



# PLANNING YOUR NEXT WEBSITE



TOPNONPROFITS

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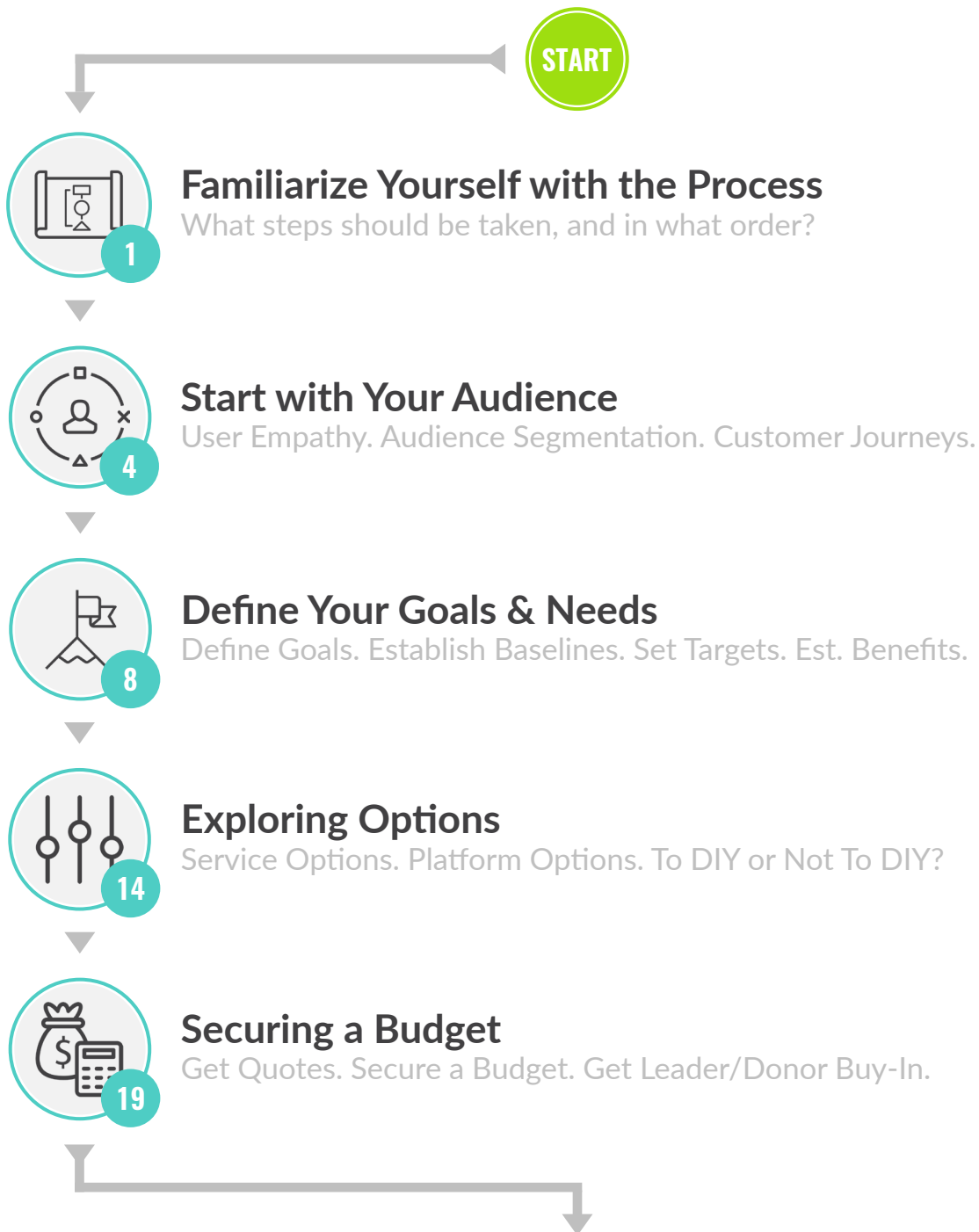


CREATIVE  
SCIENCE

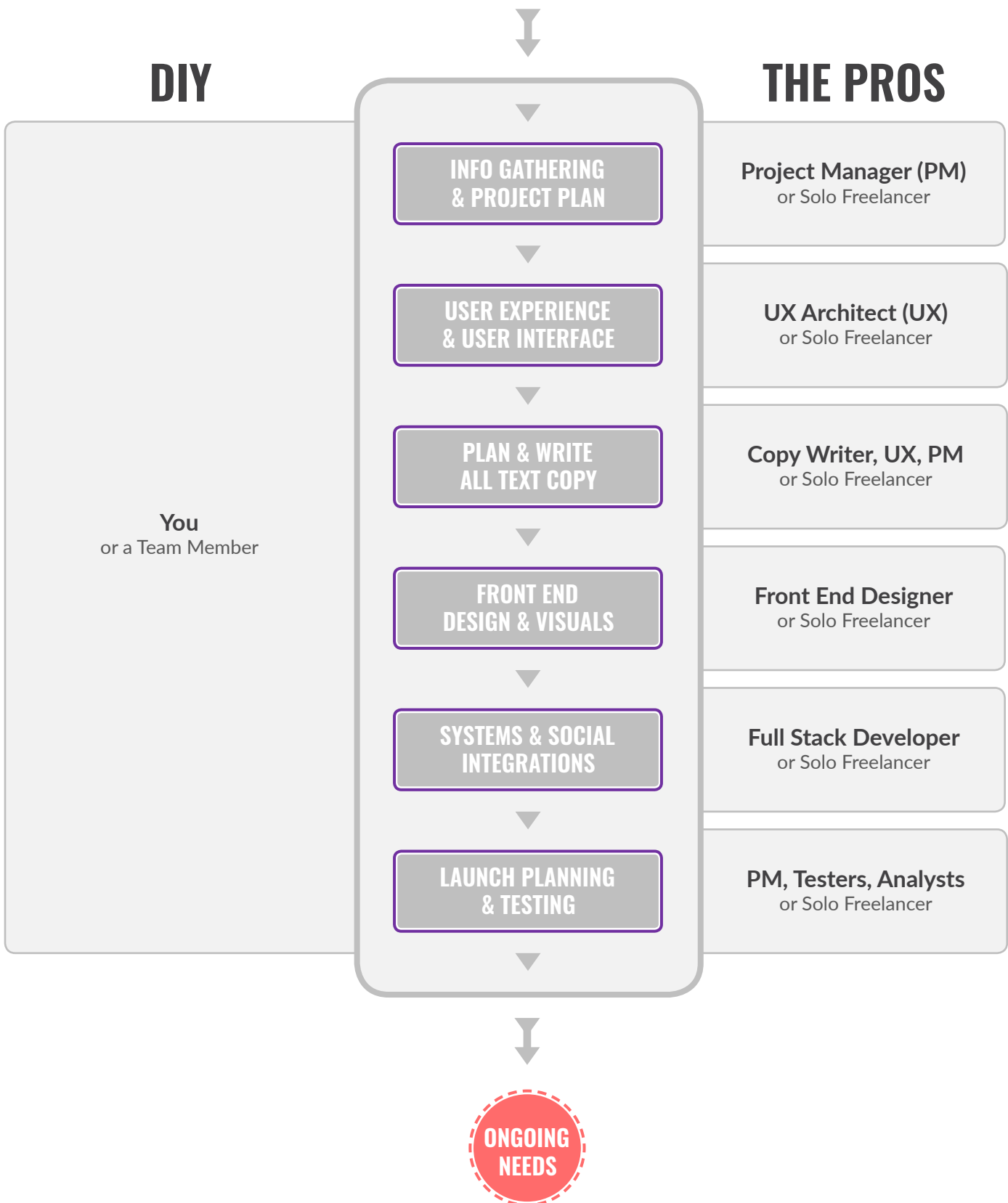
# PRE-PLANNING OVERVIEW & TABLE OF CONTENTS

## Introduction

This guide is designed to help organizations of any size and budget plan not just a pretty website, but one that works around the clock on behalf of your organizations goals. This page and the next serve as both high-level process flows as well as tables of contents helping you quickly reference where more information can be found.



# EXECUTION OVERVIEW



# THE CREATORS

Our mission statement at TopNonprofits is Learning From The Best Organizations & Leaders. In keeping with this focus, when we embarked on this resource we decided to enlist a multi-year finalist from our Top Nonprofit Websites List to help provide color commentary.

True to their name, Creative Science combines serious design chops with a unique emphasis on behavioral economics - the study of human psychology and behavior as it relates to economic decision-making.



**CRAIG**  
Process Design



**NATE**  
Behavioral Economics



**WILL**  
User Experience



**JANINE**  
Project Management



**ALLISON**  
Digital Marketing

## Street Cred – Creative Science’s Clients



**CRAIG**  
Process Design

*“Thanks for taking the time to contribute your expertise and insights into the website planning process.”*

*“Glad to. It was a natural fit. The website planning process can be overwhelming with so many different options available on the market. My hope is this guide will serve as a means to cut through all the noise and allow people to pinpoint what really matters when redesigning a website.”*



**NATE**  
Behavioral Economics

*“A nonprofit’s website is a critical extension of their brand. If your nonprofit is doing great work, you want the website to reflect this both in its messaging and the experiences users have when interacting with it. If it doesn’t, it can set back your nonprofit’s impact.”*



**JANINE**  
Project Management

**PLANNING:**

# **STARTING WITH YOUR AUDIENCE**

# USER EMPATHY & AUDIENCE IDENTIFICATION

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## Why User Empathy & User-Centric Design Helps Achieve Your Goals

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Empathy is the skill of being able to go past audience statistics and be able to see and emotionally experience things from your customer or user's perspective. User-centric design takes high-level internal objectives and then focuses the design directly around the user's unique needs, value adds, and pain points throughout the customer journey.

Design exclusively around your needs will undermine the very outcomes you desire.

## Identifying Primary & Secondary Audiences

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If you are like most nonprofits, you're going to have multiple types of audiences visiting your website. The question is which one is the primary audience for any given page. There are several approaches you can take concerning audiences, we like to organize them around intent first and then consider demographics vs the other way around.

Each page (or section) should be geared towards a specific audience. This doesn't mean that you go out of your way to exclude secondary groups, but rather that you build your messaging to meet their immediate need while gently nudging them forward on their journey.

## Common Nonprofit Website Audiences (By Intent)

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## Understanding Audience Overlap & Progression

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In some cases it could be that the journey involves an upgrade to their intent. For example, a visitor might start as someone we would call "org curious", who is simply interested in learning more about an organization. After their curiosity needs are met, you have an opportunity for a call to action that moves them into one of the "wants to help" audiences. Same person, but different needs. Asking them to help before addressing their curiosity wouldn't work. Answering their questions without giving them a clear path to engage further leads to a missed opportunity.

# USER EXPERIENCE BASICS

## What is User Experience & Why Does it Matter?

User Experience (UX) and the related field of User Interface (UI) design is all about making a process as intuitive and frictionless as possible. The best UX design is so seamless that you don't even realize it is there.

*"Confused, distracted, and frustrated people donate less and are less likely to support your cause. It is as simple as that. If you want your website to contribute to organizational goals, you have to take the time to make all interactions with your brand as simple, clear and smooth as possible. Look to connect with your supporters on an emotional level and nudge them to take action. That is the essence of good UX."*



WILL  
User Experience

## Tough Truths About Your Visitors You Need to Embrace

- They are not statistics
- They aren't all like you
- They don't owe you anything
- You aren't their only option
- Their time is valuable
- Their attention spans are limited
- They don't like to feel stupid
- They care about their privacy & security

## 10 Rules of Thumb for Designing Great User Experiences



**Understand your user**  
Empathize with their journey



**More images and visuals, less text**  
Remember, many people scan vs read



**Use as few steps as possible**  
Simple processes convert better



**Only ask for what is really needed**  
A cell # doesn't help process a donation



**Keep things easy**  
Require minimum brain power



**Don't require a login to donate**  
Account creation is painful



**Eliminate distractions**  
Keep the focus on completing journey



**Don't require Captcha to donate**  
Most people hate them



**Provide context**  
Indicate location within journey



**Ensure an accesible reading level**  
10th grade max → [Readable.io](https://readable.io)

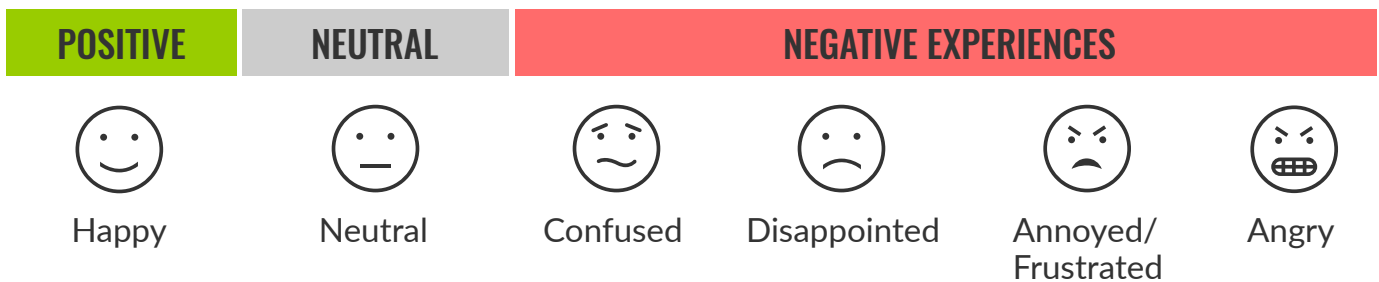
# JOURNEY MAPPING

## Seek to Understand Your Stakeholder's Journeys

A user journey is the series of steps taken by a visitor to your website in order to accomplish a specific objective. Your end goal will be to (re)design each journey to be as short and friction-free as possible. Unless you are already a User Experience (UX) expert with an unlimited budget, we recommend starting with mapping your existing customer journeys to visualize each of the pages and decision points involved and then pairing this with user conversion data from Google Analytics. This will give you the baselines from which your improvements can be compared.

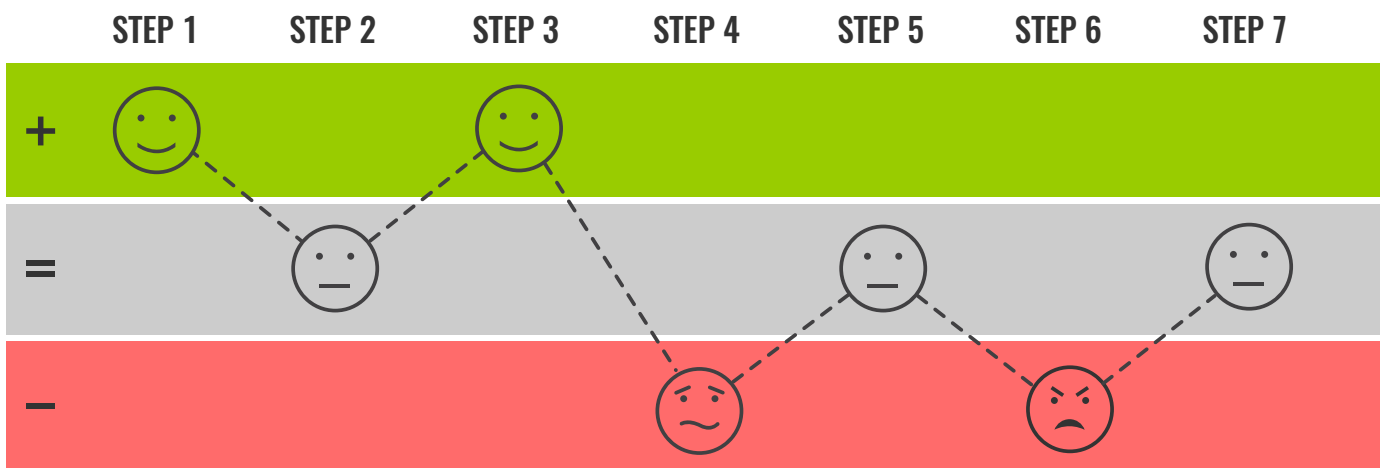
## Capturing Experiences & Emotions

As you look to create a smoother and streamlined process, you'll need to do more than count the steps in your new process. A combination of user behavior data from Google Analytics and an understanding of your users emotions at each step in the process will give you the most insight.



## Plotting Individual Journeys

When testing a process with users, you should look to capture their emotions and feedback for each step. By organizing each step into a column and capturing the emoticon for each step, you can quickly create a visual of that individual's journey.



Note: we don't recommend stacking multiple maps on top of each other, but you may want to keep a running tally of the three categories for each step.



**PLANNING:**

# **YOUR NEEDS & GOALS**

# BASELINES, TARGETS & ESTIMATING BENEFITS



## Brainstorming your Needs and High-Level Objectives

Reach out across the organization and collectively brainstorm a list of user and organizational needs/objectives for your website. From here a smaller group will want to organize, consolidated, and prioritize this list.



## Documenting Your Goals

From this brainstorming session write down the outcomes that align to organizational goals. At this step it can be as simple as things like “Increase online donations” or “attract more volunteers”



## Selecting Appropriate Key Performance Indicators

In addition to finding a metric that represents the desired outcome (lagging indicator), consider any leading indicators such as incremental conversion rates you also want to track. See next page for examples.



## Documenting Baselines

If you have an existing website, capture your existing performance for these metrics to serve as a baseline to measure improvements against. If this is your first website, search for [industry average benchmarks](#).



## Setting Targets

Your goals should have specific, measurable, and time constrained targets in mind. They need to be realistic though in order to be taken seriously. Tip: Although improvements over 50% or even 100% are possible, you'll need to have a very strong case if you want to sell them to leadership.



## Estimating Benefits

Start by subtracting your baseline average from your target and then look to translate this improvement into a tangible benefit such as number of dollars or number of new volunteers. Seems too good to be true? Then it probably is and you should pull things back a bit. You may also want to measure incremental benefits (e.g. for every 1% increase or every X volunteers).

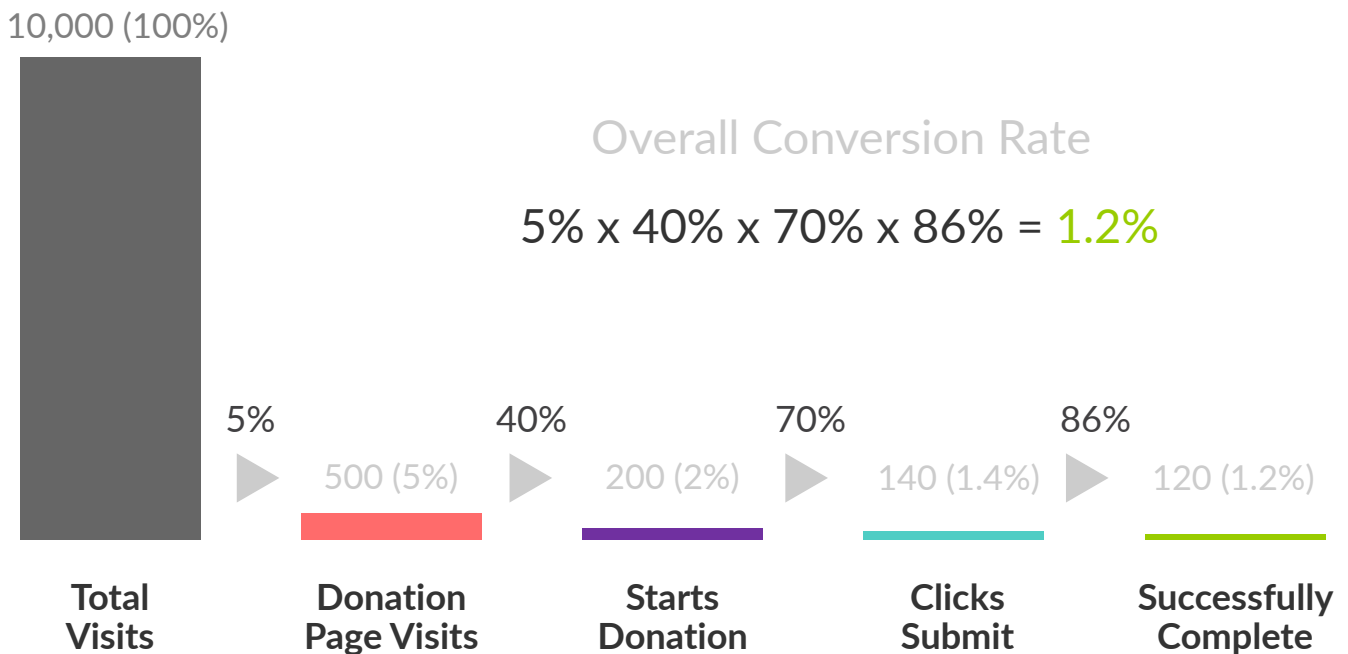
# INTRO CONVERSION RATES

## Conversion Rates

The reality is that there will always be more people who are potential candidates for a specific outcome than actually reach the finish line. By breaking a journey down into steps and tracking progress through them, you can calculate conversion rates for each step (% of visitors that move on to next step). By definition, if 33% of visitors convert from one step to the next, this also means 67% did not. Understanding why they didn't convert and looking for ways to increase the chance someone will progress instead of getting stuck or falling out is where the magic happens.

Conversion rates are compounding, meaning that an impact in one area will typically change the volume through the downstream parts of the process and ultimately what comes out the bottom. Lets say that an organization receives 10,000 visitors a month and 120 of these visitors completed a donation for an overall conversion rate of 1.2%. Let's take a look at how compounding conversion rates create the output of 1.2%

## Example Donation Conversion Rates



See how much more insightful and actionable these metrics are than just the overall conversion rate of 1.2%? A quick inspection of the data raises some important questions...

- What prevented those 20 visitors who tried to submit their donations from being successful?
- What caused 60 people to abandon the donation process before clicking submit?
- How can we get at least an additional 5% of visitors to view the donation page?
- What would happen if we jump start the donation process right from the home page?

Tip: After going live, only test one change at a time within a given step in the journey until you can determine if it helped or not. Also worth noting, the further downstream the change, the fewer visits you'll be working with and the longer you'll have to wait to get statistically relevant (or at least close) results from your experiment.

# ACTIONABLE METRICS

## Focusing On Actionable Metrics

There are a million metrics out there. Selecting and pursuing the right key performance indicators is important. We group key performance indicators (KPIs) into two categories. Basic, which are typically important measurements of the final result but don't give any insights as to why, and actionable metrics that shed light on what is going on behind the scenes. Some level of variation is present in any dataset, so don't freak out with slight lift or drop to an overall metric. Basic metrics can be measured monthly, but you might want to keep a closer eye on actionable metrics to help you prioritize improvement efforts and catch issues early.

	BASIC	+ ACTIONABLE METRICS
<b>Website Donations</b>	<ul style="list-style-type: none"> <li>Online Donation Revenue</li> <li># of Online Donations</li> </ul>	<ul style="list-style-type: none"> <li>Donation conversion rates (desktop vs. mobile)               <ul style="list-style-type: none"> <li>Total Visits → Donation Page Visits</li> <li>Donation Page Visits → Started Donation</li> <li>Started Donations → Completed Donation</li> </ul> </li> <li># of new donors</li> <li>Top 5 Traffic Sources of Completed Donations</li> </ul>
<b>Website Traffic</b>	<ul style="list-style-type: none"> <li>Total Visits</li> <li>Organic Visits</li> <li>Direct Visits</li> <li>Referral Visits</li> <li>Mobile Visits</li> </ul>	<ul style="list-style-type: none"> <li>5 Highest Converting Organic Landing Pages</li> <li>5 Highest Converting Referral Sites</li> <li>5 Pages with Most Organic Traffic</li> <li>Top 5 Referring Sites</li> </ul>
<b>Website Engagement</b>	<ul style="list-style-type: none"> <li>Total Pageviews</li> <li>Time on Site</li> </ul>	<ul style="list-style-type: none"> <li>Pages Per Visit</li> <li>Overall Goal Conversion Rate (% of visits)</li> <li>5 Longest &amp; Shortest Time on Page</li> <li>Homepage Scroll Distance (long homepage)</li> <li>Repeat visits</li> </ul>
<b>Site Performance</b>	<ul style="list-style-type: none"> <li>Uptime</li> </ul>	<ul style="list-style-type: none"> <li>Total Outages</li> <li>Unplanned Outages</li> <li>Average Outage Length</li> <li>Average Server Response Time</li> <li>Number of Errors</li> </ul>

# DECISION MAKING & BEHAVIORAL ECONOMICS



CRAIG  
Process Design

*"How does behavioral economics fit into the digital work that you guys do?"*

*"Our primary goal when designing and developing digital presences for our nonprofit clients is to ultimately hand them a tool that is going to directly contribute to their overarching organizational objectives. Whether those goals are to raise more donations, get visitors to learn more about the projects they have going on, increase email newsletter signups... the list goes on... we need to create a tool that gets online users to perform actions.*

*That said, getting users to perform certain actions on a website is a challenge and is not something that can be accomplished at random. Instead, there needs to be a scientific methodology to what we do.*

*Think about how much content you view on the web every day. I don't know about you, but my eyes start to glaze over. Our job is to build a website that creates a structured path with desired actions highlighted in an easy to understand, clear, yet non-intrusive manner. And that's where behavioral economics comes in... We apply principles that describe how humans process information and make decisions, and reflect these theories in our designs and development features."*



NATE  
Behavioral Economics



CRAIG  
Process Design

*"What are some pitfalls to avoid when leveraging behavioral economics?"*

*"The goal is not to manipulate them, but to enhance the user's experience with a website through a seamless process that eliminates the stage in which the user tries to figure out, "Okay where to next?" We create an experience in which subtle cues flag them to head in particular directions and complete certain actions.*

*In today's world, content is everywhere, so having a set path for visitors to follow when they land on your site is critical to their experience, and your organization's success."*



NATE  
Behavioral Economics

# BEHAVIORAL ECONOMICS EXAMPLES

*"Your nonprofit's mission isn't driven by guesswork, and your organization's website design shouldn't be either. By harnessing the power of behavioral economics and user psychology principles, we help our clients dramatically increase desired outcomes. For example, the design and development of Malaria No More's site contributed to a 165% year-over-year increase in grassroots funding (dollars)."*

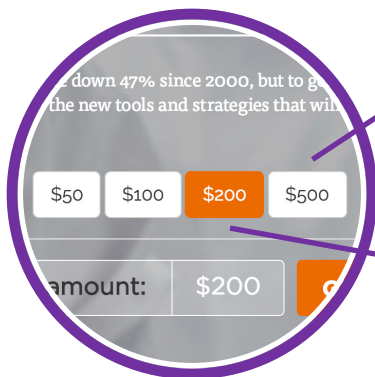


NATE  
Behavioral Economics



**Endowment Effect:** This effect explains the natural tendency of humans to ascribe a higher value to things that they own or are involved with in some way. We wanted the first thing the viewer saw to be text that helped them understand that they should have a stake in the responsibility of ending Malaria.

*"Malaria deaths are down 47% since 2000, but to get to zero, we need your help to fund the new tools and strategies that will get the job done"*



**Anchoring:** When making decisions, humans have a natural tendency to rely too heavily on the information offered, the "anchor". We deliberately gave the visitors four different donation options that are more money than they likely would have spent otherwise while technically still giving the option to key in any amount they chose. This increased the dollar value of each donation significantly.

**Default Effect:** If a visitor is indifferent or conflicted about which donation option to select, they will likely disregard the process of evaluating how much they would like to give and go with the value that is suggested. Knowing this, we highlighted \$200 as an amount to suggest they give.



**Identifiable Victim Effect:** Our emotions are one of the most powerful characteristics of humanity. When it comes to design, that sentiment certainly rings true. We used this effect to immediately connect with the visitor with the cause on an emotional level. This effect triggers visitors to offer greater aid when an identifiable individual is observed under hardship. It is a far stronger "nudge" than merely noting a large, vaguely defined group that is experiencing the same need.

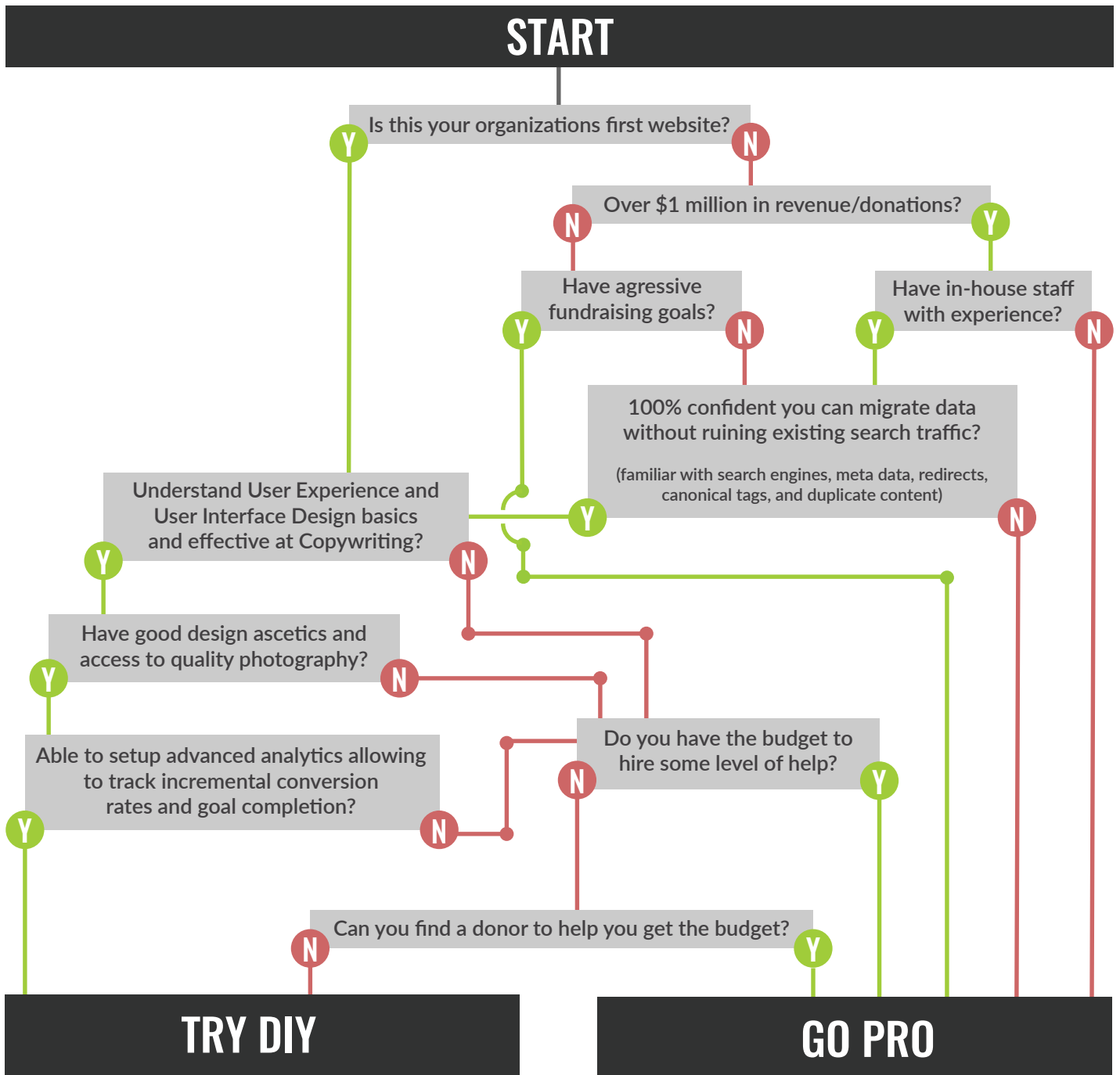
**PLANNING:**

# **EXPLORING OPTIONS**

# TO DIY OR NOT TO DIY?

For some organizations a DIY website might truly be the best option, but is it right for you?

Our goal with the following flow chart is to help you figure out if you should seek out at least some level of professional help.



If you've rule out DIY or are on the fence, the next page will help you explore the types and levels of professional services you should consider.



# PROFESSIONAL SERVICE OPTIONS

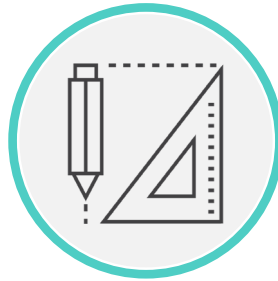
## Types of Services

Website help comes in many shapes and sizes ranging from the generalist freelancer to a full service agency. Make sure you plan for not only the build, but ongoing upkeep and maintenance.



### STRATEGIC PARTNER

Helps you design, build, & maintain an overall web strategy, including but not limited to your website.



### DESIGN & BUILD

Helping you get a new website live. Range from template deployment to custom web development.



### UPDATE & MAINTAIN

Hosting, monitoring, troubleshooting, security patching, adding new content and features.

## Design & Build Options

### FULL WEB AGENCY

The beauty of an agency is their ability to hire a team of highly skilled specialists who work together to deliver the best results. If you can make the investment, this is often the most strategic option.

### SMALL WEB SHOP

Small web shops tend to rely more heavily on generalists vs specialists. If you go this route, look to understand if you'll be working with a PM and a team or primarily working with a solo designer/developer.

### FREELANCE

Some freelancers are generalists who can do everything others are specialist. Ask for examples of their work, get things in writing, and have a backup plan for ongoing support if they aren't available.

### VOLUNTEER

Just because a board member's nephew "can build a website" doesn't mean he can build one you'll want. Only go this route if you have zero budget, aren't in a rush and are prepared to explain why you need to have someone else take it over if they don't deliver.










CRAIG  
Process Design

*"As a general rule, you get what you pay for when it comes to investing in a website. If you don't have the budget, make the effort to try and secure one. If you are forced to cut corners in the short term, I recommend getting help implementing a premium WordPress theme. This will give you the most flexibility to make tweaks and improvements with any remaining budget and provide more options to upgrade in the future."*

# DIY OPTIONS

If you don't have (and feel you cannot raise) the money to hire a pro, there are a number of Do-It-Yourself website builder and WordPress templates available. Unless you have a website design or marketing background, spend some extra time planning and studying best practices.

## Popular DIY Website Builders & Templates

	TYPE	PRICING	INCLUDES HOSTING	CUSTOMER SERVICE OPTIONS	PRO HELP AVAILABLE
 SQUARESPACE	DIY website builder	Subscription		24-7 Including phone.	Freelance Community
	DIY website builder	Subscription		Submit a ticket or chat. Pro required for phone service.	Third party
	DIY website builder	Subscription		Submit a ticket or request a call back.	Third party
 themeforest	Template Marketplace	One-Time		Contact Form. Responsiveness varies based on theme author.	Third party

## DIY Tips



CRAIG  
Process Design

*"Before you get too invested in a particular template design, make sure you've mapped out how it will handle your different customer journeys."*

*"Remember, less is often more. Just because you have the ability to add extra widgets, photos or navigation options doesn't mean you should. Don't create a 'carnival effect' on your site where there is so much going on visitors don't know where to start or where to go next."*



WILL  
User Experience

*"Even with a DIY template, you should plan on finding a quality photographer (or quality and non-cheesy stock photography) as imagery can make or break a website. If possible, give the photographer the page layout options in advance. This will allow them to frame the subject in a way that fits the format. For background and full-width images, this may mean being a little further back and offsetting the subject more than might be normal in say an engagement shoot. Cropping is a whole lot easier than reshooting."*



ALLISON  
Digital Marketing

# COMMON WEBSITE (RE)DESIGN MISTAKES

Regardless if you are going DIY or working with a freelancer, you need to keep an eye out for the following common mistakes.

## Common Mistakes Unique to Redesigns

MISTAKE	TIP
Blowing up your existing search traffic	Redirects, canonical links, and appropriate meta data can help Google know how to handle the content migration.
Not addressing repeat 404 "Page cannot be found" errors	There may be hundreds of links around the web to old URLs on your website. Setup relevant redirects to avoid page not found errors.
Not properly caring for duplicate content	Google doesn't like duplicate content. Delete duplicates and use a permanent redirect or else canonical links that let Google know which one to index and those to skip.

## General Website Mistakes

MISTAKE	TIP
Not remembering mobile	Having a responsive website (or a separate mobile website) is non-negotiable. Make sure you are also testing and tracking mobile analytics separately.
Failing to test	When launching a new website, you need to test it on multiple browsers and screen sizes.
Spelling & grammatical errors	It is easy to miss a spelling mistake or grammatical error, but it can cost you credibility. Consider a tool like Grammarly, or find someone who can proof-read your content.
Too many calls to action visible at the same time	People can easily get overwhelmed with too many choices. Intentionally limit the number of buttons, links, and calls to actions visible at a time.
Clutter. Not enough white space	Give your content room to breath. It creates a less stressful experience and helps people focus on what is most important.
Lame images & graphics	Imagery is one of the most effective ways to communicate, but low quality, busy or cheesy imagery communicates the wrong thing.
Auto-playing audio	Do. Not. Do. It.

**PLANNING:**

# **SECURING THE BUDGET**

# REQUESTING A QUOTE

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We don't necessarily recommend a formal request for proposal (RFP), but the more information you can provide upfront, the more you can cut down on the back and forth. That said, avoid being so fixated on your plan that you are unwilling to accept recommendations from the experts.

## Things to Prepare in Advance

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### **Project Overview**

You'll want to start out with a few sentence overview touching on your organization, describing the overarching project and the specific services you are looking for.



### **Background: About Your Org & Audience**

In this section, you'll go into more detail about your organization, its mission, the services you provide and your different stakeholder groups (audiences).



### **Project Goals & Desired Timeline**

Now is the time to get specific about the outcomes you are aiming for and the desired timeframe within which you are looking to complete the project.



### **Scope, Deliverables, and Examples**

Here is where you will describe the specific things you are expecting them to provide. For example, if you want a long home page with a floating top menu, say so.



### **Technical Details (Hosting, Systems Integrations, Etc.)**

If there is a particular CMS you want, systems you want the website to integrate with, advanced analytics capabilities you want to be captured, etc. include them here.



### **Ongoing Support**

Are you looking for them to assist with ongoing support? Do you want the flexibility to allow internal staff or a third party to assist or take over after deployment?



### **Primary Point of Contact**

Wrap things up with a quick thank you and the name and contact information for the person they should respond to.

# GETTING LEADERSHIP BUY-IN

## Making Your Case

Getting leader and donor buy-in is all about aligning your project to their needs and goals and communicating value in a way that resonates well with them. Leaders are busy. **Keep things brief & to the point**, but come prepared with answers to possible questions and & additional supporting data and journey examples to pull from if needed.

## Investment vs Cost

Like it or not, part of a leader's job is to control costs. If they view a website as a necessary cost, they will only be interested in the cheapest option that will "do the job." If they can be made to understand that investing more in a great website experience will help them realize measurable returns towards their mission and bottom line, it will change the conversation entirely.



### FIRST POINT OF CONTACT

A website should not be a static billboard, but an online extension of your brand and mission. The interactions they have on your site will often be the deciding factor on if they stick or bounce.



### MAXIMIZE CONVERSIONS

The process leading up to a donation or some other conversion point matters. Even the smallest area of friction, distraction, or confusion comes at a real cost. Maximizing conversion rates means maximizing return on investment (ROI)



### TANGIBLE BENEFITS

There are two primary ways to do this: data walks and user stories. Any talk of investments should include baseline and target data to support it. Stories can be used to bring different user experiences to life.

*"Use an offline metaphor. Often it can be hard to understand how much opportunity you're missing out on because it is happening online and not in the physical world. Imagine if thousands of people a day were walking into the lobby of your office only to turn around seconds later and walk out because they were confused about what your nonprofit does and the impact it's making. Now, if your website isn't working for you this is exactly what is happening. Even for those that stick around you now need to work twice as hard to overcome this wrong first impression before gaining their support."*



NATE  
Behavioral Economics

# MAKING SPECIFIC ASKS TO DONORS

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Approaching a donor or sponsor can feel intimidating, but it doesn't need to be. Your goal should be to find someone who gets the value of a good website and supports your cause and make a very intentional and very specific ask (read invitation) for them to play a key role in making it happen.

