ASSOCIATION OF MIDWEST MUSEUMS

TECHNICAL WORKSHOP 1: PLAN FOR SUCCESS: MANAGING WEBSITE
PROJECTS

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 >>ZINNIA WILLITS: Good morning or good afternoon, and a warm welcome to all.
You have joined the first technical training session for Module 4, Managing Website
Projects, in which you will learn what you need to get started with a website project,
including easy to follow, step-by-step processes that help with guide checklist and
helpful guides for goal setting, project phases and teambuilding even if you are a staff of
one. This is the fourth module of the Digital Empowerment Project, nationwide initiative
organized by the six US regional associations that is dedicated to providing free, self-
paced training resources for small museums. This inaugural series of online trainings
and resource toolkits focused on digital media and technology topics is made possible
by funding from the Institute of Museum and Library Services.

My name is Zinnia Willits, and I am the Executive Director of the Southeastern Museums Conference. My pronouns are she/her, I am a light skinned, white female with shoulder length, reddish-brown hair. I'm wearing black rimmed glasses that are often referred to as cat eye style. Today, I am wearing a plum colored sleeveless top and I am sitting in front of a backdrop of my home office which consists of a desk and a few computers behind me.

As the host for today's session, I would like to convey just a few things to our attendees before we begin the program. First, in this era of virtual meetings when digital spaces may substitute our physical sense of place, it is important to reflect on the land we occupy and honor the indigenous people who have called it home. Today I am back home that speaking to you from Charleston, South Carolina, the historical homelands of the Natchez-Kusso people. Wherever we are, let us acknowledge all Indigenous nations as living communities, their elders both past and present, as well as future generations. We, the Digital Empowerment Project Team, recognize that our organizations and those of our members were founded within a colonizing society that perpetuated the exclusions and erasures of many native peoples throughout the United States and beyond. We ask you to reflect on the place where you reside and work and to respect the diversity of culture and experiences that form the richness of our world and our profession. Thank you.

Now for just a few housekeeping notes before we introduce today's presenter and get started. First, the best place to view the session in real time is on the Museum Learning Hub website under the watch live tab at museum-hub.org. Here, you will be able to see all the captioning, chat, and others' questions. I would also like to acknowledge today's American Sign Language Interpreter who will be on the left side of your screen. And, let you know that captioning for today's program is embedded in a box just below the YouTube player on our website with controls to adjust your experience. The best way to continuously refine our programs is to listen to our attendees. And we ask that you share your candid feedback with us. Following today's program, you will be sent a link to a satisfaction survey. Sharing your experience

through this survey will only take a few minutes and will greatly improve our work. We encourage you to post questions to our presenters which will be addressed at the end of the program after our presentation. Please type your questions in the chat. A digital empowerment team member will be gathering them. We will get to as many questions as time allows, however, we may not be able to address all questions during the live session and other questions may arise after reflecting on a program. For this reason, we have set up an online community for raising questions, posting answers, and connecting with your fellow Museum practitioners on the Museum Learning Hub website, which again is museum-hub.org.

If you are looking for help between programs, please visit this forum, create a login and post your questions. A member of the community or one of our student technology fellows will get back to you. Finally, to stay connected with us and be aware of future programs, please follow us on social media. Links will be posted in the chat.

Now it is my pleasure to introduce today's presenters, Despi Mayes. Despi is the Founder and Lead Strategist of Bluebird, a marketing consultancy focused on serving solopreneurs, startups and nonprofits. Her marketing career has spanned nearly 2 decades and crisscrossed through nonprofits, consumer brands, agencies and the startup world. She has led digital marketing and interactive technology project in collaboration with museums ranging from the Terre Haute Children's Museum to the Musee du Louvre, plus many corporate clients from local farms to Fortune 500 companies. I have enjoyed getting to know Despi and I'm than for the time she has devoted to this session. Now I am pleased to turn the floor over to you, Despi, to begin our session.

>>DESPI MAYES: Thank you, Zinnia, it's awesome to be here. I'm really excited to share this content with you and have a chance to answer your questions both now and in the foreign as a she mentioned. I'm going to jump right in. I know time is short, so I'm going to get right in there so we can get to the content everybody is here to see.

Okay. As Zinnia mentioned, my career and working in tech and marketing and museum space has kind of taken me all over the place. As we were preparing for this workshop today, one of the organizers really challenged me to think about the needs of smaller teams, of solopreneurs, which those of you who are out there running museums as a soloist, you are definitely a solopreneurs in my estimation, and really think about how I could present this content to you from this lens, because so many other people in the workshop participate coming from that angle.

I wanted to start this presentation by giving you a little inspirational boost from that point of view. So, the first step, there's a few steps and we'll talk to you today of planning a website project, is truly to believe that you can do it. As I was talking with her about what I was going to present today, I was thinking about all of the folks I've worked with to build websites, who has had the biggest challenge, the smallest of teams, there are a couple of local farmers that came to mind, because local food is something that's really important to me personally. So anytime I have the opportunity to build technology for somebody was out there trying to grow our food, I am excited to work with them to do that. But it's a big challenge if you're a farmer and you're trying to build a website because, from dawn until dusk you're doing this, or some variation of this activity. [LAUGHS] Which is not really conducive to project planning and writing content and figuring out what your payment process is going to be or all of the little things that make up a website project. So, there are creative ways for people who have lots of other stuff going on to pull together people who are interested in supporting you in order to make these technology projects happen, even if you're not available from sunrise until sunset.

So, believe you can do it, because it is possible and there are a lot of ways to make it happen. There's not just one. So today we're going to talk through all these different ways and how you can get creative in building a team, putting together a project plan and setting yourself up for success by thinking through some of the obstacles you're going to encounter from the beginning.

The first thing I'm going to talk about is building a team. Even if you are a staff of one, you probably can't do it alone. I put that probably in there because if somebody told me I couldn't do it alone, I'd be tempted to just to prove them wrong. [LAUGHS] So if you're like me, that probably has given you some room to accept help. [LAUGHS] So, any team you're putting together to build a website work to rebuild a website or add on a website, consider these four functions. Often, as the person who is a leader of an organization with the person who is doing the organizing, you find yourself in the project manager role. And that role is, arguably, the most important piece of the team because it keeps everybody else moving. And, you know, you might decide that's not the best role for you, maybe you fit into one of these other categories better. But it's really important for the project manager to care deeply about the outcome of this project and be willing, week after week to solve the problems, keep an eye on what's happening, kind of live with that ask top of mind. You know?

The content manager is somebody who's going to go out, loves to do research, is going to find things, is a good writer, is going to help you edit, that person is the information person. The creative lead is somebody who's going to help you resize images or create graphics, possibly even design your website. It really depends on the scope of the project as to exactly what the duties of each of these roles might be. But you just want to be thinking about the function. Who's the creative person who's going to help bring this to life?

And then of course, the technical lead. I feel this role is the one that often causes the most anxiety if it's not something that you, yourself, are comfortable taking on, because you have to find that person, you feel like you might not have the vocabulary or the experience to talk to them in their language. This person really is responsible for setting up everything from your hosting account to migrating content into the built website, helping you figure out how to use it after launches and all of that. In order for you to turn this into actionable request of somebody, I have created some job descriptions and I have heard these resources are available to you. They will be emailed today if you're registered, and they will also be available on the Museum

Learning Hub, as well. These job descriptions are intended to be a place to start. With each one of them, it gives you a detailed overview of what this position should do. You can customize it to your specific project so that as you're out there for people to help you, you have something you can share that's kind of specific about what you need each person to do.

So the next question, of course, is where are you going to find these people? I'm sure you have a sense already of where you might look. I think a lot of us would look to a group of volunteers and often, volunteers are best suited to help with content because they've been involved with the organization for a long time. They know it, they might have helped you already with archival projects or digitization projects or things like that. Content is the best place to start, often, with volunteers. But you might get lucky and have a really amazing design resource and a really amazing tech resource that could serve you really well.

I think interns really excellent for well-defined content roles. Sometimes graphic design help and sometimes technical work, especially content migration. So when you're ready to take the content that you've gathered and copy it into a website, that's a really excellent intern project. But the thing about interns I have encountered is that the projects need to be really specific and pretty easily turned into a checklist of things to do. I have been a part of projects where an intern is designed to build a technical project and they might have a little bit of experience doing that. But they struggle through the problems and challenges, and if the project that they've been given is broad, they might not know how to overcome those obstacles. So, well-defined roles, were successful there.

The next two are interesting things. I'm in Indianapolis, and I have worked with a really great university program from Ball State University and a group of students that are doing semi-professional work at really, really affordable rates so that they can professional experience and build their portfolios prior to graduation, and the organizations that work with them get really great technology, I think better than if you

hired a freelance college student kind of without the support of those programs. So if you are in or around college or university, and even now with, as comfortable as everyone is working with Zoom, it's a great opportunity to kind of hunt for those programs and reach out and use of resources to really reach out and stretch any budget you can allocate. The same is true for nonprofit career development programs. There are at least three here in Indianopolis that I have worked with in different capacities and they are sometimes transition to tech. So people learning to code or people doing graphic design work. Lots of different types of those career training programs so look and see what is available in your community. And again, if you are feeling like you want to extend beyond that or you can't find the resources you need in your own community, look in your region and see what's available to you because you can get really great resources that way, much more affordably than the last option, which is, I think, next to volunteers and interns, probably the thing you think of most often is hiring out this type of work. As I'm sure you're all aware, the cost of doing that ranges dramatically from the single individual freelancer to a full on agency that might charge five or six figures for tech project. Lots of options depending on what you're trying to accomplish, technical is it and how much specialist skill do you need. Most of the time, most web projects I think that you can build a really functional team with those first four options. If you have the luxury of a budget that allows you to hire out parts, I would say design and technical implementation are the parts that really you get the most value for sending to a paid resource.

All right. One small note about free help. So, you know, I've been a volunteer on boards, signing up to volunteer for events, a plethora. You know? I think we all enter into these agreements or, we have the best intentions when we sign up to be a volunteer. In life gets in the way. When you, as a person who has a paying job and maybe you have kids and you have a partner or you have family, whatever the case may be, whenever pressure starts to bubble up, the thing that is going to get pressed out is the thing that has the least consequence for not doing it. Right? It's just basic. So I'm suggesting these ideas to create a little more accountability for volunteers so that your project isn't the first thing to go on the to-do list. It's not to question the commitment

of a volunteer, but rather to create an agreement between you and that person who's agreed to help you so that your project keeps moving forward. And if that person can't live up to that commitment, that they have a clear means of communicating that to you. So you can do that by creating an actual project agreement and that can be as simple as an email or something you actually both sign. I think it's more important that you just review the details of what your agreement is sort of like this handshake agreement, because it says to this person, here's what I need to I'm relying upon you. Here's how you can communicate to me if you can't fulfill that need.

Also, scheduling check ins, this is related to interns, too, not waiting for things to be off the rails before you have that check-in. So a reasonable check in cadences, and just cancel it if you don't need the time, if you feel like everything's cool, great. But if not, and… It's just helpful to talk through things. It doesn't have to mean things are not going well, it just helps things go better.

The other thing is asking for work samples. This wasn't exactly a volunteer situation, but I was in a situation where I was working for somebody who was trying to create a multimedia experience and somebody who had been like a show operator was really excited about creating this 3D, animated thing. And that was supposed to be 25 minutes long, school groups come and see the show, whole thing. Well, months and months of work and effort and the big reveal day came and this person excitedly showed their work which was intended to be sort of like a space experience, shuttle launch, explosions, this person had a very carefully animated single paper airplane going in a slow circle around the room. We had maybe six more weeks to finish the other 28 minutes and 30 seconds or whatever of this show. So in this instance, it is not that person's fault. They were excited, they wanted to help. But the, there was not enough oversight, so those check-ins were not in place. This person didn't really have the chops to do the job, this deadline driven job, and nobody really knew because there hadn't been that sort of check-in on what kind of work that you done before that that would tell me you can do this work. Especially when deadlines are involved, ask for work samples.

The last one is pay when you can. You can't always, but if you can, even if it's a small honorarium, consider doing that. Because as the first bullet here, creating that agreement, having that actual payment functions in exactly the same way. You know? That person realize this is an important project for you, and your financial commitment, it is in exchange was at their time commitment.

The next step, once you have your team is building a project plan. The first part of building a successful web project plan is creating goals. We'll talk through that in a little more detail in a minute. Also, having a flexible timeline. So I'll talk to that in some detail as well. Creating solid technical requirements is really important, even if you might feel intimidated by the process. It's easy to begin and I have created a resource that can help you begin, as well.

Then, setting a project check-in cadence. Even if you're going to build this whole thing, you're going to write all the content, you're going to install WordPress, you're going to migrate at all, putting time on your own calendar to say how's it going, am I on schedule? Do I need to fit in more time? Less time? It's probably never less time, if we are being real. That self check-in matters, too. And if you're working with a team it matters even that much more because it will affect everyone on the team.

In the third technical workshop will be talking about project management and working with technical resources and some of those things about the nitty-gritty of being in the midst of it and also for about this particular bullet then.

When you're starting with your goals, there are four types of goals that I would suggest that you create for the project. The first one is a really clear purpose statement. Why are you doing it? There are so many reasons why. They come from, we need to solve a particular business type problem, like a revenue problem. Or, we need to provide better audience engagement or better access to our content. We have something new that worker releasing, it could be a technology problem, some piece of

technology is no longer supported. So there are lots of whys and knowing what yours is will help you later down the road when scope creep starts coming up and you think ooh, I really want to add on this amazing part of this project. And when you go back to that clear purpose, does this shiny, wonderful thing really fit into that why, and if it doesn't, it should go on to a post-launch to-do list. This watch list can be really helpful tools in keeping the project focused.

The next category of goals is business objectives. Think money. Ticket sales, event registration, membership, donations, all those things you might be transacting online. When you are adding it's new transacting online [sounds like]. Make them ask specific and quantitative as possible. Also, be as realistic as you can be, conservative, even, in what you want those financial targets to be. Because having them will help you determine if you're headed in the right direction. But you don't want them to be so aggressive that the project is deemed a failure because you didn't hit a goal, you know? Just some balance there.

Audience engagement metrics are important in both business objectives and audience engagement metrics are important I think no matter what your why is. No matter why you're doing the project, thinking through how it's going to have an impact on the business aspect of what you do, and also, how is it going to have an impact on how you in engaging audiences, both super important. How we can engage the audience that you serve and what do you need to measure in order to know if you're successful?

Finally, describe what success looks like once this project is done. You can do it three months, six months, a year out. You can be just a year out. But having some idea of when you look back on this project what is that about this project is going to make you say yeah, we didn't. Document that, because that is sort of the North Star that everybody is working toward. And having that document that you can refer back to is nice when you get there. It's a way to celebrate getting there.

I created a goalsetting worksheet that has one of these... I'm going to skip ahead for a second... Has one of these sort of website goals, Madlibs in there for you to create that sort of why purpose statement. You can, if you want these to be a little different, you can say this website will help an audience with a problem to solve in order to do X, or because we believe Y. Does that make sense? You really just want this to be a single, impactful statement like an elevator pitch. If someone asked you, "Why are you doing this website project?" This statement is your answer. When you say it they say, "Oh yeah, that makes sense." So that's what the goals worksheet will help you do.

I going to go back now to these two slides. I thought it was important just to say a little bit about this, when you are setting goals remember that a website is none of these things. Sometimes we get caught up in wanting to make something that is character by character or pixel by pixel perfect and is 100% complete and tells the entire story forever and ever, and people simply do not expect that. It just is not possible. I would argue it is not possible, even with an endless amount of resources and time, you will always find something that you want to change, because things are always changing. If we think about the work that you're doing, you're always looking for ways to engage audiences better, to make what you do more relevant. So, to think that your website is going to be something that you put in print and it never changes, it just doesn't work like that. And, the work that you think about it instead as this living, breathing thing that is always a work in progress, is made as a toolkit for the audiences that you serve and is about, first and foremost, what they are trying to accomplish when they're engaging with you, the more successful your web project will be, no matter what project that is. If you think about it in this way, it will always be more relevant.

All right. So about that timeline, I'm sure there's a variety of opinions about project management and timeline from the folks that are here with me today, or if you're watching the recording, timelines I think for some people are energizing and it gives them a sense of purpose and stuff to do. For other people, it's absolutely terrifying or demotivating. [LAUGHS] So I want to encourage you to have an agile-ish mindset about timeline. Previously in the tech space, waterfall is the predominant method of planning

and implementing projects. What that means, a waterfall method means we spent an enormous amount of time planning. We try to plan for every possible thing that could go wrong, every possible detail. If you've heard that saying, you see the forest instead of the trees or vice versa. Waterfalling is about detailing every single tree that's in the forest that we're going to paint and model and know everything about every tree before we plant the forest. And, agile is like we just need a forest. We know it's going to have some trees, which is going to start building it. We know it's going to change, the requirements of the project will change as we start to implement it, so we're just going to take it one tree at a time.

So I'm advocating a little bit of a blend. I am giving you a template if you were doing a small, medium or large size project, and I've done that just on number of pages, about how long each key milestone takes from kicking things off and creating a site map to building a content plan, getting a design, implementing that design, testing and watch. Those are the basic parts Building a website or redesigning a website. So, within those parts, there are a lot of details. Within the project you're going to learn things that change the plan. If you have a waterfall mindset and you have done all this planning and you have this perfect timeline that has tons of assignments and all these deadlines, when something goes wrong, it's like dominoes falling. Everything in your plan and all those deadlines and assignments could be wiped out, irrelevant. But if you have a more agile mindset you say okay, I know the project is going to have these steps and in between, we're going to have some stuff to figure out. If you use those milestones as goals, keeping your eye that forest that you're trying to plant, and be flexible in between you will be I think no more successful. I use my calendar a lot to keep track of all the things I'm doing, not just meetings I have, but I will block on my calendar on Monday morning or even Sunday night here, I'm going to write this here, I'm going to create this plan. Every hour of my day is blocked out with all the things I need to accomplish that week. If something pops up, I have to move something in order to accommodate it. It gives me a really great sense of how much time do I have, can I take on something new? What do I need to delegate? All of those type things.

The thing I will say about that, though, I will take a self-care pause, is to put creative time and rest on your calendar, too. I am notoriously bad at that. I like to hustle and do lots of things. I always have some crazy idea I'm cooking up. So I forget to rest and that isn't good for your project getting done or you coming to the end of that project in your best state.

The last thing is...oh, before we move on from that, I wanted to mention Trello. I use Trello to great effect to track the different parts of a project. That uses a system called Conbon [sounds like] which is a tool that agile technical folks use which basically is the different lanes, you have these cards that basically get organized into different states of a project and you can just drag and drop them. You can reorganize them to reprioritize them. It's a really great way to keep things organized and visual if you're a visual person. Trello is free. You can create a free account that you can use. You can share the boards you use with other folks if you are working collaboratively with other folks. But even if it's just you, I have this consultancy and I work with partners, but I mostly use it for my own time management project management.

The last part is learning to be a delightful nag. If you need things from other people, obviously, figuring out how you're going to address those delays, figuring out what the obstacles might be and how you can proactively address them is always better than waiting for things to be superlight and have an uncomfortable conversation. Just as an aside, anytime you have to have an uncomfortable conversation, having as soon as possible makes it the least amount of uncomfortable in my experience. Whether that's with a wealth developer or designer or whatever the case may be, just get it out there. But this tool, WOOP, is also a tool that will be in the resources related to this session. And WOOP stands for wish, outcome, obstacle, plan. It was developed as a tool to help people with any goal setting in life. You want to learn a foreign language, he went to become a painter, want to launch a website, you can use WOOP to accomplish it. Because the idea here is every week you're going to look at what is the progress toward this goal or the wish that I have to achieve. You're going to anticipate what are the obstacles to that outcome and they create a plan to overcome it. So, if I am actually a

painter, so I say this week I want to do three pieces. I want to make project on three pieces. I know that my obstacle is always going to be a perception of not enough time. So I have to build a plan for how, when I encounter that obstacle, how am I going to go forward? So, WOOP has an app you can download, there are some tools online, does not use it to do anything awesome you're trying to do.

Okay, requirements. A funny note, and you contact this quote, I was pretty sure Benjamin Franklin said it. I thought if I get this wrong, this is the group of people who is going to [inaudible -- off microphone]. So I looked it up to be sure. But it is the truth in this case, that an ounce of prevention is worth a pound of cure. When I was talking about waterfall versus agile and having a really clear picture of every tree, you don't need a really clear picture of every tree. But if you create this requirements document, you will have a better understanding of what trees you need to be able to see better. As you start thinking about the project, while you're doing it, what your goals are, that will tell you what the components of your project are. So if for example you are making a collection available online for the first time, well, documenting what system are you using to do that, what website technology do you have, that'll start to unlock new questions. You might need help answering them but, until you understand what it is that you're trying to accomplish and you actually write that down somewhere, it's all just a vague forest, like I can see there is a forest, but I'm not really sure what it looks like.

I created a project requirements checklist that has general list of different types of components your web project could possibly have. You can go through there, delete stuff that's not relevant, add stuff that might not be there that you need. Then start adding the details that you know. Then, as the project comes along, details will emerge. But as you go through this exercise, which probably will take you only an hour to do, you will suddenly have a lot more awareness of where the holes are in what you know, what you have access to, what you need. These are the main parts that you need to figure out. The technology you're actually using or that you prefer to use force of the project, if you don't have a requirement that's okay, too. If you're open to considering options, you just have to find someone who can help you evaluate those options. Third-

party tools, I made a list of the types of them in this requirements checklist. So it could be what are you using to send email. Do you use Google analytics or something like that? Are you taking donations online from PayPal or something more complicated? Do you have ticketing, just all those things you might be using third-party systems to do.

Then on the content side, what are all the different types of content that you wish to have a part of this website project? That could include the things that are listed here like photo galleries and video players, but also things like, I don't know, do you need rest of the cards? Do you need to be able to look at an object in 360 degrees? Do you have virtual tours? You know, there could be lots and lots of things, there are lots of tools out there. So making even a wish list of what you want to see will help you get there.

Then, measurement. Start with the goals you achieve and look at the goals you identify at the front end of the project did figure out what you need to measure in order to know if you hit them and include that in your requirements document. Once you create this overview of the project, you can use it to work with potential team members to figure out if people have skills that you need. You also can use it to kind of build the project plan, that timeline, by figuring out what tasks are going to go into the various phases of the project. These tools all work together. I think that you could do all of them in like a plan a week, a sprint week, if you really wanted to get your project off the ground into a really running start. It's a nice way to create and modify movements of to do that. Or you can do it more gradually, especially if you're a team of one. If you want to do it more gradually, you can put these on your calendar like every Monday afternoon I'm going to work on one of these parts for example. Either way you're going to end up of a really great understanding of where you need to go in order to do what it is you need to do.

Two controversial ideas, then we'll have questions. [LAUGHS] Some people absolutely disagree with me, by throwing them out there because I think they're both are so helpful. If you have a budget and you're trying to hire work for any part of your

project, be willing to disclose that budget. Even if it's a range or not to exceed number. Because, it will make sure you're sitting at the table with somebody who can do what you need for the budget that you have. That will save you so much time and headache. Similarly, RFPs are kind of dying on our side of the industry, right? Like the people who are building technology or creating design, less and less want to respond to them because often it feels like oh, I'm just a bid, I'm a bid in this process. But you need competing bids for all kinds of things. You want to make sure you're making a good investment. You want to make sure you're not overpaying for what it is you're getting. But instead of going through a more formal RFP process you sent out an RFP and you just wait to see what comes back, instead consider looking around in your community regionally or online, however you want the selection process to be, I would recommend asking people you know who they've worked with that's awesome. I think that's the best way to really find a good fit. But, find those partners that you want to work with and ask them to bid because -- and I know this isn't always possible, because there might be regulatory reasons for accessibility reasons, there might be lots of reasons you want to send something out more broadly -- but I think if you want to have really good conversations with people who can find creative solutions to do what you need to do for the budget you have, making sure that you reach out and kind of pick people who can do that is going to give you a better results. That's my soapbox on that.

In the third session, I will talk a lot more about managing the project, choosing technical partners, and I will create a technical partner interview sheet. That's one of the things I like to do for that session. All right, I know I'm a little bit over, and I want to be able to get to all of your questions. There's lots of ways to connect with me. I'm lucky in that my name is Despi, so if you Google me, you'll probably find me. So you can find me in all of these places. My digital studio, you can find me obviously online, as well. Then, there are all these ways to find me within the Museum hub and connect with them [inaudible -- off microphone]. I'm going to turn it over to Zinnia to lead us into Q&A.

>>ZINNIA WILLITS: Thank you. That was great. I was taking notes for the entire session, as we've talked about, I'm also your target audience as the director of an

organization that has a website that I'm still relatively new to this position. I don't feel like our website is ever really been anybody's baby. So it's kind of an ongoing process. So we do have some questions, some of them make the mind that I put in there, as well. [LAUGHS] I'll start with the attendee questions, first.

As you have advised nonprofits on the development of their websites, what have you suggested they prioritize?

>>DESPI MAYES: That's a great question. I think it would really depend on what the goal is. If you are trying to raise money obviously you want to prioritize the things that do that well. If the project is more mission centered and you're trying to create great intent to engage the audience, it's a different set of priorities. I would go back to that big white statement. Then, I would prioritize my work to be what are the aspect of this work that will best embody that why statement.

>>ZINNIA WILLITS: That's great advice. One of the things I wrote down was "a virtual front door." That's a very practical, helpful way to frame who's coming to our websites, and what they need, and really thinking about what did they need. The people visiting.

Kind of along those lines, which should be keep in mind about outreach efforts as we plan our website? Are there particular website elements needed to ensure that a website marketing efforts are coordinated?

>>DESPI MAYES: That is a great question. I feel like I could teach a whole other session, or maybe three more sessions on that topic. It's a hard one to answer. Definitely, measurement. So when you think about what those goals are, but for audience engagement for those business objectives, working with marketing in order to make sure you're measuring what you need to measure, you make sure that the investment that you're making in marketing is worthwhile. There are so many ways to do that whether that's using Facebook tracking pixel in the background, or using a URL

structure like a UTM. Google has a great UTM builder, so if you use Google analytics, you can basically build these custom URLs so you can track where did this hit come from? Was it a paid campaign or print out or Facebook ad, whatever the case may be, was it a partner who shared this [indiscernible]? Those types of simple tracking can really help with efficacy. In terms of really making sure that your website is serving your audience from a marketing perspective, I think the best thing to do is keep it extraordinarily user-friendly and especially on mobile. Because we are going to be making decisions about how am I going to spend my day, [indiscernible] down here, what are the hours, where do I park, do I have to pay? They're going to be wanting to answer all these questions instantly. So, no amount of awesome marketing will make up for that user experience in that really key visit information on your website. I know it seems like not exactly marketing, but I think it's the most important thing marketing can care about, because if you're out there, if you're spending money on -- or promoting your museum in any capacity, email or whatever, then people come to your website and can't figure out what your hours are – dead in the water.

>>ZINNIA WILLITS: That is so true, as a user of many websites, especially when you're traveling and just want that information. That is a good way to think about it, what is the quick information that people might need right away in the palm of their hand. That sort of alliance with the next question in a flipped way. What are some common website pitfalls?

>>DESPI MAYES: I think I'll talk about this in the second, the content workshop, and not. One of the biggest pitfalls is waiting too late to start content planning. A lot of people are excited about design and they go from having a plan to a design phase and then, the content is fit into the design, rather than vice versa. I think museums, especially, have such a content forward existence, you know? So, thinking about what is the content of this website and how are we best going to showcase it allows the design process to be informed by all the cool stuff that there is to see and do and experience, rather than, I think, sometimes in the content process you just discover oh my gosh we need this thing that we didn't even know we need. If you do that sooner, it

will keep your project on track better. Also, having really great check in with whatever technical resource is building your site. Because I think that's other place things go off the rails is, you know, there's a big push for content and getting everything together and then it's sort of like okay, person who's doing this build, here's all this stuff. Then they have a deadline that could be weeks out, if there's not a really good check-in agreement, things could definitely be delayed. I think as a project manager, myself, and these cases, too, it's just a good idea to have a really regular conversation about that resource.

>>ZINNIA WILLITS: I love that idea with really understanding everybody's roles within website development, that helps to keep the timelines realistic. Because once were part is done I'm going to dump all the content out to the technologist who is like whoa, let's go back to that realistic timeline. Just understanding how long it takes to keep things on track. That was really great advice.

We're nearing the end, but this one, I alluded to it earlier when we were just chatting. But the checklist and that process that you were talking about, does not apply to dealing with an existing website, [indiscernible] in the middle, refreshing. It's not an entire build of a website. Is the approach the same no matter where you start?

>>DESPI MAYES: That's a good question. I think so, with some caveats. Is easier and harder to say okay, we're just going to redesign this thing. We're going to overhaul it behind the scenes then swap them out. It has its challenges and its benefits. You know, when you're working on something that is in full view of your audience, that has benefits and challenges, too. But partially the same. I think the main difference of -- and get into this a little bit next time -- is what is the minimum viable product, MVP. This is like the software idea that when you're building a piece of software, your goal should be what is the minimally useful thing that you can produce that your audience can get value from? When you think about it that way, it makes these projects easier to tackle, especially if you're adding on or revising an existing piece of technology because you can take that part that's not working and think okay, what do I need to do to make this

more workable? I can still look at it from this team approach and creating a timeline and creating your requirements for it. But you can also think about it in phases of development, too. So what do I need to do to make it better is a different question than what do I need to do to [inaudible -- off microphone] (police it? Replace it?). Does that make sense?

>>ZINNIA WILLITS: Absolutely.

>>DESPI MAYES: Like I said, I'll talk a lot about that next time because I think we all, even if you're redesigning something, there's still that whole notion of how can I make it better? Maybe I want it to be this spectacularly awesome thing, but getting there in a more iterative way might be more realistic. You know?

>>ZINNIA WILLITS: Yeah. I will be listening next week, as well! Final question for you today, how do you best plan for changes to content? This user said we find change necessary constantly.

>>DESPI MAYES: Yeah. One of the ways I think is if you have the ability to, well, I have different answers depending on your technology situation. So, if you're in a situation where you're building a new website where you're designing a site and have the opportunity to create a more modular design, that will help you tremendously. So there are lots of drag and drop WordPress tools, other content management tools, that allow you to be much more flexible about how your pages lay out and you can build custom pages with the same tools that, with the same design elements. That's great. But if you have a website that is not really flexible and you're not in that position, then it really has work to do with how can you work with what you have. And often, that means, at the minimum, you probably have the ability to make copy changes, image changes, maybe you can embed YouTube video. You can do a lot actually with those elements to tell different stories, to make your content relevant to the moment. Without knowing a little more about the context of your question, it's hard to answer the specifics. I think having, if it's possible, a single point of contact, a single person that's making those

changes, really great. As long as that person doesn't become a bottleneck. But when you're thinking about all the different things that might need to happen in order to maintain a website, lots of people can have ideas about how to change it. And all those people have the ability to, you're suddenly going to have this spiderweb effect. You know? So yeah, I'll talk more about that in the content session for sure, managing content and planning for that.

>>ZINNIA WILLITS: Wonderful. This was a great session and we very much thank you for your time and are looking forward to seeing you again next week. So I'm just going to close us out and say thank you to all of you for attending today's session on Managing Website Projects and again, Despi, a huge thanks for sharing your technical experience with website development and management. We look forward to more.

Just a few final reminders, after each module all of the videos will be available on our website, as well as a complete toolkit of resources provided by our presenters. So, and also remember that if you missed any of this session or you just want to watch it again, you can access the recording on the Museum Learning Hub website, again, that's museum-hub.org, under the Recent Webinars tab at the top of the page. If you would please complete the post event survey and feedback form, that helps us greatly. Then, don't forget to visit the forum on our website to ask any questions related to this presentation or additional tech questions. As always, follow the Museum Learning Hub on social media. And finally, please join us next Tuesday, which is July 20, for the second technical training workshop for Module 4. This is going to focus on methods to streamline content planning with helpful tracking tools, ways to identify content And find creative ways to fill them, and will also explore innovative ways to tell stories online without breaking the budget. Everyone needs to know that. The session will once again be taught by Despi Mayes, again she is the Founder and Lead Strategist of Bluebird out of Indianapolis, Indiana. I enjoyed being today's host and look forward to seeing you again next week. Thank you all for attending today's session and have a fabulous day.

>> JUSTIN: Correction, that's next Wednesday.

>>ZINNIA WILLITS: Oh my god.

>> No, no problem. I don't want to miss anyone on the next broadcast. That will be next Wednesday, July 21. Just backing you up.

>>ZINNIA WILLITS: We usually do them all on the same day at this particular month, next Wednesday, July, is that, I'm sorry y'all, I'm in the wrong --

>> JUSTIN: 21.

>>ZINNIA WILLITS: July 21. That will go out in a million different places. Now you have it on record that I sometimes screw up. [LAUGHS] Thank you all, we look forward to seeing everybody next Wednesday. And Despi, again, thank you. Have a great day. [END TRANSCRIPT]