01 / PURPOSE & SCOPE

Start with the business.

Use the fields to prepare for a useful scoping conversation. Short, specific answers are enough. Save a copy before filling it in; leave unknowns marked "to discuss".

Business name

The name customers know.

Current website

URL, or "new website".

What should the website help your business do?

Name the main outcome: suitable enquiries, bookings, online sales or another clear purpose.

Who is it for, and where do you serve them?

Describe the customer, their need and the locations you genuinely cover.

Which pages are essential at launch?

List the services, products or information customers need to make a decision.

What could wait until a later stage?

Separate useful extras from the work needed for the first launch.

02 / JOURNEY & CONTENT

Define what needs to work.

Describe the visitor journey and the information available. Name tools and dependencies; share account access separately through an agreed process.

What should an interested visitor do next?

For example: request a quote, call, book an appointment or complete a purchase. Who handles it?

Which features and connected tools are needed?

List booking, shop, CRM, forms, payments or other systems. Note what is already in place.

What content is ready, and who supplies the rest?

Include service copy, product details, photographs, testimonials and any approvals needed.

Which brand assets or reference sites will help?

List available assets and reference URLs. Explain what you like and why; avoid copying another site.

What must be preserved from the existing website?

Note important URLs, useful content, enquiries, store data or other dependencies to review.

03 / DELIVERY & DECISIONS

Agree the practical details.

These answers help a provider explain the scope, dependencies and total costs. This worksheet is a planning tool, not a quote or a promise of results.

What budget or range should the proposal work within?

Separate the build from hosting, software, ongoing care and marketing. "To discuss" is fine.

Is there a launch date or a fixed business deadline?

Give the date and reason. Identify any approvals or third parties that may affect it.

Who supplies feedback and gives final approval?

Name the roles and agree a practical review process.

What must pass before the website launches?

Consider mobile use, key forms or bookings, content, important links and agreed migration checks.

How will you assess the result after launch?

Define the outcomes and available evidence. Keep visits, enquiries, bookings and sales distinct.

What still needs to be discussed?

Use this space for unknowns, scope options, handover, training or ongoing support.