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When building a successful Web presence, it's important to have well-defined objectives and requirements. I start out with a series of questions to help ascertain the project's overall scope and requirements. In-turn, I use this survey as a guideline therefore, please feel free complete this survey in a collaborative effort with your leadership team.

The first phase of any Web-based initiative is all about gathering information and the primary core process are divided into three tracks:

1. Discovery
2. Clarification
3. Planning

Discovery is the thinking process. Its purpose is to allow team members to put themselves in the minds of the site's users and to understand as much as possible about the target audience. The Discovery phase leads to understanding three critical needs: your online goals, your audience and their needs and capabilities, the industry and the competition as it relates to the Web.

The Clarification and Planning phase consists of documenting the information gathered and preparing a Communication Brief and Project Plan designed to communicate several topics clearly and concisely to all respective parties.

The overall objective of this defining phase is to communicate clearly the requirements and to keep both the client and service provider aligned with the same goals throughout the project's lifecycle. Once the objectives have been clearly defined and documented, the preparatory materials are distributed at the kick-off meeting, attended by all team and key client members.

The web is all about the audience. What needs, capabilities, wants, demographics and characteristics of your audience will you need to know in order to be successful?

General Information

1. What is the name of your company and your current (or intended) URL?
2. Please provide a history and background on the company?
3. Who are our most formidable competitors (provide Web addresses if applicable)?
4. What services or products best support our business goals (i.e. things users want are positioned near things users might want when they see them)?
5. Who are the primary contacts from your organization, and who has final approval on the project? Please list names, titles, email addresses, and phone numbers.
6. What is your intended launch date for the new site? Are there any outside considerations that might affect the schedule (for example, PR launch, tradeshow, annual report, etc.)?
7. Do you have a specific budget range already established for this project? Can this project be divided into phases to accommodate budget and timing constraints?

Current Site

1. Do you feel your current site promotes a favorable user experience? Why or why not?
2. What specific areas of your current site do you feel are successful? Why are they successful?
3. What shortcomings exist with the current site and what three things would you change on the site today if you could?
4. Have you conducted usability tests or gathered visitor feedback for your current site? If so, how long ago? Please include any reports or findings.
5. How important is it to maintain your current look and feel, logo, and branding?

Reasons for Design/Redesign

1. What are the main reasons you are redesigning your site (new business model, outdated site, expanded services, different audience)?
2. What are your primary online business objectives with the site redesign? What are your secondary objectives? (Examples include increased sales, marketing/branding awareness, and fewer customer service calls.) Please discuss both long- and short-term goals.
3. What is the main business problem you hope to solve with the site redesign? How will you measure the success of the solution?
4. What existing strategy (both on- and offline) is in place to meet the new business objectives?

Audience/Desired Action

1. Describe a typical site visitor. How often are they online, and what do they generally use the Web for? Give basic demographics: age, occupation, income level, purchasing habits. (Use as much detail as possible in profiling your target user. Profile more than one type if appropriate.)
2. What is the primary "action" the site visitor should take when coming to your site (make a purchase, become a member, search for information, book an appointment, etc.)?
3. What are the key reasons why the target audience chooses your company's products and/or services (cost, service, value)?
4. How many people (as far as you can tell) access your site on a daily, weekly, or monthly basis? How do you measure usage? Do you forecast usage to increase after the site launch and by how much?

Perception

1. Use a few adjectives to describe how your site visitor should perceive the new site. (Examples include prestigious, friendly, corporate, fun, forward thinking, innovative, and cutting edge.) Is this different than the current image perception?
2. How is your company currently perceived offline? Do you want to carry the same kind of message through your Web site?
3. How does your company differentiate itself from competitors? Do you think your current audience differentiates you from your competition? Please list competitor URLs.
4. List the URLs of any sites you find compelling. What specifically do you like about these sites?

Content

1. Will this site use existing content from the current site? If so, what is the source, who is responsible for approval, and has the content been audited? If not, will you be creating content in-house or using an outside provider?
2. What is the basic structure of the content, and how is it organized? Is it a complete overhaul of the current site or an expansion?
3. Describe visual elements or content that should be utilized from your current site or marketing materials (logo, color scheme, navigation, naming conventions, etc.)
4. How will the content of this site (along with functionality and navigation) expand or differ from your current site? Do you have an existing sitemap for the outgoing site structure? Do you already have a sitemap or outline for the proposed redesign?

Technology

1. What is your target platform and browser? Whom can we talk to in your organization to help respond to technical issues?
2. Are there specific technologies (Flash, JavaScript, DHTML, etc.) that you would like to use in the site? If so, how will they enhance the user experience? Please describe in detail.
3. Will you have database functionality (dynamic content generation, personalization/login)? Do you already have a database in place? Please describe it in detail, including specific information regarding existing programs and software.
4. Will you have a need for secured transactions (e-commerce)? Do you already offer transactions online? Please describe in detail.
5. Will you require other specific programming needs (such as personalization or search capability)? Please describe in detail.

Marketing/Updating

1. How do most people find out about your current Web site? What kind of triggers prompt a visit (referral links, incentives, search engine terms)? What methods of distributing the URL already exist within the company on and offline?
2. Briefly, what are your short-term marketing plans (specifically, for the site redesign and the 6 to 12 months following launch)?
3. Do you have an existing or planned marketing strategy in mind to promote this site redesign? If so, please describe.
4. Do you intend to keep the site updated? If so, how often? Who is responsible for updating and providing content?

Brand & Identity

1. How would you describe your company's brand identity? What is the promise you make to you customers? How will this Web site help to fulfill this promise?
2. What specifically do you want to communicate with your logo and brand? What kind of emotional response should the customer feel when they come to the Web site?
3. Are you open to modifying or altering your current logo? How has the logo been modified over time? If a new logo is required, please attach any examples (or URLs) of logos you feel effectively communicate that company's brand personality.
4. Who is responsible for maintaining consistency of the brand company-wide? Is this person also responsible for the Web site? Who has final approval over the logo and brand?

Rank the Following in Order of Importance	Rankings
A web strategy that fits with our corporate strategy	
Repurposing existing content	
Creating a community of dedicated visitors	
Quality execution (graphics, writing, navigation, etc.)	
Time to market	
Ease of maintenance	
Doing better than our competition on the Web	
People bookmark the site because they get so much out of it regularly	
Staying within the budget	
Sending the message that we know the Web and use it appropriately	

Audience

This part of the profile is very important. Find at least **three** quality sites on the Web that relate to your project in one, or more of the following categories:

- Branding in a similar situation to yours (new company, new brand, established brand, etc.)
- Appeal to same target group of customers
- Whether or not you would build the site if you were in a different industry
- Colors, look-and-feel, user interface, layout
- Size of site
- Size of project
- Publishing model (frequency, novelty of content, etc.)
- Attracting new people to the site (newsworthiness, giveaways, impact, etc.)
- Your competitors' sites
- Quality of content
- Quality of graphics
- Functionality (things sites do for people)
- Community, special features, responsiveness, other categories important to your project
- Overall favorite sites (for whatever reasons)

URL (Uniform Resource Locator) is the address of a Web site on the Internet (i.e. <http://www.webnetdesignstudios.com>).

1. URL:
2. URL:
3. URL: