

Website Planning Questionnaire

Learn about their business. Find a problem. Develop a solution.

Below we have compiled a very long list of questions that you may want to ask yourself - or your clients - when you first begin your website project. We recommend you print this list off and highlight just a few of the questions that resonate with you. Then create your own questionnaire.

Please, do not ask yourself or your clients every single question on this list. You and your client will be totally overwhelmed! Pick just the questions that will help you formulate your website plan.

So, what do you need to know?

Ultimately, what you are trying to scope out is what the business does, for whom, and how. What features will the website may need (blog, shop, events, recipes): Is there any current brand, visual identity, imagery, and text that you have to work with:

*"As designers, we're responsible for delivering not just the visuals as a pdf, psd, or .svg but also for delivering the intangible associations with those visuals. It can get icky when working with clients who lack clarity. **Part of our job is to help clients achieve clarity about their brand identity.** You don't want to be caught in multiple cycles of design iterations, hoping the client likes your work. Or experimenting with different shades of blue." (Richa Jain, [SitePoint](#))*

Katy and Krista both use a contact form in their website that asks a few basic questions. As soon as they receive an inquiry form, (if they are remotely interested in that project), they will reply to the client asking them to fill out a more detailed questionnaire. They will then schedule a time to talk to the client to review any outstanding questions, and to *feel* whether they are a good fit or not. Armed with all of this information, you can then prepare a detailed strategy and fee proposal.

Sample Questions To Get To Know The Client, Their Business, And Website Features:

Personal Information:

- What name do you like to go by (e.g. I'm Katy, and I answer to both Katy and Kate):
- How did you hear about me (so I know who to thank):
- Where do you live (so I know what time-zone you are in):
- What is your phone number:
- What is your mailing address:
- What is your email address:
- What is the email address you use for your business email:
- What is the email address associated with a google account (for gmail and/or google analytics):
- Will there be any other people working with us on this project? If yes, please provide their name and contact details:
- Have you worked with any other designers and/or developers in the past: If yes, how would you view the relationship and success of the project:
- Why choose me for your project:
- Let's say I approve you as a client today. Can you walk me through the process of you deciding to work with me?

Current Website Information:

- What is the name of your business:
- What is the URL of your website:
- What's your tagline, if you have one:
- Have you registered your website's domain name: With which company:
- Have you set up website hosting? With which company:
- Do you have any other websites? If yes, what are the URLs:
- What website or software do you use to check your email address(es):
- Do you know where your email accounts are hosted? If yes, with which company:
- Do you have another Wordpress blog, or a blog, and do you want to transfer posts or pages from this site to your new website:
- Are there any technical requirements or limitations we need to be aware of:

- What timelines are you're looking at for this project:
- Why start now vs six months from now or six months ago:
- What's your budget:

About your business:

- Who are you and what do you do:
- What does your business / product do:
- If you had just 30 seconds (or two sentences) to explain your product to a customer, what would you say:
- Please describe what your product or service does for customers (in 2 to 5 sentences).
- What's the origin story behind the company:
- Tell me all about your brand:
- If you have an existing brand/identity, why isn't it working for you:
- Is there a unique story behind your business or business name or logo:
- Share 5 adjective or words that best describe your company:
- Using 5 adjectives or short phrases, describe your brand's desired look and feel:
- How are you unique:
- What problem does your product or service solve:
- Why do your customers buy your products and/or services:
- Why do your customers care about your business:
- Why do you, personally, think this product should sell: What do YOU like best about it:

Clientele:

- Who is your target audience: (age, gender, spending habits, employment, income, etc):
- Who are you best suited to help:
- Imagine your "perfect" customers. Describe what they are like (niche details, income ranges, profession, etc).
- Tell me all about your favorite customer and why you love working with them:
- Why do your favorite clients or customers seek you out:
- How many are one-time clients vs repeat clients: Do you rely on referrals, reviews:
- How happy are your customers: Where are they dissatisfied:
- How do people currently find you:
- If people are looking for your product or service, what do you think they will be searching for in google in order to find you:

- Write down what your visitors want to learn when they visit your website:
- What are they most interested in learning about:
- What do your customers need to know to solve their problem:
- Do you have any market research about your ideal client or your product/business that you can share with me:
- What are three important "pain points" your customer is experiencing that they want to go away: What's making them say "I need to change my situation": Phrase it in the language of your customer. Your customers are feeling pain because ... 1 - 2 - 3 -
- What are 3 frustrations your customer is feeling: In other words, when they think about their problem, what's blocking them on solving it on their own:
- If your customer could have their "dream situation" and their problem was solved, what would their new situation look like:
- If your customer could have their "ideal solution" so their problem was solved in the most convenient and accessible ways, what would that solution (your product) look like:
- Your customers' would love your product to be a solution that had these features ... 1 – 2 – 3 –
- If your customer could have their "dream situation" and their problem was solved, what would their new situation look like: Your customers' would love their situation to look like this ...
- How does your product or service make their life more utterly delightful:
- What characteristics would your ideal customers possess:

Current business model:

- How does your business currently generate revenue:
- How has your business performed over the last 12- months:
- How often do you create new products and/or services:
- Do you have plans for any new ones:
- What are your most popular products and/or services:
- Which products generate the most revenue for you:
- When it comes to your business, what are you struggling with the most:
- Where is your business now:
- Where do you want it to be:
- What's the biggest change you're hoping to see out of working with me, beyond the literal "get a new logo or website"

- What's inside your product: Break it down into all the components of the offer. Does it have audio, video, workbooks, checklists, one-on-one consulting, online forums, etc.: Include each part so we can make sure the customer knows just how much value they're getting.
- Also describe what each part does if it's specific, if you have something like checklists, then what are the checklists for: The more detail, the more we can position your total offer as very, very valuable. Include actual cash values if any component sells in your store.
- What has the life cycle of this product or service been so far: (Is this something you've been offering forever: Is it brand new: Is it currently in launch: Does it have bigger or smaller siblings in your business:)
- What does the product or service cost: How does that compare to your other products and services (if you have some), or to industry competition:

About your website:

- Tell me everything can about this website project:
- Is this a new project that will live on its own or are you adding onto an existing site:
- What prompted your desire for a new website:
- What will make this project feel like a success:
- What's the goal of this project:
- What would be the difference in the organization if you were successful:
- How would you measure the success of a project if we work together (i.e., what would a homerun look like):
- What's your [key metric] right now? ("We'll know this project is successful if we increase X by 20%"):
- What is the profitability improvement expected:
- What if this project failed:
- How will this project affect image/reputation:
- If you had to set priorities now, what three things must be accomplished:
- How will you know when these objectives have been accomplished:
- What should people feel when they visit your website:
- What works about your current website:
- What would you like to change about your current website:
- What new features are you looking to build into your new site:
- What type of site are you creating: Content-based: Ecommerce: Social network: Marketing:
- What is every possible thing your website could do to benefit you: (Rank them in order of importance):
- What does your website need to do for you over the coming months and years:

- Tell me about how someone buys your products or services, starting from how they hear about you, to how they purchase from you:
- What steps do you imagine your customers will take on your website in order to buy from you:
- How do people pay you:
- What follow-up communication do you have with your clients after they purchase from you:
- What have you tried so far, marketing-wise:

Your website pages:

- What is the number one action users should take on the site:
- What is the second most important action: Third:
- Brainstorm your pages: Write down every possible page you may need in your website:
- For each page in your website, what do you want people to know about when they visit that page, and what do you want them to do next:
- Narrow it down: For every page in the list above, consider if it helps your goals and your customers goals, and then list your most important pages here:

Competition:

- List some other people / brands in your industry:
- Who do you see as your biggest competition right now:
- Who are your top 3-5 competitors:
- What do you like about their product/service, branding and website:
- What do you dislike about their product/service branding and website:
- How are you different from your competitors:
- How are you viewed by your industry:
- Do you have a unique perspective on your industry? If so, what is it:
- Who do you hope to have as your biggest competition in the future:
- What sets your business apart from your competition:
- Why do (or will) people choose your business over your competition:
- Have a look at some websites you love. What do you love about them: What do you think works really well:
- Take a look at other websites in your industry. Who is getting it right and why:

Logos and branding background:

- Do you have a logo:
- Do you have a specific color palette you like to use:
- Do you already use specific fonts in your marketing materials:
- Do you have any branding guidelines:
- What brand assets already exist: Logo: Font files: Colors: Styleguide:

Imagery:

- Do you have any special photos, or unique images available to use in your website:
- Do you have any head-shots: if no, describe the subject matter and style of any imagery you'd like to use:
- Discuss any symbolism in your brand and business:
- What do you want the visual style of your website to say about you:
- What is the overall tone of the website: Is it serious: Fun:

Technological Background:

- Can you crop a photo:
- Do you use Photoshop, iphoto, or any other photo-editing tool:
- Have you every used Canva or PicMonkey:
- Have you ever touched any HTML:
- Have you used Wordpress before:
- Have you used any other website content management systems before:
- Do you measure and track your traffic using Google Analytics:

Email marketing background:

- Do you have a mailing list:
- Approximately how many people are on it:
- Which email newsletter tool do you use (e.g. MailChimp, Constant Contact, etc.):
- How often do you communicate with customers on your mailing list and what do you send to them:
- How successful do you think your email communications are:
- Do you have an opt-in freebie: What is it and how do you share it with your customers:



Social media marketing background:

- List the URLs for the social media websites you use, e.g. Pinterest, Facebook, Twitter, Instagram:
- Tell me a little about how you use these tools, and how often:
- Tell me a little about how you use these tools for your business, and how often:
- Where do people engage with you the most right now:
- What type of marketing and/or advertising initiatives are you currently engaged in, if any:
- How are these advertising campaigns working out for you:

Text and copywriting:

- Do you like to write:
- Do you currently write blog posts: If yes, how often and what about:
- Do you have a content marketing strategy:
- Do you participate in any guest posting, podcasts, or interviews:
- Do you want to write content for your website, or would you like to work with a copywriter:
- Do you already collaborate with anyone to write content for your business:
- Have you collected any testimonials from your clients or customers:

Anything else you want to tell me about the project:

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