Sitemaps

Executive Summary

We created baseline sitemap drafts for both the external site and intranet, in collaboration with the Communications team, GenAI suggestions based on site crawl data, and manually going through the websites. The goal was to logically organize the site content into new menu headings, subheadings, and related content contained within that allowed easier discovery and paths for a user.

Further refinement with Region 4 department teams is needed to arrive at a version 1, leaning on their domain expertise to ensure accuracy of content structure. This will flesh out the sitemap drafts to be validated during implementation. Refinement steps are spelled out in the implementation roadmap.

Requirements

Sitemap:

- Illustrates the hierarchical structure of the esc4.net website, displaying relationships between different pages.

- Defines the main navigation menu and its categories, allowing stakeholders to grasp the overall site structure at-a-glance.

Information Architecture:

1. Identifies key landing pages, sections, and pathways for users to access information seamlessly.

2. Outlines the categorization and labeling of content to optimize user understanding and exploration.

3. Defines the flow of information, ensuring a logical and intuitive user journey throughout the site for key business objectives.

Process & Rationale

Education

Before starting the sitemap workshops, we gave the Comms team a quick understanding around the sitemap and menus. L1 refers to Level 1 navigation, and as you go deeper into page hierarchy the level goes up to 2, 3, etc.

1. Sitemaps show page structures *and* content. Not all items listed represent a page, some represent content on a page.
2. L1 pages are clickable links to an overview page with L2 and L3 content/pages within.
3. Some L2 pages can also be an overview page with funnels into more information and content on L3.
4. Items in more than one place is ok and appeases different user mental approaches. This sitemap has an organizational approach to services as well as a task-oriented services navigation. These are 2 different paths to the same content.
5. Sticky navigation is suggested so users can have that persistently when scrolling pages, removing a need to scroll up and down. It also removes the need for repeated navigation elements in the footer.

Inputs

We arrived at the draft sitemaps by combining a few inputs:

1. Looked through site menus and pages, placing them into sections. We also looked into page content on level 2. (e.g. we went through each center's landing page and mapped their offerings)
2. GenAI analysis and suggestions based on the site crawl data. We ran prompts against the crawl data to suggest multi-level sitemap structures.
3. Virtual workshops with Communications team, refining our initial draft. A lot was cleaned and refined but there was a limit to knowing other teams' domain content. It was agreed that those departments would need to help finalize sitemaps before implementation. We captured comments and feedback on the Miro for reference later in refinement.

Conclusion & Output

We arrived at Sitemap drafts for the external site and the intranet, but they need further refinement with R4 domain experts, and testing with external users.

Files & Artifacts

All sitemap artifacts in Miro board and Confluence. Recordings and transcripts in Box.

Feature Prioritization

Executive Summary

After the Use Case Workshop, we had several features that came out of the collaboration, as well as some additional ones for consideration. These were categorized and listed out to be prioritized and used as a basis for weighting and scoring of CMS vendors.

Requirements

To enhance clarity and decision-making, each CMS feature will be assigned a priority score, considering factors such as impact on user experience, alignment with organizational goals, and scalability.

- Prioritized list of CMS features based on their criticality to supporting the sitemap and information architecture recommendation.
- Quantifies the importance of each feature, allowing for a systematic and strategic implementation approach.

Process & Rationale

Features from the interview synthesis, use case workshop, and additional ones for consideration were categorized and ready to be plotted into a Moscow matrix: Must have, Should Have, Could Have, Won't Have. We held 2 sessions, the first was more technical in nature with Kenneth Benavides and the second was with Stephanie Noriega, which was more functional in nature.

Assumption & Priority

There is an assumption that the same CMS recommendation will be for both External site and Intranet. External site optimization is deemed higher priority over intranet.

Notes

Kenneth and Stephanie both had comments that were captured during prioritization sessions.

CHATBOT

- A chatbot would need consistency & integration across sites & systems

ANALYTICS

- Google analytics is current but not necessary if we have Exchange capturing same data
- What if the CMS has built-in analytics capabilities–depends on granularity desired (deep)
- Align with Stephanie and Bevin on needs

HEADLESS CMS

- Need staging: DEV, QA, Production

USER-FRIENDLY CMS

- Need ability to find uploaded content and share easily on pages

ECOMMERCE INTEGRATION

- Will need it to be modern and have ability to be customized for other R4 systems
- Need a limited MVP 1 to allow store/hub/other to integrate with global search- per Dr. Watson
- Need an understanding of global search for future so we can grow into it and scale

SSO INTRANET

- Which single-sign-on? How many applications are going to pass sign in data? Depending on existing single sign on supported in app, it could lead to heavy customization.
    - How many apps are planned for MVP?

SSO EXTERNAL

- Same consideration for SSO support across all systems
- What are SSO standards for R4?
- Need an inventory of sites connecting to SSO
- Staff members should have credentials that work already
- External users sign into applications – not the R4 site
- Need R4 alignment on a chosen SSO – CMS should support this

SEAMLESS JOURNEY

- What does seamless mean? Need to define it as something that still feels like it's part of R4.
- ESCWorks is less branded for good reason as a sold product & shouldn't impact Region 4 site brand or look and feel

MATERIAL UI

- Development already underway with escWorks project with Material

Conclusions & Output

The final output is the Moscow prioritization matrix, which was then used to give weight to specific features when evaluating CMS vendors. Many of the features ended up high priority but are covered by most modern CMS, and Region 4 making a leap forward to common modern features.

Post-Use Case Workshop and Prioritized Features

TIER 1 FEATURES (MUST HAVE)

- User-friendly CMS interface
- Autonomy and Permissions
- CMS Workflow Automation
- Content governance with templates
- Headless CMS
- Standard Analytics Tracking
- Integration with an Enterprise grade eCommerce solution
- Modern integration with 3rd party tools
- Single Sign On (Intranet)
- Secured authentication (AD)
- Security Governance
- Account recovery
- Data and cookie compliance
- Material UI Libraries
- Metadata Tagging and Taxonomy
- Advanced plugins (social media)
- Calendar and Events
- Personalization features
- Responsive site
- Wide range of basic business plugins available (form, calendar, print…)
- Accessibility, disability related.
- Documentation set for user training

TIER 2 FEATURES (SHOULD HAVE)

- Content scheduling
- WYSIWYG editor
- Robust Site Search (predictive auto suggestions)
- Transitions between platforms are seamless.
- Global Search
- Single Sign On External Site
- Customer Journey Tracking
- Restricted areas or functions based on permissions.
- Multi-media integration (video, images, audio, etc.)
- Blog features
- Modern UX (modern page layout, footer design, hamburger menu…)
- Technical assistance for US during workdays
- 24/7 technical assistance

TIER 3 FEATURES (COULD HAVE)

- Modern UX best practice pop-up capability
- Multi-language support
- Chatbot / AI (integrates with products)
- Ease of extendable functionality through custom development

TIER 4 FEATURES (WON'T HAVE)

- Information searching within editor

Files & Artifacts

Feature prioritization Moscow activity captured on Miro board and Confluence.

Content Taxonomy

Executive Summary

We created a baseline proposed broad taxonomy that can apply to all products and services across Region 4. In addition, we did an example of what a service level deeper dive taxonomy could look like. Just like the sitemap, a content taxonomy will need to be informed by SMEs at Region 4 and as part of an overall content strategy.

We did research into content taxonomy benefits, how they work with CMS, standard schemas, strategy for starting and implementing in phases, and ideation which led to the broad taxonomy proposal to start with and the service deep-dive example.

Process & Rationale

Benefits

Content taxonomy, like sitemaps, are part of a site's information architecture, allowing a CMS to categorize content. This provides many benefits, including content discovery, cross-selling and up-selling, content management, integrations, and data analysis.

CONTENT DISCOVERY:

Enhanced SEO, improved search results, cross-selling & up-selling

INTEGRATIONS:

Consistency across channels, automation of workflows, scalability and flexibility

CONTENT MANAGEMENT:

Dynamic content changes, consistent classification, bulk tagging

DATA ANALYSIS:

User interactions by category, personalization, content & marketing insights

Taxonomy + CMS

In addition to researching the general benefits of taxonomies, we outlined how they work well with a CMS, and looked at some standard schemas that could potentially work for Region 4.

A Content Management System (CMS) can work with a metadata taxonomy to enhance content organization, discoverability, and management efficiency. Integrating a metadata taxonomy into a CMS involves defining and using structured metadata to categorize and tag content, including products, services, articles, or media. Here's how a CMS can leverage a metadata taxonomy:

1. TAXONOMY CREATION AND MANAGEMENT

Definition: Administrators can define a hierarchical structure (taxonomy) within the CMS that includes categories, subcategories, tags, and custom attributes relevant to the content. This structure serves as the framework for organizing all content within the system.

Customization: The CMS allows for the customization of the taxonomy to suit the specific needs of the website, including the addition, modification, or deletion of categories and tags.

2. CONTENT TAGGING AND CATEGORIZATION

Content Association: When content is created or uploaded to the CMS, it can be tagged with relevant terms from the taxonomy. For example, a product might be tagged with its category, type, features, and any other relevant attributes.

Bulk Operations: CMSs often support bulk operations, allowing for multiple items to be categorized or tagged at once, which can greatly improve efficiency when managing large volumes of content.

3. DYNAMIC CONTENT DISPLAY

Automated Organization: The CMS can dynamically organize and display content based on its taxonomy, automatically updating categories and listings as new content is added or existing content is modified.

Filtered Search and Navigation: Users can filter and search content based on taxonomy terms, improving the discoverability of content. This can be especially useful for e-commerce sites where users want to narrow down product listings.

4. PERSONALIZATION AND RECOMMENDATIONS

User Experience: The CMS can use taxonomy data to personalize the user experience, showing content that matches a user's previous interactions, preferences, or search history.

Recommendation Engines: Taxonomy data can feed recommendation engines, suggesting related content or products based on the categories or tags a user has shown interest in.

5. SEO ENHANCEMENT

Structured Data: Taxonomy terms can be used to generate structured data (e.g., schema.org markup), which helps search engines understand the content of web pages, potentially improving search rankings and visibility.

Sitemap Organization: Taxonomies can help structure sitemaps, making it easier for search engines to crawl and index content.

6. CONTENT ANALYSIS AND REPORTING

Insights: The CMS can generate reports based on taxonomy, such as which categories are most popular, trends in content consumption, and how different types of content perform.

Content Gaps: Analysis of taxonomy and associated content can reveal gaps or areas for expansion, informing content strategy.

7. MULTI-CHANNEL CONSISTENCY

Unified Taxonomy: A CMS with a well-defined taxonomy ensures consistency across different channels (website, mobile app, social media) by using the same structure and terminology to organize and present content.

8. INTEGRATION AND API SUPPORT

External Systems: A CMS can integrate with external systems (e.g., e-commerce platforms, CRM systems) using APIs, allowing taxonomy terms to be shared and synchronized across systems, enhancing data consistency and user experience across different platforms.

Standard Taxonomy Schemas

Educational service providers often rely on standardized metadata taxonomies to organize and classify their content and services efficiently. These taxonomies help ensure that educational resources are accessible, interoperable, and reusable across different systems and platforms. Here are some of the most widely recognized standard metadata taxonomies for educational service providers:

DUBLIN CORE METADATA INITIATIVE (DCMI):

This is a set of vocabulary terms used to describe web resources such as video, images, web pages, etc., including educational resources. It includes elements like title, creator, subject, description, and more, allowing for easy discovery and classification of resources. **Dublin is considered great for low-tech and small teams due to simplicity, flexibility, broad application, ease of impolementation, interoperability, and community & support.**

LEARNING OBJECT METADATA (LOM):

Specifically designed for describing learning resources, LOM includes detailed elements that cover the educational, technical, and pedagogical characteristics of learning objects. This standard allows for the creation, storage, and exchange of learning content descriptions across different systems.

SCHEMA.ORG EDUCATIONALCONTENT:

An initiative by major search engines, Schema.org includes terms specifically for tagging educational content on the web. It helps improve the visibility and accessibility of educational materials through search engines, with tags for courses, educational programs, lesson plans, and more.

IEEE 1484.12.1 – LEARNING OBJECT METADATA STANDARD:

Developed by the IEEE, this standard specifies the syntax and semantics of Learning Object Metadata, defined to support the description of learning objects and enable their reuse in different contexts.

COMMON EDUCATION DATA STANDARDS (CEDS):

CEDS includes a comprehensive vocabulary for educational data, from early childhood to postsecondary and workforce sectors. It aims to streamline the communication of data within and across institutions and sectors by standardizing the definitions of terms.

IMS GLOBAL LEARNING CONSORTIUM STANDARDS:

IMS Global offers various standards to support educational technology services, including Learning Tools Interoperability (LTI), Question and Test Interoperability (QTI), and Competencies and Academic Standards Exchange (CASE). These standards facilitate the integration, discovery, and exchange of educational content and services.

METADATA OBJECT DESCRIPTION SCHEMA (MODS):

While not solely focused on education, MODS is a flexible schema for representing complex bibliographic elements and can be used to describe educational materials among a wide range of resources.

SIMPLE KNOWLEDGE ORGANIZATION SYSTEM (SKOS):

SKOS is used for representing knowledge organization systems such as thesauri, classification schemes, and taxonomies within the Linked Data cloud. It can be applied in educational contexts to facilitate content discovery and organization.

Each of these taxonomies serves different aspects of educational content and service provision, from resource description and classification to integration and interoperability across systems and platforms. By adhering to these standards, educational service providers can enhance the accessibility, discoverability, and reusability of their resources.

Taxonomy Strategy

We also looked at what a typical strategy for approaching content taxonomy would look like, in phases: establishing goals & scope, content audit, draft taxonomy, implementation planning, documentation & training, and continuous improvement.

DEFINE OBJECTIVES AND SCOPE:

Start by clearly defining the objectives of the taxonomy. Understand what you want to achieve with it—whether it's to improve searchability, enable better content management, or enhance data analysis. Also, define the scope of where and how this taxonomy will be applied.

STAKEHOLDER ENGAGEMENT:

Identify and engage stakeholders early in the process. This includes anyone who will use, manage, or be impacted by the taxonomy. Gather their input on needs, challenges, and expectations. Stakeholder engagement is crucial for adoption and for ensuring the taxonomy meets the needs of all users.

CONDUCT A CONTENT AUDIT:

Review the content or data that the taxonomy will organize. Understand the types of content, how it's currently categorized, and any existing metadata. This will help identify gaps and opportunities for improvement. *(R4 not currently leveraging metadata but there is a lot of content to consider for categorizing.)*

DEVELOP A DRAFT TAXONOMY:

Based on your objectives, stakeholder input, and content audit, start drafting the taxonomy. Begin with high-level categories and then drill down into subcategories. Keep it as simple and intuitive as possible to ensure easy adoption and maintenance.

Iterative Review and Testing: Consider conducting a small-scale test to see how well the taxonomy organizes and retrieves content. Use the findings to refine the taxonomy.

IMPLEMENTATION PLANNING:

Once the taxonomy is finalized, plan its implementation. This includes technical aspects, such as updating content management systems, as well as people aspects, like training for users. Ensure there is a **clear plan for how the taxonomy will be maintained and evolved over time.**

PILOT AND ROLLOUT:

Start with a pilot implementation if possible, to test the taxonomy in a controlled environment. Gather feedback and make any necessary adjustments. Then proceed with a full rollout, continuing to monitor and tweak the taxonomy as needed. *(Further down line after CMS implementation and small scale tests / refinement)*

DOCUMENTATION AND TRAINING:

Provide clear documentation on how the taxonomy is structured and should be used. Offer training sessions for users to ensure they understand how to apply the taxonomy in their daily tasks.

FEEDBACK LOOP AND CONTINUOUS IMPROVEMENT:

Establish mechanisms for ongoing feedback on the taxonomy's usability and effectiveness. Be prepared to periodically review and update the taxonomy to reflect changes in content, business needs, or technology. *(This can be part of customer feedback loop as well as leveraging data analysis on customer journeys from taxonomy interactions.)*

Broad Taxonomy

Finally, we did some ideation around what a broad categorization scheme might look like that could apply to all content. We also explored Literacy & Language as a service to deep dive and imagine what more specific taxonomies could look like.

CORE METADATA

Identifier: Unique identification code for the product or service. (e.g. Product ID)

Title: Name of the educational product, service, or resource.

Provider/Author: Organization or individual offering the product or service.

Product/Service Category: Software, professional development course, educational tool, curriculum, speaker series, academy, conference

File Format: image, video, spreadsheet, calendar, pdf

Duration: Short (0-30 mins), Medium (30 mins - 1 hour), Long (1 hour+)

Delivery Method: Digital download, Live Streaming, In-person, On-demand/self-paced, textbook, digital hub portal

Release Date: The availability date of the product or service.

Related Content: Suggested Reading, See Also (e.g. reading deck cards, alphabet mat, posters)

DESCRIPTIVE METADATA

Subject Area: Mathematics, Science, Language Arts, STEM, literacy, special ed

Skill Level: Basic, Intermediate, Advanced

Grade Level: Targeted educational levels (e.g., K-5, 6-8, 9-12, Higher Ed).

Outcome/Objective: Key skills or competencies addressed (classroom mgmt, addition

Pedagogical Approach: direct instruction, inquiry based, blended

Description: Brief overview or summary of the content and its educational objectives.

Edition: student, full, sample, single

Set: found on some external site products

Volume: found on some external site products

Part: found on some external site products

Module: found on some external site products

Series: found on some external site products

Language: Languages in which the product or service is available.

Accessibility Features: Closed Captions, Audio Descriptions, Screen Reader Compatibility

Interactive Elements: Quizzes, Assignments, Discussion Forums

USAGE METADATA

Access Requirements: Technical or subscription requirements for access. Certification prerequisites.

User Ratings: Aggregate user feedback scores.

Recommended Uses: Suggested for: classroom learning, individual study, professional development

Rights and Access Metadata

License Type: Information on usage rights (e.g., single-user, site license, enterprise, multi-user, digital hub license).

Copyright Holder: Owner of the intellectual property.

Privacy Compliance: COPPA, FERPA

EDUCATIONAL STANDARDS ALIGNMENT

Standards Met: Common Core, Next Generation Science Standards, STAAR, TEKS

Certification: certs related (teacher license, edtech cert, special ed credentials)

SUPPORT AND RESOURCES METADATA

Training Resources: Availability of training materials or professional development resources.

Supplementary Materials: Additional resources provided (e.g., lesson plans, worksheets, interactive activities).

Support Resources: FAQs, Help Center, Customer Support, technical support

COMMUNITY AND REVIEWS METADATA

User Reviews: Educator and institutional reviews and testimonials.

Community Forums: Links to discussion forums or communities related to the product or service.

Success Stories: Case studies or examples of successful implementation in educational settings.

Example Deep Taxonomy (Literacy & Language)

LANGUAGE ARTS

Writing

Narrative Writing

Expository Writing

Persuasive/Argumentative Writing

Descriptive Writing

Creative Writing

Research Writing

Writing Process (Prewriting, Drafting, Revising, Editing, Publishing)

Grammar and Mechanics

Speaking and Listening

Public Speaking

Discussion and Debate

Listening Comprehension

Presentation Skills

Group Communication

Vocabulary Development

Context Clues

Root Words, Prefixes, and Suffixes

Academic Vocabulary

Domain-Specific Vocabular

LITERACY

Foundational Skills

Letter Recognition

Phonemic Awareness

Decoding

Sight Words

Fluency

Comprehension Strategies

Predicting

Questioning

Summarizing

Inferring

Visualizing

Connecting (Text-to-Self, Text-to-Text, Text-to-World)

Literacy Across the Curriculum

Content Area Reading (Science, Social Studies)

Technical Literacy

Media Literacy

READING

Genres and Text Types

Fiction (Short Stories, Novels)

Non-Fiction (Biographies, Essays, Reports)

Poetry

Drama (Plays)

Folktales, Myths, and Legends

Informational Texts

Reading Strategies

Skimming and Scanning

Critical Reading

Annotating and Note-Taking

Comparing and Contrasting Texts

Evaluating Sources

Themes and Big Ideas

Identity

Heroism

Conflict and Resolution

Social Justice

Environmental Issues

Text Complexity

Lexile Levels

Guided Reading Levels

Text Gradient

Reading for Different Purposes

Reading for Pleasure

Reading to Learn

Reading to Perform a Task

Conclusions & Output

We delivered research on the benefits and use cases for implementing a content taxonomy, outlined a strategy, and ideated on a baseline broad taxonomy as a suggested starting point that can be modified as part of the strategy steps, pending other steps like content audits, testing, and further iterations over time.

We also explored possibilities for what deeper taxonomies could look like for Literacy and Learning. Region 4 SMEs and Communications team who will be governing the CMS will need to collaborate on taxonomies in a way that best serves customers and business.

Files & Artifacts

Content taxonomy artifacts in Confluence. Recordings and transcripts in Box.

High Fidelity Design Concepts

Executive Summary

For the first submission, we designed 5 pages between the external site, intranet, and the Region 4 Store, to give an “art of the possible” visionary concept for a look and feel, considering content hierarchy, visual design, common patterns, discovery research, and applying the new Region 4 branding. Several designers were leveraged to do a quick swarm and generated 6 new ideas which were presented in a follow up presentation.

No design concept was explicitly chosen but there was satisfaction with new ideas being brought forward that were unique and would need further review and consideration.

Requirements

Allows a view of key visual features that will shape the final design, ensuring look and feel aligns with the intended user experience.

Process & Rationale

5 pages across the 3 Region 4 sites based the design content hierarchy based on interview research, applying modern visual design principles, utilizing common interaction and layout design patterns, and applying the new Region 4 branding to design elements. Also explored component design for search box and navigation megamenu.

PAGES DESIGNED

1. External Site Home Page
2. External Site Department Page
3. Intranet Home Page
4. Intranet Department Page
5. Region 4 Store Home Page

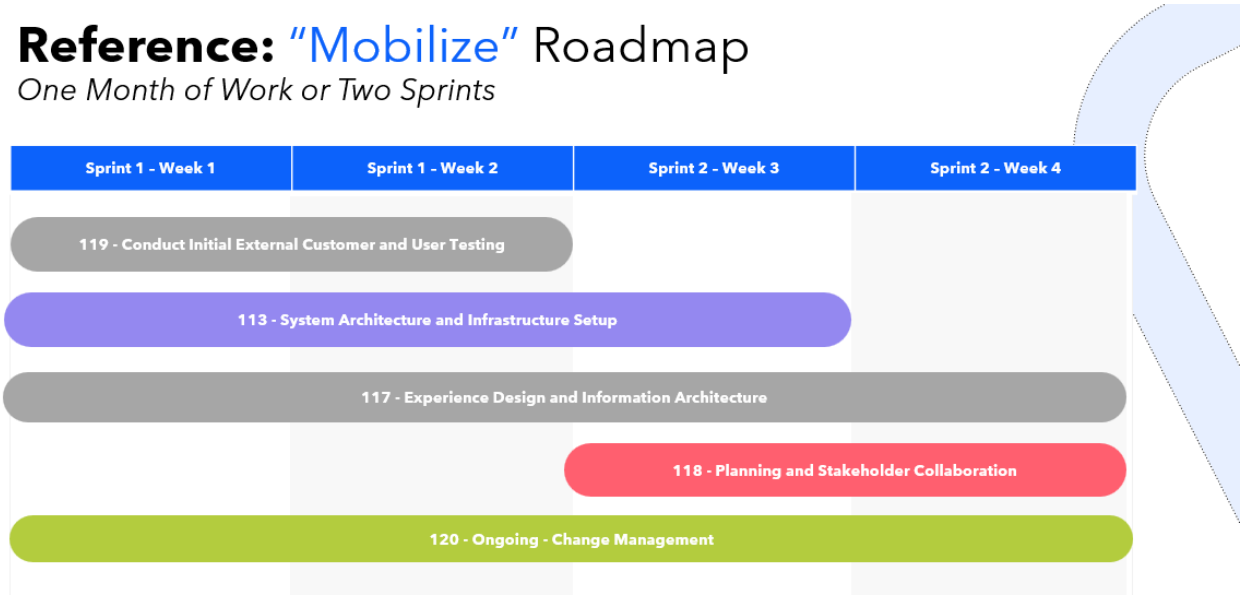
INSPIRATION

Inspiration was gathered from a few places. Some sites were shared by Region 4 staff in interviews or email. We also looked at other sites for inspiration into content flow, design patterns and approaches to components, copy and microcopy ideas, layout, search, and other aspects.

Site	Referring Person	Comment
https://www.scholastic.com/home		good job combining a website and a store
https://www.hmhco.com/		good job combining a website and a store
https://childmind.org		Look at the drop down menus for corrolation to Region 4?

		I like how they seem to organize A LOT of items
https://spacecenter.org/		Organization of many menu options– two levels of menus: • once you hover over one plus sign, you can then hover and show another level after that
https://iteach.net		Big competitor for Alt certs • top navigation carrots for discovery • Overall aesthetic appeal • 1st glance overview of content on page • Clearly showing payment plan options
https://www.hcde-texas.org/		Nothing specific
https://holdsworthcenter.org/		Nothing specific
HOME | Region 8 ESC (reg8.net)		Liked how the home page made the TIPS Interlocal link prominent, as just an example of how R4 could do it better. This led to more exploration.
Education Service Center Region 13- Supporting Educators In Central Texas (esc13.net)		Listed as inspiration for a careers page in a PPT she shared. This led to further exploration of the R13 site.
REI: A Life Outdoors is a Life Well Lived | REI Co-op		Navigation

Roadmap for Next Steps to Mobilize



Epics for Mobilize Phase

Epic 1 - System Architecture and Infrastructure Setup

Problem Statement: Selecting and setting up an appropriate system architecture and infrastructure is critical to support the CMS's functionality, scalability, and security requirements. Without a confirmed architecture and provisioned services, the project risks facing technical limitations that could hinder future expansion and compromise system performance and security.

Benefit Hypotheses: By confirming the system architecture and provisioning necessary cloud services early in the project, we hypothesize that the CMS will meet all current and future requirements, ensuring a scalable, secure, and flexible foundation that supports ongoing development, testing, and operational excellence.

Related User Stories:

- Solid Foundation for CMS Implementation
- Scalable and secure environment for development and testing
- Infrastructure setup

Epic 2 - Experience Design and Information Architecture

Problem Statement: Designing a Region 4 site that meets the expectations of external customers requires a thorough understanding of user needs and business objectives. Without an experience design and a well-defined information architecture, the site might fail to engage users effectively or present information in an intuitive and accessible manner.

Benefit Hypotheses: By completing the experience design that prioritizes user engagement and usability, coupled with defining a clear information architecture and content model, we hypothesize that the CMS will become intuitive and aligned with both external customer expectations and business goals. This approach is expected to result in higher satisfaction, increased adoption rates, and enhanced overall effectiveness of the CMS.

Related User Stories:

- Continue Defining Information Architecture

- Continue Experience Design Creation
- Refine and Finalize Experience Design
- Detailed Information Architecture and Content Model Validation

Epic 3 - Planning and Stakeholder Collaboration

Problem Statement: Effective planning and collaboration among project stakeholders are essential for the successful implementation of the CMS. Lack of a comprehensive delivery plan, an unclear product backlog, or insufficient stakeholder collaboration could lead to misaligned priorities, overlooked requirements, and project delays.

Benefit Hypotheses: By collaboratively developing an initial product backlog, creating a detailed delivery plan that outlines team roles, responsibilities, timelines, and budget, we hypothesize a strategic and focused CMS implementation. This approach is expected to prioritize critical needs, enhance stakeholder alignment, ensure efficient resource allocation, and establish a clear execution roadmap.

Related User Stories:

- Initial Product Backlog Development
- Develop Comprehensive Delivery Plan
- Update and Prioritize Backlog

Epic 4 - Conduct Initial External Customer and User Testing

Problem Statement: Integrating user feedback into the CMS development process is crucial for ensuring the system meets user expectations and requirements. Without initial external customer and user testing, there is a risk that the CMS may not fully address user needs, potentially leading to lower adoption and satisfaction.

Benefit Hypothesis: Conducting initial user testing sessions with external customers will provide critical feedback on the CMS's design and usability, allowing for early identification of areas for improvement and ensuring the CMS aligns with user expectations.

Related User Stories:

- Create interactive prototypes of the CMS.
- Conduct user testing sessions with external customers.
- Analyze the data and feedback collected from user testing sessions.
- Prioritize design improvements based on user feedback.
- Update the CMS design.
- Validate the updated design.
- Document the insights gained from user testing.
- Share the findings from user testing.

Epic 5 - Ongoing: Change Management

Problem Statement: For the newly implemented CMS to be effectively utilized and maintained, it is essential that staff across various departments are proficient in using the system and are knowledgeable about its features. Without adequate training and support, staff may struggle to transition, leading to underutilization, inefficiencies, and diminished user adoption rates.

Benefit Hypotheses: By developing role-specific training materials that comprehensively cover CMS functionalities and best practices, and establishing a support system with ongoing feedback mechanisms, we hypothesize that staff will achieve a deeper understanding and more effective utilization of the CMS. This holistic approach is expected to foster smoother transitions, enhance operational efficiency, promote higher system adoption rates, and align the CMS's evolution with user needs and organizational goals.

Related User Stories:

- Develop CMS Training Curriculum
- Design Interactive Training Modules

- Organize Training Sessions Schedule
- Facilitate Role-Specific Training Workshops
- Implement Feedback Mechanisms in Training Sessions
- Create an Ongoing Support Portal
- Monitor and Evaluate Training Impact
- Update Training Materials Based on Staff Feedback
- Conduct Training "Refresher" Sessions

Phases for Implementation

Phase 1: Mobilize, Prepare Foundations for Delivery Phase. See above epics for mobilize phase.
Phase 2: Delivery, CMS Platform Implementation, focusing on ESC4.net.
Phase 3: Ecommerce Platform Implementation
Phase 4: Pilot of ESC4.net redesign by the end of August 2024
Phase 5: ESC4.net Go-Live
Phase 6: Implementation of Intranet

Technical Recommendations

Regardless of CMS vendor selection, these are overall technical recommendations for future state of architecture for the websites redesign.
CMS

- Select a CMS license that offers self-hosted solutions to avoid the need for managing the system.
- Ensure the CMS license includes at least one testing and one production environment.
- Ensure that the CMS can scale horizontally without incurring license cost increases.
- Ensure the CMS uses CDN's to improve content delivery performance.

Design & Implementation

- Use modern Front-End frameworks and components during implementation.
- Follow the KIS approach (Keep it simple) to reduce implementation cost.
- Avoid UI components customization to keep cost under control.
- Keep the public and the intranet web sites separate.
- Ensure the system includes a way to preview content updates before going live.
- Prioritize API design to ensure seamless integration with other modern systems.