Site Review Outline

Goal: To understand and inform stakeholders of how well the website functions technically, and as a reading experience. Also, provide a plan for continual improvement of the website.

(Not a website rehaul, it's a snapshot and an iterative approach to opportunities for improvement)

The asset to audit: www.calmatters.org

Areas to cover in this audit: Comparative analysis, user experience & user engagement, site technical health & site metrics.

Deliverable*:* A detailed report documenting the current snapshot of the user experience on CalMatters website and newsletter and the opportunities to improve the same. The report will also document the current tools available to empower the CalMatters team and opportunities to better empower the team.

User Profile: The CalMatters Reader Today (get a current snapshot from GA): A 35+ reader from California (verify)

1. Comparative Analysis

Timeline: 2-3 Days
Resources needed: Sapna/Nick
Scope: Understand and record similarities in approach across comparative sites below, record best practices and usable elements that we can test, iterate and evaluate for CalMatters.

Sites to evaluate
Texas Tribune,
The 19th
Salt Lake Tribune.
Chalkbeat
Marshall Project
Bridge Michigan,
CT Mirror

Politico, VT Digger, The Trace, The Imprint, Wisconsin Watch
Center for Public Integrity, Center for Investigative Reporting/Reveal, PRX
KQED, High Country News, Mother Jones, The 74, Hechinger Report,

Deliverables

- Google Doc comparison table

2. User Experience

Timeline: 4-6 weeks (timeline to be re-evaluated)

Resources needed: Google analytics, *Inputs from various teams/subject matter experts (**John**, **Trevor**, **Margarita**, **Courtney**, **Bhyronda**, **Dave**, **Shyla**, **Avrianna**, **Kim**, **Neil**), user demographics, surveys (SurveyMonkey), User testing tools (card sorting test (OptimalWorkshop), users tasks (UserTesting/UsabilityHub), success with tasks, questions, user testing sample of 10 people, HotJar or other tool for Heatmap)*
Scope: Analyze the user flow as it exists on the website today. Talk to relevant stakeholders to understand limitations and potential needs. Recruit users to test the experience so as to identify potential and missed opportunities in delivering value.

2a) Brand Consistency

Where Are We Today? *(more questions to be added, if required)*
-Is the design aligned to the company brand?
-Are we using the logo consistently?
-Are we using the color scheme/tones consistently across the website?

How Might We Improve The Use of Brand Elements? Recommendations

2b) Navigation

Where Are We Today? *(more questions to be added, if required)*

- ➔ How easily can the user navigate to different sections of the website?
- ➔ How easily is the user able to navigate to and read relevant content?
- ➔ How well does the website follow UX best practices?
- ➔ Is the website designed with easy discoverability to relevant stories?

How Might We Improve The Experience? Recommendations

Deliverables

- Google Doc outline of areas for improvement

2c) Accessibility

Where Are We Today? *(more questions to be added, if required)*

- ➔ How does the website meet accessibility standards and best practices?

How Might We Improve The Experience? Recommendations

Deliverables

- Google Doc outline of areas for improvement

2d) Engagement

Where Are We Today? *(more questions to be added, if required)*

- ➔ What is the current process to include engagement on the website? (When is a Google form used? How do we deal with reader stories?)
- ➔ How well are engagement elements working today (conversions to email subscriptions, donation?)
- ➔ Are the calls to action easy to find and well-designed?
- ➔ How is the design enabling conversions, and is it aligning with business goals?
- ➔ How easily is a reader able to understand the value and subscribe to a newsletter?
- ➔ How easily is a reader able to understand the value and donate to CalMatters?
- ➔ How easily is a reader able to understand the value and subscribe to a podcast?
- ➔ Shareability: how easy is it to share articles across social media or email? Do entire articles get shared? Are we able to share charts or infographics?
- ➔ What are the opportunities to better engage the reader today?
- ➔ How frequently do we survey newsletter subscribers and donors? What do we know from any past surveys or qualitative conversations?

How Might We Improve The Experience? Recommendations
(Highlight key areas of need we can research, test, iterate, and report on)

Possible idea to test: 'engagement' in stories via calls for responses, etc using simple tools If it works, work to create a workflow for editorial team to use when considering the addition of engagement elements
Possible idea to test: A/B test conversion call-to-action text
Survey of members and subscribers of newsletters

2e) Content

Where Are We Today? *(more questions to be added, if required)*

- ➔ What is the current process and workflow to publishing content on the website?
- ➔ Are the publishing tools and plugins working as they should?
- ➔ How well does the content render for the user across browsers and devices?
- ➔ How easy is it for the reader to get story highlights?
- ➔ Are there logical content breaks to provide an easy-to-read experience for the reader?
- ➔ Reader surveys and polls: What is the current mechanism to invite reader feedback?
- ➔ How is content discoverability (related posts and search tools) on the website?
- ➔ Is the content categorized and tagged appropriately?
- ➔ Are there diverse story templates for multiple use cases?
- ➔ How well does Newspack support editors and writers with creating story modules?
- ➔ How well does Newspack support visual storytelling with different image layouts?
- ➔ How easy is the experience for producers to publish and share content?
- ➔ How easy is the experience for producers to effectively publish rich, engaging stories?

How Might We Improve The Experience For Readers As Well As Producers? Recommendations

Possible ideas: test a new story template
Possibly test video on the CalMatters website?
Explore more ways to include reader survey and polls and invitations to contribute
Example: How might we provide the newsroom tools or functionality to talk or survey their users?

3. Technical Audit

Timeline: Week of December 28th
Deliverable: Google Doc with audit results and recommendations for possible areas to explore (Highlight key areas of need we can immediately test, iterate, and report on)

Resources needed: A walkthrough of Newspack, a walkthrough of website architecture as we best understand it, an understanding of the content and newsletter workflow with related editorial team members

Where Are We Today? *(more questions to be added, if required)*

- Understand where content is mapped, architectured and lives.
- Understanding content product workflow for both producers and editors
- Audit Newspack
- Understanding the newsletter workflow
- A clear understanding of site map as it exists today
- Audit plugins used on WordPress
- Audit for site security
- How well does the page load and how fast is the website?
- What is a 'project' on a site and how is it used? What is the use case for calling something a project versus post?

How Might We Improve The Technology Behind The CalMatters Website? Recommendations

4. Metrics Audit

Resources needed: Google Analytics, Shyla, Trevor, Margarita, Analytics and usage report, understanding of stakeholders

Where Are We Today? *(more questions to be added, if required)*

- ➔ How do we report metrics for website, newsletter and conversions?
- ➔ Do we have an easy-to-use dashboard for website analytics for usage by product, executive and engagement teams?
- ➔ How do we measure and prioritize metrics for the website today? (traffic, engagement, time spent, returning visitors)
- ➔ How do we measure and prioritize metrics for the newsletter today?

- ➔ How do we measure and prioritize social media metrics?
- ➔ Are we creating clear, well-defined audience segments to track?
- ➔ How do we measure and prioritize the metrics for user conversions into donations?
- ➔ How do we measure and prioritize the Search metrics from the Google Search console?
- ➔ How do we measure content performance on partner sites?

How Might We Better Align Metrics to Organizational Goals? Recommendations

5. Discoverability Audit

Resources needed: Google Analytics, Shyla, Margarita, Search metrics and usage report

Where Are We Today? *(more questions to be added, if required)*

Traffic
-How are we performing on search engine results pages?
-How are we performing on shareability?
-How are we performing on partner sites?
-Are we performing well for the brand and related keywords?
-Is the Sitemap well-defined?
-Do we have clear descriptions and page titles with headers?
-Are Redirects and dead pages handled well?
-Do we have strong backlinks and links from partner sites
-How is the site performing for branded and relevant keywords?
- What are the missed opportunities?

How Might We Better CalMatters Discoverability in Search As Well As Social Channels? Recommendations

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Other notes from previous versions

2. Site Discoverability
Resources needed: Google Search Console, Google Analytics, SEO rankers, SEO consultant?
Questions for Kim: Will any part of this audit help setup Define Media for success? How do we approach SEO in this site audit given Define Media's focus?

Traffic
-How are we performing on search engine results pages?
-How are we performing on shareability?
-How are we performing on partner sites?
-Are we performing well for the brand and related keywords?

Identify areas of improvement

SEO Hygiene

-Is the Sitemap well-defined?
-Do we have clear descriptions and page titles with headers?
-Are Redirects and dead pages handled well?
-Do we have strong backlinks and links from partner sites

Identify areas of improvement

State of Design/UX/Accessibility
Resources needed: Nick, John, user demographics (ongoing list), User testing tools (card sorting test, users tasks, success with tasks, questions, user testing sample of 10 people, Shyla for Google Analytics to understand typical behavior, HotJar or other tool for Heatmap),

Tools and resources needed:

- Is the design aligned to the company brand?
- How easily can the user navigate through the website?
- How easily is the user able to navigate to and read the content?
- How well are engagement tools (surveys, calls for responses) working?
- Is the website designed with easy discoverability to relevant stories?
- How accessible is the website?
- How well does the website follow UX best practices?
- Is the call to action easy to find?
    - ➔ How is it affecting conversion, and is it aligning with business goals?

Identify areas of improvement

Design & UX Audit

- Is the design aligned to the company brand?
- How easily can the user navigate through the website?
- How easily is the user able to navigate to and read the content?
- How well are engagement tools (surveys, calls for responses) working?
- Is the website designed with easy discoverability to relevant stories?
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- How well does the website follow UX best practices?

- Is the call to action easy to find?
    - ➔ How is it affecting conversion, and is it aligning with business goals?

Identify areas of improvement

Content
Resources needed: TBD (Possibly editorial team producer, authors on the site, graphic designer, video editor?)

-Are the publishing tools and plugins working as they should?
-How well does the content render for the user? (no text overlay on image, content works and looks the same across different browsers, …)
-How is content discoverability (related posts and search tools) on the website?
-Is the content categorized and tagged appropriately?
--Identify areas of improvement

4. User Conversion

Resources needed: Newsletter team, membership team, reports from SalesForce, Mailchimp

Snapshot: What is the current conversion numbers for newsletters, donations, event attendance?

-How easily is a reader able to understand the value and subscribe to a newsletter?
-How easily is a reader able to understand the value and donate to CalMatters?
-How easily is a reader able to understand the value and subscribe to a podcast?

--Identify areas of improvement

Scope (what would a full-length design analysis look like?)

Report

Small wins: What could we tweak in a small way to test a better experience for the user?

Engagement Components

(Tools and resources needed:)

bullet points /line items

-
-How easily is a reader able to understand the value and subscribe to a newsletter?
-How easily is a reader able to understand the value and donate to CalMatters?
-How easily is a reader able to understand the value and subscribe to a podcast?

-How are we engaging the user today using onsite tools (surveys/call for perspectives/call for responses)
How it is setup and used by CalMatters staff today?

scope (How well are we converting readers into sharers, members or newsletter subscribers today?)

Report

Small wins: What could we tweak in a small way to better the readability experience? A/B test the share feature, for example.

Content Components

(Tools and resources needed:)

Resources needed: TBD (Possibly editorial team producer, authors on the site, graphic designer, video editor?)

-Are the publishing tools and plugins working as they should?
-How well does the content render for the user? (no text overlay on image, content works and looks the same across different browsers, …)
-How is content discoverability (related posts and search tools) on the website?
-Is the content categorized and tagged appropriately?

-story templates
-imagery /gallery/
--Identify areas of improvement
-content and topic organization
-
-imagery /gallery/
--Identify areas of improvement
-content and topic organization

How it is set up and used by CalMatters staff today?

scope (how well are the components in the story working today?)

Report

Small wins: What could we tweak in a small way to better the readability experience? A/B test the share feature, for example.

Technical know how:

- A clear understanding of where various content lives (site vs projects)
- Understanding content product workflow
- Browser compatibility
- Newspack
- Understanding the newsletter workflow
  A clear understanding of site map as it exists today

Technical Outcome

Metrics

Google Analytics
Newsletter metrics
Social metrics
Search metrics
Demographics
Audience Segments

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Questions for Kim: How do we approach the content audit? Is the scope expected to include the content itself (length of content, use of graphics) or simply the user experience for the current, familiar CalMatters reader? Assume the scope does not include newsletter

Design & UX Audit

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- How easily is the user able to navigate to and read the content?
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--Identify areas of improvement

4. Site Health
Resources needed: Talk to news producers, email producers to understand how well the below tools are working.

-Audit Newspack
-Audit plugins
-Audit for site security
-Loading and speed of the site
-Page requests/page size

Schedule

Timeline: Clarify with Kim first on time constraints.

Phases

1. User mapping (who is it for right now?)
2. Audit backlog (what needs to be done?)

3. Sprint 1: Discoverability audit
4. Sprint 2: Design Audit
5. Sprint 3: Content Audit
6. Sprint 4: Conversion Audit
7. Sprint 5: Site Health Audit

Other Notes

Bridge Michigan are parallel businesses but much smaller; the peers in size (say 40-plus employees) would be Texas Tribune, ProPublica, Chalkbeat, Marshall Project, Center for Public Integrity, Center for

Investigative Reporting/Reveal, and to an extent some of the public broadcasters like PRX or KQED though of course the delivery for them is different. Maybe also High Country News,
Mother Jones for sure.
The 19th. And The 74. Hechinger Report. And in a way, the newest nonprofit, the Salt Lake Tribune.