

Developing a website that works well, meets your business's goals, provides for a pleasing user interface and keeps your customers updated and informed takes planning. In fact, it's not uncommon that the planning takes longer than the implementation of the plans.

We approach planning as a time to carefully understand the requirements for the site, and how you and your customers will use the site. We ask you to thoughtfully complete this survey so we can help design, build and code the best website for your business.

## Website Client Survey

### General Information

What is the name of your company and your current (or intended) URL?

Have you purchased the URL?

Who are the primary contacts from your organization, and who has final approval on the project? Please list names, titles, email addresses, and phone numbers.

Is there someone responsible for maintaining consistency of the brand company-wide? Is this person also responsible for the website? Who has the final approval over the logo and brand?

What is your intended launch date for the new site? Are there any outside considerations that might affect the schedule (for example, PR launch, tradeshow, annual report)?

Do you have a specific budget range already established for this project? Can or should this project be divided into phases to accommodate budget and timing constraints?

### User Experience on Site

What type of user experience do you want your user to have?

What specific areas must be included?

Have you conducted usability tests or gathered visitor feedback for your intended site? If so, how long ago? Please include any reports or findings.

Do you have corporate branding?

Will this be maintained in this site?

Do you have your logo in a vector based file format? i.e. Adobe Illustrator

**Why do you need a website?**

What are the main reasons for the creation of your site?

What are your primary online business objectives for the site? What are your secondary objectives? (Examples include increased sales, marketing/branding awareness, and fewer customer service calls.) Please discuss both long- and short-term goals.

What is the main business problem you hope to solve with the website? How will you measure the success of the solution?

What existing strategy (both on- and offline) is in place to meet the business objectives?

### **Audience/Desired Action**

Describe a typical site visitor or visitors if you expect more than one type of customer to use your site. How often are they online, and what do they generally use the web for? Give basic demographics: age, occupation, income level, purchasing habits. (Use as much detail as possible in profiling your target user. Profile more than one type if appropriate.)

What is the primary “action” the site visitor should take when coming to your site (e.g. make a purchase, become a member, make a donation, complete a request to volunteer, subscribe to a newsletter, search for information, contact you)?

What are the key reasons why the target audience chooses your company’s products and/or services (cost, service, value)?

What do you want to communicate to your customer with your website? What kind of emotional response should the customer feel when they visit your website?

If you have a current site, how many people (as far as you can tell) access your site on a daily, weekly, or monthly basis? How do you measure usage? Do you forecast usage to increase after the site launch and by how much?

## Perception

Use a few adjectives to describe how your site visitor should perceive the new site. (Examples include prestigious, friendly, corporate, fun, forward thinking, innovative, and cutting edge.) Is this different than the company's current brand / image perception?

How is your company currently perceived offline? How would you describe your company's brand identity? Do you want to carry the same kind of message through your website?

What is the promise you make to your customers and how will this website help fulfill this promise?

How does your company differentiate itself from competitors? Do you think your current audience differentiates you from your competition? Please list competitor URLs.

List the URLs of any sites you find compelling. What specifically do you like about these sites? Be detailed and specific with your responses.

If a new logo or brand identity is required, please attach any examples or URLs of logos you feel effectively communicate that company's brand personality and explain why you feel they are effective.

## Content

Will this site use existing content from your marketing materials? If so, what is the source, who is responsible for approval, and has the content been audited for completeness and suitability for your new site? If not, will you be creating content in-house or will you look to an outside source to develop content?

What video or audio files must be used in the site's content?

What is the basic structure of the content, and how is it organized?

Describe visual elements or content that should be utilized from your marketing materials (logo, color scheme, navigation, naming conventions, etc.)

How will the content of this site (along with functionality and navigation) work in your understanding?? Do you already have a sitemap/page hierarchy or outline for the proposed content?

## Maintenance

What areas of the new site will be updated (news, photos, videos, podcasts, blog, products, reviews, etc.) and how often do you expect them to be updated (daily, weekly, monthly, quarterly, and annually)?

Will you be using an internal content creation and site maintenance team or will you want to create an ongoing contract with an external source/content provider/creator/web management firm? If internal, name and describe the planned team, including individual responsibilities and time allocation, if known. Who will be responsible for maintaining the site and what is their level of technical expertise? Will this person require training?

## Content Creation

Who is responsible for creating content for the site? Will this person be creating content part or full time? (Content not only means copy for the site, but logos, photos, documents, videos and podcasts to be posted to the site, PDFs of important paperwork, etc.)

Who will be responsible for approving look and feel changes as the site is developed over time to ensure that the quality of the site is maintained?

How often will new pages, sections or areas be added to the site? Will they be based on the existing site template or as independent sections?

## Technology

Who in your organization is going to help support this project and sort out technical questions?

What are you currently using for e-mail? Microsoft Exchange? Google

What specific interactivity and or functions that you would like to see in the site? If so, how will they enhance the user experience? Please describe in detail. (this can be anything from downloading items such as whitepapers, completing surveys, participating in polls, making donations, downloading PDFs or other files; uploading files such as pictures or completed documents, or even just completing a contact form.)

Will the site need to be integrated with any software used in your business? e.g. does your donor software need to interface with the site; or does a CRM have to interface with the site?

Will you have database functionality (dynamic content generation, personalization/login)?

Will you have a need for secured transactions (e-commerce)? Do you already offer transactions online? Please describe in detail.



Will you require other specific programming needs (such as personalization)? Please describe in detail.

### Marketing/Updating

How do you expect people to find out about your website? What kind of triggers prompt a visit (social media activity, digital ads, referral links, incentives, search engine results pages)? What methods of distributing the URL already exist within the company on and offline? i.e. marketing materials, email signatures, business cards, advertisements, social media.

Will you blog on your site?

Will you need to migrate blog content from WordPress.com or Blogger or Tumblr or other blog platform?

What methods of promoting your URL do you use? Will your site rely on search results or pay per click ads for traffic?

Briefly, what are your short-term marketing plans (specifically, for the site redesign and the 6 to 12 months following launch)?



What are your short, medium, and long-term goals to increase traffic and awareness of your site?

Do you have an existing or planned marketing strategy to promote this site? If so, please describe.

Do you intend to keep the site updated? If so, how often? Who is responsible for updating and providing content?

What are your plans to encourage return visits to your site? What factors will motivate positive word-of-mouth solicitation?

What are your plans to keep users informed of site updates?

Will there be email announcements or special deals tied into the site updates?

Will you need to develop a special e-mail or newsletter template which will send your site's subscribers updates from the website? i.e. E-news sent when new blog posts are added to the site

Will someone need to set up a subscription system for sending these updates or do you have a current e-mail blast set up? If so, what platform do you use now? e.g. MailChimp; Constant Contact; Please list the system you use.

Who will be responsible for ongoing website optimization?

### **Additional Notes/Comments**

Please take as much space as you need.