

# **1. Business & Primary Contact**

## **Business details**

- 1. Business / Organization Name**
- 2. Doing Business As (DBA) (if different)**
- 3. Industry / Type of Business**
- 4. Business Address**
- 5. Business Phone Number**
- 6. General Info Email (e.g. info@yourdomain.com)**

## **Primary contact for this project**

- 7. Full Name**
  - 8. Role / Title**
  - 9. Best Email for Project Communication**
  - 10. Best Phone / Mobile**
  - 11. Preferred Contact Method (Email / Phone / Text / Other)**
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# **2. Current Website Overview**

- 12. Current Website URL(s) (all domains/subdomains you use)**
- 13. Do you want to: (Single choice)**
  - Keep the current website as-is
  - Redesign / rebuild

- Migrate to a new host
- Consolidate multiple sites

**14. Briefly describe what your website does today**

**15. Top 3 goals for your website over the next 6–12 months**

- Goal 1
  - Goal 2
  - Goal 3
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### **3. Domain Name & DNS**

**16. Primary Domain Name(s)**

**17. Where is your domain registered?** (Registrar – e.g. GoDaddy, Namecheap, Google Domains, IONOS, etc.)

**18. Who owns the domain?** (Person or company name on the registrar account)

**19. Do you have access to the domain registrar login?** (Yes / No / Not sure)

**20. Who should we contact for domain/DNS changes?** (Name, email, phone)

**21. Do you have any custom DNS records we must preserve?**

- Examples: MX (email), SPF, DKIM, DMARC, subdomains, verification records
- If yes, list or upload details.

**Note:** For security, please do *not* send passwords in this form. We'll use a secure method (password manager share/one-time link) for credentials.

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### **4. Hosting & Server Details**

**22. Who is your current hosting provider?**

(e.g. IONOS, Bluehost, SiteGround, WP Engine, DigitalOcean, Azure, AWS, custom server, etc.)

**23. Hosting Type** (check all that apply)

- Shared hosting
- VPS / Dedicated server
- Cloud hosting (AWS/Azure/GCP)
- Managed WordPress hosting
- Other (describe)

**24. Do you know the following details?**

- Control panel type: cPanel / Plesk / Custom / Unsure
- PHP version (if applicable):
- Database: MySQL / MariaDB / SQL Server / PostgreSQL / Other / Unsure

**25. Do you have SSH, SFTP, or control panel access?**

- Yes, and I can provide access securely
- No
- Not sure

**26. Are there any other apps or sites on this same server we must not break?**

- If yes, list them.
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## **5. Platform / CMS / Tech Stack**

**27. What platform is your site built on? (If known)**

- WordPress
- Custom HTML/PHP
- Shopify
- Wix / Squarespace / Weebly
- Custom application (Laravel, Node, .NET, etc.)
- Unsure

**28. If WordPress or other CMS:**

- Approximate theme name (if you know):
- Any important plugins/apps we must keep?

**29. Does your website connect to any third-party systems?**

- Examples: CRM, booking system, payment gateway, email marketing tools, donor platform, EHR, etc.
  - If yes, list them and what they do.
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## 6. Email & Communication

**30. Do you use email addresses on this domain? (e.g. name@yourdomain.com)**

- Yes / No

**31. Who hosts your email?**

- Microsoft 365
- Google Workspace
- Hosting provider (cPanel/IONOS/etc.)
- Other / Not sure

**32. Do you use any of these? (check all that apply)**

- Contact form(s) on the website
  - Newsletter signup
  - Chat widget
  - SMS notifications
  - Support/helpdesk system
  - Other (describe)
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## **7. SEO, Analytics & Tracking**

**33. Do you currently use any of the following? (check all that apply)**

- Google Analytics (UA or GA4)
- Google Search Console
- Google Tag Manager
- Facebook Pixel
- Other tracking pixels (TikTok, LinkedIn, etc.)

**34. Do you have access to those accounts? (Yes / No / Not sure)**

**35. Top 5 keywords or phrases you want to show up for in Google (if known):**

- Keyword 1
- Keyword 2
- Keyword 3
- Keyword 4

- Keyword 5
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## 8. Content & Branding

36. **Do you have an existing logo and brand assets?**

- Yes, and I can provide files
- No, we need help with branding

37. **Brand assets you can provide:** (check all that apply)

- Logo (vector/PNG)
- Brand colors
- Brand fonts
- Brand guidelines document
- Image library / product photos

38. **Who owns the content on the website now?** (You / previous agency / shared / unsure)

39. **Anything we should NOT remove or change?**

- (e.g., specific pages, PDFs, legal disclaimers, forms)
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## 9. Security, Compliance & Backups

40. **Does your site currently have an SSL certificate (HTTPS)?**

- Yes / No / Not sure

41. **Any specific compliance requirements?** (if applicable)

- HIPAA
- PCI-DSS
- ADA accessibility
- Other (describe)

**42. Do you know if regular backups are being performed today?**

- Yes, daily/weekly
  - No
  - Not sure
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## **10. Access & Prior Vendors**

**43. Do you currently work with another web designer/agency/IT provider?**

- Yes / No

**44. If yes, do we have permission to contact them about the site/hosting transfer?**

- Yes / No

**45. Existing providers to be aware of**

- Name / Company
  - Email
  - Phone
  - What they handle (hosting, email, IT, marketing, etc.)
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## **11. Project Scope & Approvals**

**46. What services are you hiring us for? (check all that apply)**

- Website takeover/maintenance
- Hosting migration
- Full redesign
- New pages / features
- Ongoing updates & support
- SEO / marketing

**47. Target date for any major changes or launch (if applicable):**

**48. Budget range for this project / monthly support (optional):**

**49. Who is the final decision maker for approvals on design/content?**