



SASHA ENDOH
CODE & DESIGN

PROJECT DISCOVERY WORKSHEET

There's no line item on a balance sheet for 'give a damn,'
but it's the most valuable thing you've got in the business.

Casey Gerald
CEO of MBAs Across America

Every website project starts with getting to know you and your organization, which means a whole lot of questions. We've developed this worksheet to help you put everything in its right place, be clear about your goals, and help determine your organization's needs. Armed with your answers, you will set the tone for a successful collaboration with us or another digital agency based on thorough understanding of the big picture.

Please keep in mind, it's ok if you don't have all the answers - we'll find those answers together.

YOUR ORGANIZATION

Name of your organization

Your website address (please leave blank if you don't have one yet)

Briefly describe your organization and the kind of services/products you offer:

How large is your team? What are the roles you envision on your end?

YOUR AUDIENCE

Who is the target audience for your website?

What needs is your target audience bringing and how do you intend to meet these needs?

What should be the primary focus of each visitor to your site?

Should they make a purchase, sign-up for newsletter, become a member, contact you, obtain information etc?

How are you going to reach new users? How are you going to promote your site?

SEO, social media, SEM, Pay-Per-Click advertisement, public relations, traditional advertising, e-mail marketing etc?

ORGANIZATIONS IN YOUR FIELD

What sets you apart from other organizations in your field (or your competitors)?

Please name a few of these organizations

1.

3.

2.

4.

YOUR WEBSITE GOALS

What attributes of your organization would you like your website to reflect?

How would you describe your organization?

Traditional Innovative

Energetic Laid Back

Cold Warm

Trendy Classic

Fun Serious

Spontaneous Orderly

Masculine Feminine

Loud Quiet

Casual Formal

Unique Familiar

What goals would you like to achieve with this website (re)design?

How will you know if your goals have been reached?

It's important to be able to track the progress of your project and have concrete indicators of success.

How can failure be avoided with this project?

You know your business better than we do - what are the pitfalls to avoid while working on this project?

What will happen to your organization if nothing changes?

What are you risking by not doing this project?

What are you goals for the future?

Where do you see your organization 6 months from now? A year from now? Three years from now? 5 years from now?

What is the single biggest obstacle for your organization right now?
What are you struggling with most?

Why are you moving forward with this project now?
What made you decide that it's time to go ahead with this project now, rather than say 6 months ago, or 6 months from now?

YOUR CURRENT WEBSITE

Please skip this section if you do not currently have a website.

What elements of your current website work well, why would you say that is?

What elements of your current site are unsuccessful and why? What problems are you experiencing with your current website?

When was your current website launched?

Who is your current website host?

OTHER EXISTING WORK

Has your website already been designed, do you only require development services?

yes

no

Are there brand guidelines that will need to be followed?

Do you have any pre-established branding, brand colours, typography, themes etc?

yes

no

Will you need branding work as part of this project?

yes

no

Is there any other existing work we should be aware of?

A new logo? Some rough designs or ideas for the site? (You don't have to have any of these.)

YOUR WEBSITE CONTENT

How many pages will your website have (per language)?

- 1 - 5
- 6 - 15
- 15 - 30
- 30 - 100
- 100+

Do you already have the content for this website? If not, do you have an expected date when it will be ready?

- yes
- no Date expected:

Are you interested in professional copywriting services to aid in content creation?

- yes
- no

In which language(s) will the website content need to be presented?

- English
- French
- Other

Do you already have all the necessary photos for your website?

- yes
- no

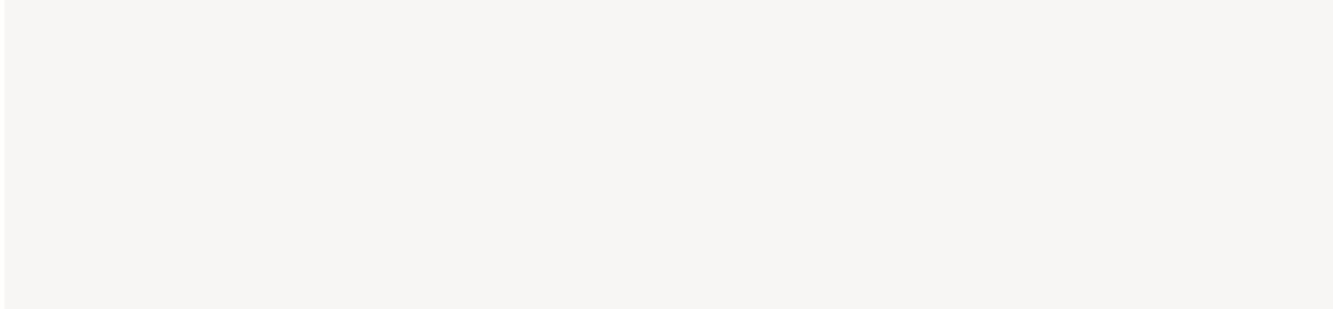
Will you need stock images?

- yes
- no

Do you already have a sitemap (your website's structure or Information Architecture)?
If yes, you may include it outline format below.

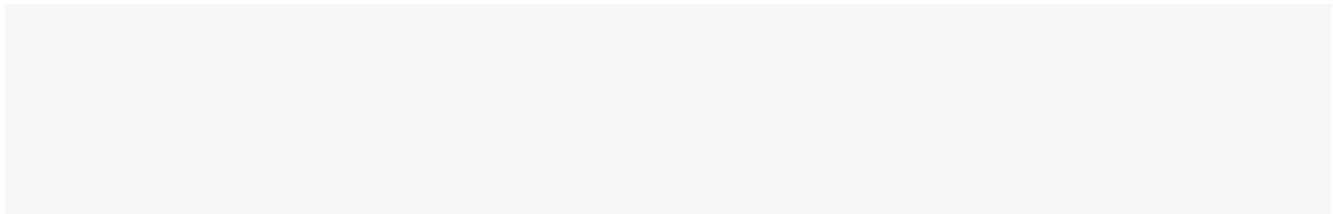
yes

no



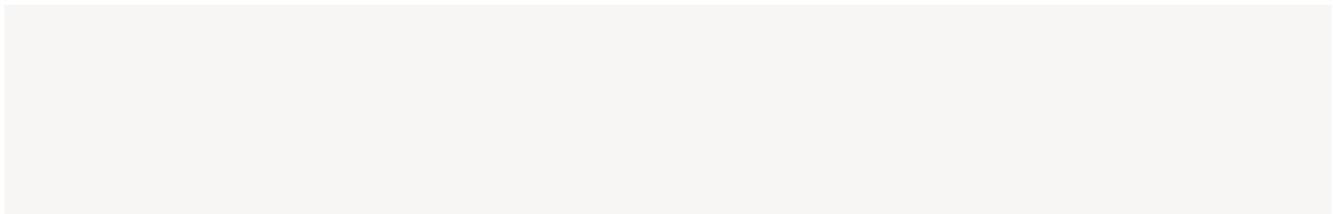
A FEW TECHNICAL CONSIDERATIONS

Who will be in charge of updating your website? What is their level of technical knowledge?



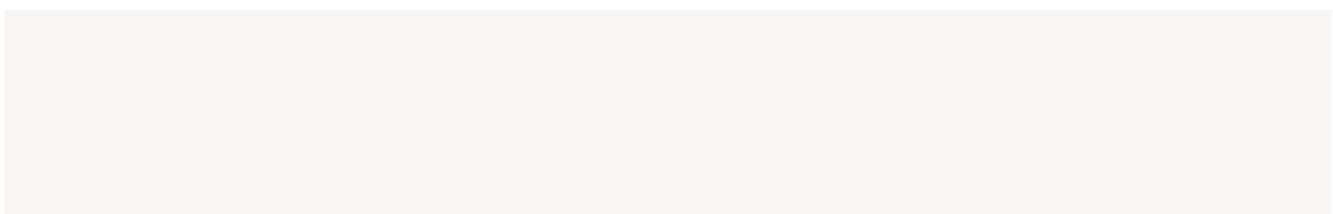
If you will be processing online purchases or donations, please describe your needs in terms of number of products, taxes, shipping, and how you will accept payments (if you have a preference)?

GST, HST, no taxes, local pick-up, shipping by weight, payments through PayPal, Stripe, etc



Will your website require other integrations?

MailChimp, Salesforce etc.



PRACTICAL INFO

Do you have a deadline for having your website up and running?

Does it need to be up for a conference, product launch, program launch? Does the project have to start before a certain date for budget considerations (in this case please indicate that this is a start date)?

How much money have you set aside for this project?

We need at least a rough idea of the budget allotted for this project in order to discuss it in realistic terms.

Who has the final approval on this project?

You

Someone else

Is there anything else we should know about your organization or project?

Thank you for taking the time fill out this worksheet! Please save this document and email it to hello@sashaendoh.com to get started on your project.

We can't wait to hear from you,

