# Client Questionnaire & Website Planner

Completing this document will help me understand your project requirements.

It will also serve as a website planner to walk your through the process of articulating your needs. Please just skip any questions that you don’t feel are relevant to this project.

Here’s how this works…

**Client Responsibilities:**

* Return filled out questionnaire with down payment
* Provide logo and relevant info
* Provide sitemap (or outline of pages needed)
* Provide images
* Provide initial content
* Collaborate on the design sketches provided by designer
* Critique and proof final layout
* Train with designer - maintaining content on the site
* Pay the Balance Due

**Designer Responsibilities:**

* After reviewing the Client questionnaire, provide client with design sketches
* Purchase hosting and domain, if requested
* Build website based on client’s questionnaire and conversations with client
* Revise the site based on Client’s review
* Train the Client to update the content on their site
* Hand over the keys!

# Client Contact Information

Name:

Title:

Email:

Phone:

Billing address:

# Business Information

Organization Name:

Business/Location Address:

E-mail for Website contacts:

Phone for Website:

# Project Information

**DOMAIN:** Do you have a domain name registered? If so, what is it?

**HOSTING:** Do you currently have web hosting? Who is the host? Would you like a hosting recommendation?

**TIMELINE:** Is there a date when the project needs to be completed? (e.g.: art opening, product launch, year-end budget.)

**BUDGET:** What is the budget range for this project? An idea of your budget will help me adapt my approach to respects your constraints.

**BRANDING**: Do you already have a logo & colors?

# Your Website Goals & Objectives

What purpose is your website to serve?

[ ] Establish a Web presence for our company

[ ] Generate requests for services/products

[ ] Create an online portfolio of your work

[ ] Educational

[ ] Online community

[ ] Online store to sell products

[ ] Provide customer service/information to our clients

[ ] Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Is Search Engine Optimization (SEO) – i.e. ranking well in Google - an important objective for your website project?

[ ] Yes!

[ ] It would be nice to rank well but isn’t main goal

[ ] No, I just want a site for existing clients or those I give my card to

#### **Why do you want to have a new website, or have your current site redesigned?**

#### **What will happen if you don’t have a new website, or have your current site redesigned?**

# If you have a current site please answer …

Tell me what you like about your existing site. What’s working?

What are some key areas that need improvement?

Are you wanting to keep the same content or rework it?

# Check out your competition

What sets you apart from your competitors? What do you offer that they don’t? Why should someone hire you instead of your competition?

Review three competitor’s websites:

*Competitor #1:*

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Website address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Review their website. What are they doing right?

What would you do differently/better?

*Competitor #2:*   
Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Website address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Review their website. What are they doing right?

What would you do differently/better?

*Competitor #3:*   
Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Website address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Review their website. What are they doing right?

What would you do differently/better?

# Design

When you look at the design of websites in general, not just your competition…

1. List websites that show colour combinations that you like:
2. List websites that have a look and feel that appeals to you: List adjectives that describe what you like about the look and feel of the site. (e.g.: modern, traditional, clean, clear, and professional.)
3. List websites with design elements that you like: and please specify what you like on the site.

Please list any design choices you don’t want included? (e.g.; Dark background, drop-down menus, etc.) Feel free to link to sites you don’t like and tell me what it is about the site that you dislike.

# Your Message & Audience

What is the key message you want to communicate about yourself/ your business? (e.g.; your mission, what you stand for, your “why” for the site/business…)

Who is your ideal client/your target market? Who is your message intended for? (e.g.; middle age women local to Toronto who are interested in wellness)

What words and phrases will your customers use to find your site on Google?   
List 5-10

#### **What problems do your prospects have that your business solves?**

If you were your own ideal client, what would you be looking for when you arrive at a website?

A “call to action” provides direction to your site visitors.  What do you want the site visitor to do when they land on your home page? Do you want people to Call? Buy? Register? Subscribe? Donate? Browse your Portfolio?

# Planning your website

It can be hard to know where to start when planning a website. Here is a free tool you may find useful as you consider your website structure, page elements and prepare content.

**SITEMAP:** This free tool will help you {www.writemaps.com}. Please submit a copy of your sitemap with this form. Feel free to skip the tool and just create simple bulleted lists, whatever works best for you.

Approximately how many pages will the site have? The sitemap exercise should help with this.

When considering those pages, how many different page layouts will you need? (e.g.: home page, pages with sidebar, full width page, etc.)

Please list any features you would like. (e.g.: blog, multiple authors, shopping cart, PayPal buttons, event calendar, etc.)

If this is an online store, what shopping cart solution will you be using?

[ ] WordPress WooCommerce?

[ ] Shopify?

[ ] Unsure

[ ] Other? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If you will be processing online payments:

* How many products? \_\_\_\_\_
* Do you need to charge tax? [ ] Yes [ ] No
* Are you selling digital downloads? [ ] Yes [ ] No
* What method of shipping are you using?
* How you will accept payments? PayPal or another payment gateway?

Do you intend to insert most of the page content yourself or will you provide all content to Designer?

Is the content already created for this site?

[ ] Yes – content is in our existing WordPress site

[ ] Yes – we’re copying from our existing site (not WordPress)

[ ] Yes – we have prepared Word documents for each page

[ ] No – when will the content be ready? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are you interested in professional SEO copywriting services?

[ ] Yes

[ ] No

Do you have photos, graphics, artwork?

[ ] Yes

[ ] I’ll need help sourcing stock images

[ ] Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Will the site include video?

[ ] Yes – Provide your YouTube or Vimeo link \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ] No

Do you intend to update the website content yourself or will you need ongoing updates by Design?

Will you or your staff require WordPress training?

[ ] Yes – if yes, how many people \_\_\_\_\_\_\_\_\_\_

[ ] No

# Thank You!

Please save this document as your-company-name.doc and email to [tinambury@gmail.com](mailto:tinambury@gmail.com). Please attach a sitemap and any other files or information that you think will be helpful.