

## Introduction to PAS 124

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# Defining, implementing and managing website standards

A statement of best practice



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# Introduction

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Publicly Available Specification (PAS) 124 has been prepared by the British Standards Institution (BSI), in collaboration with Magus and a panel of industry experts<sup>1)</sup>, to establish a best practice approach to website standards.

Website standards are the library of standards specified by an organization to govern the content, function and appearance of their web estate. Managed effectively, they deliver tangible performance and operational benefits (Table 1), and are powerful tools for regulating the process of website creation and publication. However, defining, implementing and managing website standards presents organizations with common logistical challenges.

PAS 124 provides a framework to help organizations deploy website standards efficiently and harness their full potential. It has four main sections:

- Defining website standards (see page 3);
- Implementing website standards (see page 5);
- Managing website standards (see page 6);
- Guide to the key categories of website standards (see page 7).

## Who's it for?

- Anyone who manages, or has responsibility for, a website or a multi-site web estate;
- Organizations considering, planning, or in the process of developing website standards;
- Organizations with existing website standards wishing to align themselves with best practice methodologies.

## Why do organizations need website standards?

The main purposes of website standards are to:

- Guide web developers and content creators;
- Optimize and control the user experience;
- Help organizations successfully utilize their websites to support their online goals.

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1) See back cover.

**Table 1** – Key benefits of website standards

<b>Brand</b>
<ul style="list-style-type: none"><li>• Reinforcement of the brand by ensuring consistency of brand presentation and messaging;</li><li>• Protection of brand and company reputation by ensuring a consistent, high quality user experience.</li></ul>
<b>Risk</b>
<ul style="list-style-type: none"><li>• Minimization of online risk through compliance with legislative requirements;</li><li>• Securement of appropriate protection of intellectual property under a defined legal jurisdiction.</li></ul>
<b>Financial</b>
<ul style="list-style-type: none"><li>• Protection of investment in web-related projects by ensuring quality and performance is maintained on an ongoing basis;</li><li>• Reduction of development and maintenance costs;</li><li>• Provision of access to the widest possible market, by ensuring compliance with accessibility guidelines and compatibility with target user platforms;</li><li>• Optimization for targeted customer acquisition due to the effective localization of content.</li></ul>
<b>Workflow</b>
<ul style="list-style-type: none"><li>• Reduction of time to market, through streamlined development and maintenance processes;</li><li>• Communication and enforcement of best practice across web teams, and the organization as a whole.</li></ul>
<b>Performance measurement</b>
<ul style="list-style-type: none"><li>• Provision of objective targets against which performance can be tracked and measured.</li></ul>

## Defining website standards

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The standards should aim to be as comprehensive as possible, and specify how the organization's websites should meet a broad spectrum of criteria, including: brand, legal, behavioural and functional criteria. In parallel, organizations should also define the processes involved for meeting, managing and maintaining the standards.

Website standards are most effectively defined in conjunction with the website design process. However, standards should continually evolve to meet changing internal and external requirements, and can be usefully addressed at any point in the website life cycle.

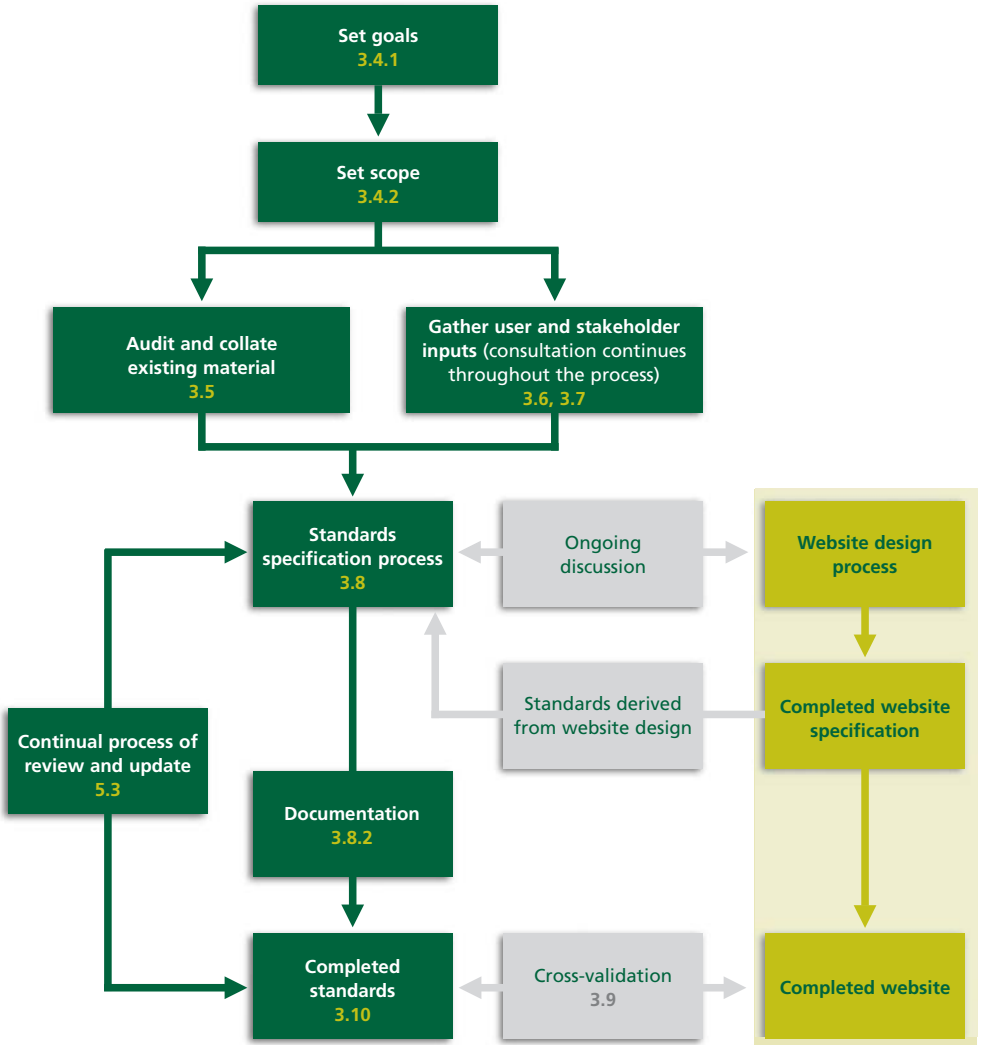
Standards definition is not usually a linear process. Different processes feed into each other, as illustrated in Figure 1.

**This section of PAS 124 covers the following topics:**

- When should website standards be defined?;
- Definition workflow (Figure 1);
- Planning, establishing project goals, and handling variation and localization;

- Auditing and collating existing material;
- Gathering user requirements;
- Stakeholder consultation and management;
- Specification and documentation of standards;
- Pre-publication validation;
- Standards sign-off.

**Figure 1** – Recommended standards definition workflow



**NOTE** References refer to the full PAS 124 specification.

# Implementing website standards

The implementation phase covers the deployment of standards via website templates, and the build and population of new websites through to launch.

A key determinant of the implementation of standards will be the organization’s publication framework. The characteristics and implications of the two main types of framework are shown in Table 2.

**Table 2 – Impact of the publication framework**

	<b>Common platform</b>	<b>Diverse platform</b>
<b>Description</b>	Provision of a centrally managed Content Management System across all or most websites. This will typically include associated web services and technical platform.	Site owners have responsibility for their own publication mechanism. This may result in a variety of technical platforms being used.
<b>Template deployment</b>	Key templates are centrally defined and updated, and used globally.	Any templates supplied will need to be adapted for the local publication mechanism. This process may be required for each and every website in a multi-platform presence.
<b>Standards control</b>	Many standards can be hard-wired into the system setup, ensuring that a basic level of standards compliance is met by default.	The standards and goals are described, however it is up to the website owner to determine the means of implementation. This can be impacted by the capabilities and constraints of the local platform, and by the expertise of the website owner or agency.
<b>Cost implications</b>	Major central cost, economies of scale. Central budget and high degree of centralized governance required.	Where budgets are administered at a local level, cost is spread across the group, often with little transparency. Costs for a diverse platform typically end up being higher on aggregate.

Whatever platform route is taken, decisions will need to be made regarding the balance of lock-down and flexibility within the template structure. On international web presences, this relates to the issues of balancing control and empowerment when setting the scope of localization.

When rolling out the standards over a multi-site web estate, deployment should be phased and a change management process adopted. Initial training in standards should be provided to all contributors as part of the launch process.

**This section of PAS 124 covers the following topics:**

- Impact of the publication framework;
- Lock-down vs. flexibility;
- Phased roll-out;
- Communicating website standards.



## Managing website standards

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An organization's website standards require ongoing management. For standards to succeed it is important to establish a clear governance structure, and to define a standards management process, in particular addressing ownership and responsibility for the standards. An effective dialogue between contributors and the standards guardians should be maintained, and training and support systems established.

The standards themselves should also be reviewed on a regular basis and updated if appropriate.

Organizations should monitor their websites for compliance with the standards. This is essential in order to ensure that the standards continue to be consistently implemented and maintained, to provide data for benchmarking performance, and to identify any shortcomings or gaps in the standards.

PAS 124 includes guidance on the selection of appropriate levels and types of compliance monitoring solutions to help organizations manage their website quality assurance strategy, minimize risk and ensure performance targets are achieved.

**This section of PAS 124 covers the following topics:**

- Ongoing support;
- Reviewing and updating;
- Process and governance;
- Monitoring and measurement.

# Guide to the key categories of website standards

Website standards should include both organizationally defined standards (e.g. brand and editorial standards), and standards specified by external agencies, such as governments and official standards bodies (e.g. legal and accessibility standards).

PAS 124 includes an annex which provides a detailed guide to the key categories of website standards that organizations should consider, along with some examples.

The annex provides a framework for use by organizations to inform the standards specification process.

**Table 3** – Key categories of website standards

Type of standard	Annex
Brand and visual	A.2
Editorial	A.3
Information architecture and navigation	A.4
Naming and metadata	A.5
Search engine optimization	A.6
Usability	A.7
Accessibility	A.8
Legal	A.9
Rich media and PDF	A.10
Code	A.11
Performance	A.12

**NOTE** References refer to the full PAS 124 specification.



“PAS 124 provides a framework to help organizations deploy website standards efficiently and harness their full potential.”

## Acknowledgement

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- Institute of Directors
- The Institution of Engineering and Technology
- Interbrand
- Localization Industry Standards Association (LISA)
- SDL PLC
- Shell International B.V.
- Unilever PLC

Wider comments from other parties were invited by BSI. The expert contributions made from organizations and individuals consulted in the development of this PAS are gratefully acknowledged.

## Further information

Magus can help you implement the recommendations of PAS 124, and develop a world-class website standards management programme. Visit the ActiveStandards website for information about our website standards consultancy and quality management services: [www.activestandards.magus.co.uk](http://www.activestandards.magus.co.uk).

## How to order a copy

Copies of PAS 124 can be purchased from [www.bsi-global.com/en/shop](http://www.bsi-global.com/en/shop).

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