



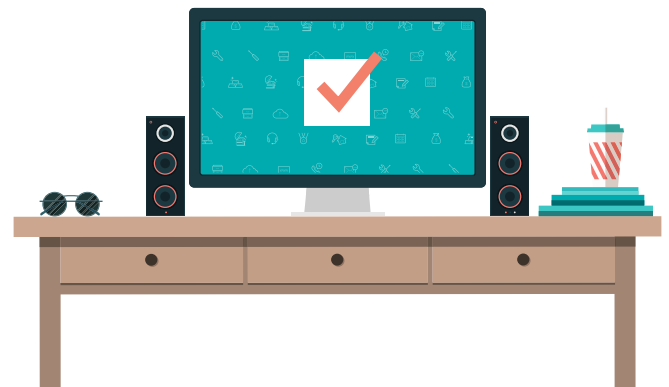
About This Document



Included in this resource file is a Client Questionnaire ([pages 2-4](#)) and a Content Planning Checklist ([pages 6-7](#)). and a [Content Inventory Spreadsheet](#).

Use the questionnaire in your initial meeting with each client. Its purpose is to help you learn as much as possible about your client's online needs and preferences.

You may want to adapt the document for every client. We recommend reading through before a meeting to remove irrelevant items, and add any additional questions you may want to ask.





Website Planning Questionnaire



General: Client's Contact Information

- **Name:**
- **Email address:**
- **Preferable telephone # to contact** [Cell phone | home | business]:
- **Best time to contact you:** morning | afternoon | evening | weekend

General Business Information

- Name of the business:
- Slogan or Tagline:
- Business address: Street _____ City _____
State/Country _____ Zip code _____
- What type of business do you run? (Check all that apply.)
- Physical Store
- Online Store
- Offline Services
- Online Services
- Business phone number:
- Toll free phone number:
- Fax number:
- Service area (towns or neighborhoods served)
- Payment methods you accept (cash, check, Visa etc.):
- Hours of operation
 - Sunday - open from _____ to _____
 - Monday - open from _____ to _____
 - Tuesday - open from _____ to _____
 - Wednesday - open from _____ to _____
 - Thursday - open from _____ to _____
 - Friday- open from _____ to _____
 - Saturday - open from _____ to _____
 - 24/7



- Do you want to display hours of operation on your site or online? **Yes / No**
- Languages spoken:
- Year company/organization established:
- Brands offered (list the product/brands the business sells):
- Products & services provided:
- If relevant, what are your credentials? What kind of training do you have?
- How do your customers / clients currently find you?

Current Online Presence

Website

- Do you currently own a website? **Yes / No**
- If yes, its domain is: _____
- What do you like / dislike about your current website?
- What do others like / dislike about your current website?
- Is there anything from your current website that you want to include in your new one?

Social Channels

- Facebook - Yes / No / Yes, but not updated on a regular basis
- Twitter - Yes / No / Yes, but not updated on a regular basis
- YouTube - Yes / No / Yes, but not updated on a regular basis
- Google+ - Yes / No / Yes, but not updated on a regular basis
- Pinterest - Yes / No / Yes, but not updated on a regular basis
- Instagram - Yes / No / Yes, but not updated on a regular basis
- LinkedIn - Yes / No / Yes, but not updated on a regular basis
- Blog / Tumblr - Yes / No / Yes, but not updated on a regular basis
- Other _____
- Who updates your social media?
- How often?

Online Directories

- Yelp! - Yes / No / Yes, but not claimed
- Yellow Pages - Yes / No / Yes, but not claimed
- Merchant Circle - Yes / No / Yes, but not claimed
- Other _____



New Website's Goals and Needs

- **What are the main goals for your website? (Check all that apply.)**
 - I want potential clients to be able to find my business online
 - I want to get phone calls from potential clients
 - I want to get my name out and establish myself as an expert in my field
 - I want to attract visitors to my physical location
 - I want to sell my products and services online
 - I want to build a community around my brand
 - Other_____
- Who is the target audience of your website?
- Tell me a bit about your clientele.
- What do you want people to do after they visit your website?
- Do you keep a blog? Yes / No / Used to, but not anymore
- Will you need to update the site on a regular basis? If so, how often and with what kind of content?
- Will you be selling items/services on the site? If so, please explain and list the approximate number of items if applicable.
- How do you hope this website will improve your company/business?
- Where do you see your business in 2 years? 5 years?
- Is there a deadline for this project?

New Website's Look and Feel

- Is there any color scheme you need/want for your new website?
- Do you have a logo? If so, send the file.
- Please list other companies/websites similar to you. Explain what you like/don't like about their sites.
- What is the general look/feel/style that you want for your new site?



Gap Analysis

- **Have you ever advertised for your business? Yes / No**
 - **If yes, what kind of advertisement did you use? (Check all that apply.)**
 - Newspaper
 - Radio
 - AdSense
 - AdWords
 - Pamphlets/Brochures
 - Street signs
 - Email marketing campaign
 - Other _____

**** Ask the business owner to give you any and all relevant materials. (paper and digital)**
This will be very valuable when you perform their gap analysis.

- **Please provide images of your business and staff.**

Note: If you don't have professional photos, we recommend taking the following photos if relevant:

- Storefront
 - Business interior, when it's clean and organized
 - Your business with clientele inside
 - Staff photo (showing happy people!)
 - Photos that capture the atmosphere of your business
 - Photos of your products and services
 - If you're building an online store, photos of all your products.
- Is there any material that you want to include in your new website that isn't ready yet (i.e. testimonials, videos, photos etc.)? Yes / No / Not sure
- Do you already have email set up? If so, with whom? If not, how many addresses do you need?
- Ask your client to send you their passwords and sign in information for the following. Give them time to change passwords beforehand if they would like.
- Business email
- Email hosting
- Wix account
- Domain/Current website hosting
- Gmail account if they have one
- Merchant account(s)
- Social media accounts (if relevant)



Content Planning Checklist



This is a basic outline of our Website Content Strategy class.

Use this checklist to make sure you're "following protocol" and not forgetting anything.

☐ Step 1: Understanding Your Client's Goals

Client Questionnaire: Use our questionnaire when you interview your client. Take a few minutes before the interview to remove irrelevant questions or to add any questions you feel would be helpful.

☐ Step 2: Define Website Type & Goals

Once your client has filled out the questionnaire and you've had a chance to discuss it, you should be able to determine the following:

- ☐ The website's business goal (e.g, selling products or services)
- ☐ The appropriate website type (e.g, eCommerce, service provider)
- ☐ The website's visitor goal (e.g, purchase products or get services)
- ☐ The website's main Call To Action (e.g, shop, request a quote or claim coupon)

☐ Step 3: Sketch a Basic Sitemap

Sitemaps (also known as "wireframes") are basic maps of a website's layout and page structure. The Sitemap is meant to provide a barebones layout of the site, so you can determine what content goes where and how it all fits together. The most important thing to get out of a sitemap is to have you and your client agree on (1) the number of pages the site will have, and (2) to show how a user should ideally flow through the site.

- ☐ Create the business's sitemap and confirm it with your client.

☐ Step 4: Creating Awesome Content

- ☐ Identify the business's audience so you can create content with them in mind.
- ☐ Determine the top-level messaging for the website.
- ☐ Create a content inventory. You can use our suggested template.
- ☐ Conduct Gap Analysis based on your content inventory and sitemap.
- ☐ Determine with your client who is responsible for producing all pieces of content.

❑ Step 5: Choosing the Right Wix Template

❑ Choose a Wix template for the website, keeping in mind:

- Industry & Niche
- Functional Elements
- User Experience
- Design

❑ Step 6: Add Your Content & Edit The Site

Here are some tips for the actual design process:

❑ Stay Consistent:

- Use consistent messaging, voice and design across all forms of content.
- Stick to a consistent color palette throughout the site.
- Don't use more than 2-3 fonts throughout the site.
- Don't vary your page layouts too much.
- Use the same background throughout the site.

❑ Focus on the User:

- Make it as easy as possible for visitors to navigate between pages.
- Place the menu on top of the site.
- Link the business logo on the website's header to the site's homepage.
- Make sure the website's navigation is simple and not distracting.

❑ Have Fun!

❑ Step 7: Make the Site Easy to Find in Google

- ❑ Write a clear Titles and Descriptions for each pages.
- ❑ Make a list of 2-3 search terms likely to be used by someone searching for the client's products or services.
- ❑ Keep the content fresh.
- ❑ Use clear labels for all menu buttons and links.
- ❑ Make sure your content is easy to read and understand, and written for users to enjoy.
- ❑ Avoid fluff and filler content.

For more info on getting your site to appear in Google, including step-by-step instructions for using Wix to optimize your website, **check out our "SEO 101" class.**

