

Project Survey

Instructions:

Client input is the foundation of successful projects. This survey will help you articulate, identify, and agree upon the overall goals of your project, including specific questions regarding message, audience, content, look and feel, and functionality.

Include this survey when contacting a Pro Network Member.

General Information

1. What is the name of your company?
2. What is your current (or intended) URL?
3. What is your intended launch date for the project? Are there any outside considerations that might affect the schedule (i.e., 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?

ExpressionEngine Needs

1. Do you have an existing blog that needs to be migrated to ExpressionEngine? What blog platform (pMachine Pro, MovableType, Wordpress, etc) are you currently on?
2. Do you need a custom plugin or module developed? Please describe the required functionality in detail.
3. Do you have existing database information that needs to be imported into ExpressionEngine? Please describe the information including the current database format being used.

Redesign questions (please skip if brand new project)

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 user 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?

Project Objectives

1. What are the main reasons for this project (new business model, outdated site, expanded services, different audience)?

2. What are your primary online business objectives with the project? 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. How will you measure the success of the solution (increased traffic? Reduced phone calls, etc)?

4. What existing strategy (both on- and offline) is in place to meet the business objectives?

Audience/Desired Action

1. Describe a typical user coming to your site. How often is the user online, and what does he generally use the web for? How old is the user and what does he do for a living? (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 user 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 user 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 the user 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

1a. 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?

1b. If you will be creating content in-house, please describe the ownership model (one “webmaster” responsible for everything, or multiple contributors, etc)

1c. If there will be multiple content owners, please outline what people will be responsible for what areas of the website.

1d. Please describe the workflow for publishing content. For example, does the content need to be reviewed/edited/approved multiple times before appearing on the site?

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, and so on).

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?

5. Do you intend to keep the site updated? If so, how often? Who is responsible for updating and providing content?

Integration Points:

1. Does your organization use other websites, web-based applications, or web-based services that this new site needs to integrate with or connect to?

Please describe them in detail, including URL's if appropriate:

Technology

1. What is your target platform and browser (if you know)?
2. Are there specific technologies (Flash, DHTML, JavaScript, Real Audio) 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 advanced functionality (search capabilities, 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? Please describe in detail.
6. Where is the site currently hosted? Describe the hosting environment (platform, server type, modules/services available), or provide a URL to the hosting company's website.

Marketing/Updating

1. How do most people find out about your current website? What methods of distributing the URL already exist within the company?
2. Briefly, what are your short-term marketing plans (specifically, for the site redesign and the 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.

Additional Notes/Comments

* This survey has its roots in the wonderful materials from Web Redesign | Workflow that Works (<http://web-redesign.com/>). If you are a web professional, do yourself a favor and buy a copy.