

Making Digital Compliance Achievable

The journey is in your hands, supported by Sitemorse®





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Every digital team strives for continuous improvement, but to know where you want to be, first you need to understand where you are.

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Sitemorse Money-Back Guarantee

The Offer

We believe in the thoroughness of our service and its ability to prioritise tasks for you and your team. So, we are backing the service you purchase from us, with a distinctive guarantee - if after a year, your Sitemorse score has not improved, you are entitled to 100% refund of subscription fee.

As an organisation that has been offering services in this industry for nearly 15 years, we have put together this guide, covering not just how to maximise the value of your service - but also to cover the key stages of service on-boarding, assisting your navigation of the both the internal and external challenges, along with helping remove any surprises, and what-ifs. If you follow this guide, we are confident that Sitemorse will help make your compliance achievable.

Terms

In line with our straightforward, transparent, way of doing business, there are very few terms.

The Sitemorse Money Back Guarantee applies to clients on an annual subscription. We will use your first assessment of your subscription to act as a baseline for improvement in your Sitemorse scores

The only condition we apply is that you must complete the priority actions advised by the system in a timely manner.





OVERVIEW

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**Sitemorse provides
a more in-depth and
thorough capability**

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Sitemorse is *the* service to manage & govern standards, rules and regulations, and then deploy these across all organisational digital touch points. We help organisations ensure a great online user experience, and one that is continually optimised whilst adhering to internal standards and external compliance regulations.

The purpose of this document is to provide a guide to Deploying and then using the Sitemorse system within a large organisation such as a multi-brand owner, UK University, or large government department. The Deployment Guide gives a sequenced breakdown of the schedule of activities that would be undertaken by us (Sitemorse), the benefits of such an approach and the internal (technical, information and human) resources necessary for successful deployment of the system.

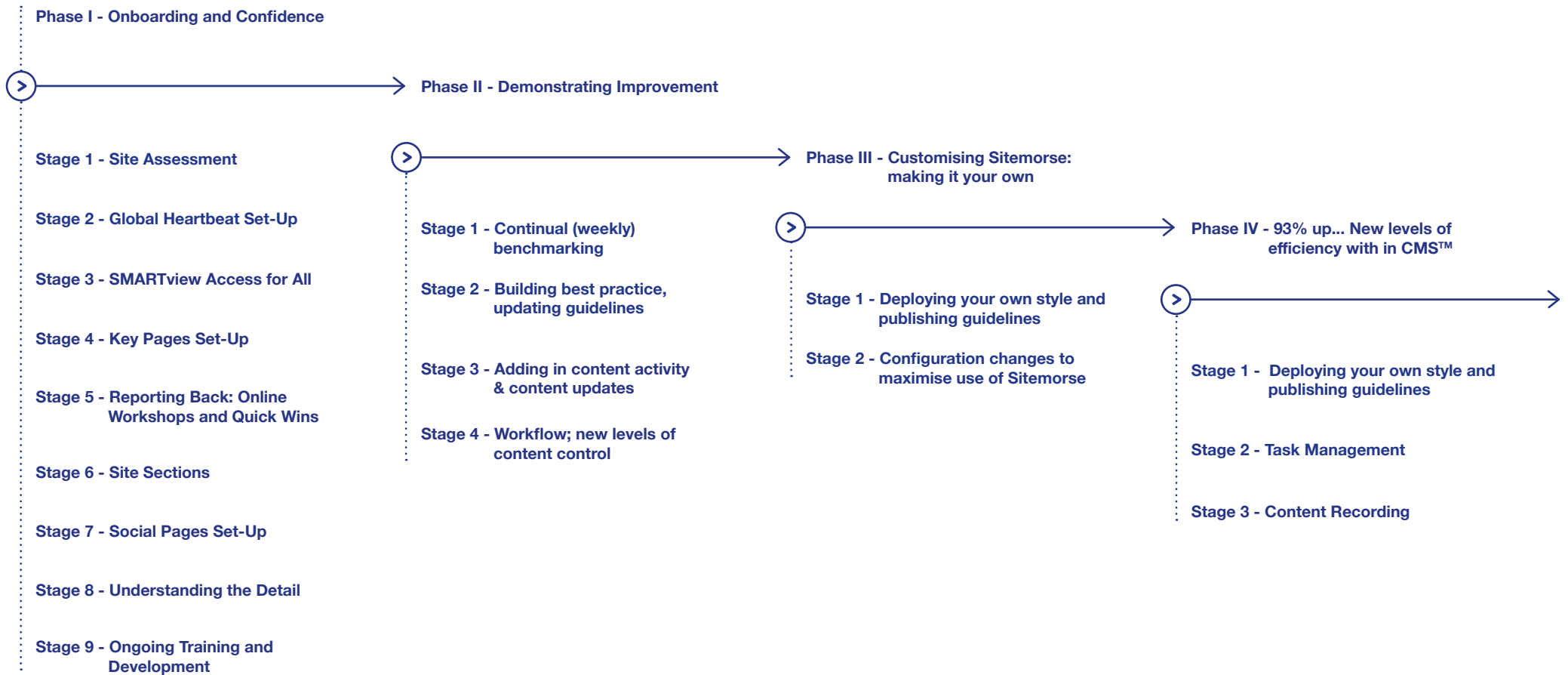
You may already have a Governance system in place to manage, and report on, your digital standards, rules and regulations, or be implementing a Governance Management System for the first time.

Compared to other digital Governance management systems, who offer a ‘snapshot’ style of reporting, Sitemorse can demonstrate a more in-depth and thorough capability across additional tests, checks and measures.

Sitemorse reports offer teams and individuals prioritisation tasks which are fast, consistent, and enable digital content teams to react to change immediately and improve the user experience for the majority.

This Deployment guide for Sitemorse is designed to move organisations, like yours, away from weekly issue reporting to continuous improvement and actionable insight, in manageable chunks. This means your Digital Managers and teams will have the confidence that their website delivers the best possible, compliant, experience for all.

Guide to Deploying and Using Sitemorse



Phase I Timescale

Typically, Phase I would look like this:

Week 1

Stage 1

Site Assessment

Stage 2

Global Heartbeat Deployed

Stage 3

SMARTview Access for All

Week 2

Stage 4

Key Pages Set-Up

Stage 5

Reporting Back: Online Workshops and Quick Wins

Week 3

Stage 6

Site Sections

Stage 7

Social Pages Set-Up

Week 4+

Stage 8

Understanding the Detail

Stage 9

Ongoing Training and Development

Phase I: Onboarding and Confidence Building

This Phase is designed to get you up and running with Sitemorse quickly and confidently. Sitemorse has a number of in-built capabilities, and Phase I will enable you, and everyone who contributes to your digital content footprint, to become a capable and confident Sitemorse user, leading to measurable and comparable improvements across the whole institution.

Stage 1: Site Assessment

Overview

Every digital team strives for continuous improvement, but to know where you want to be, first you need to understand where you are.

Sitemorse Site Assessment benchmarking is available to all clients who not only like to measure how their sites are progressing over time, but also wish to report improvements to their team.

The initial assessment we run as part of a new Sitemorse service, forms the baseline, benchmark report for your online presence and serves as a KPI reference for you to compare back to as your journey starts to improve your online presence in terms of quality and compliance.

What do we do?

On day one of your Sitemorse implementation we will set up a Site Assessment of up to 7,500 pages of your site, starting at a specific URL. Sitemorse will assess that specific page in detail across many areas including accessibility, brand, code quality, email, function/links, SEO and metadata, trademarks, performance, privacy, and spelling. Sitemorse then follows each link on that page and performs the same set of comprehensive tests on those pages beneath (or documents if the link points to a document). The process continues until the required number of pages has been reached.

This assessment takes around a day to complete and runs in the background, causing no disruption to the digital team at all.

This site assessment report is then reviewed by Sitemorse and shared with you later in Phase I.

Each week Sitemorse will then run an assessment on the top 125 pages of your site and generate reports accordingly. This gives Digital Managers consistency of reporting and the ability to benchmark progress against with previous results.

Digital Managers are also able to run a full site assessment, on-demand, should they require it, e.g. as part of a website redevelopment project.

Why do we do it this way?

Experience has shown that around 7,500 pages would take a human a month's worth of work time to run tests on. This size of assessment enables Sitemorse to build a comprehensive map of your site and give a good indication of the condition of it, by combining the scores of the individual sections together.

Any further increase in the number of pages assessed gives a very small improvement in the overall score of the site.

Assessing these first 7,500 pages also enables Sitemorse to gauge the overall quality of your site, whilst also highlighting any configuration issues with, for example, calendars, external feeds, or malware, that may be causing issues across certain sections or all your site.

What do we need from you?

We simply require the URL that you wish to start the audit from, and away we go!





Stage 2: Global Heartbeat Set-Up

Overview

Global Heartbeat is the Sitemorse availability and monitoring system that offers Digital Managers 'at a glance', dashboard-style, essential information on poor response times, downtime, hacking etc in a traffic light colour-coded interactive map format.

What do we do?

Global Heartbeat is set up on your institution's home page and, initially, weekly summaries are set up for the Service Owner (usually the Digital Manager) plus one or two key contacts.

Following this initial set-up, the system is fine-tuned in collaboration with you and Sitemorse, and real-time text alerts initiated to key contacts across your institution.

Why do we do it this way?

Global Heartbeat is designed for Digital Managers rather than technical teams. Its detail ensures that managers can see, and understand, how their site infrastructure is performing in real-time, rather than receiving weekly reports from their IT team which may only give an average response time over several days.

Weekly reporting is initially set up to enable Digital Managers to get comfortable and confident with the system, in their own time, thus reducing the support requirement and time from you to a couple of hours in the first week or so.

What do we need from you?

Sitemorse requires details of the confirmed Service Owner (Digital/ Site Manager), the organisation's Content lead and the Technical/ Development lead, to which to send reports.

Stage 3: SMARTview Access for All

Overview

SMARTview is a module within Sitemorse which enables the entire content community to assess their own pages, through their browser, on-demand, whenever they want. SMARTview can be rolled out, undistruptively, to the whole user community, quickly and effectively. Once your Sitemorse account is configured for your organisation, it takes each user less than a minute to set up SMARTview for themselves, without the need for any software or technical knowledge.

What do we do?

During this stage, usually in week one, we ask you to provide a list of *everybody* who has anything to do with your digital content production (content creator/editor and developers) and they will all be given access to SMARTview. Each user receives an email from which they can drag the SMARTview icon into their browser bar. No technical experience is necessary. SMARTview simply sits in the users' browser and enables them to assess any page, any time, and as much as they want.

Why do we do it this way?

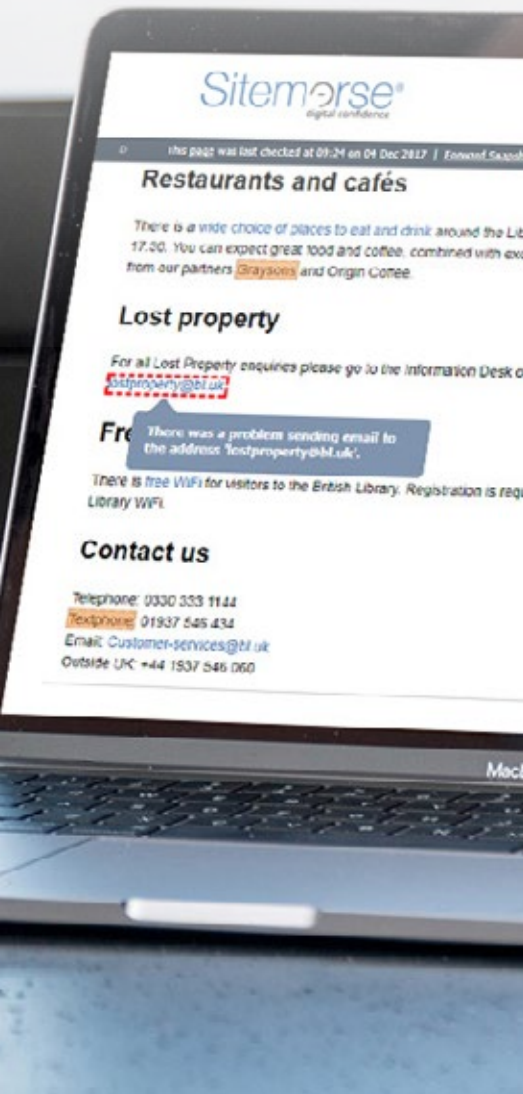
This approach increases the confidence of your content community by enabling them to assess their own pages, through their browser, whenever they want, in an environment that they are comfortable with. There is no need for your user community to wait for reports from the central team; SMARTview highlights instantly any errors on the page against set criteria, giving the content owner/developer immediate feedback and the ability make necessary corrections. SMARTview enables anyone to check any page as much as they want, giving everyone a sound understanding of how to get the best out of digital content.

Content Editors and Developers don't normally get things wrong on purpose, they just don't always know how to get it right. SMARTview empowers everyone to see any issues on their pages, from an external 'Google' perspective, and fix issues immediately.

SMARTview can also run seamlessly within your CMS, offering automation within the publishing control and page workflow process, enabling content teams to get content right first time, pre-publish. This is deployed later in the schedule, in Phase IV.

What do we need from you?

A list of *everybody* who has anything to do with digital content production (Editors and Developers) and their contact email addresses.





Stage 4: Key Pages Set-Up

Overview

Sitemorse has the ability to monitor, and report on, key pages across your institutional digital presence to ensure that all of your digital elements are approved, assessed, accounted for and compliant.

Digital Managers, through the Digital Manager's Dashboard, are able to see any changes to the institutional digital footprint, e.g. new pages, new domains added, new sections added, new social channels set up, so that a holistic view can be taken across all digital channels and any rogue presences dealt with swiftly and effectively.

What do we do?

The Sitemorse team works with your Digital Manager to log and assess all key pages and sections across your digital channels within the system. This may include social channels, extra domains, sites on different platforms, sites in development and so on, and these are assessed and reported on weekly through the Key Pages report, available through the Digital Manager's Dashboard. Any new channels, domains, or sites (containing institutional keywords) are flagged enabling the Digital Manager to act quickly and find out more about these additional channels and take further action if required.

Why do we do it this way?

Sitemorse understands the need for consistency and compliance across an institution's digital footprint to aid the user experience and their future engagement with the organisation.

Logging, and monitoring, these key sections, and any exceptions, provides a simple list of any new channels, as well as if/when they have been removed in subsequent reports.

What do we need from you?

A list of your key pages, sections, domains, social channels, and any external sites that should be included in the Sitemorse Key Pages assessment and report.

Stage 5: Reporting Back - Online Workshops and Quick Wins

Overview

Sitemorse can offer unique insights into your digital presence following the site assessment carried out in Stage 1. Our online support sessions report back on the initial findings from Stage 1 and focus on 'quick wins' across your organisation's digital presence, giving immediate actions based on the unique prioritisation intelligence built within the system.

The first session concentrates on the Top Ten pages to improve results, as well as Section Manager and Developer priorities, whilst the second session is open to all users.

What do we do?

The first online workshop will run through the results found in your Site Assessment, undertaken in Stage 1. Sitemorse will work with you to help you understand any overarching issues with your content creation and publication, plan out any quick wins (Top Ten priorities for maximum site-user value), and help you understand the different types of reporting available through the system. This is aimed at Digital Managers/Service Owners to get them up and running quickly, and give them the confidence they need to be able to support others on their continuous improvement journey.

A few weeks later, another online workshop is arranged for all users, giving them a general introduction to the Sitemorse capabilities, providing everyone with a strong baseline knowledge from which to start using the system.

Why do we do it this way?

This staged approach ensures that all users are given the information they need at a level and pace that is best for them. Too much information can overwhelm and put users off a system, and so this Sitemorse, tried and tested, targeted approach to information dissemination is offered to all new clients.

What do we need from you?

We will contact you to arrange suitable times and dates for all online workshops.



Stage 6: Site Sections

Overview

The next stage of Phase I looks at the different sections of your site and sets up specific assessment reports for each one.

What do we do?

Following the previous assessment activities carried out in Stage 1, Sitemorse already have a lot of information about your site. These, previously identified, site sections are clarified and confirmed in this stage, and each individual site section is allocated a Section Owner and Section Developer. Each section of the site will be assessed against the same criteria as Stage 1, and individual reports generated for content owners within that section.

The Section Owner is in charge, and the manager, of that section. They get a specific Section Manager's report giving an overview of how their section is performing overall. Where clients feel that key sections of the site warrant a separate team, that Section Manager can also have access to a dashboard view of the tasks and capabilities of the Content Editors within it (this is usually only available to the overall Digital Manager). Section Developers each receive the detail of any issues with style sheets, developer diagnostics, and templates etc for that section along with their Top Ten priorities. Content Editors also get emailed their own, individualised report which details only their Top Ten priorities to action. Developers and Editors simply open their report, click on the relevant issue icon, and open up a SMARTview of the page where the issue can be fixed, ready to be re-published, issue and error-free.

Why do we do it this way?

A Top Ten Priorities report gives a manageable, surmountable number of tasks for one Content Editor or Developer to do in any one working week (based on five working days). This amounts to fixing issues on one page each morning and afternoon, giving clear, measurable improvements the following week.

Giving Content Editors long and detailed 'snapshot' reports can be overwhelming and put them off fixing important issues which are buried amidst less impactful issues and errors. This easily manageable report enables them to get comfortable with the Sitemorse system and reports quickly, and start making improvements straight away.

Experience has shown that if everyone deals with their Top Ten Priorities consistently for the first month, Digital Managers will see a 0.5 improvement in the institutional overall score (out of 10). This gives Digital Managers strong metrics to report up to senior management, as well as being able to congratulate their user community and share best practices.

What do we need from you?

Email contact details for each site Section Owner and Developer, and the individual Content Editors within it.

Stage 7: Social Pages Set-Up

Overview

Sitemorse understands the need for consistent quality and compliance across all digital channels, in order to deliver a seamless, and exceptional user experience across your entire digital footprint.

Sitemorse can assess and report on your social channels, as well as your main website, in order that all digital channels (websites, social pages, emails and mobile content) are fully optimised, within compliance requirements and on-brand.

What do we do?

Rather than analyse the sentiment of your social posts, Sitemorse continuously monitors your social channels for e.g. broken links and email address, 'not to use' words, Malware links, and so on. This ensures that issues are highlighted before publication, to improve the quality and compliance of your social channels.

Why do we do it this way?

Quite often, social and web teams are separate, and where changes in rules have been made across your website, these may not have been enacted across your social channels to the same effect.

Assessing and reporting on all digital channels enables teams to consistently publish high-quality and compliant content, without the need for constant re-training and support.

What do we need from you?

Your social media channel owners and usernames.





Stage 8: Understanding the Detail

Overview

This penultimate stage of Phase I enables Section Owners and Content Editors to find out more about Sitemorse and its capabilities in order that the institution, as a whole, fully utilises the system and the support available.

This stage concentrates on embedding the service across the institution and enabling individuals and teams to be responsible for their content, their sections, and the continuous improvement of their digital presence.

What do we do?

Sitemorse will set up a call with the Service Owner and key Section Owners and Content Editors so that specific questions about the detail of Sitemorse can be asked of the Support Team.

Why do we do it this way?

All system users have already had access to SMARTview and will be confident and comfortable with the reporting system by now.

This call enables the key system users to learn more and delve deeper into the Sitemorse system, to improve the knowledge and understanding of the entire content user community across the organisation.

What do we need from you?

We will arrange a suitable time and date for the call, and ask that any questions are passed to the Support Team in advance to ensure that the relevant Support Team colleagues are involved in the call.



Stage 9: Ongoing Training and Development

Overview

All Sitemorse clients have access to ongoing training and development through the online Sitemorse Training Academy. This training is available to the following users:

- Digital/Site Manager
- Section Manager/Owner
- Content Editor
- Developer

What do we do?

Each week the Sitemorse Training Academy runs specific, open, sessions on each of the different modules within Sitemorse. These are short, 30 minute-long, presented workshops, which start with a 10-minute introduction and overview, followed by 20 minutes of 'deep-dive' into the topic, including specific questions from users.

We encourage all key users of the Sitemorse system to work their way through the modules as they become more confident and comfortable with the main features and wish to learn, and deploy, more across their site section.

Why do we do it this way?

As all Sitemorse users are granted access to SMARTview early in deployment, they have the benefit of becoming familiar with the system quickly and can make measurable improvements right from the beginning. As Content Editors and Developers become more familiar with Sitemorse, and feel comfortable with wanting to know more about particular elements of the reports, they can book onto these scheduled and presented training sessions, run by members of the Sitemorse Support Team, and increase their own capabilities at a pace that is suitable for them.

What do we need from you?

We encourage all Service Owners to work with their user community to encourage them to take part in the Sitemorse Training Academy at a pace relevant to them and their role within the digital publishing community.



Phase II: Demonstrating Improvement

The assessment and reports from Phase I have given your organisation an effective way to monitor and report on the quality and compliance of your digital channels – moving from hope to confidence in your teams and their outputs.

Phase II embeds these new ways of working and reporting across your entire digital team; from the Digital Manager, to the Section Managers, the Content Editors, and Developers. This phase enables your Digital Manager to set appropriate KPIs for your organisation, regularly report upwards on the continuous improvements that are being made and the impact that these are having on the user experience, as well as manage more effectively the devolved Content Editors and Developers across the organisation.

Stage 1: Continual (Weekly) Benchmarking

Overview

Digital Managers have access to the Sitemorse Digital Manager Dashboard, and the weekly Digital Manager Dashboard report, which gives them a visual view of the Sitemorse assessment results, and enables them to utilise these results quickly without needing to trawl through long, detailed reports, where important and impactful errors and issues can get lost. Digital Managers are then able to drill down into these high-level results to understand the detail behind the current site scores around, e.g. accessibility, response time, up-time and availability, SEO, links, and so on.

Sitemorse's weekly, individual section reports contain a score for the section of the site that is being assessed as well as an inventory of all the different elements within that section. This immediately gives Section Managers the intelligence to see how different pages are faring against each other, as well as how the organisation's digital footprint is continuously improving over time.

Content Editors and Developers also receive their own individual reports, at a level of technical detail that is appropriate for them. These reports detail the top ten issues to prioritise to improve their own content and pages.

More information is available in the Sitemorse User Roles section on page 30.

What do we do?

Sitemorse's new levels of Data Science weekly assess and score the pages within each section against set criteria, grouped into Experience, Optimisation and/or Compliance issues and actions. This gives each section an individual score out of 10 (for Section Managers), as well as a combined score out of 10 for the website as a whole (for Digital Managers).

These scores give a continual, evolving picture of how high-value improvements are positively impacting on the quality and compliance of the organisation's digital footprint, in order to better serve its users.

As well as the weekly reports, Digital Managers are able to run reports at any time, on-demand, by simply clicking on the 'rerun' icon next to the site address in the Dashboard. These extra reports, known as Sitemorse Unlimited, still contain the Top Ten Content and Developer priorities, and so extra issues and errors can be allocated and fixed where capacity allows.

These, unlimited, reports give Managers and teams achievable actions to complete, rather than large, unwieldy reports which remain unactioned leading to an inconsistent, uncompliant and inaccessible digital footprint.

Why do we do it this way?

Individual section reports enable Section Managers to concentrate on their own area of the website, and allocate high-value tasks to Content Editors accordingly, to bring about continuous improvements to their section. Digital Managers can benchmark and monitor the whole site, and the individual sections within it, in order that timely and informative reporting be implemented to senior colleagues who wish to know the effectiveness, quality and compliance of the institution's digital footprint. Individual Content Editor and Developer reports enable each staff member to only concentrate on their area of responsibility and deliver high-value, effective changes in a short space of time.

Reports can be run, on-demand, across a site or a section and the results can, very quickly and easily, be emailed to anyone - they don't even need to have a Sitemorse account. This enables Digital and Section Managers to share their continuous improvement journey with, for example, senior colleagues who require only high-level information, rather than the day to day information that a Sitemorse user would have, or to an external agency who may be working with the team on a digital development project. The Top Ten Priorities reports can also be shared in order that high-impact issues and errors are allocated to the correct Editor or Developer and fixed accordingly.

What do we need from you?

The different sections within your site, and the name and contact details of the owner of each one, as well as the individual Content Editors and Developers for each section.



Stage 2: Building Best Practice, Updating Guidelines

Overview

Digital and Section Managers must often deal with 'local ways of working' where different departments within a large organisation have different ways of doing things, leading to differing levels of content quality, accessibility, and compliance from one area to another.

Using the intelligence from individual reports and the Digital Manager Dashboard, Section Managers and Digital Managers are able to see which areas, and which individual Editors and Developers, are delivering high-quality content and code (or not) and take appropriate action to share best practice and/or update institutional guidelines, training and support.

Managers are able to use the data from the Sitemorse reports to see the common errors, pitfalls and practices that are detrimental to the quality of the institution's digital presence and update their internal publishing guidelines, training materials and support as appropriate.

What do we do?

Sitemorse reports detail which pages have issues and who has created that page. These weekly reports, and Dashboard information, quickly and effectively highlight any page, or Editor/Developer, issues to Section and Digital Managers so that they can work with their content teams to improve their performance, and/or share best practice.

Why do we do it this way?

Through experience, we understand that large organisations often have large, devolved content teams, who operate under Section Managers, who may, or may not report directly to the overall Digital Manager. These segmented reports enable both the Section Manager to have a clear, benchmarked view of the performance of their section over time, and give the overall Digital Manager the intelligence they require to understand the quality and compliance of the site as a whole, as well as the capabilities of the Content Editors and Developers across the organisation.

What do we need from you?

Nothing! We already have all the information we need from Stage 1 of Phase II.



Stage 3: Workflow; New Levels of Content Control

Overview

With new levels of automation and intelligence, Sitemorse presents the key pages for individuals to action to give the greatest value, together with workflow to allocate and manage these tasks across a devolved content team, transforming how content actions are located, prioritised, distributed and monitored.

This enables Section Managers, Content Editors, and Developers to focus on the actions that are going to make the greatest improvements to both the user experience and the overall quality and compliance of the organisation's digital footprint, quickly.

What do we do?

Each Section Manager will receive a report which enables them to see the pages within their section and the number of issues for each, grouped against Experience, Optimisation and/or Compliance. The system's levels of intelligence ranks these pages in order of importance to action, so that the Section Manager can see, at a glance, where their Content Editors' (or Developers') time should be spent. Pages are then allocated, through the system workflow, to the appropriate Content Editor, who receives an action report detailing just the pages that they need to action.

Why do we do it this way?

This level of workflow and automation enables Section Managers to allocate high-impact tasks to individual Content Editors, and for Content Editors to only receive tasks that are relevant to them. This cuts down on the time taken to fix high-value issues, and the time required for Content Editors to spend on this, usually secondary, task as part of their daily work.

What do we need from you?

Nothing! We already have all the information we need.

Phase III: Customising Sitemorse - Making it Your Own

Each client has access to the same, 'out of the box' Sitemorse system on day one, but custom publishing guidelines and configuration changes can be implemented by the Sitemorse Support Team as and when an institution requires them.

Once you are established, confident and comfortable with Sitemorse, and the improvements it is bringing to your digital footprint, you can work in collaboration with the Sitemorse team to build in your own, custom, rules, guidelines, and configuration changes, into the system, as well as fine-tune your reporting and alerts needs.

This staged approach ensures that Section Managers, Content Editors, and Developers are trained in the fundamentals of the system first, from day one, and can fix high-value issues, such as broken links, quickly and efficiently, before having to learn any new capabilities of the system.



Stage 1: Deploying your own style and publishing guidelines

Overview

By Phase II, Content Editors and Developers will be comfortable with fixing the issues as highlighted through their own individual Top Ten Priorities reports. This first stage of Phase III enables institutions to build their own, additional, organisational, rules into the system against which pages will be assessed and issues prioritised.

What do we do?

Sitemorse will work with you to review your brand, style, and publishing guidelines to establish what new, additional, rules could be added into the system, for even greater adherence to institutional policies and guidelines, through automation.

These additional, institutional rules cut down on the communications and training required to implement any new rules across an organisation (e.g. a department name change, removal of a member of staff, new brand guidelines) as any additional rules will be built into the Sitemorse system, all content assessed against this new criteria, and errors and issues flagged in reports in the usual way.

Why do we do it this way?

We ensure that the basics are covered across an institution first, before adjusting the fundamental capabilities of the system. Adding in additional, institutional rules further down the line will then be easier for the user community to adapt to, as they continue onto the next stage of their continuous improvement journey. Users are then more likely to understand the potential capabilities of the system, and be able to move, in manageable chunks, away from weekly reporting to continuous improvement and actionable insight.

What do we need from you?

Your brand and style guidelines as well as your time to work with the Sitemorse team on implementing the most effective institutional rules into your assessment and reporting system.

Subject to your Service Level Agreement and organisational requirements, additional costs will be incurred for each bespoke implementation or development.



Stage 2: Configuration Changes to Maximise Use of Sitemorse

Overview

Organisations can work with Sitemorse to configure their system to meet other institutional requirements such as report content, reporting frequency and alerts, and to alter their Service Level as their digital footprint grows or shrinks.

What do we do?

We work with each organisation to understand your priorities, challenges, and opportunities to see where tailored configuration would be of an advantage, and further improve the quality of your online presence.

Why do we do it this way?

Once the basics are covered, and Managers and teams are comfortable with the 'out of the box' reporting and alerts, they are more able to understand the potential of the capabilities of the system and the benefits that additional, or bespoke, reports and alerts can bring to them, and the senior team.

Sitemorse will work with you to explore additional reports and alerts based on your organisational needs and requirements, and build these into your system.

What do we need from you?

Your time to work with the Sitemorse team to explore the most effective reports and alerts for your organisation.

Subject to your Service Level Agreement and organisational requirements, additional costs will be incurred for each bespoke implementation or development.

Phase IV: New levels of Efficiency - Introducing inCMS™

Institutional teams don't deliberately get things wrong; more often than not, they just don't know how to get it right.

Sitemorse inCMS™ integrates Sitemorse with your institutional Content Management System to streamline processes, reduce the amount of training required by system users, and reduce the level of support needed across the institution, whilst also improving the standard and quality of your online content, in line with institutional, and legislative, requirements.

inCMS™ enables your content creators and developers to check their content before it is published, with any errors or issues being highlighted, without them having to leave the comfort of the institutional CMS. This reduces, greatly, any manual checking and approval processes, enabling the content to go live only once it is amended within the CMS, confirmed as error-free and able to offer a great experience. inCMS™ is also branded within your institutional style guidelines.

This approach to Content Management and Content Governance integration is the cornerstone to truly managed, and accountable, publishing capabilities.

It gives Digital Managers the confidence, rather than hope, that all digital channels are fully optimised, as your content creators check their page *before* it is published, with any errors or issues highlighted. The page can then go live once it is error-free and able to offer a great experience.



Stage 1: Publishing Control

Overview

Your institutional CMS is unable to check all content prior to publication in the same way that Sitemorse can. Sitemorse is able to assess content, code, PDFs, and any external feeds or 3rd party elements that may be on the page from an external 'Google' point of view, most of which would be 'invisible' to your CMS.

Integrating Sitemorse into your existing Content Management System gives a seamless, integrated approach within your organisation's publishing workflow. High-quality, accessible, usable, and error-free pages can then be published, first time, leading to a great user experience, and a confident and focussed content team.

What do we do?

Sitemorse will work with your organisation's technical team to integrate our system with your institutional CMS.

We have modules for a number of Content Management Systems that allow for quick integration and embedding within your existing institutional system. This is a secure communication to the CMS (which you control), rather than an API, offering resilience and security across all systems.

This integration is simple to do and typically takes just one to two days to implement.

Why do we do it this way?

We ensure that the Sitemorse basics are covered across an institution first, before implementing any additional functionality such as inCMS™. This ensures that the institution is both confident and comfortable with the 'out of the box' functionality of the system, and technically ready and capable to implement and support additional capabilities.

What do we need from you?

We will work with the Service Owner (usually the Digital Manager), technical team, and key users to identify when inCMS™ integration would be beneficial to your organisation and to identify suitable timeframes within which to carry this out.

Subject to your Service Level Agreement organisational requirements, additional costs will be incurred for each bespoke implementation or development.



Stage 2: Task Management

Overview

inCMS™ enables Content Editors to action high-impact tasks on their pages without ever leaving the institutional Content Management System. Editors have no need to access another service, or learn a new product, as, through logging onto the CMS, they will be presented with a list of only their pages, detailing any specific actions required, in a prioritised order.

Editors are able to create new pages within the CMS and run a Sitemorse assessment prior to publication, and subsequently fix any errors or issues using SMARTview, all without leaving the CMS. Editors can also see the performance of that page enabling them to amend, for example, large images or bloated code, which may be affecting the performance of their content, again pre-publish.

inCMS™ removes the need for Editors to trawl through long, complicated reports to find their relevant pages and actions – they can see clearly, and succinctly which pages require action, against the Sitemorse and bespoke institutional libraries, and can link to that page immediately to edit it through SMARTview.

All of these capabilities give Editors live production control within the institutional CMS before publication.

What do we do?

Once your institution has worked with Sitemorse to integrate your CMS using inCMS™ your teams will be up and running with Task Management in no time. They will be comfortable and confident with using SMARTview following Phase I and will be soon reaping the benefits of improved publishing control pre-publication.

Why do we do it this way?

As with the other additional system capabilities, we ensure that your users are confident and comfortable with the fundamentals of the system before implementing new features.

What do we need from you?

Nothing! By this stage we should have all the information and details that we need.



Stage 3: Content Recording

Overview

It's not unusual for a request to come to a Digital Manager asking what was on a particular page at a particular point in time.

Sitemorse is unique in being able to record, store and demonstrate exactly what you had online and when, including faults in the content or code, metadata, when changes were made, and updates published, and who made the change.

Sitemorse is able to show pages before and after changes were made and store them for seven years, giving institutional robustness around internal and external guidelines and legislation.

What do we do?

Everyday Sitemorse gets an update of any new and changed pages within your CMS. These are recorded, stored and retrievable through the Digital Manager's Dashboard.

Why do we do it this way?

Sitemorse records and stores everything related to that page giving Digital Managers the confidence that their reporting data is robust and complete.

What do we need from you?

Nothing! By this stage we should have all the information and details that we need, and Sitemorse will automatically store your CMS content and changes as they occur.

Stage 4: Capabilities Monitoring

Overview

It is important for a Digital Manager to understand, and improve, the capabilities of the individuals and teams across their organisation.

Using the Capabilities Monitoring functionality within the Sitemorse Dashboard, Digital Managers are able to see the activities of each team and individual at their fingertips, negating the need for long reports and large amounts of data.

Digital Managers can quickly and readily see how individuals and teams are contributing to the institution's overall digital presence, and ensure that quality and consistency is maintained across departments.

What do we do?

Information is passed from your institutional CMS to Sitemorse, which generates the Dashboard view of individual and team activities and scores. Analytics from your CMS are also pulled into Sitemorse which builds the priorities reports for each area, i.e. most looked at pages are prioritised above those pages with less traffic.

Why do we do it this way?

Content Editors and Developers don't get things wrong on purpose, and Digital Manager don't have the time to trawl through long, detailed reports of data to understand the capabilities of their institutional teams. inCMS™ gives Digital Managers the information they need to manage, develop, and support their teams, based on impartial, accurate data from the institutional CMS.

What do we need from you?

Nothing! By this stage we should have all the information and details that we need, and Sitemorse will automatically build Dashboard reports for your Digital Manager using the information pulled from your institutional CMS.

User Roles

Similar to many other systems, Sitemorse allocates user access rights based on the role of that user. Each User Role defines the permissions for that user group, the tasks that they are allowed to perform, and the reports that they have access to or can receive.

Sitemorse has several pre-defined roles each with its own pre-defined set of permissions. Depending on the Service Level Agreement, organisations may be able to request capabilities to be added or removed from specific roles, on request to the Sitemorse Support Team.

Sitemorse categorises its users into one of the following pre-defined groups:



Executive



Digital Director



Digital Manager



Section Manager



Content Editor (publisher)



Social Media Manager

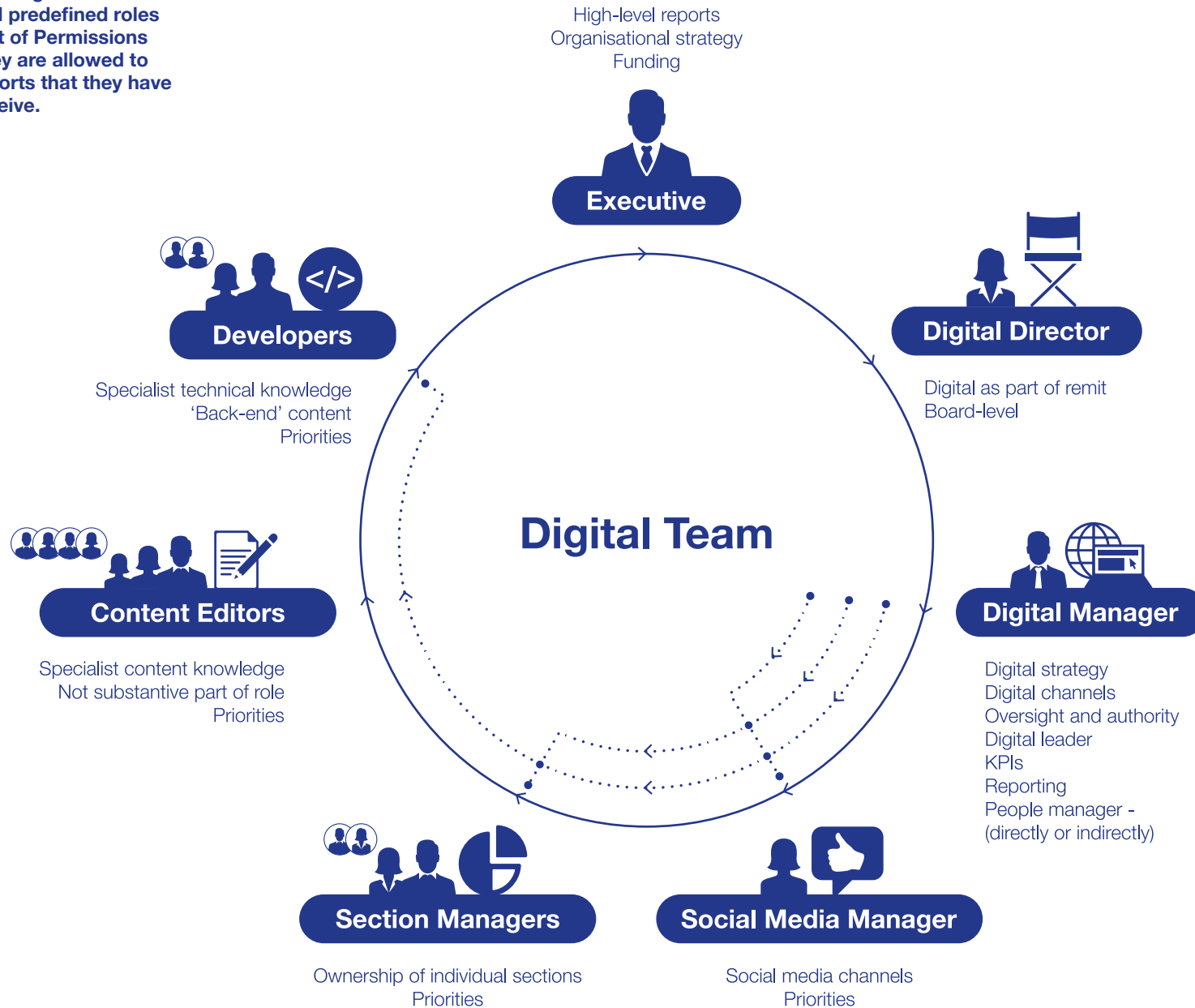


Developer

In terms of the level of reporting information that roles have access to, the Digital Manager and the Developer have access to the highest level of detail, with the other roles receiving regular, tailored reports appropriate to their seniority, authority, and role within the organisation.

The Digital Team

Within Sitemorse, the Digital Team is comprised of several predefined roles each with its own set of Permissions for the tasks that they are allowed to perform, and the reports that they have access to or can receive.



Executives

A C-Suite executive will oversee a top-level functional area of the organisation, such as Marketing or IT. This role has many responsibilities other than digital channels and commands a significant budget. This person is also responsible for planning and executing the overall strategy.

They are likely to oversee the entire digital programme, amongst other responsibilities, although the Digital Director will have specific responsibility for the management of digital.

There are many issues faced by a C-level role but regarding digital, this will include the overall public perception of the company as portrayed by the digital channel. How their company rates against other organisations in their vertical. They need to get a foundational view of their responsibilities.

Sitemorse can provide a top-level view that is simple to digest but this can be drilled down through to get to the details.

To make things easy, we do not expect a C-suite Executive to use Sitemorse directly, but they will be provided with overall compliance (red flags) serious alerts, benchmarking performance across the organisation and against the competition. We can provide automated reporting at a country, company or brand level for an Executive, if desired

Sitemorse provides a Quarterly Benchmark (flash report) which supports the Executive, as well as internal benchmarks. Bespoke reporting is available on request.

If the organisation had multiple sites in multiple countries, this user would receive an email showing the map view.

Sitemorse®
digital confidence

SSE PLC Group Digital Audit
Q2 2018 Benchmark & Report

Key features summary:

- No need to login to Sitemorse – even when links sent to them
- Weekly organisational benchmark reports (private to organisation)
- Monthly sector reports through the Sitemorse INDEX (public)
- Quarterly flash reports for use in board reports
- Breakdown that reflects organisational structure by country, company and brand
- Easy to understand, and share, benchmark scores out of 10

Top 10 Sites

Site 1 is the best performing site based on criteria relating to experience, optimisation and compliance this quarter. However, as each website has its own specific characteristics, overall results are also important to consider (page 9). With a website benchmark at your disposal, you can identify areas that require focus and then chart your success.



Top Site:
Site 1
<http://www.site1.com/>



Digital Director



The Digital Director has digital activities within their overall remit but doesn't manage them on a day to day basis. They will usually manage the person with day to day responsibility for the organisation's digital channels; the Digital Manager. The Digital Director is usually on the Executive Board of an organisation and will be required to report at Board level as to how the organisation's digital channels are performing in terms of helping achieve the institution's overall goals and objectives, as well as how they are faring compared to peers and competitors within their sector.

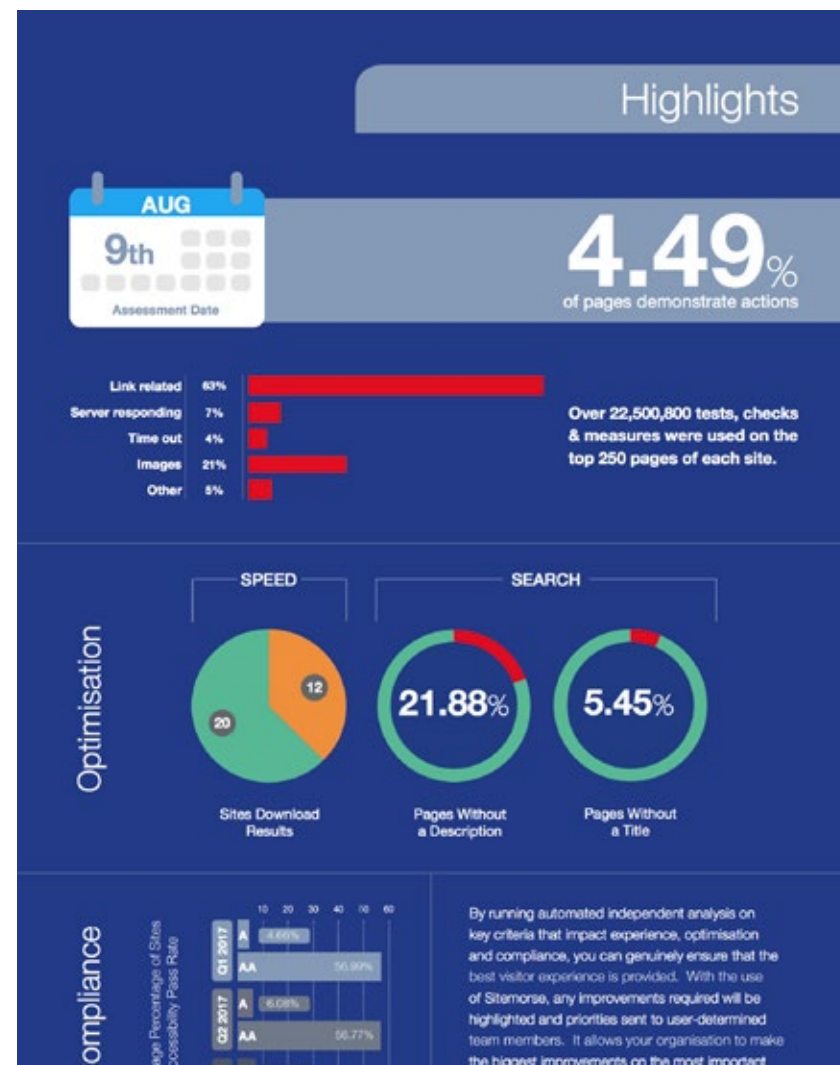
The Digital Director/Executive acts as the Digital Champion at Board level and liaises regularly with the Digital Manager to plan strategic development across the institution's digital channels, and garner support and funding for these development from other Board members/Executives. The information they share needs to be clear, concise, understandable by all, useful and accessible.

Sitemorse understand that, for the Digital Director/Executive, Digital may be only one part of their management portfolio and has designed reports that fulfil the needs of their reporting responsibilities, without going into too much, unnecessary detail.



Key features summary:

- Weekly organisational benchmark reports (private to organisation)
- Monthly sector reports through the Sitemorse INDEX (public)
- Easy to understand, and share, benchmark scores out of 10
- No need to login to Sitemorse



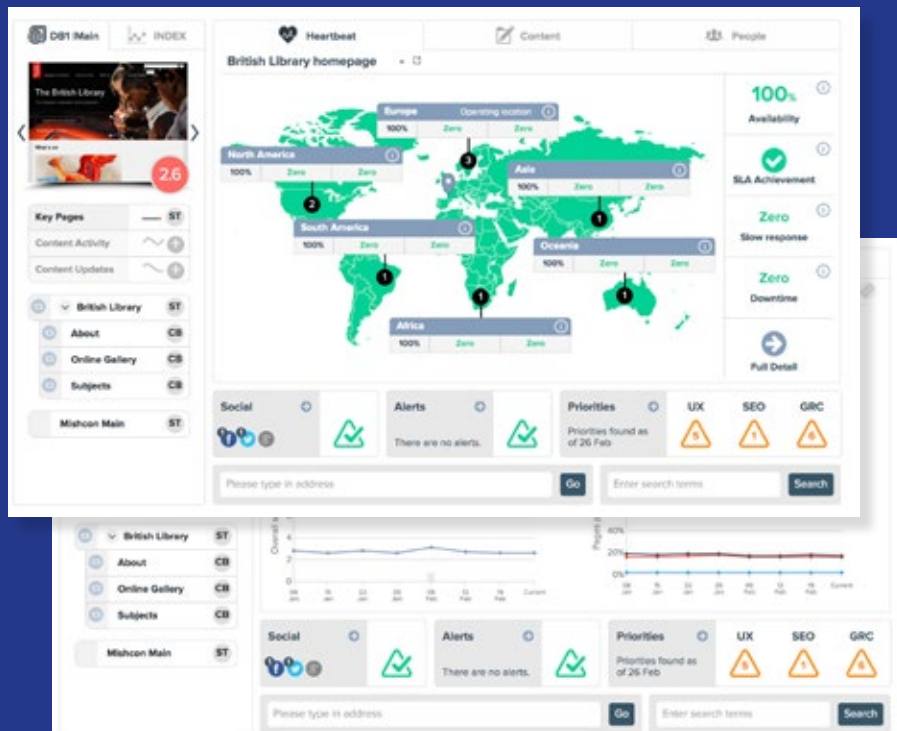
Digital Manager

The Digital Manager is the day to day manager of the organisation's digital channels and has responsibility and authority for them. They may be based within a Marketing/Communications function, or IT, or be completely autonomous within the organisation.

They have a responsibility to report up and across the organisation as to how the organisation's digital channels are performing, both in terms of continuous improvement, and against peers and competitors through the public quarterly INDEX reports.

The Digital Manager will usually report to the Digital Director/Executive and will work closely with them to monitor and feedback on any improvement to, or issues with, the organisation's digital channels and the teams and individuals that manage or contribute to them.

The Sitemorse Service Levels and pricing packages are based on the number of pages that the Digital Manager has within their control – even if these are across sub-sections, microsites, separate domains, social channels and pre-launch sites.



Key features summary:

- Dashboard view of institution's full digital landscape including social, sub-domains and development sites
- Multiple views of data through the Digital Manager Dashboard
- Uptime and availability monitoring
- Weekly and daily reports as well as on-demand access to the Digital Manager dashboard
- Visual approach to information using, e.g. clock features
- Ability to drill down into the content to look at the detail and prioritise actions by category, e.g. accessibility, spelling, links, brand, SEO
- Social pages are included as well as main website content
- Capability to compare reports from live sites with those sites in development or 'pre-launch'
- Key Pages reports to action high-impact issues quickly
- Ability to forward reports to colleagues, or those outside of the institution who aren't Sitemorse users
- Ability to fix pages directly through inCMS™ or forward onto someone else
- Historical view of content and code and any issues at that point in time
- Inventory function to track connectivity of different areas of your digital landscape
- Monthly sector reports through the Sitemorse INDEX
- The Digital (or Site) Manager is usually assigned as the Sitemorse Service Owner, and the main Sitemorse contact within the organisation.

Section Manager

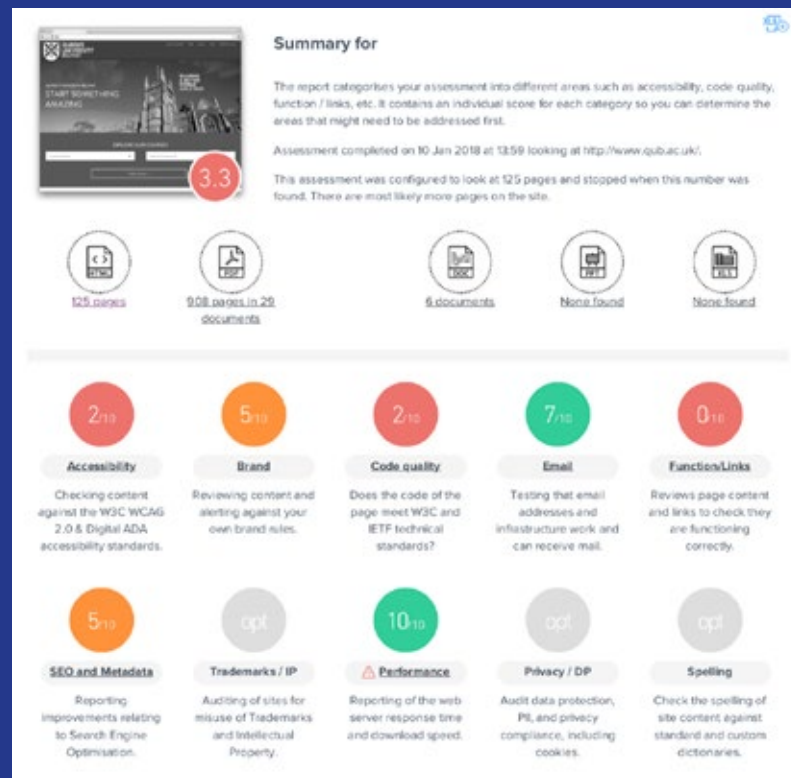
This role is allocated to whoever oversees, and has responsibility for, that website section, for example an academic Faculty or a support service or department in a University.

This role may, or may not, be a substantive part of their main job, and this could vary from area to area.

In terms of line management, the Section Manager may, or may not report directly to the Digital Manager, depending on the level of content publishing devolvement across the organisation.

It is not unusual for ungoverned organisations to have local ways of working, where different content is described, used, or spelt differently across different sections. The role of the Section Manager, and their reports, is to ensure that institutional, and external, rules are complied with, leading to increased accessibility, usability and consistency across all website sections and organisational digital channels.

Scoring your section of the site, by category

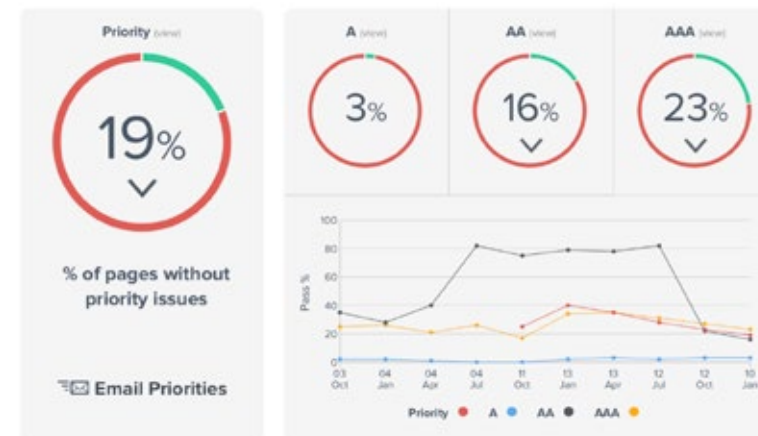
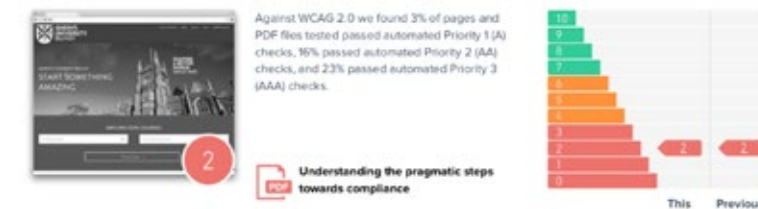


Key features summary:

- Section Manager Report including priorities and inventory
- Own individual Top Ten priorities report
- SMARTview
- Ability to allocate tasks to Content Editors through Workflow
- Ability to rerun assessments following updates and changes to content
- Ability to export data and forward reports to colleagues via excel and email
- Overview of section and users within it

Drilling down by category, to show progress and give access to further detail.

Accessibility Summary



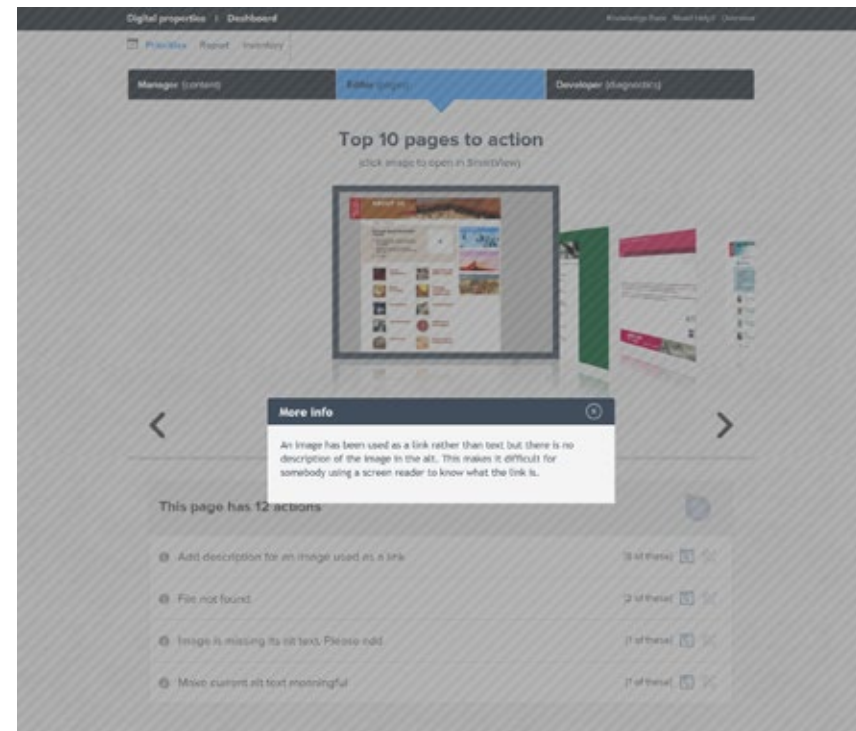
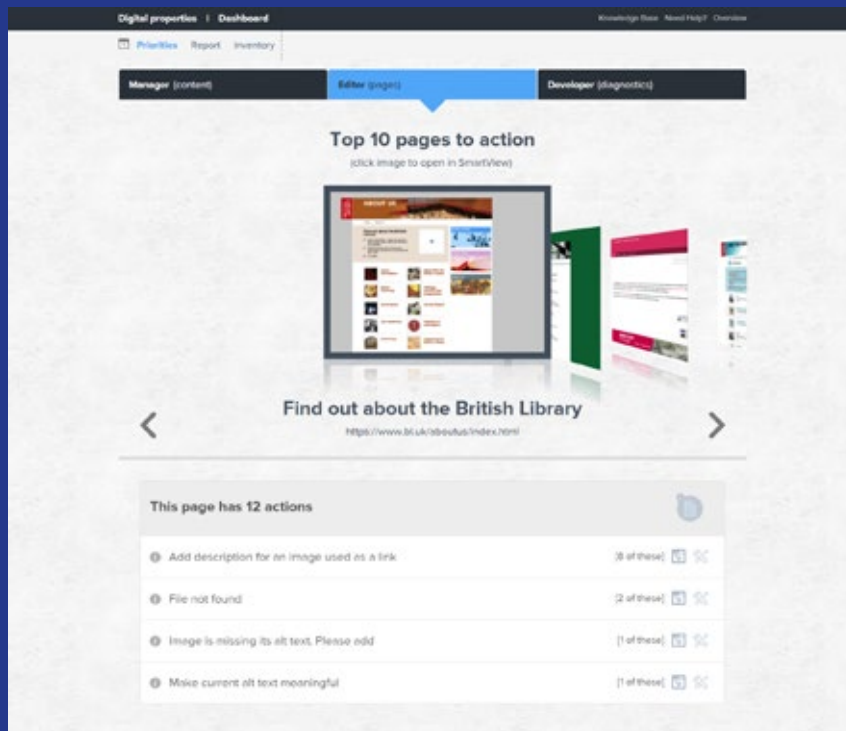
Content Editor (Publisher)

Sitemorse understands that Content Editors have often had this role added to their more substantive post. Due to the diversity of skills, experience and time available across a large, devolved team of Content Editors, it can be difficult for Digital or Section Managers to keep their teams up to date with training, support, and changes to organisational rules.

Sitemorse is designed to give Content Editors the information they need to be able to carry out their duties quickly and efficiently and with as little training and support as possible.

Key features summary:

- Individual Top Ten prioritisation reports
- No need to log into the Sitemorse system (with inCMS™)
- SMARTview

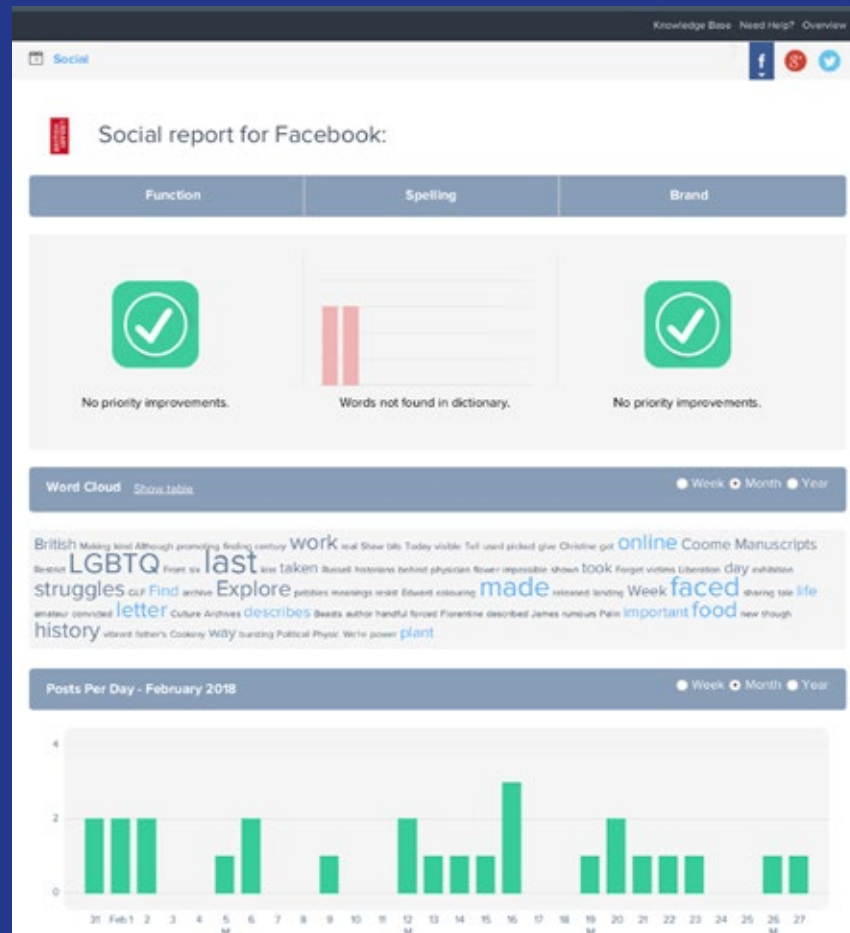


Social Media Manager

Sitemorse understands the need for a consistent approach to quality and compliance across all digital channels.

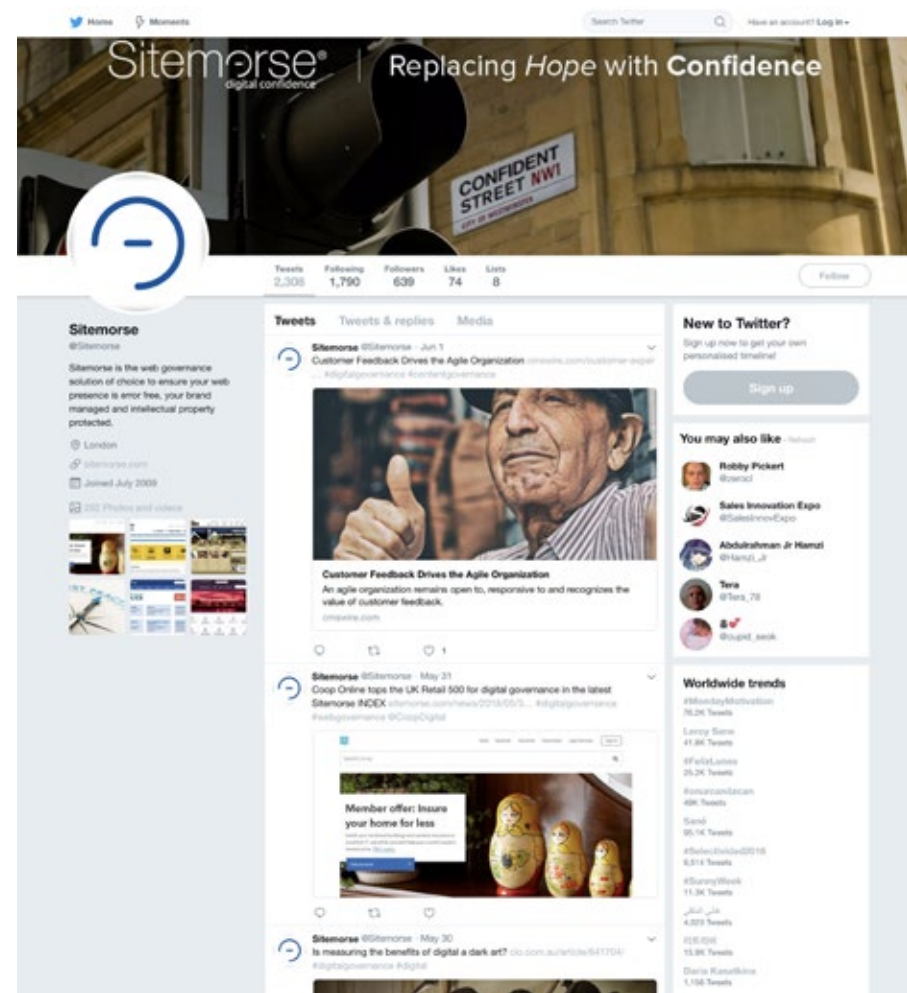
Quite often, social and web teams are separate, and where changes in rules have been made across your website, these may not have been enacted across your social channels to the same effect.

Assessing and reporting on all digital channels enables teams to consistently publish high-quality and compliant content, without the need for constant re-training and support.



Key features summary:

- Individual, daily prioritisation reports across organisational social media channels
- SMARTview





Developer















Developers are integral to the success of any digital channel and SiteMorse understands the need for high quality, 'back end' content such as code, style sheets, and templates.

As with the Section Managers, Developers may not report directly to the Digital Manager, or even be in the same department, and so it is key that they can quickly and easily access all the technical information that they need to ensure that both local and site-wide issues are identified, allocated and fixed as soon as possible.

Accessibility compliance check - WCAG 2.0 Techniques

Standards			
F38 - Failure of Success Criterion 1.1.1 due to omitting the alt attribute for non-text content used for decorative purposes only in HTML 			
▪ 1.1.1 - Non-text Content (A)			
F65 - Failure of Success Criterion 1.1.1 due to omitting the alt attribute on img elements, area elements, and input elements of type "image" 			
▪ 1.1.1 - Non-text Content (A)			

Page 1 | 2 | 3 | 4 | 5 Next

Message	URL / Address	Line / Page	View
The following items have failed the accessibility check 'WCAG 2.0 Techniques'			
F38: Image has no 'alt' attribute	http://www.pub.ac.uk/	275	 
F38: Image has no 'alt' attribute	http://www.pub.ac.uk/	335	 
F38: Image has no 'alt' attribute	http://www.pub.ac.uk/	390	 
F38: Image has no 'alt' attribute	http://www.pub.ac.uk/	482	 
F38: Image has no 'alt' attribute	http://www.pub.ac.uk/Study/	289	 
F38: Image has no 'alt' attribute	http://www.pub.ac.uk/Study/	349	 
F38: Image has no 'alt' attribute	http://www.pub.ac.uk/Study/	404	 

Key features summary:

- Individual, technical, prioritisation reports
- Detailed diagnostic reports for all digital properties
- Ability to view reports broken down into the different assessment categories
- Ability to rank digital properties by the different assessment categories
- Historical view of all digital properties
- Pre-launch section, to enable live and development sites to be benchmarked against each other
- Ability to share results with others via email
- Top Ten actions for maximum accessibility compliance against WCAG standards
- SMARTview

Five slowest URLs by time to first byte

URL	Time to first byte (ms)
https://www.bfu.ac.uk/events/news/academic-business 	2,048
https://www.bfu.ac.uk/events/2019/academic 	2,032
https://www.bfu.ac.uk/collection/items/blotch-baroque-gardens 	2,007
https://www.bfu.ac.uk/events/2019/academic 	1,741
https://www.bfu.ac.uk/events/2019/academic/2019/2019/academic 	1,729

Top five accessibility issues

Occurrences	What We Checked
999+	Q141: Organizing a page using headings
999+	H30: Providing link text that describes the purpose of a link for anchor elements
345	C22: Using CSS to control visual presentation of text
124	G131: Providing descriptive labels
124	H44: Using label elements to associate text labels with form controls

Top five code quality issues

Occurrences	What We Checked
999+	A "301 Moved Permanently" response was received
814	Invalid attribute name

About Sitemorse®

Sitemorse helps organisations to efficiently drive improved user experience, ensuring that content is always optimised and that compliance requirements are always met. It does this by replacing manual checking procedures with Software as a Service (SaaS) tools to drive agile publishing and continuous assessment across the digital landscape. This results in an improved online customer experience and reduced internal cost. Editors are empowered, managers are in control and the organisation has confidence across all digital channels.

Sitemorse was founded over 15 years ago and built its reputation on launching arguably the first automated website auditing service. Over the years, the company has continued to develop its automated technology with methodologies and service offerings to meet the demands of clients and their ever-expanding digital operations. Most recently, this has included a focus on extending the capabilities directly within the CMS, as well as addressing the governance / QA service issue of 'endless reporting'.

The company supports organisations that wish to replace 'hope' with 'confidence' that all digital channels (websites, social pages, emails and mobile content) are fully optimised, within compliance requirements and on brand; that their investment meets the latest in-country rules, regulations and standards; and they have confidence that their online channels will perform perfectly at all times for all visitors.

Sitemorse is a British-based company with UK support teams and a head office in central London. The company works in partnership with clients worldwide, delivering and supporting contracts ranging from those with a single site and a social page or two, through to global enterprises with thousands of sites. Services are available on a self-managed or fully supported basis.

Sitemorse has helped hundreds of organisations in the public and private sector, including many major corporations. The Sitemorse INDEX is the only recognised independent sector benchmark – supporting the UK Gov. 'Better Connected' report for some 13 years, along with the World Retail Congress for some 7 years.

Sitemorse is registered in England and the company is 100% privately owned by staff and with no external investors. The company has no bank borrowings and year-on-year has a cash positive position.







“

Sitemorse gives Digital Managers the confidence that all organisational digital channels are fully optimised, accessible, on-brand, and compliant.

”



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