

# Websites & CMS Welcome Guide

Updated 7/21/2025



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Granicus is committed to the successful deployment of your new website. To that end, we have compiled this guide to help you prepare for the kickoff, set expectations for working together, and provide reference materials for use later in the project.

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## Preparing for Kickoff

### ASSEMBLING YOUR TEAM

In most cases, a team of professionals from your organization are involved with the project implementation process. Granicus encourages broad engagement across the organization to foster "buy-in" for the new website while simultaneously empowering focused decision-making to ensure continued progress.

#### Typical Roles Within the Project

##### *Project Manager / Point of Contact*

A single point of contact (POC) is required for the project. This person serves as the client's project manager and is responsible for relaying all communications within your organization.

- Should allocate 3 to 8 hours per week during through development
  - During soft launch, the number of hours needed per week may increase dramatically
- Maintains day-to-day communication with the Granicus project manager
- Coordinates completion of assigned deliverables
- Coordinates schedules
- Is enabled to make small project-related decisions

##### *Steering Committee*

Many clients organize a small steering committee to support the POC in making decisions and completing day-to-day action items.

- Should allocate 2 to 4 hours per week in addition to meetings with Granicus
- Participates in meetings with the Granicus project manager to discuss project-related deliverables
- Should meet weekly internally to discuss and complete deliverables
- Is enabled to make medium to large project-related decisions
- Works with project manager to interface with the executive approver, department representatives, and departmental resources as needed
- Should be limited to 3 to 5 members including Project Manager for best results

##### *Executive Approver*

Some organizations require major milestone approvals by an executive approver rather than the project manager or steering committee. Whenever possible, it is highly recommended that the executive approver participates as much as possible with the

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**Commented [SN5]:** 3 to 5 members, for consistency and accessibility

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steering committee to reduce the need to repeat information and rehash decisions. An executive approver should:

- Allocate about 2 hours per month to the project
- Be available for consultation with the project manager or steering committee within 5 business days
- Attend the entire UX Workshop or trust the steering committee to present the findings after the workshop is complete

### Department Representatives

Some organizations wish to include representatives from each department or service organization in the website project. The role of department representatives should be clearly identified as a consultative but non-decision-making role. Not making this distinction often leads to long, drawn-out projects. Department representatives:

- Should allocate 2 to 3 hours per month to the project
- Should be available for consultation with the project manager or steering committee within 3 business days.
- Do not generally attend meetings with the Granicus project manager for completing major project deliverables.

### Department Resources

Almost all projects have departmental resources. Departmental resources are the personnel that are subject matter experts and/or responsible for maintaining their department's information on the website. The POC or steering committee should not serve as a substitute for departmental resources. Departmental resources:

- Should allocate 2 to 5 hours to review and update the sitemap
- Should attend 3 to 6 hours of training
- Should allocate 8+ hours per week following training to test, review, and finalize content

### Approval Process

It is important for you to know and communicate your organization's approval process to your Granicus project manager. Within each organization, it is normal that different opinions carry different weight. Those whose opinions carry the most weight should be involved in the early parts of each phase to ensure optimal team efficiency. As iterations are completed within a phase, feedback should be focused from an ever-decreasing pool of opinions.

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**Commented [SN10]:** Recommend rewording to say, "Department representatives:" - remove "the" and lowercase 2nd word.

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## Team Planning Worksheet

### Project Manager

Name \_\_\_\_\_

Role in Organization \_\_\_\_\_

Email Address \_\_\_\_\_

Phone Number \_\_\_\_\_

### Steering Committee

Name 1 & Email \_\_\_\_\_

Role in Organization \_\_\_\_\_

Name 2 & Email \_\_\_\_\_

Role in Organization \_\_\_\_\_

Name 3 & Email \_\_\_\_\_

Role in Organization \_\_\_\_\_

Name 4 & Email \_\_\_\_\_

Role in Organization \_\_\_\_\_

Preferred Day of Week and Time \_\_\_\_\_

### Approval Process

Do you have an executive approver?  Yes  No

If yes:

Name \_\_\_\_\_

Role in Organization \_\_\_\_\_

Will you need to preview any aspects of the project with anyone else, such as the mayor, city council, county board, etc., at any point before being able to proceed to a next step?  Yes  No

At which points in the project will this be required?

Wireframe Approval  Visual Design Approval  Go-Live Approval

When does this group typically meet? \_\_\_\_\_

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## KNOW YOUR PRIORITIES

### What is it that you most want to accomplish with this project?

The answer to this question is unique to every organization but often falls into one of several main categories. What you prioritize will also have an impact on the implementation of the project. Keep in mind, not everything can be your top priority so consider it carefully. Listed below are three of the most common priorities.

#### *Priority: Go-Live Date*

Having a go-live date in mind is a good way to help ensure the project continues to keep moving forward. Aggressive dates, however, can sometimes require making strategic decisions to limit certain work in the project such as design revisions or content migration.

**Please note:** While your Granicus project manager will make every attempt to construct a project plan in line with your requested go-live date, Granicus does not commit to a specific go-live date until after the completion of at least one round of User Acceptance Testing. Your project manager will provide periodic timeline updates to inform you of whether the project is tracking towards the requested date.

#### *Priority: Innovative Design*

Granicus' team includes a pool of highly creative and talented user experience (UX) designers and graphic designers that are eager to take your new design to the next level. Prioritizing design will often mean that the design phase will take a little longer, but it also means that it's critical for the feedback received for each revision be as precise as possible. Most projects include an initial design plus three revisions: each revision needs to count!

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#### *Priority: Updated Content*

A new website is a perfect opportunity to refresh the content on your website. We encourage you to start updating the content on your current website *right now*. The more you can update now, the more time you'll save later in the project. Unless specifically included in the project scope, Granicus' content migration team moves your content "as-is." While we do make certain adjustments for accessibility considerations, we do not rewrite the content. If you're not able to refresh the content until after Granicus has migrated it, you will likely require a longer than usual launch preparation phase towards the end of the project.

## DESIGN ASSETS

Granicus will provide a SharePoint link for you to upload assets that will help us with the production of your visual design. Please provide:

1. Your logo, preferably in a vector format (.eps, .ai, .svg etc.)
2. Five or more high resolution photos that could be used on your website
  - a. Some photos on your website will be editable through the user interface and the graphic design merely uses them as placeholders
  - b. Depending on your design, some photos may not be editable, and the visual design shows how they will be programmed permanently into the design of the website
  - c. Geometric patterns
  - d. **Please note:** Do not send photos that you do not want us to use on your website.
3. Your organization's branding guidelines, including color palette

## Rebranding

If your organization is currently or planning to soon undertake a rebranding initiative that will affect the website, please inform your Granicus project manager immediately. The website project cannot proceed while a branding initiative is underway.

## KICKOFF MEETING AGENDA

1. Introductions with specific identification of the client's project manager/point of contact, steering committee, and executive approver
2. Approval process
3. Priorities
4. High level scope review
5. Implementation process overview
6. Next steps and questions

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**Commented [SN24]:** High level scope review

**Commented [SN25]:** Implementation process overview

**Commented [SN26]:** Next steps and questions

## Working Together

Every project that Granicus undertakes is a partnership with our clients. We're proud of the work that we do, and we want you to be completely satisfied with your Granicus experience. In support of that partnership, we ask that we mutually commit to maintaining open, honest, and frequent communication with each other. We encourage you to discuss a specific communication plan with your project manager.

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### GRANICUS COMMUNICATION STANDARDS

- Emails will be acknowledged within 1 business day.
- Voicemails will be treated with priority and returned as soon as possible.
- Recurring project status meetings will be scheduled at least bi-weekly.
- Timeline updates will be provided at least monthly.
- If we encounter a delay in our ability to meet a deadline, we will communicate that delay as soon as it becomes known.
- We focus on solutions.

### CLIENT COMMUNICATION STANDARDS

We ask that clients mirror the communication standards that we have committed to for you. If you are ever concerned, confused, lost, frustrated, or upset, please let us know right away; we want to make things right.

If for some reason, a period of at least two weeks passes with at least three communications from your project manager and no response from the client, this can put the project at risk for cancellation. Please note that this is not an automatic process, but it is important that we maintain communication with each other.

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### PLANNED & UNPLANNED TIME OFF

- Your Granicus project manager will communicate any planned time off in advance and in proportion to the amount of time off and in consideration of how it can potentially impact the delivery of the project. We will make every effort to plan around time off to prevent any delays in the project.
- We request that you please inform us in advance of any extended time off that could affect the implementation of the project so that we might plan around it.
- Illness and other unforeseen circumstances are a given in life and we will make all prudent efforts to minimize the effects of unplanned time off.

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### MEETINGS WITH GRANICUS

It is essential for the "right people to be in the room" every time we meet in order to ensure being able to achieve the objectives for the meeting. This means that the

meeting should be limited to POC, steering committee, and executive approval. It is the responsibility of the POC to relay information outside of that group. Large meetings become ineffective. Certain meetings may require certain departmental representatives or resources. Your project manager will let you know in advance if additional attendees are recommended. If a decision-maker is not available to attend a meeting at which a decision is expected to be made, please notify your project manager in advance so that the meeting might be rescheduled.

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## DUE DATES

Setting due dates on each action item is essential to maintaining project momentum. Your project manager will work with you to set a mutually agreeable due date for each action item.

Different types of tasks typically have different durations for how long they take to complete. Our project timelines are constructed around an expectation that wireframe and design feedback and approval is provided within 1 week each time.

Once a due date is set, it is important to commit to them. We understand that sometimes delays happen, please let us know as soon as possible if one is expected so that we can set a new due date.

## ESCALATION

We hope that you never feel the need to escalate your project but if there is something that you wish to bring to management attention, there are two options:

1. Your project manager's email signature includes a link [Communicate a Concern](#). This link will open a webform that will send a message to both the project management team's manager as well as our web implementation director.
2. You may contact the project management team's manager directly:  
Trevor Wolter, Senior Manager, Project Implementation  
[trevor.wolter@granicus.com](mailto:trevor.wolter@granicus.com)  
(949) 899-8108

## Approvals

Granicus requires approvals from the client throughout the project as work progresses. Some approvals require a documented signature while others just require an email acknowledgment.

### HOME PAGE WIREFRAME (NOT ESSENTIALS)

A documented signature is required. Once the wireframe is approved, we can then move into visual design. Following approval, changes to the wireframe are no longer allowed.

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### VISUAL DESIGN

A documented signature is required. Once the graphic design is approved, we can then move into development. Following approval, changes to the visual design are no longer allowed.

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### CONTENT RATIONALIZATION WORKSHEET WITH PROPOSED SITEMAP

An email acknowledgement is acceptable. Once approved, content migration is scheduled. The sitemap cannot be changed once content migration begins.

### CONTENT MIGRATION COMPLETION

An email acknowledgement is acceptable or will be automatically considered approved two weeks after the delivery of the Content Rationalization Worksheet with Migration Notes. After this, requests for Granicus to make any migration changes are no longer allowed. Migration changes are limited to pages identified for migration but missed or pages that were incorrectly migrated.

### WEBSITE LAUNCH COMMITMENT

A documented signature is required. This is required to officially schedule a go-live date for the website. This must be completed at least two weeks prior to the scheduled go-live date but not until after at least one round of User Acceptance Testing has been completed. The launch of the website can be rescheduled one time.

## Managing Project Scope

Change requests can have a negative impact on the project timeline. Some requests may need to be completed after launch to maintain the agreed upon timeline.

- Standard add-ons can be initiated directly by your Granicus project manager
- Small to medium requests are typically reviewed on a weekly basis by the Websites & CMS functional managers
- Medium to large requests are referred to your account manager

### TYPICAL OUT OF SCOPE REQUESTS

- Additional content migration
- Wireframe or visual design changes after approval
- Additional system training
- Application Programming Interface (API) calls not already included in a customization line item
- Interactive features on interior pages that are outside of existing system functionality
- Integrations with third party applications

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