Full Discovery Outline for a Large Website Redesign

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A comprehensive discovery process is the foundation of successful website redesign projects. This document provides a complete, structured framework for conducting thorough discovery work for large-scale website initiatives, with particular emphasis on Drupal-based implementations. Through strategic planning, stakeholder engagement, and technical analysis, this outline ensures all critical aspects are addressed before development begins.

Strategic Alignment

Organization Mission and Priorities

Understanding the core mission and business objectives is essential for ensuring the website serves organizational goals effectively. The discovery process must clearly establish how digital presence supports long-term priorities and meets leadership expectations. This foundation guides all subsequent decisions about functionality, content, and user experience.

Key considerations include identifying primary business drivers, understanding competitive positioning, and establishing clear connections between organizational strategy and digital execution.

Purpose and Success Metrics

Defining the website's primary and secondary functions establishes clear parameters for design and development decisions. Required conversions, brand expression goals, and communication objectives must be explicitly documented.

Success metrics combine quantitative KPIs like traffic, leads, and conversion rates with qualitative measures including usability scores, brand trust indicators, and user satisfaction ratings. Benchmarking against current analytics provides baseline data for measuring improvement.

Business Drivers

Identify primary revenue and growth levers

Competitive Positioning

Assess market strengths and differentiation

Strategy Alignment

Link organizational goals to digital initiatives

Execution Clarity

Define clear roles, metrics, and timelines

Stakeholder and Governance Discovery

Stakeholder Identification

Map all internal and external stakeholders across leadership, marketing, IT, content ownership, customer support, and vendor partnerships. Each group brings unique perspectives and requirements.

Stakeholder Interviews

Conduct structured interviews to understand goals, pain points, internal process challenges, and future needs. These conversations reveal critical insights about current obstacles and desired outcomes.

Governance Structure

Define roles, responsibilities, decision-making pathways, and content approval workflows. Clear governance prevents bottlenecks and ensures smooth ongoing operations.

Change Management

Plan internal communication, training expectations, and transition support. Successful change management ensures adoption and minimizes disruption during the transition from old to new systems.

Effective governance structures are essential for long-term website success. By establishing clear ownership, approval processes, and update protocols during discovery, organizations prevent confusion and conflicts that often emerge post-launch. The governance framework should address both immediate launch needs and ongoing content lifecycle management, ensuring the website remains current, accurate, and aligned with organizational goals as it evolves over time.

Current State Analysis: Content and Information Architecture

A thorough content audit provides the foundation for migration planning and content strategy development. This comprehensive inventory documents all existing content, evaluates quality and relevance, and identifies opportunities for improvement. The ROT analysis—examining content that is redundant, outdated, or trivial—helps teams make informed decisions about what to keep, update, or eliminate during the redesign process.

01

Full Content Inventory

Document every page, asset, and content element across the current website

02

Quality Scoring

Evaluate content for accuracy, relevance, readability, and SEO value

03

IA and Navigation Review

Analyze current sitemap, navigation depth, taxonomy systems, and findability issues

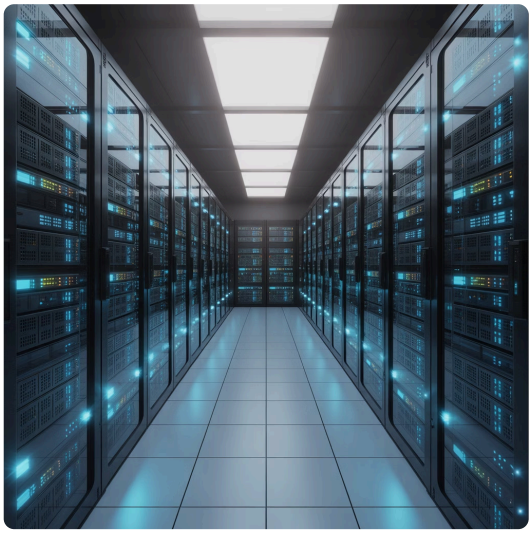
04

Accessibility Assessment

Review WCAG compliance levels and identify problem areas requiring remediation

Information architecture review examines how content is organized, labeled, and structured. By analyzing navigation complexity, tagging systems, and user search behavior, teams can identify structural improvements that enhance findability and user experience. This analysis informs the new site architecture, ensuring content is logically organized and easily accessible to all user segments.

Current State Analysis: Technical Infrastructure



Technical Audit Components

The technical audit examines the current website's underlying infrastructure, identifying strengths to preserve and weaknesses to address in the redesign. This comprehensive evaluation covers CMS architecture, hosting environment, performance characteristics, security posture, and custom configurations that may impact migration or future development.

Understanding technical constraints and opportunities early in discovery prevents costly surprises during development. The audit should document hosting specifications, server configurations, installed modules, custom code, integration points, and any technical debt that needs resolution.

CMS Architecture Review

Evaluate current platform capabilities, custom modules, configuration management, and upgrade paths to inform platform decisions

Performance Analysis

Identify bottlenecks, slow queries, large assets, and optimization opportunities through detailed performance profiling

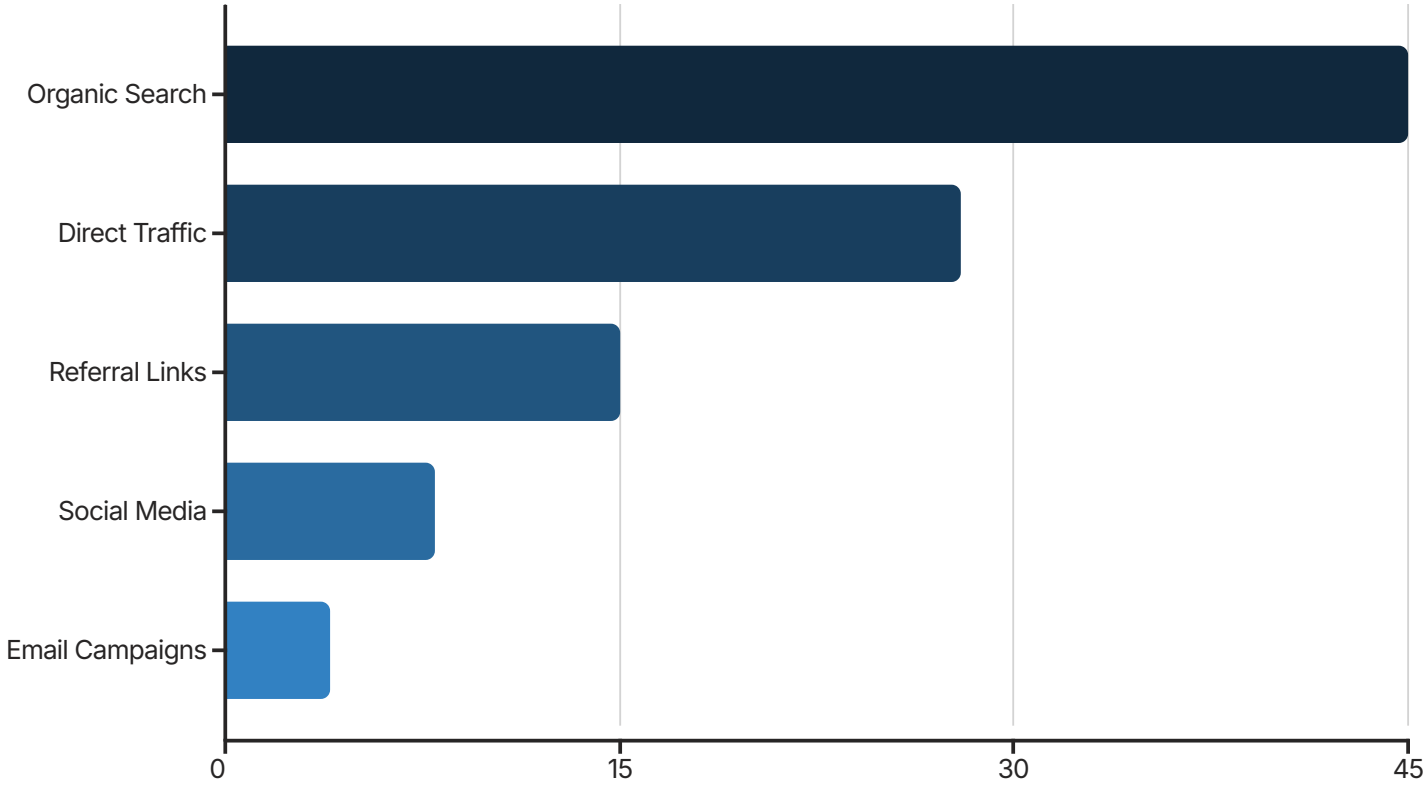
Security Assessment

Review authentication systems, permissions, data protection measures, and compliance with security standards

Performance bottlenecks often stem from inefficient caching, unoptimized images, complex queries, or inadequate server resources. Documenting these issues during discovery allows teams to architect solutions that address root causes rather than symptoms. Security concerns must be thoroughly documented, including authentication weaknesses, permission gaps, outdated dependencies, and compliance gaps that require remediation in the new system.

Analytics and User Behavior Insights

Analytics data provides objective evidence of how users actually interact with the current website, revealing patterns that may contradict assumptions or stakeholder beliefs. By analyzing traffic sources, user flows, device usage, and conversion performance, teams gain insights that should directly inform design and content decisions. This data-driven approach ensures the redesign addresses real user needs rather than hypothetical scenarios.



High-value pages that drive conversions deserve special attention in the redesign, while consistently underperforming pages may need significant revision or elimination. User flow analysis reveals common paths through the site and identifies friction points where users abandon their journey. Device usage patterns inform responsive design priorities, ensuring optimal experiences on the devices users actually use. These analytics insights transform abstract user personas into concrete behavioral data that guides every design decision throughout the project.

User Research and Audience Understanding

Audience Segmentation

Define primary, secondary, and tertiary user groups with detailed demographics, behavior patterns, motivations, and expectations

User Testing

Conduct prototype testing, A/B tests, and usability reviews to validate assumptions with real user feedback

User Goals and Tasks

Identify most frequent tasks, content users struggle to find, and barriers in the current experience

User Journeys

Map entry points, key paths, decision points, and drop-off moments throughout the user experience

User research transforms assumptions into validated insights about how real people interact with digital experiences. Through audience segmentation, teams develop nuanced understanding of different user groups, their unique needs, and how those needs should shape website design and functionality. User journey mapping reveals the complete experience from first touch to conversion, highlighting opportunities to reduce friction and enhance satisfaction.

Qualitative research methods like user interviews and usability testing complement quantitative analytics, providing context and explanation for observed behaviors. These insights inform information architecture decisions, navigation design, content prioritization, and feature development. By grounding design decisions in actual user research rather than assumptions, organizations dramatically increase the likelihood of creating websites that truly serve their audiences effectively and drive desired business outcomes.

Content Discovery and Migration Planning

Content Strategy Development

A comprehensive content strategy defines required content types, identifies gaps relative to audience needs, and establishes guidelines for tone, voice, and messaging. This strategic foundation ensures content serves both user needs and business objectives while maintaining consistency across the entire digital experience.

Translation and multilingual requirements must be addressed early, including decisions about localization depth, translation workflows, and language-specific content variations. Content gaps identified during discovery inform content creation priorities, ensuring the redesigned site provides all information users need to accomplish their goals.

Content Modeling

Define entity types, field requirements, relationships, taxonomy structures, and SDC component support

Migration Planning

Map source systems, decide automation vs. manual migration, create mapping rules, and plan cleanup

Quality Assurance

Develop migration scripts, establish QA processes, and create timelines for content rewrite and migration

Content modeling for Drupal requires careful planning of entity structures, field configurations, and relationships that support flexible, scalable content management. By defining content types, taxonomies, and entity references during discovery, teams create a solid foundation that accommodates current needs while enabling future growth. Migration planning must balance efficiency with quality, determining which content can be migrated automatically and which requires manual review or rewriting. Clear mapping from old content structures to new models ensures data integrity and prevents content loss during the transition.

Functional Requirements and Core Features

Functional requirements define the capabilities the website must provide to serve user needs and support business objectives. Core features like forms, search, personalization, events, e-commerce, and media libraries require detailed specification during discovery to ensure accurate scoping and proper technical architecture. Each feature should be documented with user stories, acceptance criteria, and technical considerations that inform development planning.

Forms and Data Collection

- Form types and complexity levels
- Validation requirements
- Submission workflows
- CRM integration needs
- Data storage and privacy considerations

Search Functionality

- Search scope and filtering
- Faceted navigation requirements
- Relevancy tuning expectations
- Search analytics and optimization
- Advanced search capabilities

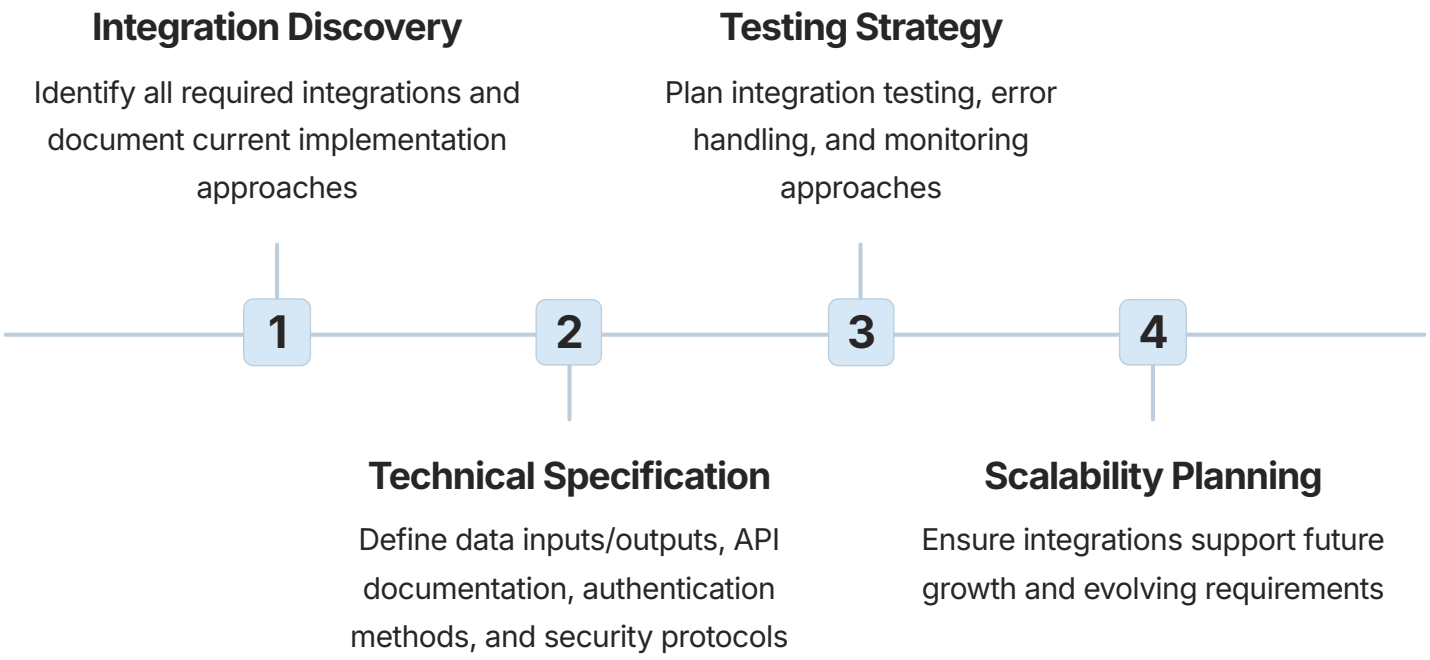
Personalization and User Accounts

- User registration and profile management
- Content personalization rules
- Saved preferences and history
- Role-based content access
- Single sign-on integration

Workflows and permissions structures must be thoroughly documented during discovery, including editorial roles, review processes, approval steps, and multi-site considerations. Clear workflow definitions prevent confusion and bottlenecks during content production, ensuring efficient operations after launch. Future enhancement planning during discovery creates a roadmap that guides long-term investment and ensures the technical foundation can accommodate anticipated growth and evolving requirements.

Integration Requirements and Architecture

Modern websites rarely operate in isolation—they must integrate with CRM systems, marketing automation platforms, payment gateways, identity management solutions, and internal business systems. Each integration requires thorough discovery to understand data flows, authentication requirements, error handling, and security considerations. Documenting these requirements prevents integration failures that can derail projects and disappoint users.



Common Integration Points

- Customer Relationship Management (CRM) systems for lead tracking and customer data synchronization
- Marketing automation platforms for email campaigns and lead nurturing
- Payment gateways for e-commerce and donation processing
- Identity management and single sign-on (SSO) for authentication
- External APIs for third-party data and services
- Internal systems including HR, ERP, and knowledge bases

Critical Integration Considerations

Each integration must address data synchronization frequency, conflict resolution strategies, performance impacts, and user experience implications. Security requirements vary by integration type but always demand careful attention to authentication, data encryption, and compliance standards.

Error handling and monitoring capabilities ensure integrations fail gracefully and issues are detected quickly. Scalability planning ensures integrations can handle growth in data volume and transaction frequency without degradation.

Technical Architecture and Platform Decisions

Platform Selection

Choose between Drupal 10 or 11, decide on Layout Builder vs Experience Builder, select core and contributed modules, and plan SDC component implementation for design system integration

Hosting Infrastructure

Select hosting provider, specify server configuration, design caching strategy, plan CDN usage, and establish backup and disaster recovery protocols

Security Architecture

Define user authentication approaches, establish roles and permissions, implement data encryption, secure integrations, and ensure compliance with relevant standards

Search Architecture

Search functionality requires careful technical planning, including selection of search technology (Search API with Solr or Elasticsearch), configuration of faceting rules, and relevancy tuning to ensure users find what they need quickly. Search architecture impacts both user experience and server performance, making it a critical discovery consideration.

Performance Optimization

Performance considerations include image optimization strategies, multiple caching layers, lazy-loading implementation, and Core Web Vitals targets. These technical decisions directly impact user experience, SEO rankings, and conversion rates, making performance planning essential during discovery.

Platform decisions made during discovery have long-term implications for flexibility, performance, and maintainability. Choosing between Drupal versions, page building approaches, and module selections requires balancing current needs with future requirements. Infrastructure planning ensures the technical foundation supports expected traffic, provides adequate security, and enables optimal performance across all user segments and geographic regions.

UX and Design Foundation

User experience and design foundations established during discovery ensure visual and functional consistency across the entire website. A comprehensive design system defines global styles, reusable components, interaction patterns, and responsive breakpoints that maintain coherence while enabling efficient development. This systematic approach prevents inconsistencies that confuse users and complicate maintenance.

Design System Planning

Establish comprehensive design systems including global styles, typography scales, color palettes, spacing systems, component libraries, and interaction patterns that ensure consistency across all pages and user experiences

Wireframes and Prototypes

Create detailed wireframes for key page templates, design navigation structures, develop mobile-first layout options, and build interactive prototypes for stakeholder review and user testing

Branding Requirements

Document logo usage guidelines, color specifications, typography standards, iconography approaches, photography style, and voice and tone guidelines that maintain brand consistency throughout the digital experience

Accessibility requirements must be defined clearly during discovery, including specific WCAG conformance levels, keyboard navigation requirements, color contrast standards, and alternative text guidelines for media. These standards ensure the website serves all users regardless of ability, while also improving SEO and overall usability. Wireframes and prototypes created during discovery facilitate stakeholder alignment and user testing before development begins, reducing the risk of costly changes later in the project lifecycle.

SEO, Analytics, and Search Strategy

Technical SEO Foundation

Technical SEO planning during discovery preserves hard-won search rankings while establishing foundations for future growth. Page title conventions, metadata standards, structured data implementation, and internal linking strategies must be defined before development begins to ensure every page is optimized for search engines from launch.

Redirect mapping prevents loss of search equity by ensuring all valuable URLs from the old site properly redirect to their new locations. Canonical URL strategies prevent duplicate content issues, while indexing rules ensure search engines discover and index appropriate pages while avoiding low-value content.

01

Search Intent Mapping

Identify primary user queries, map content needed to match search intent, and document gaps in existing content that must be addressed

02

SEO Preservation Planning

Catalog high-value URLs, create comprehensive redirect strategies, establish canonical URL rules, and define indexing priorities

03

Analytics Implementation

Plan GA4 configuration, develop detailed event tracking plans, design custom dashboards, and establish measurement frameworks

04

Tag Management

Configure tag management systems, document tracking requirements, plan data layer structure, and ensure privacy compliance

Search intent mapping ensures content strategy aligns with how users actually search, improving both SEO performance and user satisfaction. Analytics planning defines what success looks like and how it will be measured, establishing baselines and targets that guide ongoing optimization. Tag management implementation enables sophisticated tracking while maintaining site performance and respecting user privacy through proper consent management and data handling practices.

Risk Assessment and Mitigation

Comprehensive risk assessment during discovery identifies potential obstacles before they derail the project. Technical risks, content challenges, organizational dynamics, and timeline pressures all threaten project success if not identified and addressed proactively. By documenting risks and developing mitigation strategies early, teams can navigate challenges more effectively and maintain project momentum even when complications arise.

Technical Risks

Fragile integrations with legacy systems, inconsistent or corrupted legacy data, hosting platform limitations, inadequate technical documentation, and complex custom functionality all pose technical risks requiring careful mitigation planning

Content Risks

Missing or unresponsive content owners, underestimated migration effort, delayed content rewriting, legacy accessibility issues, and incomplete content inventories threaten content quality and project timelines

Organizational Risks

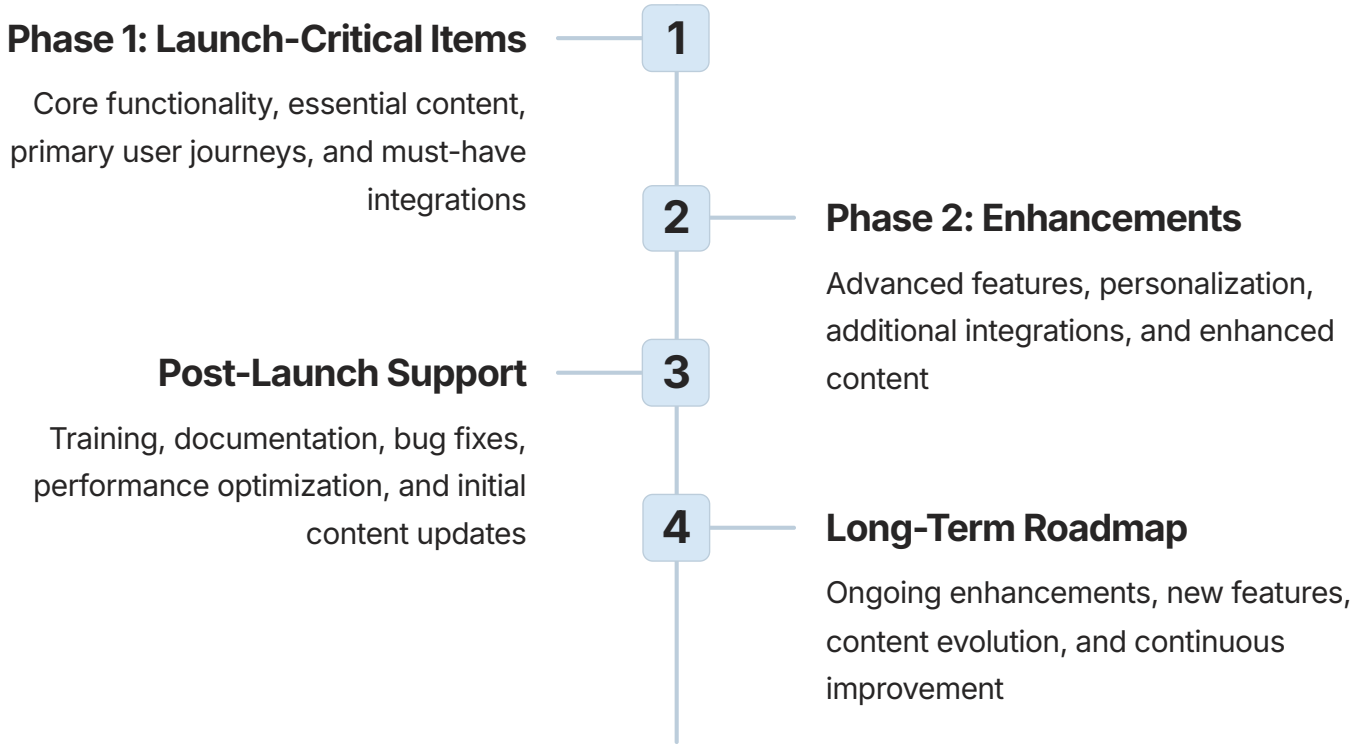
Leadership turnover, internal politics, conflicting stakeholder priorities, insufficient resources, and poor communication can undermine even technically sound projects

Timeline Risks

Hard external deadlines, dependencies on external systems, delayed approval cycles, inadequate testing time, and scope creep threaten project completion targets

Mitigation strategies should include contingency plans for high-probability risks, buffer time in project schedules to absorb unexpected delays, clear approval gates that prevent bottlenecks, and escalation procedures for resolving conflicts quickly. Regular risk reviews throughout the project ensure new threats are identified early and mitigation strategies remain effective as circumstances change. Documentation of risks and mitigation plans also helps stakeholders understand project complexity and supports realistic expectations about timelines and outcomes.

Roadmap, Launch Planning, and Long-Term Success



Budget and Timeline Framework

Phased implementation allows organizations to prioritize essential functionality for launch while planning future enhancements that add value over time. Budget frameworks should include estimated hours by phase, realistic ranges that account for uncertainty, and contingency recommendations for addressing unexpected challenges. Timeline development must balance ambition with realism, accounting for review cycles, approval processes, and integration dependencies that extend project duration.

Post-Launch Success

Long-term success requires comprehensive training for editors and administrators, clear technical documentation, defined support expectations with appropriate SLAs, and governance structures that ensure content remains current and accurate. Annual audit plans identify improvement opportunities, while enhancement roadmaps guide continued investment in digital capabilities that serve evolving user needs and business objectives.

The discovery process culminates in executive summaries and presentations that synthesize findings, articulate recommendations, and secure stakeholder alignment for moving forward. These communications should clearly explain core problems identified, opportunities uncovered, recommended strategic direction, proposed architecture approach, realistic timeline and budget, and comprehensive launch plans. By grounding recommendations in thorough discovery work, teams build confidence that the proposed approach addresses real needs and sets the foundation for long-term