



CLIENT SURVEY

General Information

1. What is the name of your company and your current (or intended) URL?
2. Who are the primary contacts from your organization, and who has final approval on the project? Please list names, titles, email addresses, and phone numbers.
3. What is your intended launch date for the new site? Are there any outside considerations that might affect the schedule (for example, PR launch, tradeshow, annual report)?
4. Do you have a specific budget range already established for this project? Can this project be divided into phases to accommodate budget and timing constraints?

Current Site

1. Do you feel your current site promotes a favorable user experience? Why or why not?
2. What specific areas of your current site do you feel are successful? Why are they successful?
3. What shortcomings exist with the current site, and what three things would you change on the site today if you could?
4. Have you conducted usability tests or gathered visitor feedback for your current site? If so, how long ago? Please include any reports or findings.
5. How important is it to maintain your current look and feel, logo, and branding?

Reasons for Redesign

1. What are the main reasons you are redesigning your site (new business model, outdated site, expanded services, different audience)?
2. What are your primary online business objectives with the site redesign? What are your secondary objectives? (Examples include increased sales, marketing/branding awareness, and fewer customer service calls.) Please discuss both long- and short-term goals.
3. What is the main business problem you hope to solve with the site redesign? How will you measure the success of the solution?
4. What existing strategy (both on- and offline) is in place to meet the new business objectives?

Audience/Desired Action

1. Describe a typical site visitor. How often are they online, and what do they generally use the web for? Give basic demographics: age, occupation, income level, purchasing habits. (Use as much detail as possible in profiling your target user. Profile more than one type if appropriate.)
2. What is the primary "action" the site visitor should take when coming to your site (make a purchase, become a member, search for information)?
3. What are the key reasons why the target audience chooses your company's products and/or services (cost, service, value)?
4. How many people (as far as you can tell) access your site on a daily, weekly, or monthly basis? How do you measure usage? Do you forecast usage to increase after the site launch and by how much?

Perception

1. 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.) Is this different than the current image perception?
2. How is your company currently perceived offline? Do you want to carry the same kind of message through your website?
3. How does your company differentiate itself from competitors? Do you think your current audience differentiates you from your competition? Please list competitor URLs.
4. List the URLs of any sites you find compelling. What specifically do you like about these sites?

Content

1. Will this site use existing content from the current site? If so, what is the source, who is responsible for approval, and has the content been audited? If not, will you be creating content in-house or using an outside provider?
2. What is the basic structure of the content, and how is it organized? Is it a complete overhaul of the current site or an expansion?
3. Describe visual elements or content that should be utilized from your current site or marketing materials (logo, color scheme, navigation, naming conventions, etc.)
4. How will the content of this site (along with functionality and navigation) expand or differ from your current site? Do you have an existing sitemap for the outgoing site structure? Do you already have a sitemap or outline for the proposed redesign?

Technology

1. What is your target platform and browser? Whom can we talk to in your organization to help respond to technical issues?
2. Are there specific technologies (Flash, JavaScript, DHTML, etc.) that you would like to use in the site? If so, how will they enhance the user experience? Please describe in detail.
3. Will you have database functionality (dynamic content generation, personalization/login)? Do you already have a database in place? Please describe it in detail, including specific information regarding existing programs and software.
4. Will you have a need for secured transactions (e-commerce)? Do you already offer transactions online? Please describe in detail.
5. Will you require other specific programming needs (such as personalization or search capability)? Please describe in detail.

Marketing/Updating

1. How do most people find out about your current website? What kind of triggers prompt a visit referral links, incentives, search engine terms)? What methods of distributing the URL already exist within the company on and offline?
2. Briefly, what are your short-term marketing plans (specifically, for the site redesign and the 6 to 12 months following launch)?
3. Do you have an existing or planned marketing strategy in mind to promote this site redesign? If so, please describe.
4. Do you intend to keep the site updated? If so, how often? Who is responsible for updating and providing content?

Additional Notes/Comments

THE EXPANDED TECH CHECK

These questions will help determine larger-scale technology issues that may include high-level programming and backend development needs. This is used initially as a checkpoint at a very basic level to identify client expectations. When you are finished, email all compiled information back to the project manager on the web development team.

1. Please identify whether you currently use any of the following features on your site. Describe in as much detail as possible. (Check all that apply and describe briefly below.)

- Search engine
- Personalization (login/cookie set)
- Security features
- Survey/voting tools
- Email newsletter distribution
- Shopping cart
- Discussion board/bulletin board
- News/press release area
- Other

2. List any other features that you hope to add to your site, now or in the future.

3. Are there or will there be any e-commerce transactions on the site (secure transactions, interface with inventory database, and fulfillment)?

- Yes (Please describe in detail below.)
- No

4. Is there or will there be login, registration, and/or personalization incorporated?

- Yes (Please describe in detail below.)
- No

5. Do you currently or will you in the future use a content management system (useful, for example, in the management of e-commerce inventory or text-publishing databases) to dynamically update and deploy content?

- Yes (Please describe in detail below.)
- No

6. Does the site need to integrate with any preexisting database system? If so, what kind of database is currently being used (FileMaker, Access, Oracle, SQL)?

7. Will you be using any scripts or code that have already been established? Are they server-side or client-side (if known)?

- Yes (Please describe in detail below.)
- No

8. Please list names and contact information for the current tech lead and any third-party vendors/providers that we may need to talk with to gather additional details.

COMMUNICATIONS BRIEF WORKSHEET

Project Summary

1. What is the basic overview of the project? Briefly include background information if relevant.
2. What is the single purpose of the new site?
3. What are the secondary goals of the new site?
4. What are the long-term goals?

Audience Profile

1. Who is your target audience? Choose a typical visitor and profile in detail. Include occupation, age range, gender, online frequency, online activities, and any other relevant information. Profile more than one if applicable.
2. What is a typical task the visitor might perform on the new site? (For example, register, log on, search for information, buy a specific product, send their email address, call for more information.)
3. What do these people care about? Why are they interested in the product the site will be offering? What trigger would prompt them to visit the site, and why would they be enticed to return?

Perception/Tone/Guidelines

1. What does the target audience think and feel about the company and the current website?
2. What do we want them to think and feel?
3. How will this new website help achieve this goal?
4. What adjectives can be used to describe the way the website and the company should be perceived by the target audience?
5. What are some specific visual goals the site should convey?

Communication Strategy

1. What is the overall message you are trying to convey to your target audience? (For example, cost-effective, secure, reliable, efficient.)
2. How will you convey the overall message? (For example, effective messaging through copy, directed path towards goal, specific offer on home page.)
3. Identify stages of development (if appropriate) used to execute goals.
4. How will you measure the success of the redesigned site?

Competitive Positioning.

1. How is your company or your web presence different from your competition?
2. What specifically sets your company apart from your competition?
3. What areas of the current site are successful and why?

Targeted Message

State a to-the-point word or concise phrase that will appropriately describe the site once it is launched.