

Discovery Questionnaire

Client Name

Street Address

City, State

Website

**CONTACT INFORMATION:**

Name, Email, Phone

Introductions

**CONTRACT HIGHLIGHTS:**

* **$ Budget (hours)**
* Process: discovery, review sitemap, IA, setup dev environment, homepage design, homepage feedback, collect content, content migration and site build, internal review and QA, site feedback (homepage + internal), copywriting, CMS training, SEO set up and redirects, image optimization, final payment, launch
* Sales Notes

**IMPORTANT DATES:**

* Present wireframes & IA:
* Present homepage design:
* Review Homepage Changes (May need to set up a meeting):
* Collect content:
* Review site design:
* Review Homepage + Internal Pages (May need to set up a meeting):
* CMS Training: TBD
* Final Payment:
* Launch:

Company Background

**Can you give us the “Who is [CLIENT NAME]” elevator pitch? In 10 seconds, what do you want someone to know or understand about you?**

**How has the business evolved? What has changed and or remained?**

**Can you provide a full breakdown of your products and services?**

**In a few words or short phrases, can you think of any adjectives that describe your business?**

Competitors

**Who are your competitors?**

**Why would someone choose you over your competitors?**

**Why would someone choose your competitors over you?**

Target Audience

**Who is your target audience and can you describe their general persona (e.g., age, interests, goals)?**

**Do the goals differ among users? If so, can you describe each of these goals?**

**What common questions come up during the sales process that we can answer on the website?**

**What are the biggest pain points for your users in the sales process?**

Website / Goals

**How do you currently attract new business? What marketing tactics do you primarily use?**

**What are your high-level goals for a site redesign?**

**What primary calls to action(s) do you want users to take when visiting your website?**

**What are the strengths of the current site? Any messaging that is particularly effective? Any elements or functionality that you’d like to retain?**

**What are some pain points of the current site? Are key pages or content missing?**

**Is there anything about your business you want to highlight more on the website?**

Features & Scope

**What features or functionality if any would you like to see incorporated on this new site that may be missing or underperforming on your current site?**

Content & Branding

**Will content on the existing site stay the same or will you be providing new copy? If your content needs to be updated, can you tell us which sections?**

**Do you already have a desired look and feel for the new website? What feelings do you want to evoke?**

**What pages and or pieces of content will *not* be carried over to the new site?**

**Can you provide a list of websites that inspire you? Specifically, what aspects of the design do you like/dislike?**

**Do you have or will you be taking professional photos of your office, staff, etc.? If not, would it be possible to get custom photography?**

**Are you currently using a stock photography account (e.g. iStock, Shutterstock, etc.)? If so, which one?**

**If our team had to source images for the new site what should they portray?**

**Can you provide the design files for your logo?**

Technical Questions

**Do you have an IT person?**

**Are you planning to host with us or somewhere else? Third-party hosting will require additional fees.**

**Where is your DNS hosted? Will we be managing DNS changes or is your team able to update this at launch?**

**Besides <example.com>, do you own or operate any other domains or subdomains?**

**What email host do you use (e.g. Office 360, Gmail, Bluehost, etc.)?**

**Do we need to copy any static files? In other words, are there any files that need to be copied from your current hosting environment to the new environment? For example, you may have email marketing templates that use images from your hosting environment.**

**Can you send us your office IP address(es)? We need it to block site visits from your internal office inside Google Analytics. This will allow us to create a “filtered” view to analyze organic traffic only. The easiest way to get this information is to Google, "What's my IP address?" This is public information so it will appear directly in the search results.**

**Can you send us your existing site redirects?**

Other Questions

**What is your company’s full legal name (including special designations, such as LLC, Inc, Corp, Ltd, etc.)?**

**What are your plans after the site launches? Do you have an agency or in-house person who can handle SEO, content updates, and general site maintenance?**

**Is there anything else that we need to know or should be aware of for the website project?**

Additional Notes

Here is what we’ll need:

* Need Google Analytics Access for gravitate.clients3@gmail.com
* Add gravitate.clients3@gmail.com to Google Search Console
* Hosting/Registrar/DNS credentials
* Logins to third-party tools
* Email and password to “no-reply” email for basic form submissions
  + I recommend setting up no-reply@domain.com
* Email(s) who should receive form notifications after submission
  + Sometimes this is a catch-all email (such as info@domain.com or hello@domain.com), or it can be specific people within your organization
* Design assets, including:
  + High-resolution images
  + Vector logo file (e.g., svg, ai, eps, or pdf file types)
  + Existing style guide or color palette for reference (if applicable)