

## ABOUT YOU AND YOUR WEBSITE

**Client**

**Contact Name**

**Phone**

**Email**

Tell us a bit about your company or organization. (*Background, vision, mission, values, products/services*)

Do you have a website currently?  Yes  No

If Yes, please tell us why you are looking to get a new website?

## marketing goals

Briefly, what are your short-term marketing goals (in the next 1-2 years)? (Example: growth, awareness, expansion.)

How do you anticipate this website helping to reach those goals? (Example: lead gen, sales, etc.)

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## target audience

Who is your target audience? (Please describe in detail. Examples: age, ethnicity, income, gender, etc.)

What are your target market segments? (Examples: donors, volunteers, businesses, parents, etc.)

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## messaging

What is the primary message you wish to convey to your audience with this site? (Example: join now, donate, education)

What is the secondary message you wish to convey

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## calls to action

What is the primary action you wish your target user to take from the main page of your site? (Example: download, browse, move along a specific path, email, order, explore, click button, call via phone, etc.)

What is the primary action you wish your target user to take before leaving you site? Is it the same action as previous? If not, please describe.

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## content

Describe any visual elements or styles that can be utilized from existing marketing materials or collateral. (Example: images, icons, content, testimonials)

What elements are key items you wish to be available on every page? (Example: donate now button, phone number, login button, etc.)

Will you be providing the content for this website (copy, art, photos, etc.) OR do you require Pixa support? Do you have content from your current site in a format other than the website itself?

What are the legal issues that require attention? (Example: copyrights, trademarks, service marks, trade secrets, patents, privacy policy, etc.)

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## website examples

List any sites from competitors and other industries you find compelling. What do you find most interesting about these sites? (Example: use of images on a site, cool or special functionality, organization of a site, animation, etc.)

# STRATEGY & TECHNICAL DETAILS

## technology

Are there special features that are required? (Example: blog, e-commerce, member's area, forms, video, flash site, photo gallery, landing pages, event calendar, etc.)

Will you have need for secured transactions? (Example: online payments, secure transfer of data, HIPAA)

Does your website need to integrate with other software? (Example: Salesforce, Constant Contact, Donor Snap, etc.)

## milestones



**MILESTONE 1 | Official Kickoff:** If you've gone through the first few pages, you're at the finish line of this milestone. We interview clients to know their requirements. We do so to understand their project summary, goals, targeted audience and message they want to deliver through their website. From there we make sure to identify three measurable outcomes which are linked to the organizational objectives.

**MILESTONE 2 | Strategy & Sitemap:** We outline the direction of the website and set delivery dates to deliver the project to the clients. The site architecture provides a visual reference to design the website and a blueprint for clients of what their website is going to look like. We outline key pages on the site with the overall navigation structure. This clearly defines the relationship of the key pages.

**MILESTONE 3 | Visual Design & Proofing:** Once the outline is finalized we will start designing. As the organization brand plays a vital role, we make sure to create a distinct visual identity. Then we create proofs for clients to review the design of key pages.

**MILESTONE 4 | Development & Site Testing:** After receiving approval on the design, our group of developers collaborate to build the website. The website is given life by feeding in content, video, images, galleries and podcasts. Before we launch, we make sure to review the website and check functionality. We take feedback and make any final adjustments.

**MILESTONE 5 | Launch & Maintaining:** After the final QC, the website is ready to launch with the client's final approval. Our work doesn't end here! Even after launching the website we offer comprehensive maintenance packages to solve issues and keep your website secure and running reliably.

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## content and seo strategy

Make an audit of your existing content and SEO, if applicable. What content can you use from your existing website (if any) and other marketing collaterals? What keywords or keyword phrases are you targeting?

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## sitemap

This serves as a primary guide and checklist during the development of your website. It outlines the structure and specifies the page hierarchies and content silos. It's the framework for your website's visual design, including content elements and the like.

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## design hand-off

**Brand style guide:** This ensures consistency in all of your design elements. The guide includes specifications for the color scheme, font guides (styles and sizes), iconography, logo variables, imagery styles, etc.

**Design assets:** Logos, photos, icons, etc.

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## timeline

DESIRED BEGIN DATE

FINAL WEBSITE LAUNCH

# WEBSITE TOOL

## official kick-off



### CREDENTIALS & MAINTENANCE

#### word press

Please provide Pixa with admin credentials and/or a contact who can support with access to the back-end of your current website.

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USERNAME

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PASSWORD

#### domain

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WHAT IS YOUR DOMAIN?

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USERNAME

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WHERE IS YOUR DOMAIN REGISTERED?

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PASSWORD

Do you have any subdomains? If so, please list them here.

List all emails associated with this domain (examples: info@, contact@, support@, employee names, etc.)

#### hosting

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WHAT IS YOUR WEB ADDRESS (URL)?

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USERNAME

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WHERE IS YOUR CURRENT SITE HOSTED?

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PASSWORD

#### maintenance

WordPress is a highly flexible platform that allows customization for your specific business needs including thousands of plugins, content management and practically limitless design capabilities. With great power comes great responsibility, meaning that it is essential to maintain your WordPress website to keep it functioning and secure.

If you would like Pixa to maintain your website, this maintenance includes performing core platform and theme updates as they are released, ensuring those updates are performing without errors and the website is error free, plugin updates, monitoring and resolving hacking attempts and spam attacks.

Do you have staff to support web maintenance?  Yes  No

If yes, who will be the website administrator?

If no, would you like Pixa to maintain your site?  Yes  No