Website Proposal Worksheet

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This form will give us and yourself a better understanding of what you need out of a website. I know that this form may look intimidating, but there is a lot of white space. Feel free to skip questions or mark "N/A" wherever you feel.

Company Background Questions

1) What does your company do?

2) Who do you do it for?

3) What are all the different ways visitors can contact you? Do you want them to contact you by anything other than e-mail? Or are other methods preferable to e-mail?

- Name
- Address
- Phone
- Fax
- 1-800
- E-mail addresses
- International offices

4) List hours of operation, time zone (PST, EST) and days closed. Even if you don't have a "brick and mortar" storefront, do you have any "physical" contact with your clients?

5) What are the needs your business satisfies for your customers? What words or images will impart those needs? It is important to paint a mental picture for

customers using words, colors and images. What analogies can be used to explain offers in simple, understandable terms?

6) Do you have other off-web locations or contact point (like a mail order catalog)? How do you see the website and off-line business working together? What are the weak points of each and the strong points that can be exploited? To handle customer service support after hours, offer on-line coupons that can be printed and redeemed at the physical location (and vice versa) use the physical location to promote the website.

7) How does your business and products benefit your target audience? Please specify a clear list of bullet items of benefits. What can your business offer your visitors, what's in it for them, how can you help them? What problems do your prospects have that your business solves?

8) List features of your products and/or services? Please specify a clear list of bullet items.

9) List 30 words or phrases that describe your business. Pick words/phrases relevant to your business. List all keywords that would link search engines to your website. Phrases should be both specific and general.

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10) Write a 25 word description of your business to be displayed and used in search engine submissions. Describe what your business offers, to whom it is offered and a succinct reason your business should be considered.

12) Do you have a business slogan or catch phrase?

13) Give reasons why your business clearly beats the competition? What is your USP (unique selling proposition)? Customers tend to look for information as a priority over shopping on-line. They may surf at other sites, but they will continually return to the sites they trust intuitively and can solve their problems. A visitor may need to return many times before making a purchase (studies suggest as many as 5 times). What can you do to encourage customers to purchase now and abandon the need to continue to search?

14) List some of your competitors' website URLs:

15) List any problems experienced with your existing website (poor performance, graphics, load time, design, etc.). Should you choose another web host?

16) What is your budget for the completion of the website and yearly maintenance?

Website Goal/Objective Questions

17) List the major purposes for the website, the reasons for building one (in order of importance, i.e. name branding, e-commerce, because that's what everyone else is doing, etc.)?

18) Describe your vision for this site? How will visitors interact with it? Provide sketches or other mockups if possible.

19) What are the specific short-term goals for the website (in the first 1 to 6 months, reduce customer service workload by X%, generate X volume in sales)?

20) List specific long-term goals for the website (in the first 1 to 3 years).

21) If you currently have a website, how many visitors do you receive each month? What is the expectation for future traffic and is there a plan and a budget for scaling the web hosting if traffic increases beyond its capabilities? Will you have the capability to handle increased monthly costs for service? Have you planned and accounted for possible additional costs?

22) Define the criteria you will use to determine the website's success (i.e. Internet orders of a certain volume, website traffic of a certain volume (this should not be used as the sole definition of success), X amount of sales as a percentage of hits, decrease in customer service costs, increase in productivity). There should be a trackable method to determine success.

23) What process will be used to integrate the website into the business on a daily, monthly, quarterly and yearly basis. Who will manage each aspect of the website once it is complete (i.e. e-mail management, system maintenance, new content, testing forms periodically, marketing, etc.)?

Marketing Questions

26) List audience demographics - who you want to reach and how this will be accomplished. Be as specific as possible (age range, profession, interests, etc.).

27) Are you a local, regional, national or international business? What areas do you want to specifically target?

28) Are there any search engines, directories or sites you would like to submit to besides the industry standard top 10 that are specific to your business or industry?

30) What is your budget for marketing the website and how do you intend to market both on and off the Internet? You should conservatively plan for at

least half of your budget to be for marketing. Simply putting up a website and submitting to search engines is not marketing. It is only one small tactic in an overall campaign. See our website for ideas on marketing your business.

31) Web surfers have short attention spans, may not remember your site and will probably not return unless you give them a compelling reason to do so. How can you encourage repeat visitors and referrals? Every measure should be taken to encourage visitors to voluntarily submit their email address. Free offers, contests, referral forms, surveys and requests for information forms can be useful tools to encourage email signups. What can you offer that can be digitally delivered on site (computer wallpaper, screensavers, special reports, on-line coupons, affiliate programs, etc.) and is free?

32) Will you use a survey form to gather information from your visitors? What questions would be included on this survey? Will you offer an incentive to customers for taking part in this survey? Surveys can also be used as exit strategies to gather useful information as visitors leave the site. A cookie can be used to eliminate seeing the form for repeat visitors.

35) Will you use an advertising affiliate program? If your site gets enough hits, you may be able to make money selling advertising space on your site.

36) Will you join any affiliate programs and link those sites to your website? You can signup on related sites programs and get a commission on sales made on your site. This works best when other sites are directly related to your website and affiliate links are worked into your site in context. Third party product endorsements work better than simple links to other sites.

Design Questions

39) In order for your site to appeal to your primary audience, what style or "voice" will you use (conservative, hip and trendy, etc.)?

41) List a series of website URLs with designs or schemes that appeal to you and give reasons why.

44) Please list and gather any existing materials and information (including but not limited to):
Photos (prints, slides, negatives)
Text
Brochures
Business cards
Flyers
Product shots
Product samples
Press releases
Price and part lists
Frequently Asked Questions
Shipping and handling charges and constraints
Warranty policy
Privacy policy
Return policy
Guarantees
True and believable testimonials (clients, industry figures, pros) ask for them with quantifiable results ("I made $10,000" instead of "I loved how great it worked")
Endorsements from known sources

Credits
Bios
History
Education
Certifications
Awards
Case studies
Photos of yourself, staff and location
Transcripts of interviews
Industry recognition
Map and directions from major airports, recommended places to stay nearby (if people visit your location)

45) Do you have any custom photography needs (still photography, product shots, stock photography, video, etc)? Will you supply all of the images required or will the developer be responsible for creating and acquiring images, graphics, logos, etc. For any images (and other materials) supplied by the client do you own the copyrights? If not do you have the rights to use the materials on the website? Please check with the copyright owners if unsure to avoid any copyright violations.

46) Choose types of components to include other than still photos and text (e-commerce, polls, forums, FAQs, informational articles, news, java applets, backend database integration, survey forms, feedback forms, opt-in newsletter management, referral forms, etc.).

47) List 6 to 8 major topics for your site (i.e. Products, Services, Information, How to Contact us, Galleries, etc.). Base these topics on the visitor's view of the division of information on your site. Major topics will be broken into sub topics (i.e. Information may be broken down into Links, Frequently Asked Questions, Tips, etc). From the tree below, mark major sub-topics of interest. This sample tree can be reorganized as needed. Add topics relevant to your

site as needed. Too many choices are confusing. 7 or 8 links is the maximum amount a visitor should confront. A site with hundreds of pages can easily be created using 7 or 8 general topics. Adding a few additional general topics (e.g., "Information" or "Products" will allow room for expansion under those headings.

Splash pages
Home
Products and/or Services
    Menus
    Catalogs (static or Rich Media)
    Prices
    Testimonials
    Purchasing / Shopping Cart
    Downloadable products
    Product overview / specifications / demos
    Product features & benefits
    Warranty & Return Policy
    Licensing
    Customer Service
    Training
    Contracting & Consulting
    Stock List
    Capabilities
    Portfolio
    Parts List
    Dealer List
    Assembly Instructions
    Schematics
    Classified Ads
    Credits
    Samples / Tear sheets
    Resume
    Bookstore
    Competitive Matrix
Contact Us
Jobs
    Overview
    Job Postings
    Recruiting
    Resume submissions
    Benefits
Customer Login
    Database searching
Information
    Links
    About Us
    Reviews
    Credits
    Copyrights

Privacy Policy
Our Team
Case Studies
Awards
News and Events
Newsletter
Press Releases
Media Coverage
Frequently Asked Questions
Alliance Partners
Legal Notices
About our Industry
Glossary of Terms
Regional Information
Tech Notes
Tips and tricks
Interesting Facts
Articles
 Who's Who
Site Map
Help
Site Quick Guide
Galleries
Intranet
Human resources
Document storage
Internal news
Finance
Project Tracking
Website reports
Free Stuff
Downloadable screensavers/utilities
Computer Wallpaper
Contests

48) Sketch out the navigation system of a typical page. Typically major topics are in a horizontal graphic at the top. Sub page menus are positioned on a vertical menu bar on the left side. Typically there is a text-based trailer navigation bar at the bottom of each page. If we are not creating artwork for your site, please supply any artwork required for creating graphic navigation bars.

49) Are there any special needs or components required that are not already covered?

50) List any existing websites you want linked in your site. These should be sites that are related to your site and not direct competitors. Sites should be those whose services you use or that provide service or information useful to your target audience. Sites that cross-link with each other may increase both businesses targeted traffic.

51) Is interfacing with other systems (both on-line and off-line) important? Other systems could be mailing list management programs, accounting systems, custom solutions, credit card processing programs. Complicated interfaces with back end database systems will require detailed process and analysis. Describe the systems you will require.

54) Will there be password protected areas for dealers, members and/or downloads? What extra information will these users see?

55) What security is required for the website - Is protection of sensitive files or user data an issue (order data, backend database access, etc.)?

56) How often during the year do you anticipate updates to the website? What types of information will be updated? Who will update it? Employment opportunities, monthly specials, contests, new products, updated news all should be updated periodically. The less frequent a site will be updated, the more general a site should be.

57) Testing is typically done using the top web browsers (Internet Explorer, Netscape and Mozilla) for the Windows and Mac operating systems. List other client platforms you would require for testing and support.

58) Who will maintain the site? If another business will do site maintenance, will they have the skills and tools to support it? Will training be required?

59) List other contacts to interview regarding the design of the site. What positions of responsibility do they hold?

E-Commerce/Ordering Questions

60) What type of e-commerce solution do you require?

1. Flat file page, non-interactive. Visitors must print and fax order or phone order in.
2. Single page secure order form that sends each order as an e-mail.
3. Multi-page secure order form with shopping cart, visitors can pick products while continuing to look at the site, change their order, preview order and submit on-line. Order sent as e-mail or downloaded via FTP from the server.
4. Full e-commerce shopping cart with automated real time credit card processing, integrated with backend database.

61) How will on-line and off-line orders be managed if your site is an e-commerce site? Are the ordering systems able to generate unique

distinguishable order numbers? Do you require an all web-based order system that integrates both on-line and off-line orders?

62) What is your current level of on-line business and what are the expectations for future on-line sales?

63) Do you have a credit card merchant account already? If so, who is it? If not, there are easy, cost effective solutions such as Paypal, but if you expect to be moving a lot of products you may need to get a credit card processor such as Versign's Payflow Pro.

64) Do your customers have buying seasons? September is the ideal month to prepare your site for the upcoming Christmas shopping season. Should the site be updated according to each season? What enticements will you offer during off seasons?

66) List any special shipping and handling charges or constraints on international orders. How will shipping and handling charges be automatically calculated for on-line domestic and international orders? Will international order shipping charges be calculated manually? List information such as harmonized codes, taxes, duty, etc. which can help expedite orders and reduce international costs. Shipping products internationally can be complex and costly.

67) How will sales tax be calculated for on-line orders? Will you need to know the tax rate for multiple states?

68) What are your delivery policies? Customers will probably buy if there is immediate delivery. How long does it take for an order to be received? A customer will not buy from a site if it does not show a complete cost breakdown of their order (price, tax, shipping, etc.) on-line.

69) Are wholesale prices, drop shipping arrangements or other standard agreements put into a dealer section? Will you allow others to offer your products or services directly on their sites?

70) It is very important to have a plan to control on-line fraud. Too many charged back fraudulent orders might result in termination of your company's merchant account. The possibility of blacklisting by other merchant account providers can be a serious problem. Use manual AVS authorization and accept no unmatched orders (even if there is an approval code). Call to authorize international orders, ship only to billing address listed on credit card, double check on large orders with overnight shipping, refuse on-line orders from customers with free email domains.   Consider checking IP Addresses and CID security codes for all orders.   Also consider not accepting on-line orders from high fraud domains (i.e. domains that give out free and untraceable e-mail accounts).

Security Questions

73) Does the website require encryption of data such as SSL support, SSL certificates in the customer's name, secure e-mail for sending online order information, or other sensitive or confidential data?

74) Will the website allow downloading of application software or any other downloads that could potentially be infected with a virus?

75) Does your e-mail system need to be secured against hijacking of the e-mail server by spammers? Should anti-spam software be installed on the client side and/or secure e-mail certificate be installed for encrypting your e-mails? Do you require contact web forms on your website to prevent e-mail harvesting and spamming instead of posting e-mail addresses directly on the website?

77) Does the website require password-protected areas to protect sensitive data? What types of sensitive data will be stored in those areas? Is there any specific information that should never be stored online for the customer?

80) What types of anti-fraud protection need to be built into the website? Typically this is for online ordering systems to prevent identity theft and credit card fraud. Simply getting approval from the credit card processor, AVS checking, and even the CVV2 code checking are not enough to prevent most fraud. More secure online order systems use a combination of techniques such as high fraud e-mail domain blocking, IP address blocking, AVS and CVV2 checks, checking originating country by IP address against the customers address, putting limits on dollar amounts or amounts ordered, etc. Also, you should budget for fine-tuning and altering the fraud-protection strategy over time.