echo

Website Planning Guide

Important questions to answer when planning a new website.

Planning a new website can be a daunting task. Strategy, content, design, UX, programming, and SEO all need to be taken into consideration.

To help you get rolling, we developed this guide which asks the critical questions one should answer when planning a new website. We hope it's a valuable resource for you and your team.
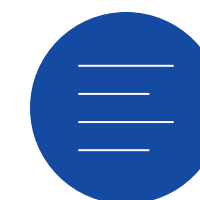
Let's Begin

Areas of Focus

This website planning guide breaks down the questions into the following areas of focus.
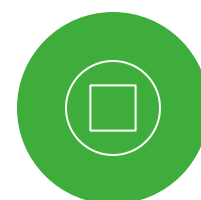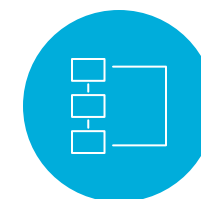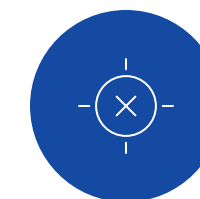
Basics
4-7

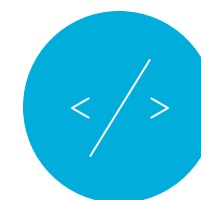**Design**
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Content
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Strategy
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Programming
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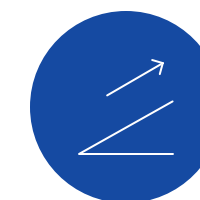
Launch
56-60
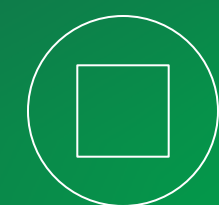
The Basics

What is your timeline?

Depending on the complexity of your website, development could take anywhere from a few months to a year. A timeline will keep everyone on track and manage expectations.

MAKE YOUR LAUNCH MEANINGFUL BY TIMING IT WITH AN IMPORTANT EVENT FOR YOUR COMPANY SUCH AS AN ANNIVERSARY, NEW PRODUCT LAUNCH, SPECIAL SEASON OR COMMEMORATIVE MONTH.

Please describe when you would like to ideally launch the website.

What is your budget for the website?

Your budget should depend on the needs and functionality of your website. Remember that it should cover any requirements needed for your website including :

- Copywriting
- Design
- Domain / URLs
- Hosting
- Iconography
- Illustrations
- Photography
- Programming
- SEO or PPC
- Strategy
- Video Production

Give an intended range or dollar amount.

$

Who is involved with the website project and what is their role?

Your website developer needs to have a point of contact at your company who will be responsible for approving updates as the project progresses. Typically developers work with a marketing team or directly with the owner of the company.

Please list who will be part of your website team.
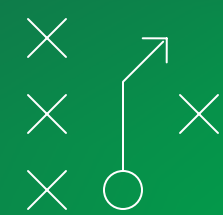
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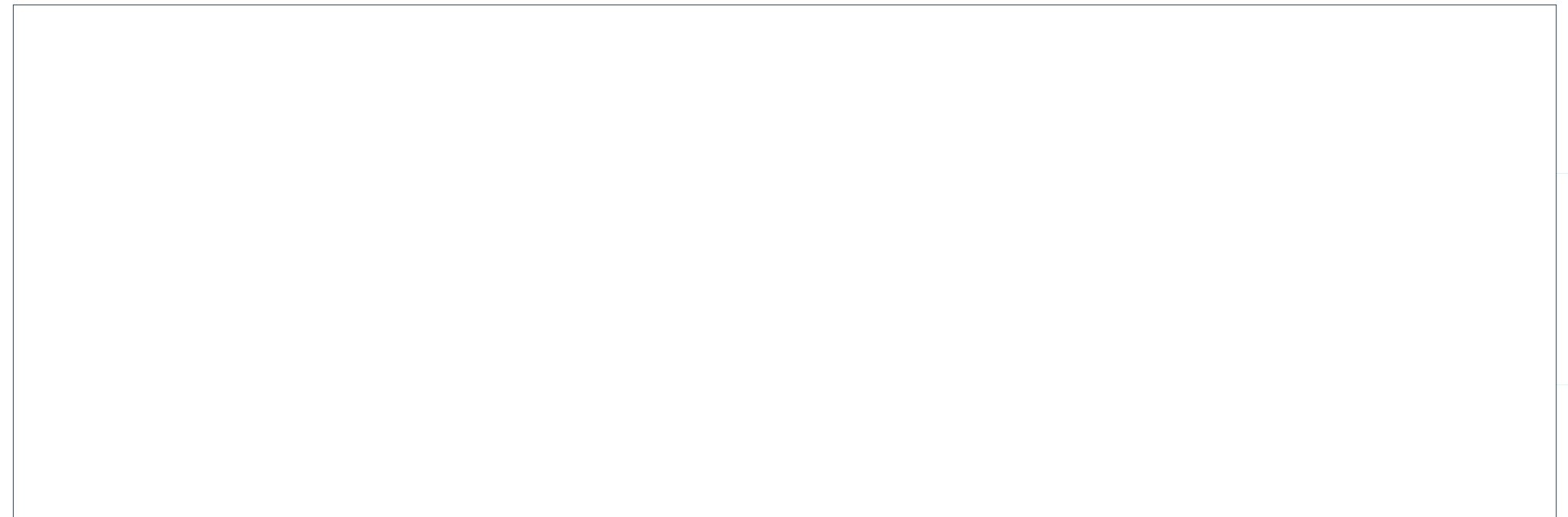
Strategy

Why do you need a new website?

Sharing the reasons why you need a new website with your website developer helps guide the strategy and design.

List all the reasons you need a new website.

Who is your website designed for?

Please list your target audiences in order of importance.

Your target audiences are :

1

2
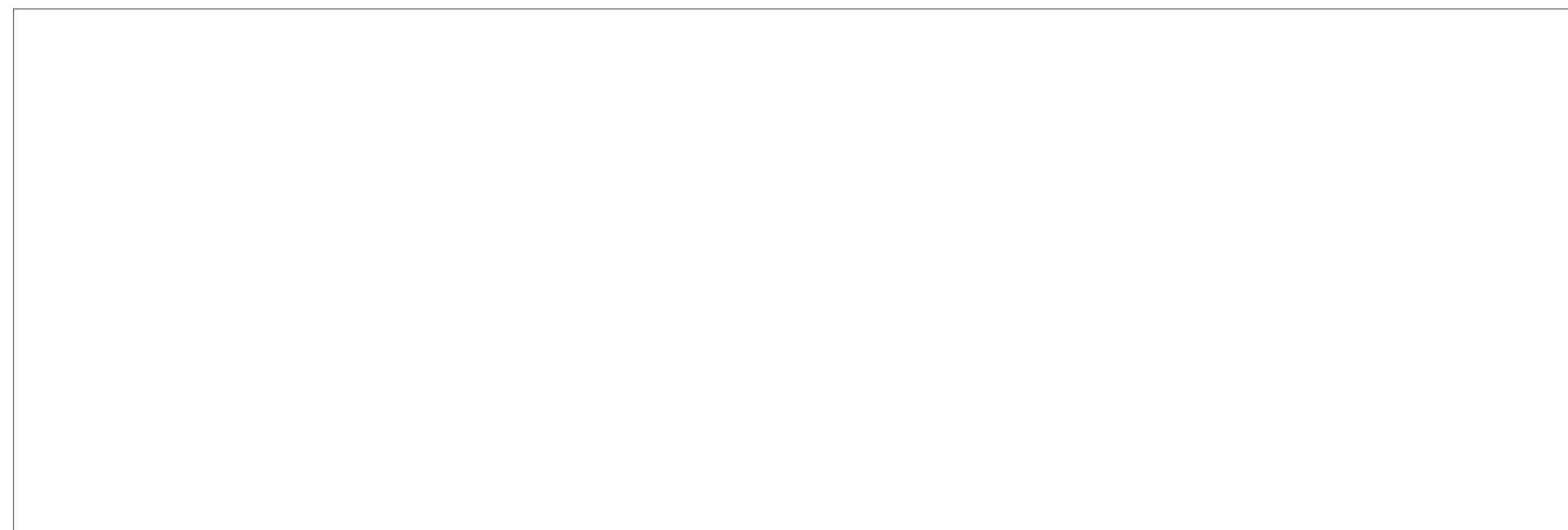
3

4

How will you differentiate your company from others?

Give thought to how you will separate your company and share any qualities that are unique and valuable from a customer perspective.

Describe ways in which you will differentiate your organization from the competition.

Where does your existing website fit within the sales process?

For most, the sale isn't made on the first website visit. Rather, there is a point in the sales process where the website plays a key role. It may be in the prospecting, proposal or follow-up stage.

Describe your sales process and how your website works with the sales process.

What actions do you want your website visitors to take?

Having website traffic is great, but you will want your visitors to take action or they'll never become customers. What do you want your visitors to do? Some examples :

- Call Your Company
- Download a Digital Asset
- Purchase a Product
- Request More Information
- Submit an Online Form
- Subscribe to Your E-Newsletter
- View Your Projects
- Visit Specific Website Pages

Rank your desired actions in order of importance.

1

2

3

4

What is the value of a sale?

What is the annual value you receive with a new customer? Please list the low and high end for the customer value.

List the lowest value with a new customer.

List the highest value with a new customer.

How will you measure the success of the website?

Your website is a significant investment. How will you determine the ROI on your investment? Some examples include :

- Bounce Rate
- Number of Conversions
- Number of Downloads
- Number of Form Submissions
- Number of Phone Calls
- Number of Visits
- Time per Website Visit

Describe how you will determine the success of your website.

Competition

Who does your company compete against?

Everyone has competitors. By sharing your top competitors with your website development firm, a competitive review can be completed providing valuable insight and a stronger understanding of your market.

Please list your top competitors.

COMPANY

WEBSITE

COMPANY

WEBSITE

COMPANY

WEBSITE

COMPANY

WEBSITE

What are your company's strengths?

There is undoubtedly one or more areas of your company where you excel compared to others. Please convey the strengths that make your organization unique.

Please be as specific as you can.

What are your company's weaknesses?

Nobody's perfect. Think about the areas of your business that need improvement. What areas do your competitors have an advantage over you?

Please be as specific as you can.

Why do customers choose your company?

You undoubtedly have happy customers. What do they say about you? What are the reasons they cite when choosing to do business with you?

STUMPED? CHECK YOUR REVIEWS FOR RECURRING COMPLIMENTARY THEMES. SOMEBODY OUT THERE LIKES YOU!

List reasons noted when you win business.

Why don't potential customers choose your company?

You can't win them all. When you compete for business and lose, there's a reason. Too big, too small, too much? What are the reasons most commonly cited when you lose to the competition?

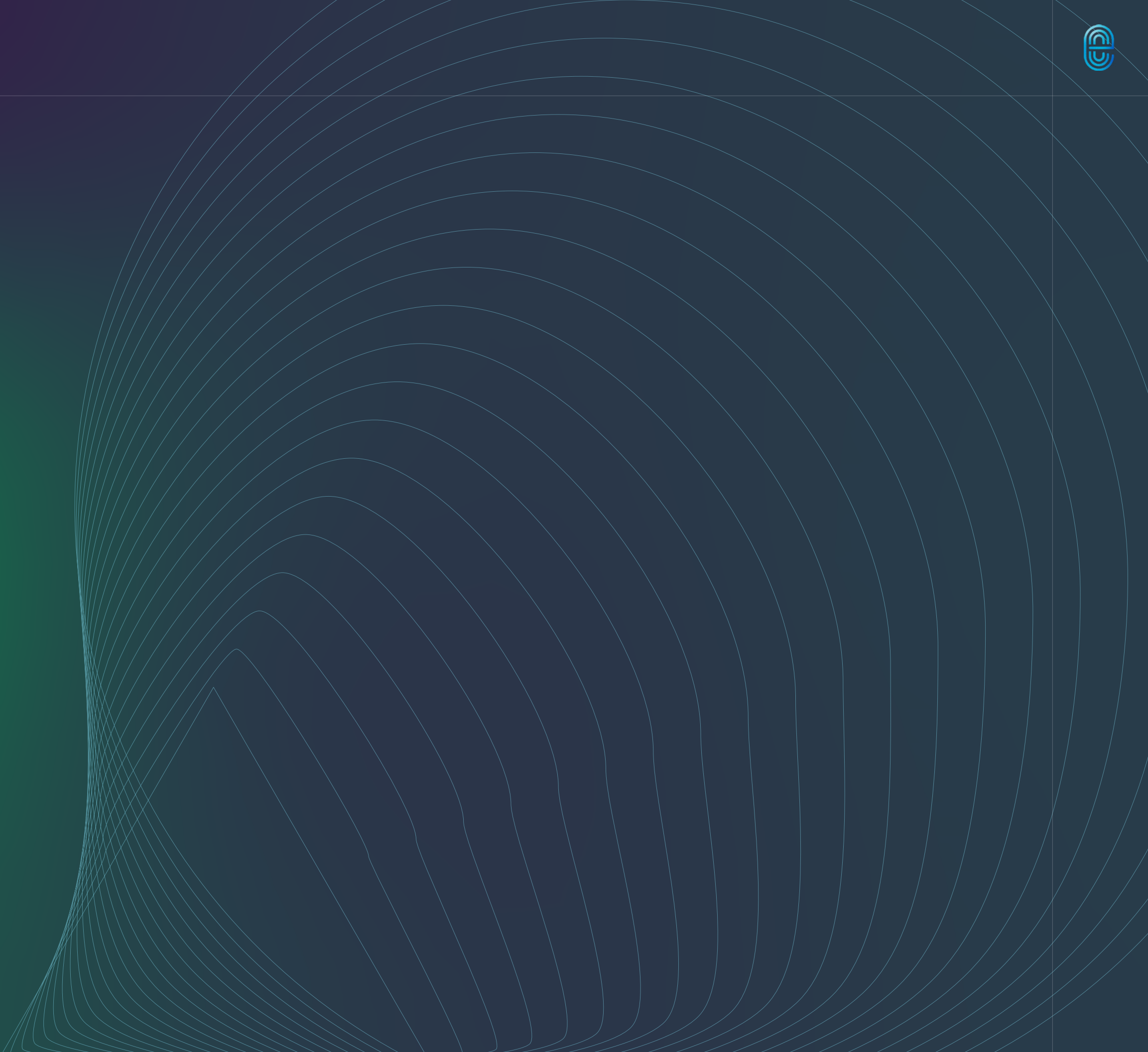*List reasons noted when you do not win the sale.*

What opportunities may this website bring?

A new website can open many doors. What opportunities do you hope to pursue once the website launches? Will the website solve any existing problems?

Please be as specific as you can.

Design

What are your goals with the design of the website?

When you think about the design of your website, what comes to mind? Please share the design goals you have for the new website.

Think about the impression you want your website to make.

What adjectives best describe the ideal website?

When you think about the ideal look and feel for your website, what adjectives come to mind?

Check all that apply.

☐ Approachable   ☐ Elegant   ☐ Modern

☐ Beautiful   ☐ Experienced   ☐ Powerful

☐ Clean   ☐ Fun   ☐ Professional

☐ Colorful   ☐ High-Tech   ☐ Progressive

☐ Competitive   ☐ Industry-Leader   ☐ Project-Focused

☐ Comprehensive   ☐ Interactive   ☐ Simple

☐ Dynamic   ☐ Mobile-Friendly   ☐ Trusted

☐ Other

How will this new website design impact your branding efforts?

Often a new website will set the stage for a brand refresh. At other times, it must adhere to the existing, well-established branding standards.

Describe how this website will develop or adhere to branding standards.

What aspects of your brand need to be part of this website?

If your new website will adhere to your current brand, your developer needs to understand your current brand standards.

If you have a graphics standards manual or style guide, please be sure to share it.

Please be as specific as you can.

TYPEFACES

COLORS

LOGOS

ICONS / GRAPHICS

☐ We have a graphic standards manual / style guide

What websites in your industry do you admire?

It's good practice to check out the websites of those in the your industry and identify those you admire most. Are there particular features or aspects that help this website stand out from all others?

Please provide company names, web addresses and what you like about their websites.

COMPANY 1

COMPANY 2

COMPANY 3

# What websites, outside of your industry, do you really admire?

There may be websites that you use personally or for work that are outside your industry but you really like. You may relish the look and feel, user experience, or a particular feature of that website.

Please provide company names, web addresses and what you like about their websites.

COMPANY 1

COMPANY 2

COMPANY 3
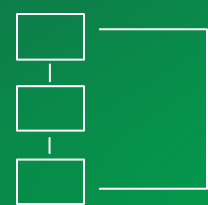
UX

What navigation style do you prefer?

Your web developer will want to know if you have strong preferences for your website navigation or if you are open to suggestions.

Please check one.

☐ Full Navigation, Dropdowns & Mobile   ☐ Mobile Only

☐ Full Navigation with Mobile   ☐ No Preference

☐ Full with Visual Dropdowns   ☐ Not Sure

Please explain.

Have you developed a site map?

Preliminary site maps are very helpful during the web development process. A site map will determine the number of pages and subpages that will appear on the website and guide the developer in creating the finished project.

Do you have a current site map?

☐ Yes

☐ No

☐ In Progress

☐ Not Started

☐ Not Necessary

What are your top level pages?

The top level pages are those the visitor sees first when they come to your website. They should easily guide website users to the information they desire most and are typically part of the top level navigation.

PRO TIP: A GLANCE AT YOUR ANALYTICS SHOULD CONFIRM WHERE YOUR VISITORS HEAD FIRST AND SPEND MOST OF THEIR TIME.

Check all that apply.

☐ Home   ☐ Events   ☐ People

☐ About   ☐ Locations   ☐ Products

☐ Careers   ☐ Markets   ☐ Projects

☐ Contact   ☐ News/Blog   ☐ Services

☐ Other

How will video be utilized on your website?

Video is a great way to create interest, increase website interaction and drive conversions. Video can be used anywhere you want, throughout the website. If you have off-site social media video channels, they can be integrated.

Video Options

- [ ] Home Hero Loop
- [ ] Page Embed
- [ ] Video Section
- [ ] Unsure
- [ ] Won't be Used

Video Social Platforms

- [ ] Instagram
- [ ] TikTok
- [ ] Vimeo
- [ ] YouTube

Where would you like to include video?

What type of animations would you like on your website?

Websites have evolved into more of an experi-ence. Gone are the days of static websites. Today's leading websites have animations and scroll triggered interactions to add interest and engage the user.

Check all that you would like to have on your website.

☐ Color Shifts   ☐ Page Load Animations   ☐ Side Scrolling

☐ Filter Effects   ☐ Parallax   ☐ Type Movement

☐ Halt Scrolling   ☐ Pointer Effects   ☐ UI Animations

☐ Hover Effects   ☐ Scroll Jacking   ☐ Video Hero

Include descriptions and/or website links with your desired animation.

How important is the mobile experience?

On average, 50% of all web interactions occur on a mobile device. Compared that to 10 years ago, where we were at 3%. More than likely, your website is being accessed on mobile more than ever before.

PRO TIP: ONCE AGAIN, A LOOK AT YOUR WEBSITE ANALYTICS CAN CONFIRM HOW OFTEN YOUR SITE IS BEING ACCESSED ON MOBILE.

Please describe how visitors use mobile devices to browse your website.

Programming

What is your preferred Content Management System (CMS)?

WordPress is the world's leading CMS but there are alternatives. Understanding your options and choosing the right CMS is an important step in the web development process. If you don't have a preferred system, your website developer can guide you to the right choice.

Please check one.

☐ Drupal   ☐ Jimdo   ☐ Square Space

☐ Duda   ☐ Joomla   ☐ WebFlow

☐ Expression Engine ☐ Magento   ☐ Webnode

☐ Framer   ☐ MailChimp   ☐ Weebly

☐ Ghost   ☐ Ruby   ☐ Wix

☐ HubSpot   ☐ Shopify   ☐ WordPress

☐ Other

What are the dynamic sections of your website?

Dynamic sections are those that update regular- ly with a landing page and related pages that are added over time. For example, projects would be a dynamic section.

As you plan which pages/areas of the website will be dynamic and updated regularly, also consider who will be doing the updates.

Check the areas of your website that may be dynamic.

☐ Calendar   ☐ Locations   ☐ Products

☐ Case Studies   ☐ Markets   ☐ Projects

☐ Documents   ☐ News/Blog   ☐ Services

☐ Events   ☐ People   ☐ Testimonials

☐ Job Postings   ☐ Photo Gallery   ☐ Videos

☐ Other

What web applications will integrate with your website?

Today's websites offer many opportunities to integrate with existing applications. Please list any third party products that will integrate with the new website.

Check as many as desired.

CHAT

☐ LiveChat

☐ Podium

☐ Textedly

CRM

☐ Microsoft Dynamics

☐ Salesforce

☐ Sugar

EMAIL MARKETING

☐ Active Campaign

☐ Constant Contact

☐ MailChimp

HUMAN RESOURCES

☐ Bamboo

☐ Taleo

☐ Workday

JOBS

☐ Indeed

☐ Linkedin

☐ Zip Recruiter

MARKETING AUTOMATION

☐ HubSpot

☐ Marketo

☐ SharpSpring

☐ Other

What social media channels will be part of your website?

If you are using social media, please share the social marketing channels you use as part of your marketing efforts.

Check as many as desired.

☐ Facebook   ☐ TikTok

☐ Instagram   ☐ Twitter / X

☐ LinkedIn   ☐ YouTube

☐ Pinterest

☐ Other

Content

How will the website content be developed?

Every website needs content. It must be engaging, professional, up-to-date, easy to understand, and grammatically correct.

Most organizations have content already written—but whether or not it's "site ready" is another matter. A new website would call for new content.

WORKING WITH A CONTENT WRITER OUTSIDE OF YOUR OPERA-TION CAN PROVIDE A FRESH TAKE ON YOUR BUSINESS, EMPLOY BEST PRACTICES, AND ENLIVEN YOUR COPY WITH INNOVATIVE IDEAS. YOUR WEB DEVELOPER CAN HELP YOU FIND ONE.

Check all that apply.

☐ Pulled from Current Website

☐ Pulled from Existing Marketing

☐ Copywriter / Strategist

☐ Developed Internally

☐ Entered in Gather Content

☐ Other

What content-related research can be shared?

Before they begin writing, a content writer will want to gather as much information about your company brand, your target market, your corporate values, and how you want to position the organization in the marketplace.

Please check all that apply.

☐ Buyer Personas

☐ Company Values

☐ Competitive Matrix

☐ Competitive Research

☐ Customer Journeys

☐ Messaging Framework

☐ Mission Statement

☐ SWOT Analysis

☐ Other

What assets can you share?

Whoever puts together the content will need to know what assets will be incorporated into the website. They will then be able to write proper descriptions and introductions to these elements.

Please check all that apply.

☐ Brochures

☐ Case Studies

☐ Fonts

☐ Icons/Graphics

☐ Illustrations

☐ Infographics

☐ Logos

☐ Photography

☐ Publications

☐ Sales Sheets

☐ Videos

☐ White Papers

☐ Other

How will assets and research be shared?

If your company currently shares information via a certain platform, invite the developer to the workspace. This will facilitate better communication across all parties on the team.

Please check all that apply.

☐ Asana   ☐ Google Drive   ☐ SharePoint

☐ Basecamp   ☐ iCloud   ☐ Slack

☐ Dropbox   ☐ OneDrive   ☐ Teams

☐ Email   ☐ OneHub

☐ Other

What "tone" do you want for your website?

The tone of your website should be in sync with your company brand and personality.

Check all that apply.

☐ Caring   ☐ Experienced   ☐ Safe

☐ Casual   ☐ Family-Oriented   ☐ Selective

☐ Collaborative   ☐ Free-Spirited   ☐ Visionary

☐ Conversational   ☐ Fun   ☐ Superior

☐ Daring   ☐ Knowledgeable   ☐ Trusted

☐ Dependable   ☐ Professional   ☐ Understanding

☐ Diverse   ☐ Progressive   ☐ Visionary

☐ Other

What words or phrases should be included on your website?

Whether it's the CEO's favorite phrase or a newly emerging way to describe a product or service, you may have some preferences as to the language used on your website.

Please list as many as you can.

What words or phrases should not be included on your website?

Sometimes seemingly, harmless words cannot be used on a website because of industry-wide restrictions, or they may have a negative connotation in your industry. Other times, you might have seen words tiresomely repeated on your competitor's websites and you may want something more inspirational.

Please list as many as you can.
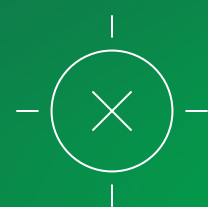
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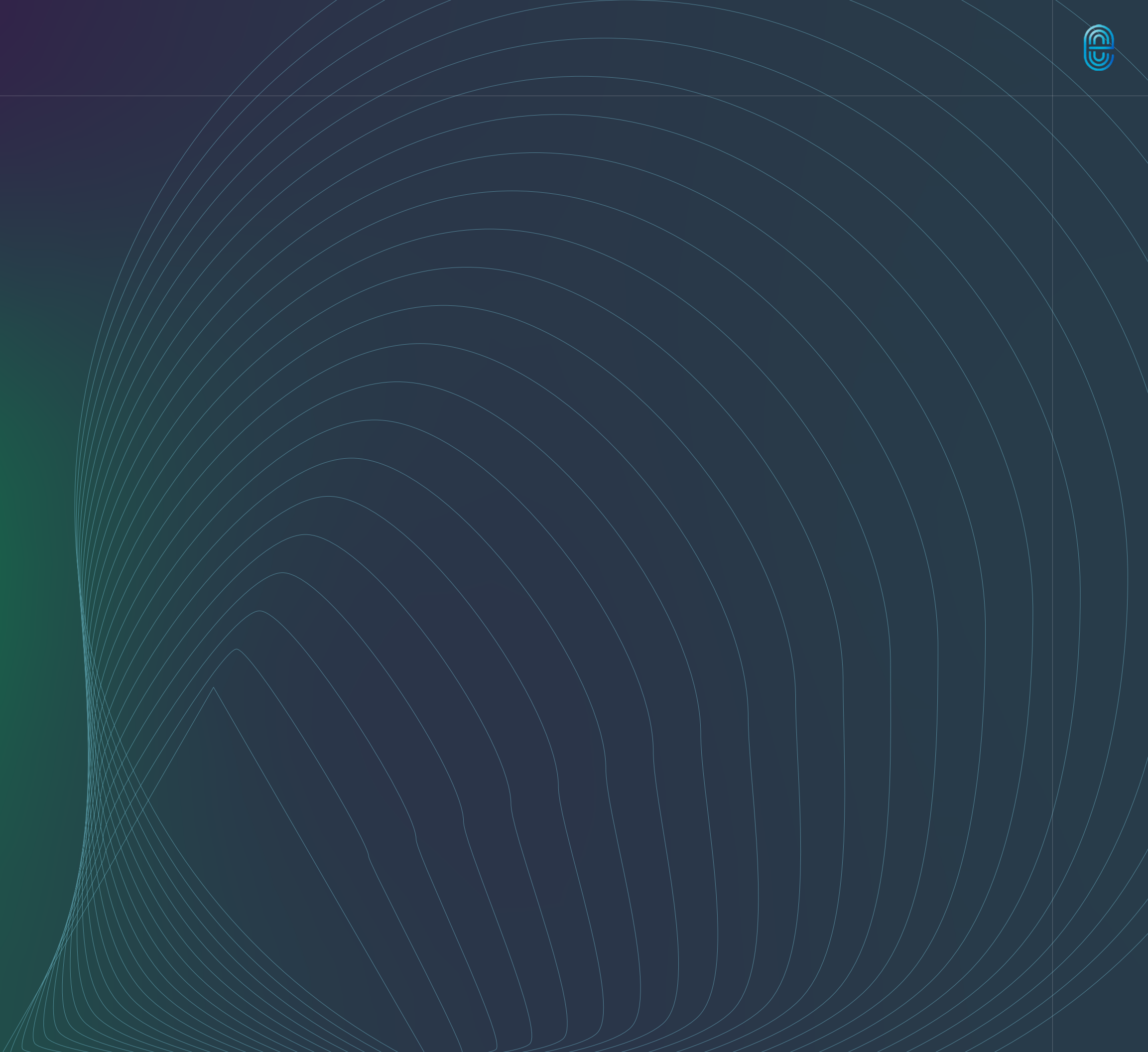
Do you have any SEO plans?

SEO stands for Search Engine Optimization. It is the practice of increasing your rank in the search engines.

Every website should have a plan for SEO, whether it's a DIY approach or through an SEO Agency.

Describe your current and desired SEO efforts.

What SEO Tools will be required with the new website?

Are there particular SEO tools that you currently use? Are there any preferred SEO plugins that you would like added to the website?

Check all that apply.

☐ Ahrefs   ☐ Monster Insights   ☐ W3 Total Cache

☐ Broken Link Checker   ☐ Rank Math   ☐ WP All in One

☐ Google Analytics   ☐ Schema Pro   ☐ WP Rocket

☐ Google Keyword Planner   ☐ SEM Rush   ☐ Yoast

☐ Google Page Speed Insights   ☐ SEO Press   ☐ No Preference

☐ Google Search Console   ☐ SEOquake   ☐ Unsure

☐ Other

How will you handle redirects from your old website?

Every page from your old website should be redirected to your new website. Typically redirects are handled by your chosen web development firm.

If that is your desire, your website developer will need an Excel file with one column of current page URLs and a corresponding column with the proper redirect url on the new website.

Please be as specific as possible.

Do you have any plans for a Pay Per Click campaign?

PPC refers to "Pay-Per-Click" advertising programs. These programs access a predetermined budget and that budget is depleted as prospects click on your ad.

As you design the website, your developer will want to know if you are planning to engage in this particular program.

Please be as specific as possible.

Do you have content marketing plans?

Do you currently engage in any content marketing campaigns or have plans to start a content marketing campaign? If so, please provide details including the content marketing platform.

Please be as specific as possible.
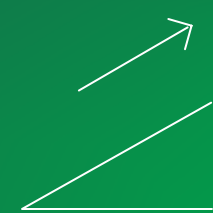
Launch

How will you launch the website?

Your Domain Name System (DNS) connects your URL to your website. With a new website, your DNS will need to be repointed as part of the launch.

Please choose which option you prefer.

OPTION ONE

☐   We will repoint the DNS internally

OPTION TWO

☐   We would like the developer to repoint the DNS

CONTACT

DNS PROVIDER

EMAIL

LOGIN

PHONE

PASSWORD

Who will manage and host your website?

It is recommended to have your web development firm host and manage your website. After all, they know the website better than anyone and have a vested interest in keeping it safe, secure, and performing at its best.

Please be as specific as possible.

What other server-related services are desired on an ongoing basis?

Not all servers are the same. As you review your options, please identify what additional services or features you want from your hosting provider. Some services are performed as part of a website maintenance package.

Check all that apply.

- ☐ Enhanced Security
- ☐ IT Access
- ☐ Plug-In Updates

- ☐ Social Media Reports
- ☐ Theme Updates
- ☐ Website Back-Ups

- ☐ Website Performance Reports
- ☐ WordPress Updates

☐ Other

How will you promote your new website?

A new website is a cause for celebration and a reason to shout from the rafters. Promoting your website is just as important as getting it up and running.

With the right strategy, you'll be driving more, high-quality traffic to your site sooner than you can say, "We're live!"

Check all that apply.

☐ Blog   ☐ Launch Party

☐ Email Campaign   ☐ Press Release

☐ Internal Memo   ☐ Social Media Announcement

☐ Other

Congratulations!

You've answered the key questions one should answer prior to starting a website.
This information is very helpful for the designer, developer and content writer.
Please share this with the website development team as they will find it very helpful
throughout the web development process.

It's Go Time

For more than two decades, the team at Echo has been designing and building websites that rise above the noise. If you're planning a website, we'd welcome your consideration as a development partner.

John Burton
President & Creative Director
630-728-6006
john@echodesigngroup.com