

Checklist: Information You Need To Provide Your Web Designer

When working with a web designer, clear communication is essential. Providing the right information from the start will help ensure your project runs smoothly and meets your expectations. Here's a handy checklist of what to share:

1. Project Overview

- Brief Description:** A summary of your business and what the website is for.
- Goals:** Specific objectives you want to achieve (e.g., increase sales, improve user engagement).

2. Target Audience

- Demographics:** Age, gender, location, and interests of your ideal users.
- User Needs:** What problems does your website solve for them? What is it about your website or product that is unique? Your USP (unique selling point/proposition).

3. Content Outline

- Site Structure:** Key pages that you would like to see on your site (e.g., Homepage, About, Services, Shop, Contact).
- Content Details:** Initial content or placeholders for each page (text, images, videos). Getting these compiled is a must.
**Your Web Designer may even send you a link so that you can upload these straight to a cloud folder for them to access rather than sending by email. (For example at Mahi Design we create G-Drive folders for our clients to upload everything to, and that only their email accounts have access to).*
- Product Details:** Images, names, prices, descriptions etc for your products. This usually takes the most time to compile so having this ready will help immensely to get your site launched!
**Your Web Designer may even create a spreadsheet for you to fill out all of these details for them if you do not already have one with all of the information. Mahi Design uses Google Sheets to share the spreadsheet with you where you can both access and collaborate on it, if you do not have the info together already, otherwise we will copy it into the spreadsheet for you so we can identify if there is any missing information before adding to the website.*

4. Design Preferences

- Visual Inspiration:** Examples of websites you like, with notes on what you like about them.
- Brand Guidelines:** Logos, colour palettes, fonts, and any other brand elements.
**Your Web Designer may even send you a link so that you can upload these straight to a cloud folder for them to access rather than sending by email. (For example at Mahi Design we create G-Drive folders for our clients to upload everything to, and that only their email accounts have access to).*

5. Desired Functionality

- Key Features:** E-commerce capabilities, forms, booking systems, social media integration, etc.
- Payment Options:** Direct bank transfer, cash on pickup, credit card. *(Stripe is the number one option for taking card payments so you will have to set up your account through them first, legally the business owner needs to do this as it requires all your business registration details.)*
- Email Marketing:** Do you have any email marketing platforms already? This is great to think about now too so that your web designer can connect forms such as the Newsletter Subscription form to your chosen platform. *MailerLite has a great free plan!*

6. Timeline

- Project Milestones:** Key deadlines, including launch date and any intermediate checkpoints.
- Availability for Reviews:** Times you'll be available for feedback and revisions.

7. Budget Information

- Budget Range:** If you haven't already spoken about this then an idea of what you're willing to spend for the project and ongoing maintenance. Does this include the domain registration and hosting costs? *(Mahi Design gives clients instructions on how to purchase their domain registration and hosting through DreamHost so that you own this yourself and are in control of paying the annual costs. It only takes about 5 minutes + DreamHost is reliable and one of the most affordable at approx. \$125NZD per year for both domain & hosting.)*

8. Maintenance Plans

- Ongoing Support:** How much maintenance you want the designer to handle post-launch? Do they have an ongoing site maintenance service and what does it cover? *(Mahi Design offers Ongoing Site Maintenance for any WordPress website for \$45 per month. This covers safe plugin updates for minimal downtime, security and performance checks and updates, SEO checks and updates, small design/content changes, ongoing support, client processes document + instructional videos, full website backups, growth tips, and a client report sent to you monthly.)*

9. Communication Preferences

- Preferred Tools:** Email, Task Lists, project management software, video calls, etc.
- Frequency of Updates:** How often you want to check in on the project's progress.

10. Competitor Analysis

- Competitor Websites:** Links to competitor sites you admire or want to differentiate from.
- Market Positioning:** How you want to position yourself compared to competitors.

11. Legal and Compliance Considerations

- Policies:** Privacy policy, terms & conditions, shipping information, returns or refunds, or other legal requirements. *If you do not have these sorted already it is best to get a business lawyer to help you with these but there are online services that can help too. Don't be afraid to ask your Web Designer for help or direction with these. Your Web Designer will have to add details to the Privacy Policy about information that is stored on your customers, as well as cookie data etc. If they do not know how or what to do for this - that is a red flag!*

Providing this information upfront will help your web designer understand your vision and requirements better, ultimately leading to a more successful project. The clearer and more organised your communication, the smoother the process will be. Happy designing!

Example Of Information For Your Web Designer

1. Project Overview

Brief Description:

'My business' sells high quality outdoor gear. We are the official distributors in New Zealand so we want to sell directly to customers through our website, as well as selling to retailers at wholesale prices.

Goals:

We want to increase sales by showing how great our products are in a professional but visually appealing way and by improving user engagement. We also want to become easily to find on search engines.

2. Target Audience

Demographics:

21-65 years old, both female and male, all over New Zealand. People that love the outdoors and hiking. All outdoor activities such as hunting, farming, bush walking, logging, climbing, etc.

User Needs:

We offer quality customer service online and in-person, helping people find the best footwear for their uses/needs and also proper boot fitting services, which stops them from wasting a lot of money on the wrong footwear, ending up with injuries or having to return the footwear.

3. Content Outline

Site Structure:

Homepage, About, Shop with dropdown and filters for different footwear uses, categories, women's or men's, information on the technology/materials of the footwear, Contact page/form, links to our Socials, Newsletter signup form.

Content Details:

Some content is ready to send through. Professional images and videos ready.

4. Design Preferences

Visual Inspiration:

www.example.com - I love the home page and the navigation - minimalistic but great use of the professional images. Plus the little elements that move is really cool!

www.example.co.nz - Love their shop and the filters and singular product pages, they show the parts of the footwear really well using hotspots.

www.cool.com - love this site on mobile, I like how the menu is down by your thumb and how it moves with you as you scroll and doesn't take up too much room on a mobile screen.

Brand Guidelines:

Have these ready to send through or upload somewhere.

5. Desired Functionality

Key Features:

- E-Commerce with filters for products
- Shipping rates
- Ability to enter Shipping Tracking information
- Contact form and Newsletter form
- Social media integration (Facebook & Instagram)
- user account where they can sign in and manage their orders
- same kind of user portal but for retailers/wholesalers
- wholesale prices for when they are signed in
- product review automation
- link to Google services (business profile, merchant centre, ads manager etc)

Payment Options:

- Stripe for credit card payments
- AfterPay integration

Email Marketing:

- MailerLite integration for Newsletter form

6. Timeline**Project Milestones:**

We would like to be able to launch by November 1st.

Availability for Reviews:

Weekends I will be able to get back to you about the website - during the week is busy with work.

7. Budget Information**Budget Range:**

Budget of 4k like we spoke about and your \$45 per month ongoing maintenance plan.

8. Maintenance Plans**Ongoing Support:**

Your full ongoing monthly maintenance plan.

9. Communication Preferences**Preferred Tools:**

Email would be best as I may not be able to get back to you until the evenings or weekends, task lists, calls if you need something urgently.

Frequency of Updates:

Weekly would be great thanks!

10. Competitor Analysis**Competitor Websites:**

www.competitor.com - our biggest competition, ideally we'd like to be more visually appealing and focus on our USP such as our digital and in-person fitting services and quality customer care.

www.competitor2.co.nz - we love their site, we don't want to copy it but would love to have a lot of the same elements/features but with our branding.

www.competition.com - a local competitor - they offer a lot of the same services but their product is a lot cheaper (in price and quality) and we have had a lot of their ex-customers come to us complaining about their products so we would like to somehow focus on our quality products but reach their customer base.

Market Positioning:

We would really like to put a focus on our USP's (unique selling points) and also subtly hint at how we are getting helping customers who have been let down by our competitors.

11. Legal and Compliance Considerations**Policies:**

We are getting our lawyer to go over these but will have them ready to send to you within the next couple of weeks.

Fillable Form - Information For Your Web Designer

1. Project Overview

Brief Description:

Goals:

2. Target Audience

Demographics:

User Needs:

3. Content Outline

Site Structure:

Content Details:

4. Design Preferences

Visual Inspiration:

Brand Guidelines:

5. Desired Functionality

Key Features:

Payment Options:

Email Marketing:

6. Timeline

Project Milestones:

Availability for Reviews:

7. Budget Information

Budget Range:

8. Maintenance Plans

Ongoing Support:

9. Communication Preferences

Preferred Tools:

Frequency of Updates:

10. Competitor Analysis

Competitor Websites:

Market Positioning:

11. Legal and Compliance Considerations

Policies:
