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management

Web Site Coaching for business ❖ jv@askjv.info

Pre-Contract Questionnaire

This initial questionnaire is designed to gather the information needed to estimate the scope and cost of the proposed project. Don't hesitate to contact us if you have any questions. Please write "N/A" if a question is not applicable, and bring this completed questionnaire to the initial meeting.

- × Client name, address, phone:
- × Client contact person and title:
- × Phone:
- × Contact Email:

Project:
Existing Domain Name(s)
Existing Web Site URL:
Site host and domain registrar if known:

1. Please circle what OS and what platform you use and what Internet connection
PC – Windows, Linux Apple – OS9, OSX
Browsers: Firefox, Internet Explorer, Safari, other:
Hi-speed cable, dsl, modem, other

× GOAL

1. The primary goal, or mission, the web site needs to achieve is:
2. Please list any major ideas you want to implement on the site(s).
3. Needs for the audience of this site (product purchase, research)
4. Needs for the administrators of the site (update content, process orders)

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× SPECIFIC SITE COMPONENTS:

Do you have a formal mission statement or tag line/logo to be used?

A. Usability

Please number in order of priority or add your own

Inform people about the company, product, people

Generate sales

Offer support to customers

Solicit feedback (what would you like to know about/from them?)

Attract new customers

B. Design - Your vision and your personal style.

In addition to web sites it is helpful to provide examples of magazines, illustrations, etc.

Please give us three model sites that have the level of style, the tone and mood that you would like and state what it is that you like about each of them (copy, colors, layout, function)

URL 1

URL 2

URL 3

Would this describe the tone of your web site project? (example)

"Elegant modern design that is built upon an understandable structure "

Would this describe the audience? (example)

"Savvy, wine-loving Internet users who expect web sites to provide the latest in look and feel"

Do you have a style guide or other graphic conventions that need to be incorporated?

Yes No

Do you have an existing logo that you would like to use?

Yes

No - Please design one for me (not included in current estimate)

Do you have any registered trademarks or service marks that need to be included?

Yes No

What types of graphical elements would you like to include in your site?

Photographs

Animation

Stock Photography

Video

Advertisements

Presentations

Drawings

Flash

Other -Please describe other below:

What format (s) are they in? Circle all that apply: jpg, gif, tiff, hardcopy, word docs, excel docs, current web site images and text, podcasts, videocasts, streaming audio or video, quicktime movies, flash

Do you want the theme of the web site to reflect the theme already established in collateral print material?

Yes No

Will any of the graphical elements need to be scanned?

Yes No

Do you have a color scheme in mind?

What kind of color do you think best reflects your vision for the web site?

Use the color scheme from the current site

Earthy

Warm and sunny

Cool sophisticated shades

Black and white

Soft pastels and tints

Primary colors

Rich saturated hues

× WEBSITE CONTENT

What types of content do you envision for your web site? Check all that interest you.

- History/Biographies/Video Clips/Portraits
- Contact info
- Contact form
- Online printable PDF brochure
- Directions
- Events calendar
- Guest/Customer Testimonials
- Product List – Gift shop Items
- Gift Certificates – on-line credit card processing or not?
- Shopping Cart - on-line credit card processing or not?
- fax-in order sheet (instead of on-line cc processing)?
- Pay Pal payments (requires user account and takes a fee like cc's)
- Reservations
- Newsletters
- Newsletters sign up form that goes into Mailing list
- Press releases
- FAQ (Frequently Asked Questions)
- Online guest book that goes into mailing list
- ecards
- Image gallery
- “Live” of-the-day elements like “did you know?”
- Web cam
- Site Search box
- Online Availability Chart (webervations, for example)
- Member areas (login)
- Email Page to friend form
- Book mark this page script (only available for PC)
- a statistics gathering system (tracker,)
- database
- email gathering database
- Other -Please describe other below: Is this something already on your site?

Ecommerce questions

How many categories of products and how many items per category will you want to be able to put on the site to start with? (example: 10 categories with up to 100 items per category)

- Do you want your ability to add products and categories to be unlimited?
- Will you want a merchant account so you can take credit cards on-line?
- Will you want to accept global payments in various currencies?
- Will you provide and charge for shipping?
- Will you need to add tax?
- Will you want to send out special offers or new item alerts to past customers or visitors?
- Will you want to offer quantity or other types of discounts?

- Will someone add/edit/remove the pictures and descriptions of the products to the web site and update pricing or store information? **Will they use a Mac or a PC?**

- Will someone write and edit professional copy for the store? (We can provide copywriting services) Customers are wary of buying if there are any spelling errors or if information on products and store policies is not clear.

Is there one single location where you will receive and process orders, or will orders go to both an accounting office and to a fulfillment house in different locations (via fax or email for example)? One location. Several Locations.

× VISIBILITY – promotion and return on design.

What criteria will you use to measure the success of the site?

Keeping track of the numbers of visitors and how much time they spend looking is a good indicator of success, especially if you don't have any concrete sales numbers for evidence.

- Do you already have any demographics on your clientele?
- Do you already analyze the site traffic?
- Do you have any paid links on other sites/directories?
- Local Web sites (chamber)?
- National/International?
- Do you know where your site is listed?
- Do you have your web site address on all printed ads and materials?
- Do you have staff/marketing departments that will monitor site demographics and statistics to track return on any site promotional efforts or
- Do you need analysis and recommendations on promotion monthly/quarterly?

Ongoing Investment in website promotion:

- Do you plan to invest an annual amount in ongoing maintenance of your site?
- Do you have a marketing and design budget and do you dedicate a certain percentage of it to website work and maintenance?

Does your industry find a website impact increasing revenue and at what level of investment? (5% of gross is an example for generating growth in the travel industry)

× SCHEDULE

- Is there an event-related desired launch date (before reprints of brochures, major advertisements, before busy season?)

Month/Date/Year _____

Are all the materials needed from you already available or do you have them budgeted and scheduled? (revised copy, photography, web cam equipment, merchant account, etc.)

SCOPE – these items are subject to modification and are based on initial conversations, the list will be refined in the process of creating the specific site proposal.

Within the scope of a typical project	Beyond the scope for project provider
<ul style="list-style-type: none"> • Custom website design and functionality • Optimization for Search Engines • Standard browser compatibility • Hi-speed Internet functionality for the site 	<ul style="list-style-type: none"> • Web Site hosting (can advise and setup account at a commercial ISP) • Violation of Search Engine regulations • Guaranteed compatibility with every browsers and operating systems (Win 95, Netscape 4, etc.) • Modem issues with flash or other advanced elements requested

× DELIVERABLES

To be filled out by client and project manager.

This is the end of the initial questionnaire. Please add any comments that were not addressed above and bring this document to the initial consultation.

End

