

executionists

we get web done.



Client Questionnaire

Please answer these questions to the best of your ability. If a question isn't relevant or you don't know the answer just leave it blank and we can discuss if needed.

Contact Information:

Your Name:

Company Name:

Phone Number:

Address:

Email:

General Information:

Who are the primary contacts from your organization? Please list names, titles, email addresses, and phone numbers.

What is your intended launch date for the new site? Are there any outside considerations that might affect the schedule (for example, PR launch, trade show, annual report)?

Do you have a specific budget range already established for this project? Can this project be divided into phases to accommodate budget and timing restraints?

What third party companies or agencies are you also working with on this project? Will you need Executionists to be the main project managers or will you be the hub for all the work?

Current Website (if applicable):

Current (or intended) website URL:

Business Objectives:

Please provide a concise statement about the goal or purpose of the website

Competitive positioning, how does your company differentiate itself from competitors?

Please list competitor URLs you find compelling and why.

What areas of the current site are successful and why?

Do you feel your current site promotes a favorable user experience? If not, please list any shortcomings on the site or anything you would like changed.

Have you conducted usability tests or gathered visitor feedback for your current site? Please include when and any reports or findings.

Look & Feel:

Do you have a logo? Do you want a [new] logo?

How important is it to maintain your current look, feel, logo, and branding?

Does your company/organization have a tagline?

Would you like us to create a Brand StyleGuide?

Do you have imagery or photos you want to provide?

Describe visual elements or content that should be utilized from your current site or marketing materials (logo, color scheme, navigation, naming conventions, etc.).

Use a few adjectives to describe how your site visitor should perceive the new site. (Examples include prestigious, friendly, corporate, fun, forward thinking, innovative, and cutting edge.)

How is your company currently perceived offline? Do you want to carry the same kind of message through your website?

Technology:

What is your target platform and browser? Whom can we talk to in your organization to help respond to technical issues?

Will you need any of the following? Check all that apply.

- ☐ Search Engine Optimization
- ☐ Registration (log-in / membership)
- ☐ Survey/Voting Tools
- ☐ Mobile / Tablet Optimized
- ☐ Newsletter Distribution
- ☐ Hardened Web Security
- ☐ Photo Gallery
- ☐ Web Traffic Analytics Tools

Would you like us to import metadata from the old site? Does the old site have a blog? If so, what blogging framework is being used?

Does the site need to integrate with any pre-existing database? If so, what kind of database is currently being used? (FileMaker, Access, SQL Server, Oracle, etc.)
Will you be using any scripts or code that have already been established?

Do you have an in-house IT person who can maintain the site?

Content:

Do you have content for the site? If not, will you be creating content in-house or using an outside provider?

How will the content of this site differ from your current site? Do you already have a sitemap or outline for the proposed design?

Marketing / Audience:

Describe a typical site visitor/ target audience: How often are they online, what do they use the web for? Include basic demographics: age, occupation, income level, purchasing habits. (Use as much detail as possible in profiling your target. Profile more than one type if appropriate.)

What is the primary “action” the site visitor should take when coming to your site (i.e. make a purchase, become a member, search for information)?

What are some of the key reasons the target audience chooses your company's products and/or services (cost, service, value)?

What is the overall message you are trying to convey to your target audience? (IE cost-effective, secure, reliable, efficient.)

Do you have Google Analytics and/or Bing Analytics installed on the current site? Would you like support with analytics?

Will you need 301 redirects from an old site?

Do you have an email marketing account set up? If so, which vendor do you use?

e-commerce:

Describe what you will be selling (hard goods, services, downloadable product). Do products have particular features? (Please describe all options and configurations of size, color, strap, finish, etc.)

Do you want the ability for users to share products via social channels? What about "tell a friend"?

How many categories? How many products initial and how many products in a year?

Do you want to set up cross-selling, upselling on the product detail pages?

Do you need particular search filters for searching the product catalog?

Do you need to integrate with any ERP or 3PL? Would you want to import product data initially from a .csv file?

How will you be managing inventory?

Will you be generating coupon codes, discounts? Describe how you'd like these to work.

Will there be any particular shipping rules (free shipping over a certain cost, flat rate, table rates, etc.)

What shippers will you be using?

Which payment gateways and services do you want to offer? (PayPal, Google Wallet, bank transfer, COD, check/ money order, zero total checkout).

Would you want your store to sync with eBay or Amazon account?

Do you want to show translated versions of your store?

Do you want to allow customer reviews?

Do you want to enable customers to create and save wishlists?