

# WEB DESIGN & DEVELOPMENT

## PRE-CONSULTATION QUESTIONNAIRE

The following questions and exercises will help you prepare for a consultation with me, or any other freelance designer or agency. The more clarity you have on these points, the more productive your first meeting will be, which can save you both time and money.

You don't need to have all the answers up front. This checklist is designed to get you thinking about your website in detail. Answer as many questions as you can. I can always help you refine your ideas later after I have a better understanding of your project.

## BUSINESS INFORMATION

Business Name:

Contact:

Website:

Email:

Phone:

## UNDERSTANDING YOUR BUSINESS & VISION

### MISSION & GOALS:

What is the core mission of your business?

What are your primary business goals for the next 1-3 years?

What specific role will your new/updated website play in achieving these goals?

*e.g., generate leads, direct sales, provide information, build brand awareness*

### KEY OBJECTIVES:

What are the top 3-5 things you want visitors to do on your website?

*e.g., book an appointment, purchase a product, fill out a contact form, find your location, sign up for a newsletter*

How will you measure the success of your website?

*e.g., number of online bookings, product sales, contact form submissions, newsletter sign-ups*

## UNDERSTANDING YOUR BUSINESS & VISION (cont)

### TARGET AUDIENCE:

Who is your ideal customer?

**Demographics:** Age, gender, location, occupation, etc.

**Psychographics:** Their lifestyle, values, interests, pain points.

**Online behavior:** What social media do they use? What kind of devices do they typically use?

What problem does your product/service solve for them?

## DESIGN, CONTENT & INSPIRATION

### BRANDING (if you have it):

Note your brand colors (e.g., hex codes, RGB, Pantone #s).



**TO-DO:** Gather your existing logo files (preferably vector format - .ai, .eps, .svg).

List any specific fonts you use.

### INSPIRATION & PREFERENCES:

List 2-3 websites you like (they don't have to be in your industry). What specifically do you like about them?



**TO-DO:** Collect any visual inspiration: images, color palettes, or general styles that appeal to you (a Pinterest board can be great for this).

DESIGN, CONTENT & INSPIRATION *(cont)*

## INSPIRATION &amp; PREFERENCES:

List 2-3 websites you *dislike*. What specifically do you not like?

Are there any competitor websites you find effective or ineffective? What can you learn from them?

## CONTENT FOUNDATIONS:

What are the main pages/sections you envision for your site?

- |                                  |                                   |                                   |                                  |
|----------------------------------|-----------------------------------|-----------------------------------|----------------------------------|
| <input type="checkbox"/> Home    | <input type="checkbox"/> About    | <input type="checkbox"/> Company  | <input type="checkbox"/> Team    |
| <input type="checkbox"/> Contact | <input type="checkbox"/> Products | <input type="checkbox"/> Services | <input type="checkbox"/> Pricing |
| <input type="checkbox"/> Shop    | <input type="checkbox"/> Menu     | <input type="checkbox"/> Events   | <input type="checkbox"/> FAQ     |

☐ Other *(please specify)*:

Think about the overall tone and style of your website copy. Do you want it to be:

- |  |                                   |                                    |                                 |
|--|-----------------------------------|------------------------------------|---------------------------------|
| <input type="checkbox"/> Professional                    | <input type="checkbox"/> Friendly | <input type="checkbox"/> Technical | <input type="checkbox"/> Quirky |
| <input type="checkbox"/> Other <i>(please specify)</i> : |                                   |                                    |                                 |



**TO-DO:** Gather any existing text, photos, videos, brochures, or other materials you want to include or use as a starting point.

## FEATURES &amp; FUNCTIONALITY

## ESSENTIAL FEATURES:

What key features does your website need to have?

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Blog             | <input type="checkbox"/> Booking / scheduling | <input type="checkbox"/> Contact forms   |
| <input type="checkbox"/> E-commerce store | <input type="checkbox"/> Event calendar       | <input type="checkbox"/> Photo galleries |

☐ Other *(please specify)*:

## FEATURES &amp; FUNCTIONALITY (cont)

## THIRD-PARTY INTEGRATIONS:

Are there any specific tools or software you already use that need to connect with the website?

*e.g., Email marketing (Constant Contact, Mailchimp, etc.), CRM, booking system, payment gateway (Stripe, Paypal, etc.), shipping provider (Shipstation, Stamps.com, etc.)*

## INDUSTRY &amp; LEGAL REQUIREMENTS:

Are there any specific industry regulations, disclaimers, or policies that must be included on your site?

*e.g., privacy policy, terms of service, accessibility considerations*

## BUDGET, TIMELINE &amp; LOGISTICS

## INVESTMENT:

What is your general budget range for the design and development of the website?

*Having a range in mind is helpful for agencies to propose appropriate solutions.*

What is your anticipated budget for ongoing website expenses?

*(e.g., hosting, domain renewal, maintenance, potential marketing)*

## DOMAIN &amp; HOSTING:

Do you already have a domain name registered? If so, what is it and where is it registered?

Domain name:

Domain registrar:

Do you have an existing hosting provider or are you looking for recommendations?

I need recommendations: ☐

Hosting provider:

## BUDGET, TIMELINE & LOGISTICS *(cont)*

### TIMELINE:

Do you have a specific deadline or desired launch timeframe for the new website?

### ONGOING MAINTENANCE & UPDATES:

Who do you envision handling content updates once the site is live?

Have you thought about ongoing technical maintenance and security updates for the website? *(In-house or outsourced?)*

## QUESTIONS & NOTES

Your consultation is a two-way street. Prepare any questions or thoughts you have ahead of time to make sure they don't get overlooked.