

How to choose a website design firm

22 questions to ask before engaging in an important partnership

Website development projects can be fraught with risk. Organizations often wonder:

- How can we be sure we're choosing the right technology for our needs?
- Have we thought of everything so we don't miss deadlines or pay for change orders?
- How can we avoid getting stuck with a vendor that we don't trust to deliver?
- How can we make an apples-to-apples comparison of multiple bids?
- How can we ensure our new website is one we will be proud of?

This document aims to help you ask the right questions and mitigate risks when evaluating a website vendor. While there are many items to compare, the 22 questions listed here are those most likely to affect your overall project process and outcome, increasing the odds that your website project stays on time and within budget.

Firm Qualifications and Company Profile			
	Incomplete	Typical	Excellent
What is your experience in our vertical?	Firm does not have experience with organizations like yours, or the websites they reference are no longer live.	Firm has some experience with organizations like yours, but what they provided for others is not exactly what you need or not exactly what you will be getting.	Firm has extensive experience with other organizations like yours and can point to many examples of how they have solved similar problems in the past. You are guaranteed to work with many of the same team members that did the cited work.
Will you provide references and case studies of live sites in our vertical?	Firm cannot provide recent references for relevant projects, or says they have to get permission before they can share contact info.	Firm can provide some references for recent and relevant projects, but there may be significant variances in scope. (e.g. they only designed the other website but did not implement it.)	Firm can provide extensive references for recent and relevant projects of similar scope, and their references' enthusiasm is evident.

Services and Deliverables			
	Incomplete	Typical	Excellent
What content and information architecture services do you provide?	Firm does not provide any content migration services. You're on your own and you are told that the software is so amazing that you will be able to "do it yourself."	Firm inventories your existing website and helps you migrate content to the new website.	Firm not only migrates your content, but also helps you design new information architecture (based on empirical usage data) prior to the move, and then reformats all of your existing content into the new structure. The migration is completed before you are trained on how to use the new system. Firm has a plan to help keep your current site and new site in sync while you finalize your new site.
What is your discovery process?	Firm does not have a discovery process and will get right to creating designs.	Firm does some exploration, mainly in the form of opinion polling of your organization's leadership.	Firm has a plan for stakeholder interviews or surveys, and incorporates analytics and other empirical usage data from your current site to formulate strategic recommendations.
What is your design process?	Firm has a poorly-defined design process, and/or strict limitations on the number of rounds or designs. Firm has a "graphic designer" with limited web UI/UX experience.	Firm provides multiple design rounds and designs, but limits feedback to a certain number of revisions, and charges by the hour if additional changes are needed.	Firm provides as many design rounds as needed to win approval. Firm even agrees to make minor design changes later on the implemented site, if needed after content has been migrated and reviews are done.
What is your implementation process?	Firm outsources the implementation of the site to 3rd party. There is limited communication between the designer and the front-end developer implementing the design.	Firm implements the website, but requires you to "sign off" on functionality at an early stage and then charges you by the hour to fix issues you inevitably encounter after implementation.	Firm fully implements the website and provides a warranty to fix usability issues or implementation bugs even post-launch. The designer and front-end engineer have a process to collaborate to ensure an excellent outcome, including a post-implementation design review.

What is your training process?	Firm has no training plan or materials, or refers you to a CMS vendor for training.	Firm provides one “train the trainer” session and only limited training thereafter.	Firm trains your key users and has extensive methods and materials for training other contributors in your organization. This includes recorded training webinars, a knowledge base, and a support ticketing system.
How do you ensure accessibility and Section 508 compliance?	Firm has no defined plan for users with disabilities or knowledge of accessibility laws like Section 508 of the Rehabilitation Act, as amended (29 U.S.C. § 794 (d)) or related accessibility laws.	Firm says that your website meets Section 508 guidelines or claims that it “comes with the CMS.”	Firm not only meets Section 508 and WCAG 2.0 AA guidelines, but also trains your organization on how to keep your website content accessible (such as tagging PDFs, uploading closed captions on videos). Firm will help you monitor your site for ongoing compliance.

Technology Platform			
	Incomplete	Typical	Excellent
What website CMS (content management system) should we use?	Firm does not have a recommendation, or says they will figure one out based on your needs, or recommends a CMS that is homegrown or proprietary with little to no popularity.	Firm recommends a CMS that is used by other organizations in your vertical, but is proprietary or has unpredictable ongoing costs.	Firm recommends a CMS that is widely adopted by organizations in your vertical and is either free (open-source) or has a very transparent cost structure. CMS upgrades and security patches are released on regular basis. If open-source, firm has contributed code back to the CMS platform.
How do you ensure that your recommended CMS and the finished site will meet our needs?	Firm claims it can do anything you need, but sales staff cannot demonstrate specific features or examples.	Firm can show you a back-end demonstration of a relevant site, giving you a sense of what the CMS would be like to use and how your needed features would work. Demo goes fairly smoothly.	In addition to having a smooth demonstration, firm has extensive experience with that CMS and a process to evaluate how well it will work for you and your specific needs.

<p>Ask yourself... How usable is the firm's technology?</p>	<p>System seems dreadful to use and has obvious bugs, has limited browser compatibility, and is inaccessible from mobile devices.</p>	<p>System isn't terribly intuitive and would require your organization to dedicate an expert to explaining it to others. People would probably end up emailing their changes to that expert because the system is too difficult to use.</p>	<p>System is very intuitive and results in few technical questions. New users can figure most things out after logging in. Your organization's web leaders can focus on content governance and strategy, not tech support. System can support many contributors across your organization submitting content for approval to a central administrator and/or specialized approvers.</p>
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Ongoing Maintenance			
	Incomplete	Typical	Excellent
<p>Do you offer hosting?</p>	<p>Hosting is not included or covered in the scope of services. Alternately, hosting is offered on a third-party platform you've never heard of.</p>	<p>Hosting is handled by a third-party, or your organization is expected to maintain it in-house with limited support. Backups are a manual process the third-party hosting vendor is supposed to do, or the task is left to your team.</p>	<p>Firm offers an enterprise high-availability (HA) hosting environment consisting of unlimited storage, off-site backups, and 24/7 monitoring. You have the ability to download your own backups and change providers. If hosting through a third-party, the firm provides an arrangement to turn over contractual control of the hosting to you if something were to happen to the firm.</p>
<p>Once launched, how do you ensure the security of the site?</p>	<p>No security plan is presented or included in the ongoing maintenance agreement.</p>	<p>Firm updates software on a monthly basis with no exception for security patches.</p>	<p>Firm constantly monitors and immediately patches any detected vulnerability or malicious script.</p>
<p>What ongoing upgrades are included?</p>	<p>Upgrades and bugfixes can be performed, but are billed by the hour.</p>	<p>Minor enhancements and bugfixes get rolled out on a scheduled basis, including, but not limited to, things you reported to them as broken.</p>	<p>Major new features are released as part of the ongoing maintenance agreement, including infrastructure upgrades such as SSL and upgrade to new versions of the content management system.</p>

<p>How do you support clients after they launch if they have questions?</p>	<p>The firm refers you to a third-party that charges by the hour for support, or has a “retainer” of hours that you can use to get help. Methods of support are undefined with no guarantees and may be subject to availability of personnel. Support is limited to CMS issues and does not help with design or accessibility matters.</p>	<p>The firm has a ticketing system where you can submit questions and service requests. They escalate issues to others in the organization, if needed, including those who helped you originally develop your site. Support may be handled by an overseas company that is unrelated to the team that built the original site.</p>	<p>The firm has a program to deliver unlimited, timely, and comprehensive support for any issues you encounter with your site. The firm has guaranteed response and resolution times for support tickets, 24/7 help for emergencies, and a system for managing and viewing support requests as well as auditing the timeliness of responses and customer satisfaction. Support is provided by the company that built the site and knows your organization.</p>
<p>Do you offer ongoing training?</p>	<p>Ongoing training is not provided.</p>	<p>Training is available as needed, perhaps for a fee, to onboard new staff members.</p>	<p>Ongoing service agreement provides training for new employees as well as periodic training refreshers, and can cover topics from website analytics to usability issues and content best-practices.</p>
<p>Do you perform site reviews after the site has launched to determine if the project has met the stated goals?</p>	<p>Firm does not have a plan to review your site after launch.</p>	<p>Firm will review your site for general usability issues and evaluate the performance of the website compared to web standards for things like accessibility.</p>	<p>Within a specified timeframe, typically 6 - 12 months after launch, firm provides at least one in-depth analysis of your site for content quality, potential design breakdowns, and to provide help with any problem sections. Also includes measures of success in achieving stated goals.</p>
<p>How do you ensure post-launch accessibility and cross-browser compatibility?</p>	<p>Firm charges you by the hour to fix Section 508 violations or cross-browser issues that come up post-launch.</p>	<p>Firm fixes any cross browser or accessibility issues at no charge in a timely manner to meet, or nearly meet, Section 508.</p>	<p>Firm proactively monitors and scans for accessibility problems that you might not be aware of, and pushes back on service requests that would have accessibility implications. It includes content accessibility (such as tagging PDFs, uploading closed captions on videos) as part of ongoing training to meet WCAG AA 2.0, the gold standard for accessibility.</p>

Does your company's insurance continue to cover us after launch?	No. Firm "designs and departs."	Firm has at least \$1M of professional liability coverage, but the extent to which it protects your organization is ambiguous.	In addition to having at least \$1M in coverage, firm has relevant insurance extensions for cyber-related and ADA issues (e.g. CyberTech+ by Travelers). Firm provides your organization with a Certificate of Additional Insured (COI) prior to contract execution.
What is the term of our ongoing service contract?	Firm requires a three to five year contract. Limitations on the number of hours for updates and support and other restrictions apply.	Firm offers a flexible contract and reasonable cancellation clause and/or the ability to add/remove services as needed.	Firm offers a full comprehensive service plan, available month-to-month or through a locked-in rate for a specific number of years with no cancellation penalty. All services are included within the monthly fee, so costs are predictable.

Contract			
	Incomplete	Typical	Excellent
What is the total cost of this project?	Firm bills "time and materials" with no protection against budget overruns.	Firm provides a fixed bid with stated assumptions (e.g. number of website posts to convert, number of design revisions) that could result in additional charges if exceeded.	Firm guarantees the website will be delivered for a fixed price and has demonstrated an understanding of project needs (e.g. delivered a content inventory of current site with its proposal) to validate its assumptions. Vendor' references back up its reputation of not charging more than it proposed.
Can you meet our deadline?	Firm doesn't have a stated timeline or plan, or the process is outlined without dates attached.	Firm's sales staff swear that they can meet your deadline.	Before the firm commits to your timeline, they confer with you and your proposed project manager to pencil in key calendar dates and confirm resource availability. The project timeline is outlined, working backwards from any required deadlines, before the project is executed.