

Web Site Planning Workbook

A STEP-BY-STEP PLANNER & GUIDE

Version 6.0



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I N T R O D U C T I O N

After much thought and consideration, you've finally taken the plunge and decided that it's time to design or redesign your Web site. That's a great accomplishment in itself. However, first you have to actually *plan* your site.

This might seem like a very tricky process, but don't worry; we've made it easy with this Web Site Planning Workbook. We'll help you every step along the way, and will take your planning to new levels from beginning to the end. We wrote this planner for you, our clients, because successful Web sites are built upon strategy and planning.

Whether you're building a public site, an intranet, a partner extranet or campaign landing pages, you need to start with a plan. An effective plan starts with quality information, and to get quality information you need to ask yourself the right questions. Use this planner to help nail down your site goals, define project scope and collect the materials necessary for development. The more time and effort you devote to this strategic and information-gathering process, the more likely you are to build an effective, customer-driven and well-staffed Web presence. Planning well now will save you time and money later during your site's design, development and ongoing maintenance.

Be prepared for a little writing—this is quite a hefty planner. Remember that successful Web sites are built upon a solid foundation of strategy and planning.

To find out what to do after you've completed this planner, go to the "What to do next" page. We hope you find this to be a useful tool as you think about your business requirements and long-term goals for your site.

Regards,

All of us at Flair Interactive

Need Assistance?

If you have questions about this Web Site Planning Workbook, you can contact us at info@flairinteractive.net.

ALL SUPPLIED INFORMATION IS STRICTLY CONFIDENTIAL.

THE WEB DESIGN PROCESS

We try to make the process of getting your Web site finished as quickly as possible. But planning and strategy comes first. That's where this Web site planner comes in handy. Without planning first, your Web site can become a disaster, wasting your time and hard-earned money. There are several steps we go through before completing your Web site.

Note that not all clients choose to utilize Flair's services for all of these tasks, but we've included a complete list here for your reference.

1.) Planning and Strategy

We start the process by having you fill out this Web Site Planning Workbook. This workbook gathers information about your company, services, audience, purpose, site goals and more. It will provide more clarity about how you see your site, and about your short- and long-term goals. We'll give you as much time as you need to review the planner and answer all of the questions. Then we'll use this information to deliver an accurate quote, and during design/development if you decide to accept our estimate or proposal.

2.) Estimate or Proposal

After you've finished with this workbook, we'll gather the information and draw up an estimate or proposal for your approval.

3.) Contract and Service Agreement

If you decide to partner with Flair, we'll send you a contract and/or a service agreement. These will state the project amount, scope, terms and other information about your project.

These documents will include some or all of the following costs (depending upon your needs): initial setup, design and development costs; monthly hosting fees; ongoing support fees; and/or third-party fees for products such as shopping carts, content management systems, analytics tools, email marketing tools, or others. You will need to sign these documents to indicate your official acceptance and approval to move forward.

4.) Payments

Along with your contract or service agreement, we'll require an initial payment upfront before work begins. This usually includes your first month's fee and a setup fee. We'll keep your credit card number, debit card number or PO on file for future payments. Terms and fees vary and are dependent upon the size of your site, whether hosting is required and what specific services are required.

5.) Domain Name Registration

If you have chosen a domain name to register for your Web site, we will register it at this time.

6.) Collecting Your Materials

Now is the time to start collecting materials for your Web site. Anything that you can provide to help us design and plan your site will help. This includes, but is not limited to; existing Web content, brochures, sell sheets, marketing materials, product specifications, images, existing Flash or multimedia pieces, and anything else that would help us understand your business and write content, if needed.

If you're selling products online, we'll also need photos, product weights, SKUs, pricing information and shipping information. The more information and materials that you provide us, the higher the quality of your final site.

7.) Content Strategy and Information Architecture

If you require Flair's assistance with content strategy and information architecture, we'll work with you to understand your needs and to create a high-level site map showing the main "categories" and pages of your site.

We recommend the inclusion of user research here, which may include surveys, focus groups, interviews with users, usability testing or other methods. We also gather detailed requirements from your business' key stakeholders to understand what features, functionality or enhancements they'd like to see in your site.

Requests and requirements may be broken out into a long-term road map in order to spread your costs out over time and "phase in" requests. This will allow you to create a scalable site that produces a return on your investment in the short-term while laying the foundation for longer-term features.

8.) Initial Design Tasks and Brand Strategy

If you've requested a brand strategy initiative or logo design, those are the first design tasks to occur.

After we've received or created your logo and brand strategy, we'll create three design comps showing potential concepts (the "look and feel") for your site. Usually, we'll include two pages for each concept (homepage and one interior page). You should discuss these design comps with other key decision-makers in your organization.

Your timely feedback and approval of design materials is essential to lay the foundation for your site, and will allow us to proceed with additional development and implementation during future stages of the process. After your design is approved, any changes later will result in change orders and additional fees.

9.) Detailed Design

Based on your feedback from the design comps and your planner, a design is established and used for your Web site. This includes building out additional design elements not included in your high-level design concepts. Resizing photos, photo optimization, color sampling (for those who want to match a corporate color to their site design), product photos, the creation of buttons and icons, and similar tasks are all done during this phase of the Web design process.

If your site is very large and you've opted to have Flair provide interface design and information architecture services for you, this phase also may include some or all of the following:

- *Wireframes* showing what content elements will be included on specific templates (i.e. section landing pages), specific forms (Contact Us, Join Our Mailing List, Login) or other custom functionality
- *Detailed Design Comps* showing detailed page views, graphical headers, icons, buttons, images and other graphical components of some lower-level pages
- *Site architecture*, which is a more detailed version of the site map, showing all of the site's pages, processes and forms
- *Process flows*, which are flow diagrams showing the pages, decision points and backend processing necessary for individual processes (login, search, etc.)
- *Use cases*, which convey specific information about online processes and functionality (who will be completing this process or form, what will happen if they don't enter the correct information, what if they forget their password, what page will they be taken to when they hit Submit, who will get notified internally and how?)

11.) Content Development

You or Flair will create the actual content for your site, including homepage content, forms content, confirmation screens, error messages, content used for functionality or processes (login, checkout, e-commerce screens, etc.), price lists, and attachments such as PDF files. SEO content such as meta titles, keywords and descriptions will also be created for every page at this time. All content will need to be approved by you during this phase before page build begins.

12.) Page Build

During this phase, we'll create XHTML templates for your Web site and we'll start building your pages, using your approved site map, site architecture, wireframes, use cases, and/or process flows. We'll also start placing content into your pages during "content load", using content files previously approved by you.

10.) Scripting and Databases

If you've requested any special scripting (contact forms, feedback forms, other custom functionality or databases), we will build and integrate these scripts into your Web site.

11.) Quality Assurance and Testing

After the site is completely built out, we will start by reviewing and testing ("QAing") the site ourselves. We'll check load times, browser testing, and links to confirm the overall performance of your site. The site will then be handed off to you for your internal review, section by section. We will require your approval of every page and/or section in order to launch your site.

12.) Site goes "Live"

Your site is published for the world to see! You can now start advertising your site and notify your customers, colleagues, partners or others that the site is live.

13.) Online Marketing

Your site can be submitted to search engines and we can complete other Web site promotion or marketing services that you require (press release distribution, email campaigns, landing pages, other online marketing tasks).

14.) Ongoing Maintenance

After your site has launched, we can make basic updates to the content, links or other site components as needed, or you can do this yourself if you're using a content management system. A separate Statement of Work or service agreement will be creating if you'd like Flair to assist with this.

15.) Future Enhancements

After laying the foundation for your basic site, you'll likely need to have additional templates, functionality, pages or other elements added in the future. Flair can help you plan and implement these as well. We recommend that your site's content is updated at least once per month and that you add features or functionality several times per year. Some clients choose to do monthly releases.

16.) Campaign Landing Pages

Either during or after your site has launched, we recommend that you create specific landing pages tailored to your direct mail, email or pay-per-click (PPC) campaigns. This will allow users to quickly find content and information that they need AND will allow you to track users' behavior and preferences while capturing qualified leads and tracking conversions. If you use some of our preferred tools, you can also utilize split A/B testing to test the effectiveness of elements of your campaign pages (headings, links, etc.)

GATHERING CONTENT ASSETS

Gathering information for your Web site can be confusing. Questions arise such as “Where do I put this information?”, “What do I put on this page?”, etc.

Here are a few examples of *content assets* that should be considered for use in your site or that can be used during the content development phase of your project:

- Existing Web content
- Forms (electronic or paper-based)
- Brochures
- Sell sheets
- Catalogs
- Price lists
- Manuals
- Product specifications
- Newsletters
- Case studies
- White papers
- Articles
- Press releases
- Frequently asked questions or an existing knowledge base
- Addresses and phone numbers for all of your locations
- Photographs you have taken or gathered related to your company
- Logos that already exist
- Testimonials
- Product demos/videos
- Industry links
- How to Buy or Where to Buy info

PLANNING AN E-COMMERCE SITE

What do you need in an ecommerce Web site?

- Online Credit Card Acceptance
- Secure Server to Accept Credit Cards
- Merchant Account
- Internet Gateway
- Shopping Cart

E-commerce Facts:

The worldwide internet population is 580 million people in 2002. 55% are comfortable with online credit card transactions and 45.5 billion dollars will come from annual revenue from e-commerce Web sites.

The following information is to help give you a brief idea of what is needed in order to start the development of your online store. If we are not building a e-commerce Web site for you, you may skip this section.

1.) About your Product or Service

How many products do you have? Do your products have a code associated with them? Do they have attributes such as different sizes and colors? We want to follow your existing business model as closely as possible in order to maintain an online brand that is consistent with your real-life business.

2.) Shipping Costs

How do you calculate your shipping costs? Some people do it by range, others by weight. If you have an existing system to calculate your shipping, we'll need to know all about it in order to incorporate it into your online shopping cart.

3.) Weight

If the weight of your product determines shipping cost, then we'll need the weight of each product going into your online store.

4.) Pictures

Do you have pictures of your products? If so, do they need to be optimized and/or resized for proper Web viewing? We'll need to know about the pictures and artwork you have about your product/service.

5.) Product Description

For every product, we'll need a description that is concise and eye-catching. If your site is very large and you have category landing pages or will be featuring your products in promotional callouts, you may need to supply several descriptions of different lengths (50-character, 150-character, 300-character, etc.) for each product. Flair can also write this content for you if you'd like.

DOMAIN NAME REGISTRATION

A domain name is simply a system for providing an easy-to-remember URL for a Web site that's hosted on a specific computer accessible via the Internet.

Computers have IP addresses, which are numerical addresses similar to phone numbers (i.e. 498.178.89.226). The domain name system points users from a specific URL to the hosting computer's IP address. For example, www.super8.com is much easier to remember than 498.178.89.226.

Why you need a domain name

There are several advantages to a domain name:

- Your Web service and e-mail addresses can be consistent (e.g., www.yourcompany.com and info@yourcompany.com).
- A domain name is shorter and more memorable than a URL under your ISP's domain name (e.g., www.yourcompany.com vs. www.verizon.net/yourcompanyname).
- Most importantly, you have the freedom to move your Web hosting and e-mail from one Internet Service Provider to another without having to change your URL and email addresses. If your URL is www.verizon.net/yourcompanyname, you have to be a customer of Verizon. If you become unhappy with the service you are getting and want to switch, you'll have to change your URL and email, throwing away all the work you did to publicize the first Web site. If you have your own domain name, you're not stuck.

The three most popular domain extensions are .com, .net, and .org. There are also several additional extensions, such as .us, .edu, .gov, .info, and more. Using a .com extension is usually the best choice, if available. Organizations should use .org, while commercial businesses should use .com, .net or .us.

If your business is located outside of the U.S. or if you're targeting users in other countries, you may wish to utilize an alternative extension such as .uk, .de, .nl or .be.

THINGS TO THINK ABOUT WHEN PLANNING YOUR WEB SITE

This section contains some things to think about when planning your Web site. Start thinking about these questions very early in your planning.

**There will be separate pages in this planner where you can document all of these answers. You don't need to answer the questions below right now.*

Planning:

- What benefits would you like to gain from your Web site?
- What challenges do you think you may encounter?
- How do you plan to overcome those challenges?

Target Market:

- Who is your primary target market?
- Who are the main customers you wish to reach?
- Who is your secondary target market (if any)?
- To whom do you sell or want to reach primarily? Other businesses, consumers or another group?
- How will your Web site compare to the way your business / organization currently operates?

Setup:

- Have you selected a domain name for your Web site? Is it currently registered?
- Will your site need a security certificate?
- Will you be processing credit card transactions?

Advertising and Promotion:

- How will you generate demand for your product or service?
- Will you offer banner ad space?
- Will you offer referrer bonuses?
- Will you offer contest-based promotions?
- Will you offer coupons for using the Web site?
- Will you be participating in email marketing?
- How else will you be advertising your business?

Customer Service:

- Who will be answering email generated by the Web site?
- Will your customers have a phone number at which you can be reached on the Web site?

Functionality:

Which functional features should your Web site offer? Consider the following:

- e-commerce/shopping cart
- site search
- customer service/support
- tech support
- discussion forums
- newsletter
- catalog/information
- order forms
- feedback form
- member logon
- password protected areas
- SSL-encrypted areas

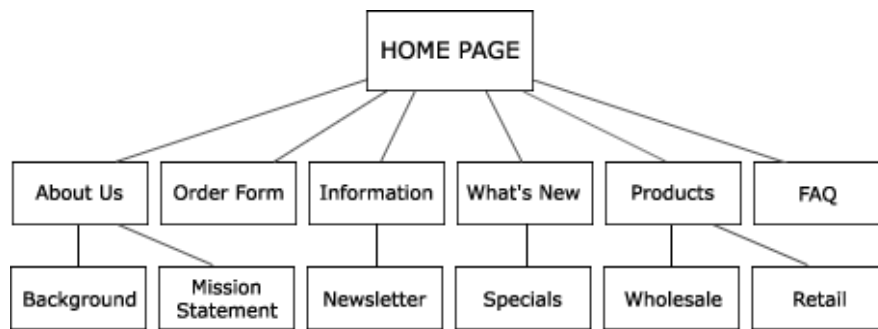
Information:

Which informational elements should your site contain? Consider the following:

- about us page
- contact us page
- copyright notice
- privacy statement
- disclaimer
- site map
- locations

PLANNING THE NAVIGATION OF YOUR SITE

Here's an example of a site map. Review it, as you'll be making one of these for your own site later in this planner. Each box shows a single page from your Web site. There are 13 boxes all together, therefore there will be 13 separate pages within your Web site.



THINGS YOU CAN INCLUDE IN YOUR SITE

The possibilities of items that you can include in your Web site are endless. Here are some examples:

- Testimonials from satisfied customers. If you have letters or emails with praise, be sure to get your customer's permission before placing them on your Web site.
- A privacy policy if you are collecting information or addresses for an opt-in email list.
- Copies of any logos, business cards and letterhead so the Web site can be consistent with your other marketing tools.
- A brief history of the company and the key employees and owners. Include pictures of the owners or founders if you would like those on the Web site.
- Any other published brochures and other marketing materials that you feel would be helpful and informative for people visiting your Web site.
- Pictures of products you are selling
- A return policy if you are selling a product
- For attorneys and medical practitioners: a disclaimer advising the visitor that there is no client relationship and any advice given or construed in the Web site is not meant to take the place of seeking actual counsel by a professional in the field.
- A *Links* or *Resources* page (which could contain links to external Web sites)
- A *Contact Us* page
- An *About Us* page
- A *What's New* page
- A *Partners* page
- An educational library containing information or educational materials of interest to your users
- Product specifications
- MSDS Sheets
- Service manuals
- Frequently Asked Questions or Knowledge Base
- Information about How or Where to Buy
- List of clients, members, customers
- Investor relations information
- Press releases or media room
- Event/trade show information

ADVANTAGES OF HAVING A WEB SITE

This is a big question with a multitude of answers. Here are the main advantages of having a Web site:

Development and distribution costs are extremely low.

When you compare the cost of establishing a Web site to what it costs to promote your business in print or on the air, you'll see that a Web site is the cheapest form of marketing. A radio campaign featuring several 30-second spots per week for three months could run you \$5,000 - \$10,000. That gets you five minutes per week of exposure for three months in the local area only. Newspaper and magazine ads are similarly highly priced, and they only last for the life span of that particular publication. A Web site has virtually limitless space.

You could put up a Web site with dozens of photographs and several thousand words for under \$3,000 for the first year, and keep it up and running for a few hundred dollars per year after that. What would it cost to run a newspaper ad of this size for a year? Imagine how much it would cost to produce a catalog for 200 different products, and keep it in consumers' hands for an entire year. You can accomplish this with a Web site very easily, with low development cost and almost no distribution cost. Web sites are in full color - a palette of 16.7 million colors for your photographs alone.

A Web site is accessible worldwide.

There are no physical limitations to broadcast areas as in radio and no circulation region restrictions as in newspapers or magazines. You can keep your Web site more current more affordably than any other media; you can update a Web site immediately, and as often as you like. Imagine you sell products whose prices fluctuate. With a Web site, you can change these prices every time they go up or down, so your marketing materials are always accurate.

Web sites are economical and not limited by size.

This means a small business can present as large or creative of an image on the Internet as a bigger company - with the right design team. A Web site also allows easy and safe communication between the consumer and you so that anyone who visits your site can contact you at any time by sending an email. Unlike communications that originate from other forms of advertising, consumers who send emails don't have to deal with many problems of everyday business: pushy salesmen, remembering to call during business hours, having to battle crowds to get to your stores, spending time waiting on voice mail or getting the wrong information. It's convenient, easy, and safe for the consumer. Email is also convenient for you.

You can respond to all your customer inquiries at the same time, and do it when you have a free moment - not in the middle of rush hour when someone calls up to ask for product information or directions to your location. You can save money on tech support and answering questions. If your employees spend a lot of time answering the same questions and sending out the same material, you can reduce that labor cost significantly by providing the information on the Web site. For instance, a client can avoid having to mail or fax information for over 1,000 phone call solicitations in a one-year period simply by providing the information on their site. That improves on labor costs and provides a real cost savings in reduced long distance phone bills (for faxes) and postage. Your Web site can also take orders while you sleep as people can place orders on a Web site at any time, day or night. But most importantly, no salesmen manning the store, no utilities, no insurance, no payroll...computers don't need a benefit package or overtime. For every second of every day, your Web site is working for you! As to your choice for Web site design, if a designer can't tell you why a Web site is a unique marketing tool as we have here, how successful will their Web site be? Are they helping you to develop a marketing mechanism or are they selling special effects? Is it an intelligent tool for driving business or an overpriced, turbo-charged business card? Make sure you choose a designer with marketing expertise, experience and skills.

MAKING YOUR WEB SITE EFFECTIVE

Everyone always asks how they can make their Web site more effective. Here are some key points that you should focus on in order to be more successful on the Internet and with your Web site.

1. Determine the Primary Goals For Your Web Site

The single most important tip is to decide what the specific goals are for your Web site.

Do you want to educate the market about your products? Provide a 24-hour information resource for current customers? Showcase your products? Generate requests for literature? Obtain qualified leads? If you set objectives and stick to them, your Web site will be a success.

2. Offer The Reader A Compelling Reason To Contact You

Turning a Web site visitor into a customer or qualified lead is the most-overlooked aspect of Web-based marketing, even on the biggest commercial sites. You want those who visit your Web site to buy or become qualified.

The easiest way to accomplish this is to engage them in a two-way dialog, so you can market to them on your own terms. Entice them to provide their name so you can inform them of specials, product upgrades, events, and new products via e-mail or regular mail. How do you get them to provide their name? Offer them something! A free catalog, a free quote, a free analysis, a free reprint of an editorial article -- anything your buyers might find of value. Other methods might include weekly drawings for free gifts (T-shirts, free product, etc.), or other promotional giveaways.

3. Get Right To The Point

People are not patient. Studies have proven that people will read long ads and marketing materials, but only if it's clear there's "something in it" for them. Be concise. Be quick. Be interesting. Don't beat around the bush with long introductions or unrelated information. Tell your customer what they want to know and they'll stick around for more!

4. Focus On Your Audience

Remember, your Web site should appeal to the interests of your audience...no one else matters! Focus on your target audience and put yourself in their shoes. If they're interested in your product because it saves them time, then focus on convenience. Don't start your pitch with a laundry list of less-important features. Focus on the key benefits of your product and leave the details for later.

5. Market Your Web Site

Would you open a sales office in a distant city and then not tell your clients in the area that it had opened? Of course not. Think of your Web site as an automated sales or service office on the Internet and let your "universe" of potential buyers know that it's available to them. Put your Web address on your stationery, business cards, ads, brochures, and other sales materials, using a rubber stamp if necessary. Be creative! For example, send out an "birth" announcement on a postcard. You should also remember to keep your domain name easy to remember. There shouldn't be any dashes or numbers if it

isn't necessary. The general rule of thumb is the name should either be the company name or something that will be so easy to remember that if you gave your business card to someone and they lost it, they should still be able to find the Web site.

6. Make Your Web Site Useful

Make sure the information your prospects or customers want is available. For example, Web sites are ideal ways to disseminate the latest information about your product. You can include specifications, case studies, success stories, white papers or testimonials. Don't forget to include important contact information, such as your toll-free number, customer service number, or contact information for technical support.

Make people want to come back to your Web site by making it "sticky". It should be updated continuously, with articles, promotions, contests or other frequently changing features.

7. Make It Easy For Viewers To Respond

You'd think this was obvious, but it's overlooked far too often. You absolutely must make it easy for a reader to express their interest in your Web site. Plaster your 1-800 number across it, make sure there's a link or form for contacting you, and treat visitors with the care you show any other prospective buyer. We have seen sales-oriented Web sites that never once listed a phone number, a contact form or a "click to send e-mail" button.

MARKETING YOUR WEB SITE OFFLINE

You should not always rely on search engines for heavy traffic. It is much harder to get your Web site included into a search engine than it was years ago. Actually, many more people are visiting Web sites for which they have seen the Web address in writing. Why do you think so many television commercials these days always include the Web address of the product they are promoting? The key thing to remember is: Anywhere you post your company name, post your Web site address along with it.

Some other places you should advertise and promote your Web site offline:

- Letterhead and envelopes
- Brochures
- Newsletters sent to your clients (either email or in print)
- Signature tag of all email messages (no matter to whom they are sent... friends, family, colleagues, etc.)
- At the end of your voice mail/answering machine message (i.e., "and be sure to visit our Web site at www.yourbusiness.com".
- Fax cover sheets (many people forget this one!)
- Flyer on free local bulletin boards (grocery stores, discount chain stores, shopping malls, dry cleaners, etc.) – print a flyer on bright yellow paper detailing your Web address and your company. BE SURE to include your email address as well as your telephone number! Tack the flyer to bulletin boards all over your town. Keep a supply in your car for handy access.
- Magnetic car signs (many office supply companies will make these for you at a very reasonable rate)
- Neighborhood directories
- Bus stop benches
- Printed on mouse pads (give one to your clients at Christmas or on their birthday instead of sending flowers)
- T-shirts (white T-shirts can be imprinted with a one-color design for a nominal price). Think about how effective it would be to have your Web address "walking around town".
- Business card
- Signage

COMPANY PROFILE

Business Name:	
Address:	
City, State, Zip:	
Phone:	
Fax:	
Email:	

Please briefly describe your company or organization so we can learn more about it.

What is your mission statement?

What is your industry?

How does your company currently market itself (attach additional materials if necessary)?

How is business generated? Do you have a dedicated sales person or department?

How many employees does your business have?

How long has your company been in business?

Who are your customers? Include demographics if available.

What is your current corporate identity?

Do you have any trademarks or service marks? If so, please list them here and indicate which are registered trademarks.



CURRENT SITE ANALYSIS

A) Will this project be a redesign or a new Web site?

New Redesign

If you selected redesign, please answer questions A1 – A9. If new, just skip these questions.

A1) If you selected redesign, what is your current URL?

http://

A2) If your Web site is currently up, who is your current Web host?

A3) If you gave an answer for A2, how much are you currently paying per month for your hosting?

A4) What are your reasons for a redesign of your current site?

A5) What features of the current site would you like to keep?

A6) What features of the current site don't you like?

A7) What feedback have you had about the current site?

Have you personally planned a Web site or managed a Web site project before?

Yes No

Are you in charge of every aspect of the Web site, including content strategy and information architecture?

Yes No

B) Do you already have a domain name registered?

Yes No

B1) If you selected that you do have a domain name registered, what is the domain?

B2) If you already have a domain registered, how much are you paying per year for the domain?

B3) Do you plan on registering another domain?

Yes No

YOUR BUDGET

We ask you your budget because it helps us determine what we can and can't do within the budget parameters you have set.

- A) How much do you have budgeted for Web site development or redesign?
- B) How much do you have budgeted for Web site maintenance annually?
- C) What is your budget for hosting annually?
- D) What is your budget for e-commerce software (if applicable), including purchase price, licensing fees and support?
- E) What is your budget for other software needs, including purchase price, licensing fees and support?
- F) What is your budget for content management? (CMS software and implementation and/or content maintenance costs)
- G) Are there other costs or fees associated with the site?
- H) Which of the following is most important to you? Rank them in order of importance (1 = most important):

___ **Cost:** I would prefer to save money and build a small site now, but lay the foundation for a larger or more complex site later.

___ **Time:** I need to get my site implemented VERY quickly, regardless of the cost. Some areas may be launched with basic information or features and more fully built out later.
My preferred timeline is:

___ **Quality or Complexity:** I am more concerned with quality—i.e. designing an “ideal” and very comprehensive site--than with cost or timeline. I’m willing to build and plan my site slowly in order to allow ample time for due diligence—possibly including internal brainstorming sessions with our key stakeholders or user research (focus groups, surveys, usability testing, etc.).

*We understand that most clients would like to create a high-quality site quickly and with a reasonable budget. We’re asking you to rank these criteria so that we can weigh some of your specific requests against these other factors to determine the highest-priority items for your initial launch.

GOALS AND OBJECTIVES

Be honest. If you want your Web site to make money or get leads, say so. You may have to start out small and build up to what you really want, but you still need to keep in mind where you want to eventually get.

A) What is the intended purpose of your Web site?

- Online store
- Online brochure for your company / services
- Community
- Educational
- Other

A2) If other, please explain.

B) What is your main objective for your Web site?

C) What are your immediate (short-term) goals for the site?

D) What are your long-term goals for the site?

E) How will you measure the success of the site?

Examples: Number of visitors to the site? Number of sales? Number of people who sign up for your newsletter? Number of people who contact you to work for them? Other?

Rate the importance of each of the following reasons for having a Web site. Be sure to rate every item.

Rating System:

1 = No or Irrelevant **2** = Nice but Not Necessary **3** = Average **4** = Important **5** = Very Important

Customer Service:

- To improve overall customer service
- To provide support info online for customers
- To provide additional info online for customers
- To answer frequently asked questions

Reduce Costs:

- To reduce printing costs by putting info online
- To reduce printing costs by putting forms online
- To save on postage costs by using email
- To lower support costs

Other Income Sources:

- To sell advertising space on my Web site
- To sell newsletter subscriptions
- To sell ad space to others in my newsletters
- To resell additional product lines

Communications:

- To put up a calendar of events
- To provide a forum for customers
- To improve internal communications
- To help form relationships with other companies

Community Resources:

- Provide a community service
- Build a resource site to attract visitors
- Provide a portal or a gateway to the Internet

Ongoing Promotion:

- Promote special offers to customers
- Promote items on sale to customers
- Send follow-up email to customers
- Send email newsletters to customers

Overall Objectives:

- To create a good impression of my company
- Establish a Web presence and credibility
- To provide contact info and directions

Advertising and Marketing:

- To supplement my traditional advertising methods
- Get free advertising from link exchanges
- So my info is available online all of the time
- To test for potential new market niches
- Experiment and look for market demand
- To promote my business location

Prospect or Lead Generation:

- To encourage prospects to request info
- To promote to possible prospects
- To develop qualified prospects
- To develop an opt-in email list

Product or Services Sales:

- To sell products directly on the Internet
- To sell services directly on the Internet
- To increase my customer base
- Sell a product or service without a middleman

Product or Service Information:

- To provide an online catalog for customers
- To provide detailed product or service info
- To inform customers of product updates
- To list product and service price lists for employees



YOUR COMPETITORS

Seeing what your competitors have done is a great way to improve your image over theirs. Let us study what they've done, and together we can improve your image over theirs. Please name the companies with whom you compete. If they have a Web site, please list it within, and tell us what you think of their site. If you would like to list more than three of your competitors, you can use a separate sheet of paper or photo copy this one. I have no competitors

A) Competitor #1

Name of Competitor:

Competitor's Web site: Http://

Review their Web site. What do you like about it? What do you dislike about it? How can we make a better site?

B) Competitor #2

Name of Competitor:

Competitor's Web site: Http://

Review their Web site. What do you like about it? What do you dislike about it? How can we make a better site?

C) Competitor #3

Name of Competitor:

Competitor's Web site: Http://

Review their Web site. What do you like about it? What do you dislike about it? How can we make a better site?

D) What can you offer that your competitors don't?

For example, a legal firm might answer, "Ability to provide in-depth answers to legal questions for \$100 in 24 hours via online form." A cookie company might answer, "Ability to get cookies delivered anywhere in a personalized ornamental box within 48 hours." Make a list of the important reasons for potential customers to choose your business. Clearly define your competitive advantage...if you can't do that, your prospective clients won't be able to do it either.

WEB SITE MAINTENANCE

A) On average, how often will new content be added to and/or updated on your Web site?

B) Who will be maintaining your site after it goes live?

Flair Interactive Single Employee Full Staff Other

B2) If other, please explain:

If Flair will not be maintaining your Web site, please answer questions B3-B7.

B3) How proficient or experienced is the person(s) that will be maintaining your Web site in Web development?

B5) Will the person(s) need training from Flair?

Yes No Not Sure

B6) How will the Web site be updated by the person(s)?

Own Software Software provided by Flair Other

B7) If other, please explain:

C1) Who will monitor and respond to emails or requests received via online forms?

WEB SITE HOSTING

Web hosting is how your Web site is stored 24 hours 7 days a week so it is always accessible by internet users. Flair Interactive offers unbeatable hosting plans. We can discuss our prices and hosting packages, and can help you decide which package is best for you. Additional fees may be required if Flair must upload content to another Web host.

- Yes, we need Flair Interactive to host our site.
- We might need Flair Interactive to host our site. Please provide additional information about Flair's hosting plans.
- No, we already have a hosting provider who will host our Web site.

DOMAIN NAME REGISTRATION

The main reason for using a Domain Name (i.e. yahoo.com or disney.com) is because they are easy for your visitors or customers to remember. If you visit a dentist's Web site and his domain was www.dentist.com, odds are you will remember how to find it again more easily than if it was at <http://www.verizonWebhosting.com/~drdentist>. Another advantage of having a domain name is that you won't lose it if you change hosting providers.

If you provide a list of potential domain names, we can check the availability of these for you. If you aren't sure what to use, we can give you a list of currently available domain names so you may choose which one you like.

- I have an existing domain name
- I intend to have Flair register a domain name for me
- I intend to register a domain myself
- I don't want a domain name

If you would like to have Flair register a domain for you, what are your preferences? You can check for domain name availability at www.godaddy.com.

- | | | | |
|-------------------------|------------|------------------------------|-----------------------------------|
| 1 st Choice: | Available? | <input type="checkbox"/> Yes | <input type="checkbox"/> Not Sure |
| 2 nd Choice: | Available? | <input type="checkbox"/> Yes | <input type="checkbox"/> Not Sure |
| 3 rd Choice: | Available? | <input type="checkbox"/> Yes | <input type="checkbox"/> Not Sure |

SITE ELEMENTS

Tell us about the features and elements you'd like to include in your site.

Place an "x" next to the elements that you will definitely need, and place a "?" next to the elements which you may want to include. If you're not sure about something, circle it and provide your questions at the bottom of this page.

- | | | |
|--|--|--|
| <input type="checkbox"/> Forms (for example, Contact Forms) | <input type="checkbox"/> My Account Page | <input type="checkbox"/> Newsletter/ Mailing List |
| <input type="checkbox"/> PDFs or other downloadable files | <input type="checkbox"/> My Profile Page | <input type="checkbox"/> Audio / Sound |
| <input type="checkbox"/> FAQs (Frequently Asked Questions) | <input type="checkbox"/> Add to My Favorites | <input type="checkbox"/> Discussion Board / Forum |
| <input type="checkbox"/> Site Map (a must on large Web sites) | <input type="checkbox"/> Live Online Support | <input type="checkbox"/> Classified Ads |
| <input type="checkbox"/> Articles, Reports, Writings, Manuals | <input type="checkbox"/> RSS Feed | <input type="checkbox"/> Art, Photo, or Graphics Gallery |
| <input type="checkbox"/> Contests or Giveaways | <input type="checkbox"/> Streaming Media | <input type="checkbox"/> Customer Feedback |
| <input type="checkbox"/> Banner ads (for sites sponsoring your site) | <input type="checkbox"/> Membership Area | <input type="checkbox"/> Online Product Catalogs |
| <input type="checkbox"/> Promotional callouts (specials, limited-time offers, links to specific pages or products) | <input type="checkbox"/> Chat | <input type="checkbox"/> Automatic news or article feeds |
| <input type="checkbox"/> Shopping Cart (e-commerce) | <input type="checkbox"/> Press Releases | <input type="checkbox"/> Flash |
| <input type="checkbox"/> Ability to Accept Credit Cards | <input type="checkbox"/> Games | <input type="checkbox"/> Animations |
| <input type="checkbox"/> Secure Server | <input type="checkbox"/> Media Kit | <input type="checkbox"/> Directory / Database |
| <input type="checkbox"/> Custom Scripting | <input type="checkbox"/> Specialized Calculators | <input type="checkbox"/> Print This Page feature |
| <input type="checkbox"/> Login | <input type="checkbox"/> Surveys or questionnaires | <input type="checkbox"/> Email This Page feature |
| <input type="checkbox"/> Registration | <input type="checkbox"/> Site Search | <input type="checkbox"/> Automatic Email Alerts and Notifications to Your Staff (i.e. for forms or when user completes a task) |
| <input type="checkbox"/> Calendars | <input type="checkbox"/> Site should be designed for wireless or handheld device | <input type="checkbox"/> Other (Please explain below) |

S I T E M A P

This page should be used for very small sites only. For larger sites or if Flair will be providing content strategy and information architecture services, please skip this page.

Below is a site map diagram. The main entry page of your Web site is where "Home Page" is written at the top.

In the boxes below the home page, write the pages that your Web site will contain. If this is a redesign of a Web site, place the pages you currently have on your existing Web site, then cross out the pages that you would like to remove and add any additional pages. (If you have more pages than spaces available, write them below, or write them on a separate sheet of paper). If you're artistic, you can always make your site map diagram on a separate piece of paper or on your computer, then attach it to this workbook.

Home Page					

B) Total number of pages: _____ (approximate number okay if you're not sure—but don't forget forms, confirmation pages, campaign landing pages, checkout screens, login screens, etc.)

C) Do you have utilities that you wish to include outside of the main navigation (i.e. Contact Us, Help, How to Order, etc.)?

D) Do you have items that you'd like to feature in the footer of your pages (i.e. Privacy Policy, Site Map, etc.)?

S I T E C O N T E N T

A) From where will the content for your Web site come? Will you be providing it? Will we need to write or edit it?

B) Will the content be new, repurposed, or both? Explain:

COLORS AND ACCENTS

A) What are your color preferences? Should they blend in with the company/organization logo?

For the most part, we recommend a white background for best readability and contrast.

B) If you'd like, provide the URL(s) of a Web site or sites for which you like the color palette and explain why.

MARKETING YOUR WEB SITE

A) Being listed in directories and search engines is important for my business / Web site.

Yes No Not Sure

B) Would you like us to handle the promotion of your site online and to optimize it for search engines?

Yes No Not Sure

C) Keywords

If you were your own customer, what words would you use to find your site in a search engine?

For example, a training company might answer "teamwork training, management training, executive coaching, communications training, train the trainer, conflict resolution, managing change, training, strategic planning, facilitation skills, meetings, risk and empowerment"

Pinpointing these accurately is VERY important to the success of your site, as they are used in your Web pages and meta code as keywords. People looking for what you have to offer will search for keywords on the Internet. If you have good keywords that reflect what you offer, you improve your chances of being found by people who are using search engines. Keywords can also include your location such as city, state, country, etc. If you had a dentist office in Sebring, FL some of your keywords would be "Sebring Florida Dentist", "Sebring FL Dentist", etc.

In priority order, list the most important keywords for your site. (Attach a separate sheet of paper if you have additional keywords—the more, the better.) If you would prefer that we find the best keywords for your Web site, check here: ___

- | | | |
|-----|-----|------|
| 1.) | 5.) | 9.) |
| 2.) | 6.) | 10.) |
| 3.) | 7.) | 11.) |
| 4.) | 8.) | 12.) |

D) Site Description:

Please draft a carefully constructed 25-word description containing the most important keywords describing your business / Web site (one to two sentences max). You should be sure to include your most important keywords throughout the description. I would like Flair to edit or optimize this description. Please include this cost in the quote.

YOUR TARGET AUDIENCE

A) Who is your target audience? Teenagers? Women 18- 25? If there is more than one, list them:

B) What types of visitors do you wish to attract?

Examples: Men? Women? Locals? National? International?

C) If you were your own customer or target audience, why would you visit your Web site? What would you be looking for? *This is a really important question. Think about your target audience - when they use the Internet to find information about your product or service, what do they want to know? What are they looking for? What do you want them to do? For example, a realtor might answer, "My visitors will want to find local listings." A tax practitioner might answer, "My visitors will want to know when the next estimated tax payment comes due or what to do if the IRS sends them a notice that they are being audited." This list will be your guideline for the kind of content you will place on your Web site, which will make or break your site. Look at this question from various angles, such as what makes my product or service attractive, why should they buy from me, and what's unique or special about what I have to offer?, etc.*

YOUR IMAGE

A) What type of image would you like to project? (You may select more than one.)

- Artistic
- Conservative
- Corporate
- Content Provider
- Feminine
- Friendly
- Child-Oriented
- High Technology
- Family-Focused
- Academic
- Fun
- International
- Rustic
- Nature-Oriented
- Other

A1) If other, describe below

YOUR SITE DESIGN

A) Specify as many Web sites as you like that show color combinations you like.

Http://

Http://

Http://

B) List as many Web sites as you like with a "look and feel" that is similar to the one that you want for your site.

Http://

Http://

Http://

C) List as many Web sites as you like which have a similar structure and layout to the one you want to develop.

Http://

Http://

Http://

D) List as many Web sites as you like that come closest in functionality to the one you want to develop.

Http://

Http://

Http://

E) List as many Web sites as you like that you do not like and explain why.

Http://

Why do you like it?

Http://

Why do you like it?

Http://

Why do you like it?



PHOTOS AND MULTIMEDIA

You must own the copyright to, or have permission from, the copyright owner to use any photos, sound, or media you send us. If you have photos of your own that you would like to place on your Web site, you may send them to us by mailing the photos so that we may scan and return them, or by sending the digitized images on a disk, CD, or via email.

Stock photos can also be obtained from multiple Web sites (Some free, some for which you must pay).

Some of these Web sites include:

iStockPhoto (<http://www.istockphoto.com>)

Getty Images (<http://www.gettyimages.com>)

Inmagine (<http://www.inmagine.com>)

Stock.xchang (<http://www.sxc.hu>)

PictureQuest (<http://www.picturequest.com>)

Animated GIF images:

High quality images are available from Photo Disc (<http://www.photodisc.com>) and other sources. We can also make customized animations for an extra charge.

We can help you select the photos for your Web site, but extra charges will apply.

A) The following is a list of possible items that you will need for your Web site. Check the items on the list that apply to your needs:

- I have graphics, photos and/or artwork that need to be scanned.
- I need assistance in choosing graphics and artwork
- I need a new custom graphic and/or artwork design
- I currently have videos that need to be transferred onto our Web site
- I would like sound to be played on our Web site.
- I need a staff member at Flair Interactive to take photos of our business or our people (Chicagoland area only)

TESTING AND QUALITY ASSURANCE (QA)

Please select the items that you will need Flair to handle after the site is built (before launch):

- Review/Optimize Download Times
- Review File Sizes
- Check Browser Compatibility
- Checks Links
- Spell Check
- Review/QA Page Content in Detail

FOOTERS AND ERROR MESSAGES

A) Do you need copyright or trademark information in small print at the bottom of every page?

Yes No

A2) If you answered yes on answer A, please tell us what you would like it to read.

Example: Copyright 2006 Your Business Name. All Rights Reserved.

B) Do you need custom error pages on your Web site?

Yes No Not Sure

C) May we include a link at the bottom of your main page which reads "Web site Designed by Flair Interactive Services Inc."? (You are under no obligation to say yes.)

Yes No

F E E D B A C K

A) Is there anything else you feel we need to know to better serve you in your Web development needs?

B) Do you think this planner helped you with planning out your Web site? If not, what can we add to make it better?

C) Do you think this planner asks all of the necessary items for us to design your Web site? If not, why?

D) Was there anything that confused you while using this planner? If so, what?

E) Did you learn anything by using this planner? Anything we could have done to expand your knowledge even more?

F) Additional Comments:

N E X T S T E P S

Congratulations! You've completed the Web Site Planning Workbook.

Now that you're finished, send this planner back to us so that we can review it and give you an accurate quote.

If you typed your answers into this document, then you can email this file back to us at info@flairinteractive.net and include the subject line "Web site Planner Attached" or send it to your main contact at Flair.

You can also print this file and send it via regular mail to:

Flair Interactive Services Inc.
2762 Carrington Drive
West Dundee, IL 60118

After you submit your planning workbook, we'll review it and contact you to discuss your project in more detail. We typically can provide a quote within a maximum of 5-7 business days. We find that careful planning and collaborative efforts upfront aid us in creating a realistic estimate--and will also save you time and money later.

We look forward to speaking with you in more detail about your site and hope that we can work together soon!

Sincerely,

The Flair Interactive Team