE PROMOTION

If you are looking for an agency to also help you to promote your website then you will need to consider whether they provide search engine optimisation (SEO), search engine paid listings (PPC), email marketing, social media and banner advertising on related websites.

9. BUDGET

You may or may not choose to include your budget in the brief. If you choose to display your maximum budget then the agencies will compete on the value they can add, and a discrepancy between what you want to pay and the end result will be less likely.

The disadvantage of course is that you may pay more than if you had left it up to the agency to cost the project. If you are going to include your budget in the brief then make sure you break it down to avoid hidden costs later, such as the budget for design and development of the website, the budget for maintenance and ongoing assistance, and the budget for online marketing.



EXPERT TIPS

At this stage it is vital to remember that saving the pounds now may mean you don't fulfill the objectives of your website in the long run. Look back at what you have spent on marketing your business in the last 1-5 years and ask yourself whether you got the return on investment you were hoping for? In the world of web design you really do get what you pay for.



If you have answered these questions and created a clear, informative brief then congratulations! You now hold in your hand the key to success when outsourcing your website project. It is fantastic that you have worked out your requirements, but don't panic if you can't actually imagine what it is going to look like. This is the job of the agency that you hire.

Prepare to be open to new, innovative approaches, just as long as you are confident in your strategy and objectives.

Further Reading

→ [How To Write The Perfect Brief](#)

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Section 2:

CHOOSE THE
RIGHT PARTNER

■ CHAPTER 7: PREPARE TO BE A GOOD CLIENT



THINK IN TERMS OF PARTNERSHIP

You are going to spend a lot of time dealing with the agency you choose to develop your website. It is important that you feel you are entering a partnership with reasonable, respectful people. You may be the one paying an agency and being their client, but don't forget it is a partnership.

“ I SUPPOSE LEADERSHIP AT ONE TIME MEANT MUSCLES; BUT TODAY IT MEANS GETTING ALONG WITH PEOPLE. ”

– MAHATMA GANDHI

It is equally important that you act reasonably and hold realistic expectations. You will get far better results if you do not go off on a power trip, and make demands at the drop of a hat just because you can. Get ready to answer more questions than you may believe necessary. A good design agency will want to get as much information from you at the offset to ensure they deliver a site that meets your requirements.

START THINKING ABOUT PROJECT TEAM AND AVAILABILITY

If you haven't done so already, then now is the time to start assembling your in-house project team. Who is the project manager? Are they the main point of contact? Who else is involved? What is everyone's availability? Who will check each stage of the build? Gather your team and make sure that each individual fully understands both the brief and their responsibilities once it is tendered out.

Further Reading

- [Successful Web Design Projects: 50+ Questions To Ask Before You Start](#)
- [How To Be A Good Client](#)

■ CHAPTER 8: FINDING YOUR PARTNER AGENCY

Put together a partner criteria checklist. Have you worked out what's most important to you when choosing the agency you will partner with? Is it timeliness? Conceptual design? Past success rates? How agreeable the agency are? Once again, it's time to do your research. Cast your net wide initially. Approach companies

whose websites you like and find out who did the design. Ask around, get recommendations and dig deep on social media to see how satisfied clients have been.



BUILD A LONG LIST

Draw up a list of up to ten agencies that you are interested in working with. Get on the phone to each agency's New Business Director, or whoever it is that fulfills this function. Don't rattle off your entire brief but give them an overview of the kind of website you are outsourcing.

You can tell a lot about how compatible you are likely to be from these early phone conversations and some will get struck off the list straight away. If you feel it would be useful, ask to set up a chemistry meeting for them to question you about your project plans and for you to sense what they might be like to partner with.

SELECT A SHORTLIST

Narrow your list down to five agencies and if you haven't already made contact, put in a phone call and tell them that you are planning to make a Request for Proposal (RFP). You will then send them over the brief that you have spent so much time and energy pulling together.

It's a good time to set up a project page or project site that will include contact information, project overview, timeline, the RFP for download and any other project documentation that you need to share with agencies.

Get ready to answer lots of questions at this stage as each agency will be keen to get to grips with exactly what you want them to produce. You will already be garnering a lot of information on how each agency works, including how well they communicate.

“ COMING TOGETHER IS A BEGINNING. KEEPING TOGETHER IS PROGRESS. WORKING TOGETHER IS SUCCESS. ”

– HENRY FORD

If all goes to plan then you should expect to receive five proposals. These will vary in length and quality but remember this is not their final pitch, but an overview of ideas and their approach. Some will include case studies and references, some won't. Some will appear to really want your business, others will have spent a lot less time on an overview at this stage.

You can't blame them. Agencies have to balance the amount of time and energy they spend on proposals that potentially will bring in zero cash. But you will get an idea of what they are offering and how they operate. They will probably include the cost in the proposal. Ask them to be specific about the timescale they foresee for delivering the project.

You may have a favourite but they may be well out of your budget. Be realistic but don't just go for the cheapest or the one promising to deliver quickest. Choose three and invite them to pitch. The norm is for the agency to come to your office.

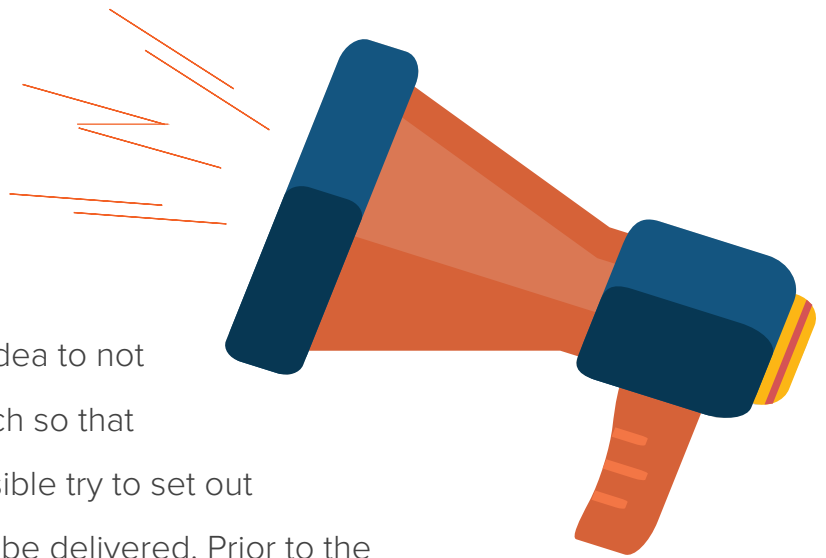
If you don't need a pitch and have been confidently convinced by a standout company's approach and proposal, don't go through the motions just for the sake of it. You may feel confident enough to skip the pitch stage entirely.

Further Reading

→ [How To Write An RFP](#)

■ CHAPTER 9: THE PITCH

You are now at the stage of setting up meetings for agencies to come and pitch to you. It's a good idea to not leave too long in between each pitch so that you can compare effectively. If possible try to set out a day in which all three pitches can be delivered. Prior to the pitch draw up a list of evaluation criteria and questions to ensure that you cover all bases and that you can adequately score and evaluate which agency is the best fit for your project.



YOU MAY WANT TO CONSIDER THE FOLLOWING

1. Is their pricing and timeline reasonable?
2. Have they been good at communicating? This includes how well they have tried to understand your project by asking questions, and how clear they have been on their limits.
3. Do you like the project examples they have so far provided? Can you see a fit with your own website objectives?
4. Do you expect to be able to meet up in person regularly? If they will only be contactable by phone, does that matter to you?
5. Does the agency seem to understand your company?
6. Have they gone into detail about how they will deliver the project? Who will be the contact? How will they complete the project? What are the deliverables?
7. Are there any concerns about the project they are presenting?
8. Have they adequately outlined the costs and payment plan?

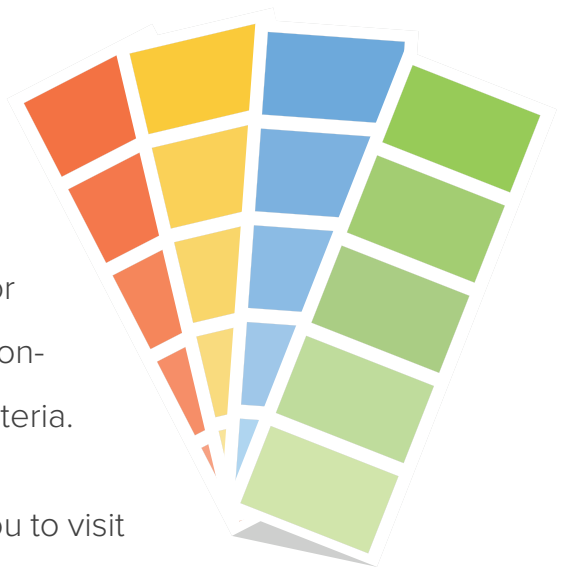
You also need to think about who from your company will be sitting on the panel. There may only be two of you in your business, or there may be ten people who will be involved in some way with delivering the project. Choose the key stakeholders, but if possible, get a mixture of expertise on your panel. Do you have someone on the panel who understands the technical needs, the brand and design, the content?

If possible set aside a good 2-3 hours for each pitch to allow plenty of time to clarify ideas and for the agency to explain in detail what they propose. You may not get definitive solutions at this stage so you want enough time to workshop ideas with the pitching agency.

Don't be bamboozled by techno-speak. If you don't understand a component of the pitch, ask! It is up to the agency to explain what they do and how they do it, at a level you can understand.

You may find it useful to create a robust scorecard for each member of your panel. Ensure that your panel is confident about the overall objectives and the evaluation criteria.

Before you make your final decision it is important for you to visit the agency in their own offices. This will give you an insight into the real culture of the company.



“ REALLY IN TECHNOLOGY, IT'S ABOUT THE PEOPLE, GETTING THE BEST PEOPLE, RETAINING THEM, NURTURING A CREATIVE ENVIRONMENT AND HELPING TO FIND A WAY TO INNOVATE. ”

– MARISSA MEYER

Before you make your final decision keep referring back to what you want to achieve. Check case studies and references, and don't be afraid to invite an agency back if you need more detail before making your decision.

A word of advice - don't choose the cheapest agency, or the one promising to deliver quickest. Go with the one that you are most confident will deliver what you are looking for.

When you sign the deal, make sure you don't pay the full amount up front. It's reasonable to expect an agency to want some payment up front but expect to see a series of payment periods with at least one of them only payable on full delivery of the project.

Further Reading

→ [How To Manage A Pitch](#)

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Section 3:

DELIVER
THE GOODS

■ CHAPTER 10: BEFORE THE WORK STARTS



1. CONTRACTS MEETING

It is usual practice to set up a contracts meeting between your in-house project sponsors and your chosen agency. You should set aside an hour for this meeting. The aim is to formalise the agreement to work together by exchanging and signing legally binding documents.

2. ASSIGNING ROLES AND RESPONSIBILITIES

If you haven't already done this, now is the time to firm up your in-house project team. Be clear on who is responsible for what within your team and share this information with your chosen agency. You will also want to find out who in the agency development team will be working on your project, and their contact information. Do not assume that it will be the same person who pitched to you.

3. PROJECT KICK-OFF MEETING

You may decide to combine a contracts meeting with a kick-off meeting. Generally you will need to set aside 2-3 hours for this meeting where all project stakeholders and members of the project team need to be present. You are likely to need this length of time to allow for a full discussion and exploration of the project requirements, going beyond what was laid out in the initial brief document. By the end of this session everyone involved should have a clear understanding of the project and direction for going forward.

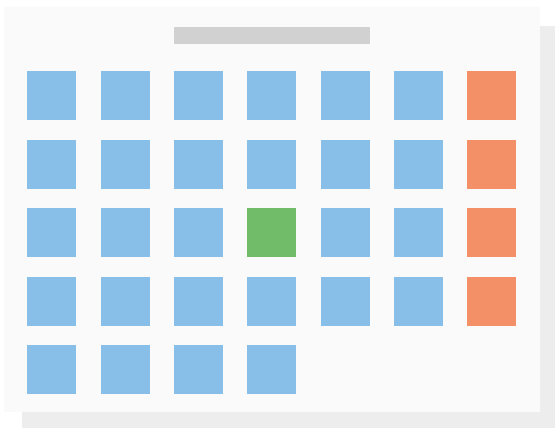
4. AGREEMENT OF SCOPE OF WORK

As a guiding document it is sensible to produce a Project Scope of Work Statement. This will reiterate much of what you have already discussed with your chosen agency, but - once signed - will also put in place a binding agreement.

A robust Project Scope of Work Statement will include the following:

- A description of the website project and the results you expect it to produce.
- Acceptance criteria and what must be met before deliverables are accepted.
- What are the deliverables, or services that must be met. What are the key milestones?
- What will not be done as part of the project.
- Constraints and restrictions that limit what can be achieved, how and when these can be achieved etc.
- Assumptions and how you will address uncertain information as you go forward with the project.
- Commitment to results that must be achieved for successful project completion.

5. PROJECT PLAN AND TIMELINE



A project plan is so much more than just a timeline, although this is a vital component to include. It is the agency's responsibility to produce the project plan but you will need to agree and sign it off.

At its most basic the project plan will comprise of baselines, or performance measures, and will

include the scope, the schedule and the cost baselines. You have already confirmed the deliverables in the Project Scope Statement but you will now need to develop these into a work breakdown structure. You will need to identify the activities and tasks, with a list of resources needed to achieve each one.

The agency will estimate the length of time needed, the cost of each task and from that you can develop a schedule. The project plan should include who on your team needs to sign off each task as it is completed.

In addition to the project plan, the Project Scope Statement and contact details of your in-house project team, you have to be prepared to give the agency everything they need to complete the project. Are you ready?

THINGS YOU MIGHT NEED TO PROVIDE INCLUDE:



- High resolution logo
- Mission statement
- Content pages
- Articles
- Blog posts
- Images and videos
- Press releases
- Case studies
- Testimonials
- Marketing literature
- Sales presentations

Further Reading

- Purposeful Partnership Methodology: How To Be A Good Client
- 10 Steps To Creating A Project Plan

■ CHAPTER 11: WORKING TOGETHER



ONGOING COMMUNICATION

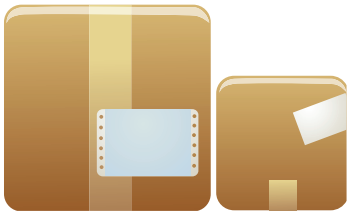
Whilst it is important to stay in regular contact with your chosen agency, don't harass them.

If you know that you, or the project stakeholders, are likely to need frequent and regular updates, then make sure you have included this in the project plan.

Be honest and pointed with feedback and always ask for clarification if you do not understand the technical jargon. The agency that you have chosen to work with should be on your side. It is their responsibility to explain what they are doing and why.

If mid-project email exchanges are getting terse and you feel that communication, and consequently your relationship, with the agency is breaking down, then get off email. Have an old fashioned phone conversation or meet up. It sounds obvious but it is often forgotten.

PLAY YOUR PART IN DELIVERY



Hopefully by now you and your chosen agency are working towards a clearly defined schedule. To ensure that they are able to do their part, and deliver your dream website, then you have to be available. Be prepared to attend design presentations and make sure that you give clear feedback as you go.

ARE YOU SATISFIED WITH THE RESULTS?

If all goes well, and you are working to a robust project plan, then you should not be signing off, and consequently paying for, deliverables that you are not satisfied with. Only make the final payment when you are completely satisfied with the finished product.

It is to be assumed that if you have thoroughly done your homework at each stage of finding and partnering with an agency, there shouldn't be any disappointing surprises. But occasionally, even with the most thorough research, you may be dissatisfied. At this stage, remember that no agency wants to end up in a small claims court with their reputation in tatters. They should do their utmost to complete and sign off the project to your satisfaction if it adheres to your clearly defined objectives and project plan.

The chances are that if you have been clear about your objectives and expectations, thoroughly researched your chosen agency and put in place a robust project plan whilst maintaining good relationships, you will be pleased with the end result.

Further Reading

- [Keys To Better Communication With Clients](#)
- [The Importance Of Meeting For Web Project Management](#)

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