



*from the desk of:*

**Brian Wm. McAllister**

CLIENT WORKSHEET

**This worksheet has been filled out by:**

*Your name here*

**This worksheet will be read by:**

*Brian McAllister*

**The Client Worksheet:**

I've put together this handy worksheet to help you capture your vision for the project. Think of this document as a business plan for your website. The more information you can give me, the better I'll be able to respond. Please answer each question in a clear and concise manner, and skip any questions that don't pertain to your project.

**All about you**

*What's the name of your company and intended website?*

*Describe your company*

*Describe the concept/product/service your site will provide*

*I like to keep my address book up-to-date. Who are the main contacts for this project and what are their roles?*

*When would you like to start?*

*When does it need to be completed?*

*What is your specific reason for these dates?  
(e.g. tradeshow, product launch?)*

*Your budget dictates how much time I can devote to your website. What are you looking to spend to achieve your vision?  
(e.g. \$2-5k, \$5-10k, \$15k+)*

**What are you trying to do?**

*Give me your main reasons for commissioning a new website*

*In order of importance (most important first) what are the business objectives for your site  
(e.g. improving sales rate, increase customer satisfaction, reduce time searching)*

*What is your measure for success, and what are you hoping to achieve?  
(i.e. 20% increase in sales)*

*What aspects of your current site work well and why are they successful?*

*What's not so great and why do you think that is?*

*Who are you doing it for?*

*Who's coming to your site? Describe the different types of visitors to your website in as much detail as possible.*

*How do you think your audience currently perceives your company and the services you offer?*

*What do you imagine people using your site for? What will they want to do there?*

*Why will people choose your site over others?*

*Outline any ideas for features you have for your site*

*How do these features support your business goals and the goals of your user?*

### **Design Concept**

*People are coming to your new site for the first time. How do you want them to feel about your company?*

*Tell us a bit about your competition. Who are the runners and riders in your field (including their website addresses)?*

*What works for them? What doesn't?*

*Leaving your competitors aside, have you seen any sites recently that you've liked the visual design of? What did you like about it?*

*(If you can't think of any have a look through [dribbble.com](http://dribbble.com) or [siteinspire.com](http://siteinspire.com) for a catalogue of good looking websites)*

*Let's briefly talk content. Aside from the features we discussed above, what else do you want your site to do?*

*I have lots of experience with WordPress and building my own simple CMSs, however, if your needs exceed my abilities would you like me to recommend somebody to build your software or content management system?*

*If so, what features would you like it to do?*

*(e.g. updatable news, multiple authors, stock control, user moderation)*

### **Additional Comments**

I've tried to keep this worksheet as general as possible, but every project is unique. Here is your chance to add any extra information you think will be helpful.