Prepare for a useful website conversation

You do not need a finished specification. Complete what you know, gather useful material where available and mark the questions to discuss with your website partner.

ESSENTIAL START | USEFUL TO GATHER | AGREE IN DISCOVERY

1. Business objectives and target audience

- [ ] Summarise what the business does and the services or products it provides. — ESSENTIAL
- [ ] Describe the main customer groups and the problems they want solved. — ESSENTIAL
- [ ] State the website's main purpose: enquiries, sales, bookings, information, publishing or customer support. — ESSENTIAL
- [ ] List regular customer questions, concerns and reasons people may hesitate. — USEFUL
- [ ] Note known accessibility needs, common devices or other audience considerations. — USEFUL

Main objective or customer action:

2. Branding and design assets

- [ ] Locate original logo files, preferably SVG or high-resolution transparent PNG. — USEFUL
- [ ] Gather brand colours, fonts, guidelines, icons and illustrations. — USEFUL
- [ ] Decide whether the existing identity is suitable, needs refinement or needs replacing. — DISCOVERY
- [ ] Collect website examples and note the specific features you like or dislike. — USEFUL

3. Website pages and content

- [ ] Draft a rough page list, such as Home, About, Services, Case Studies, FAQs and Contact. — USEFUL
- [ ] Gather existing brochures, service information, prices, team details, FAQs and policies. — USEFUL
- [ ] Identify testimonials, accreditations, case studies and other approved evidence. — USEFUL
- [ ] Agree who will write, edit and approve the website copy. — ESSENTIAL
- [ ] Confirm whether copywriting or content entry needs including in the quotation. — DISCOVERY

Content, functionality and existing systems

4. Photographs and media

- [ ] Gather suitable photographs of people, products, premises and completed work. USEFUL
- [ ] Check image quality and permission to publish each supplied asset. ESSENTIAL
- [ ] Identify gaps requiring professional photography, video or licensed stock images. DISCOVERY

5. Functionality and integrations

- [ ] List what visitors need to do: enquire, book, buy, pay, register, download, search or calculate. ESSENTIAL
- [ ] Describe what staff need to manage after launch. ESSENTIAL
- [ ] Identify CRM, booking, payment, email, accounting or other connected services. USEFUL
- [ ] Note important business rules, exceptions, approvals and customer communications. USEFUL
- [ ] Leave platform, database and technical architecture decisions for discovery. DISCOVERY

Most important function or integration:

6. Existing website and technical access

- [ ] Identify the domain registrar, DNS manager, website host and current CMS. ESSENTIAL
- [ ] Confirm who owns and controls each account. Do not add passwords to this checklist. ESSENTIAL
- [ ] List important forms, integrations, redirects, databases, downloads and customer records. USEFUL
- [ ] Record existing email services before any DNS or hosting change is planned. ESSENTIAL
- [ ] Arrange secure delegated access only when the project team needs it. DISCOVERY

7. SEO and analytics

- [ ] Identify Analytics, Search Console, advertising and tag-management accounts. USEFUL
- [ ] Flag important URLs, organic landing pages, campaigns, blogs and external links. ESSENTIAL
- [ ] Mark content that must remain, needs updating or is no longer relevant. USEFUL
- [ ] Agree the detailed audit, redirect map and migration checks during discovery. DISCOVERY

Responsibilities, budget and next steps

8. Legal and privacy information

- [ ] Gather verified company details, current privacy information and relevant policies. ESSENTIAL
- [ ] List forms, mailing lists, analytics, cookies and third parties handling personal data. USEFUL
- [ ] Identify e-commerce terms, delivery, cancellation or sector-specific information where relevant. USEFUL
- [ ] Obtain appropriate legal advice where the business needs it. DISCOVERY

9. Budget and project deadlines

- [ ] Share an approximate initial project budget or investment boundary. ESSENTIAL
- [ ] Consider separate branding, content, photography, hosting, maintenance and marketing costs. USEFUL
- [ ] State any genuine fixed date and the business reason behind it. ESSENTIAL
- [ ] Identify dates that are preferences and features that could follow after launch. USEFUL

Budget range and VAT assumption:

Preferred date and reason:

10. Decision-makers and responsibilities

- [ ] Appoint the main project contact and final decision-maker. ESSENTIAL
- [ ] Name reviewers for branding, content, functionality, budget, compliance and launch. USEFUL
- [ ] Agree how feedback will be consolidated and how quickly approvals can be provided. ESSENTIAL
- [ ] Decide who will update content and maintain the website after launch. DISCOVERY

Ready for the first conversation?

Bring the information you have and mark the gaps. Your website partner should help turn the objectives, evidence and unknowns into a clear scope.

Do not include passwords or other sensitive credentials in this document.