

Client Website Questionnaire

01 Business and contact

Complete what you can. Type into the fields or print and write. Save a copy before closing.

Business name and overview

What is your business name, what do you do, and what makes your approach different?

Main contact

Name, role, email, phone, preferred contact method, and best times to reach you.

Public business details

What address, phone, email, hours, and service areas should customers see? Note anything that should stay private.

Goals and success

What are your top three website goals? More inquiries, bookings, sales, credibility, recruiting, or something else? How will you measure success?

Do not include passwords, access codes, payment details, or private customer information.

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02 Customers and positioning

Not sure yet? Say so. Use the editable copy or an extra page if you need more room.

Ideal customers

Who do you serve? Include customer needs, typical questions, and why they choose your business.

Services and products

List your main services or products, priorities, prices you want published, and any seasonal offers.

Competitors

Share competitor names or URLs. What should your business do differently online?

Inspiration websites

Share two or three websites you like. Explain what you like or dislike about their layout, words, features, or style.

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03 Style and brand

Not sure yet? Say so. Use the editable copy or an extra page if you need more room.

Preferred style

Choose or describe: modern, clean, bold, traditional, warm, premium, playful, or another direction. What should visitors feel?

Colors and typography

What colors and fonts should we use or avoid? Include color codes if known.

Brand identity and logos

Do you have a logo, brand guide, tagline, and logo source files such as SVG or EPS? Do you need help creating or refreshing them?

Accessibility and design preferences

Any known audience access needs, readability requirements, language needs, motion preferences, or examples of designs to avoid?

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04 Website and ownership

Not sure yet? Say so. Use the editable copy or an extra page if you need more room.

Existing website

Share the current URL. What works, what does not, and what pages or search traffic must be preserved?

Domain and DNS

What domain will you use? Who owns it and which company manages it? Please do not include passwords or access codes.

Hosting and tools

Who hosts your current site? What platform, business email provider, and website tools do you use?

Account access and ownership

Who can approve access to the domain, hosting, website, and business profiles? List account owners, not login credentials.

Do not include passwords, access codes, payment details, or private customer information.

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05 Pages and content

Not sure yet? Say so. Use the editable copy or an extra page if you need more room.

Required pages

Which pages do you need? Consider Home, About, Services, service detail pages, Areas Served, Portfolio, FAQ, Blog, Contact, and policy pages.

Website copy

Who will supply or approve the writing? What existing brochures, service descriptions, credentials, or other approved facts can we use?

Photos and media

What original photos, videos, team images, or project examples are available? Who owns the rights? Do you need photography or licensed stock?

Trust and content approvals

What licenses, certifications, real reviews, case studies, or memberships may be published? Note permissions, required disclosures, and claims needing review.

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06 Features and integrations

Not sure yet? Say so. Use the editable copy or an extra page if you need more room.

Forms and booking

Which forms, quote requests, appointment scheduling, or calendar tools do you need? Which fields, routing rules, and confirmation messages are required?

Ecommerce needs

Will you sell online? Include product count, variations, payment provider, shipping or pickup, inventory, and who supplies tax and return policies. Never include payment credentials.

Other integrations

List CRM, email marketing, maps, chat, accounting, customer portals, automation, or other connections. Include the tool names and intended purpose.

Social profiles

Share the links to your social accounts and Google Business Profile. Who manages them? Which should appear on the site?

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07 Search and ongoing care

Not sure yet? Say so. Use the editable copy or an extra page if you need more room.

Local SEO and service areas

Which cities, counties, neighborhoods, services, and search phrases matter most? Include any existing rankings or priority locations you want us to review.

Analytics and measurement

Do you have Google Analytics, Search Console, advertising pixels, or call tracking? What actions should be measured, and who owns those accounts?

Privacy and data preferences

What information will customers submit? Are there industry requirements or approved privacy notices? Do not submit health records, financial data, or other sensitive customer information here.

Maintenance and editing

Who will update the site? What support, training, backups, security updates, content changes, or marketing assistance will you need?

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08 Budget timeline and approvals

Not sure yet? Say so. Use the editable copy or an extra page if you need more room.

Package and budget

Which package fits: Local Launch \$995, Small Business Pro \$1,995, Business Growth \$3,495, or Custom / E-commerce \$4,995+? Include your total budget and interest in \$99, \$199, or \$349+ monthly care.

Timeline and dependencies

When would you like to launch? Is there a fixed event or deadline? When can content and approvals be available?

Decision makers and approvals

Who makes the final decisions on design, content, budget, and launch? How will feedback be collected and approved?

Anything else

What concerns, must-haves, special requests, or questions should we discuss? Completing this questionnaire is not a purchase or a project commitment.

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