

Create A Scalable Multi-site Platform Roadmap

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Hello!

It's great to meet you.



Mandee Englert

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Mandee has over 10 years experience in website strategy and optimization. She is focused on building platform strategies and brings her expertise in website analytics, user experience research, redesign roadmapping and content optimization to every project she works on.

650+

FULL-TIME
EMPLOYEES

11+

COUNTRIES
WORLDWIDE

21+

YEARS
EXPERIENCE

500+

CLIENTS
SERVED

2000+

SOLUTIONS
DELIVERED

Client Success Report Card

93%

of our clients are
multi-year partners.

4 years

average age of an FFW
account.

80%

of our clients run multiple
FFW projects at once.

175+

of our team members
have direct experience
on higher ed projects

// Working with FFW helped us think critically about our audiences and how they access information and to create a tool that is **accessible** and **user friendly**.

WomenLift
Health

Panasonic

PRINCETON
UNIVERSITY

SAF

Study
Abroad
Foundation

Pfizer

UFC

Discovery

Johnson & Johnson

NBC
Sports

We're Experts in Scaling Drupal



10-year partner with NBC to support the broadcast of the Olympic Games



Consolidating and streamlining ownership of hundreds of sites from D7 to Sitebuilder.

Panasonic

A complete replatform of Panasonic's North American B2B site portfolio

HOLOGIC®

Highlight of this long-term partnership: microsite spun up in 6 weeks for a Super Bowl ad

Scalable Multi-site Platform Roadmaps

How can you enhance your platform roadmap to prune technical debt, keep stakeholders organized, and focus on optimizations that matter to the business?

Keeping Up with Evolving Priorities

Provide a future-facing and cohesive platform experience that **continues to evolve and grow** as needs and users grow.

- Outline milestones for optimizations that meet content and author needs
- Map out configurations and integrations that help authors flex within the system
- Unified, consistent message and brand identity across multiple sites
- Organized process and resources around the lifecycle of websites and content
- Governance models for platform change management, content, design

“Platform” vs. “Website”

Building a single “Website” is like tailoring a suit.

Building a “Platform” is like building a clothing factory.

A platform needs to have the tooling and flexibility that will allow site builders to construct a variety of websites with different content needs.

This requires a greater level of forethought and planning than building to the needs of an individual website.

Features need to be general enough to serve the needs of many, while providing flexibility to adapt to individual use cases.



Creating Consistency



Speed

Launch websites faster with reusable components and templates at a lower cost



Optimization

Create efficiencies through continuous refinements to technology and infrastructure



Flexibility

Efficient content workflows and editing experiences to get content up quickly while staying on brand



Maintaining An Adaptable Platform Strategy

While no single technical solution can solve for every type of website across an organization, a unified strategic web, design and technical philosophy – with appropriate stewardship by the platform team – can flexibly drive cohesive, lasting solutions for many strategic areas within the ecosystem.



What does scalable mean?

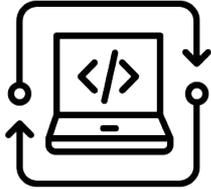
Governance & lifecycle management guidelines so that stakeholders know who is responsible for what, and a process that adapts when user needs change, or when sites need to be provisioned or retired.

Enhanced brand standards that empower authors to create unique experiences tailored to their audience needs while following accessibility and brand best practices with easy-to-understand documentation.

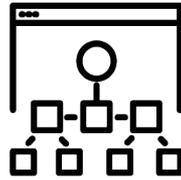
Effective storytelling capabilities providing out of the box SEO & marketing tools within flexible templates that can meet several different content strategies.

Coding standards and workflows to allow multiple developers to work from a shared codebase with the ability to build in configurations when necessary without creating technical debt.

Scaling Your Platform



OWN



OPERATE



OPTIMIZE

AT SCALE



01

Owning Your Platform

How can governance help you



A **web governance strategy** will protect the brand and help manage your web presence easily through strongly defined processes that ensure **consistency, stability and scalability** when adding features and optimizations to the platform.



Build guiding principles that provide structure, but are flexible and can quickly adapt to rapid changes.



Collaborative ownership with partners to bring insight and shape the future of the platform and determine how support requests will come in and to who



Workflow for prioritization with a steering committee to review and prioritize work, prune dead features, and staying on top of security updates.

Governance Capabilities

The highest levels of quality and user experience will be achieved through strong defined processes that ensure consistency across experiences while allowing for more site builder autonomy.

Key Benefits

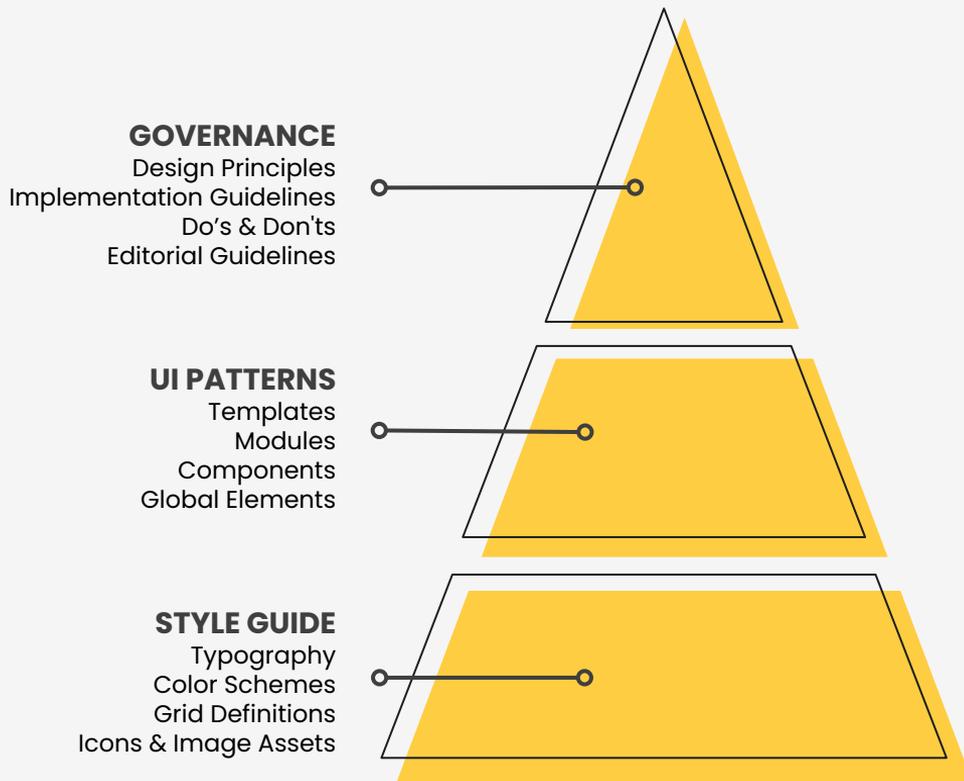
- Stakeholders will have unified access to groups of websites they manage
- Empower site builders to create new on-brand experiences quickly and effectively
- Development team is able to manage entire lifecycle from site creation to site retirement
- Contributing partners will now have the ability to help shape the direction of the platform and recommend new features and experiences



Enabling Modern Design Practices

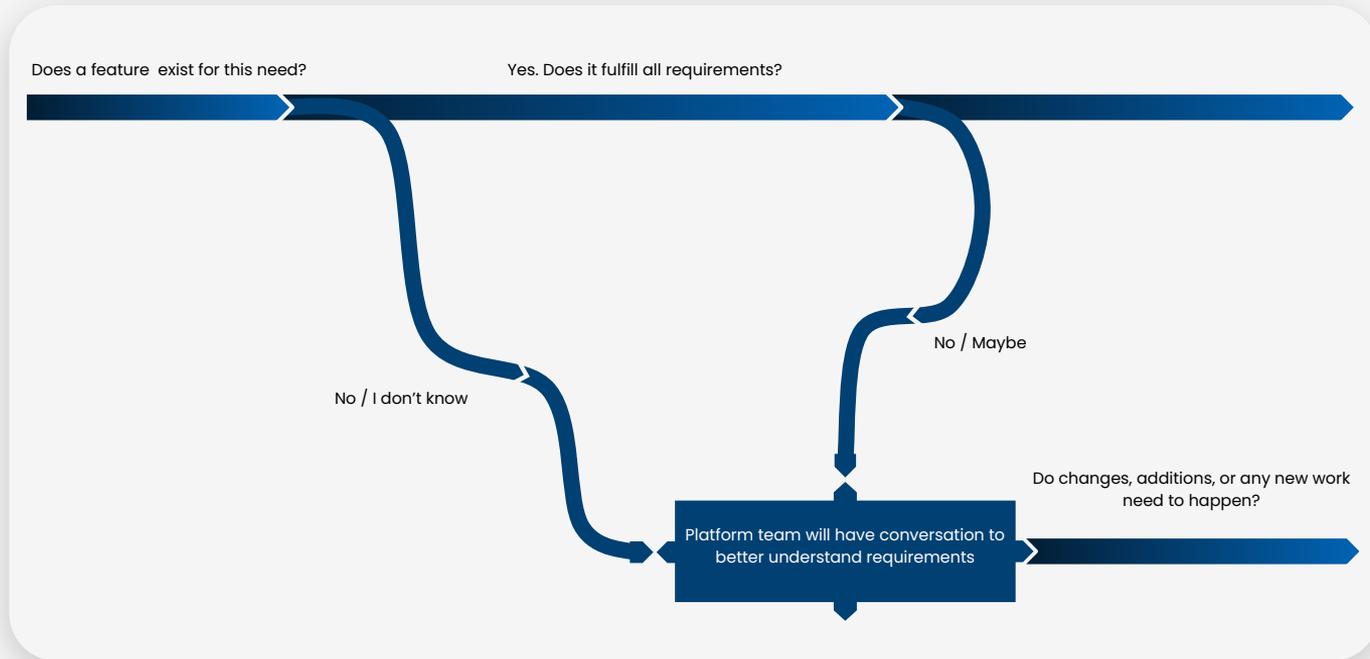
A design system built with flexible components, accessible layout variations, and role-based configuration options will make one-off customization nearly obsolete allowing for easier design and maintenance.

By providing a consistent structure across similar types of content within the system, we can create a unified and cohesive content experience for users while future-proofing the platform.



Establishing A Review Board

This committee should include the platform team, members of the scrum team as well as contributing partners. They should oversee feature requests and determine if features should be added to the platform.



/ Consistently Review & Prioritize Defects

Some criteria to consider when prioritizing issues includes:

Severity of
the issue

Estimated
proportion of
sites affected

Estimated time
to **share across**
websites and
workflows

Estimated
effort to fix

Based on these criteria, we may decide to fix, develop a new feature, or to not fix it at all.

Manage the Lifecycle of Websites

Site Provisioning

- Tooling for provisioning new sites
- Installation presets and starter kits for “Genres” of sites
- Ability to “Clone” existing sites as a starting point

Group Management

- Ability to group sites, and assign “Group Owners”
- Provide Group Owners autonomy in managing their sites

Platform Reporting

- Site “quality” metrics, such as when the site was last updated, how often a feature is used or how many page views it receives per month

Site Retirement

- Tooling for retiring sites
- Tooling for archiving and exporting sites

02

Operating Your Platform

Improve maintenance & buy-in



Improving Maintenance & Adoption

Utilizing an adaptable architecture focused future-facing optimizations, lifecycle management, and a built-in design system, the platform will empower developers and site builders to build scalable modern experiences with an easy upgrade path.

FEATURE FLAGS

Develop release toggles to allow new features to deploy in a safe environment where a group of beta users or developers can test these features before using across all websites within the platform.

CHANGE MANAGEMENT RESPONSIBILITIES

Based on organizational structure, determine who should be responsible for pieces of the platform like SSL, security updates, how new features are request and what chain of command do users need to run through.

AUTHOR & DEVELOPER DOCUMENTATION

Build documentation for developers to contribute and own their piece of the platform, and for authors to build new experiences autonomously without the support from the team.

Different groups of users will have different needs and levels of expertise in building web experiences.

A critical component to scaling platform adoption is creating easy-to-use guides for creating new experiences, best practices, and strategies for how to use layout and component variations available.

Demo Website & Starter Kits

A “demo” site will help users stay up to date with how the platform is changing and access documentation they need to adopt the platform and build new experiences.

- Provides a place for developers to build and test new features for the platform.
- Contain sample content demonstrating all available content types, widgets, and features.
- Starter kits are available to help authors create content for their genre of website without requesting a brand new feature.
- Host written documentation for Site Builders on how to use the platform.



Training Authors & Developers

Proper training is critical to ensuring the strength and accessibility of your web presence. When operating a platform at scale, training should be a top priority to keep users as autonomous as possible, saving you time and budget.

Recommended Techniques

- **Self-Guided Training Videos**
- **Training User Cohorts**
- **Case Studies**
- **Request & Support Process**

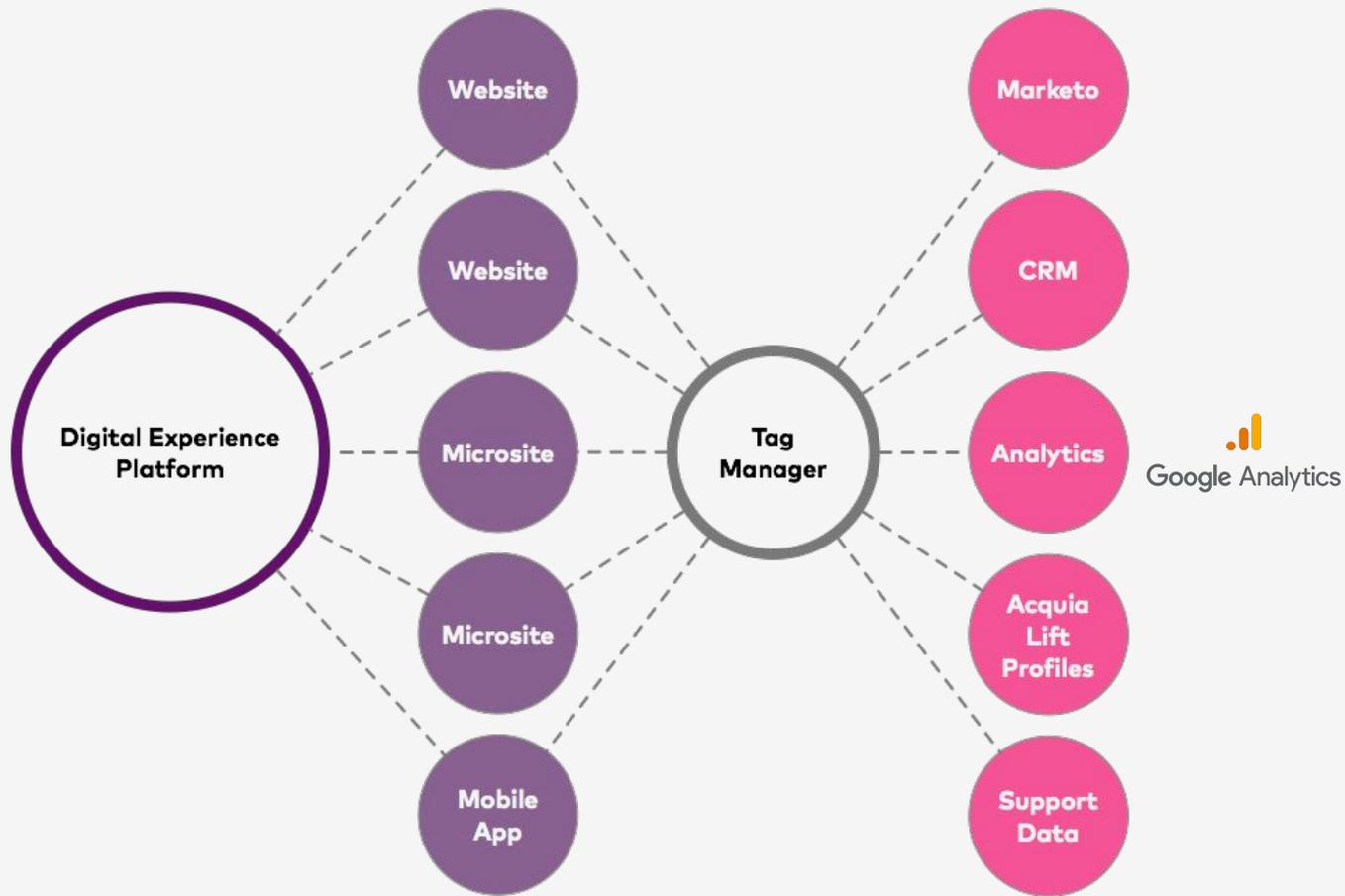


Measuring Usage & User Engagement

Measurement strategies and **reporting options** will provide the insights needed to optimize the platform and user experiences.

With effective reporting and visitor analytics strategically built-in to the platform, the team will be able to understand platform usage and quickly adapt to users changing needs.

A measurement strategy that links both platform and visitor insights that also integrate with tools like Google Tag Manager will allow the platform team to optimize the platform; enabling an author's ability to build engaging content and modern experiences.



Types of Metrics

Web Application Performance

- **Drupal platform-level performance monitoring**
- MELT (Metrics, Events, Logs, and Traces)

User Experience

- **Report on quality of site experience**
- Page Speed, Core Web Vitals
- Qualitative Feedback (Surveys, Ratings)

User Behavior

- **Understand how users are engaging with site features and content**
- Custom Events, Conversions, Scroll Activity
- Heatmaps

Content (Editorial)

- **Report on content statistics and metadata**
- Top Content Types, Top Taxonomy Terms
- Avg Page Word Count, Size of Site (Number of Pages)
- Content Age (Avg number of days since content last updated)

Types of Metrics (cont)

Search Console

- **Understand organic traffic acquisition**
- Metrics: Clicks, Impressions, CTR, Avg Position

Drupal CMS Usage

- **Apply analytics tracking to Drupal admin and internal URLs**
- Logins, Content Updates, Configuration Changes, Admin Page Views, etc.

Site Feature Usage

- **Apply consistent event tracking to common site features**
- Understand which features are most utilized by site owners

Indexation

- **Metrics gathered from site crawl results**
- Redirect chains, 404 errors, pages with missing titles, etc

Accessibility

- **Analyze how well a website tests against web accessibility standards**
- Example: Siteimprove Accessibility Score

Keep users up-to-date with platform features and changes

- Update the 'demo' website with new features, and documentation on how to use those features
- Send out email alerts when things have changed
- Create case studies on how new features or optimizations are performing to help create buy-in
- Hold open monthly/quarterly committee meetings that users can attend to learn what has changed in the platform and decisions that have been made by the steering committee



03

Optimizing Your Platform

How can you consistently improve the experience



Optimize

Create a process for marketers and external developers to contribute, make data-driven decisions, and advocate for change

- 01. Features that make development easier** by building in automations for priorities that take platform developers away from day-to-day priorities.
- 02. Design & content configurations** to help authors have variations in their web experiences and customize the experience based on user needs.
- 03. Prioritizing marketing needs** by building in technical SEO, accessibility and social best practices to help site content be found.



Promoting SEO & Findability

Modernizing an approach to content strategy and SEO in the platform will enable sites to enhance their organic search presence, and engage users to learn and take action, ultimately enhancing the visitors experience.



ATTRACTING USERS FROM SEARCH ENGINES

Building in SEO best practices like enabling a sitemap.xml file, robots.txt file and a collection of meta and schema data fields can allow authors to improve their organic search rankings by providing structured information that tells search engines what the content is about.



URL ALIAS & REDIRECTS

Allowing users to create their own URL alias and redirects will keep site structures clean and keep site visitors from landing on pages that no longer exist or link to old content. Allowing users to create redirect autonomously will help developers keep focused on other tasks.



ENABLING SOCIAL REACH

Populating fields that target social media platforms like Facebook & Twitter can enhance the website profile and tell users more about the content at a glance, leading to more views and clicks to the website.



Optimize and Add Global Elements

Global elements strengthen brand experiences and aid with wayfinding by offering reasonable defaults enabling authors to provide optimal experiences to their users.



THEME CONFIGURATIONS

Shared configurations like color palette, typography, button styles across business units will create cohesiveness and identity.



ALERT BANNERS

Global features like alert banners can help users react quickly to changes in the organization to alert their visitors to change.



COMPONENT FEATURES

Building new components that can enable content types to have structure but flexibility in how the content is viewed by visitors.



Improve Site Accessibility

Site visitors should be able to easily navigate and consume the content for all websites on the platform.

Platform code should consistently be reviewed against accessibility guidelines to ensure that all front-end experiences are accessible.

Accessibility compliance also depends on the content site owners produce.

Automated accessibility checkers should be implemented to assist content creators with producing accessible content, even if they are unfamiliar with web accessibility best practices.

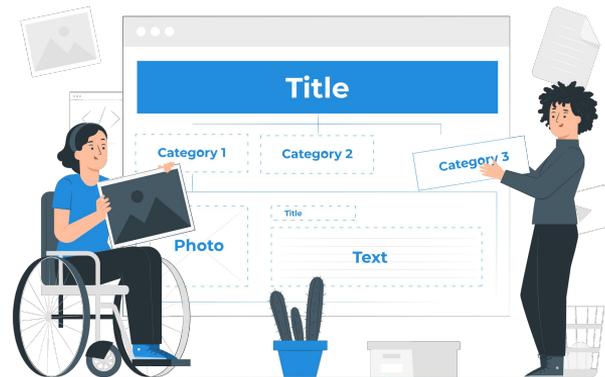


Illustration from StorySet.com

Personalizing Audience Experiences

Connect data from multiple sources to understand the full journey of any user segment driving repeat engagement and loyalty for the brand.

Testing Tips

- Find segments that are worth your time and effort
- Offer users relevant information that improves their journey
- Always A/B test with an end-goal in mind



Getting Buy-in to continue scaling your experiences.

- 01. Cost Savings:**
 - Centralizing the brand and infrastructure to manage the process of creating & maintaining assets saves budget.
- 02. Efficiency:**
 - A shared ecosystem allows for a quick process for rolling out new sites, and provides an ability to reuse content between sites. Marketers learn how to use one platform.
- 03. Consolidating Support:**
 - Single point of upgrade and development, allowing for rapid upgrades and improve code accessibility & quality.



Thank you!

FFW is offering a complimentary 1-hour consultation with our digital scale experts to get you started.

Scan the code on the right, or visit:

bit.ly/FFWDrupalCamp2023

