Client onboarding questionnaire

Questions to send a new web design client before the discovery call: the business, goals, existing accounts, content and brand, budget and who maintains the site after launch.

Copy, adapt and send. Replace anything in [brackets] with your own details.

HOW TO USE IT

Send before the discovery call, or fill it in together on the call. Short answers are fine. "Not sure" is a useful answer too.

THE BUSINESS

- [ ] Business name, what you do, who decides, and how you found us: [answers].
- [ ] Who approves designs and copy, and how quickly can they reply? [name, days].
- [ ] Your customers in one sentence: [who they are, where they are].
- [ ] Three competitor or admired sites, and what you like about each: [links].

GOALS

- [ ] Why now? What is wrong with the current site, or what is missing? [answer].
- [ ] The one thing a visitor should do on the site: [call, book, buy, inquire].
- [ ] How will you judge success in six months? [inquiries, sales, fewer emails].
- [ ] Features: [forms, booking, shop, members, popups, integrations, multilingual].
- [ ] Hard deadline, and the reason for it: [date, event or launch].

ACCOUNTS YOU ALREADY HAVE

- [ ] Domain registrar and who holds the login: [company, person].
- [ ] Hosting, if any, and who holds the login: [company, person].
- [ ] Email provider: [Google Workspace, Microsoft 365, host mail, other].
- [ ] Analytics, Search Console, ads, social and business listings: [who owns each].
- [ ] Payment, booking, CRM or newsletter tools to connect: [names].

CONTENT AND BRAND

- [ ] Look and feel: [follow our brand guide / refresh what we have / we have sketches / open to ideas]. Logo files: [have / need].
- [ ] Words for the pages: [not started yet / notes we can shape / final and approved / hire a copywriter], ready by [date].
- [ ] Photos and video: [own, stock, need a shoot]. Do you hold the rights? [yes / unsure].
- [ ] Content to move from the old site: [number of pages, posts, products].

BUDGET AND AFTER LAUNCH

- [ ] Budget range for the build: [range]. For ongoing care each month: [range].
- [ ] Who will update the site after launch, and how often? [name, frequency].
- [ ] Anything that went badly with a past website project: [answer].