

Website Design Project Brief & Checklist

A practical planning worksheet for small-business owners | The Business Theory

Use this worksheet before requesting a website design proposal. Type your answers directly into this Word document or print it and write them by hand. Not every answer needs to be final.

Quick-start checklist

- ☐ I know my main goal for the website.
- ☐ I can describe my ideal customer.
- ☐ I have a preliminary page list.
- ☐ I know what content and photos I already have.
- ☐ I have identified must-have features.
- ☐ I have a budget range and target launch date.
- ☐ I know who will approve the design and supply materials.

1. Business basics

Business name and website address (if you have one):

Primary contact, email, and phone:

What does your business do? Describe your main services in 2–3 sentences:

Cities or service areas you want to reach:

2. Goals and ideal customers

What is the #1 action you want visitors to take? (Call, request a quote, book a consultation, submit a form, etc.)

Who is your ideal customer? What problem are they trying to solve?

What makes your business different from alternatives?

How will you know the website is helping? (Examples: qualified inquiries, consultation requests, calls.)

3. Pages and website structure

Check the pages you may need. Your designer can help refine the final structure.

- ☐ Home
- ☐ About
- ☐ Services overview
- ☐ Individual service pages
- ☐ Service areas / locations
- ☐ Reviews or testimonials
- ☐ Portfolio or gallery
- ☐ FAQ
- ☐ Blog / resources
- ☐ Contact
- ☐ Other: _____

List your three most important services or pages:

4. Branding and design direction

- ☐ Logo available
- ☐ Brand colors available
- ☐ Fonts / style guide available
- ☐ Business photography available
- ☐ Need help selecting imagery
- ☐ Existing website to reference

Three words that describe the look and feel you want (e.g., clean, premium, welcoming):

Websites you like and what you like about them (links welcome):

Design elements or styles you want to avoid:

5. Content and supporting materials

- ☐ Service descriptions
- ☐ About/company story
- ☐ Team bios
- ☐ Customer testimonials (with permission)
- ☐ Portfolio photos (with rights to use)
- ☐ Contact details and business hours
- ☐ Service-area list
- ☐ Existing domain login / ownership details
- ☐ Privacy policy or legal text, if applicable

What content is ready, and what still needs to be created?

Who will provide and approve the final text and photos?

6. Features and customer journey

- ☐ Click-to-call buttons
- ☐ Contact / quote-request form
- ☐ Consultation booking link
- ☐ Map / directions
- ☐ Photo gallery
- ☐ Newsletter signup
- ☐ Social media links
- ☐ Other: _____

Describe the ideal customer journey from arriving on the site to contacting you:

Any forms, fields, or integrations that are essential? Be specific:

7. Search visibility and marketing

What services and locations should customers find you for in Google Search?

- ☐ Google Business Profile exists
- ☐ Google Analytics access available
- ☐ Google Search Console access available
- ☐ Planning SEO / local SEO
- ☐ Planning Google Ads
- ☐ Planning Meta Ads
- ☐ Planning blog content

What marketing activity is already running, if any?

8. Budget, timing, and responsibilities

Estimated website budget or comfortable range:

Preferred launch date and any hard deadline (plus reason):

Who is the final decision-maker? Who will respond to questions and approve revisions?

Known constraints, dependencies, or unanswered questions:

9. Questions to ask your website designer

- ☐ What pages and deliverables are included in the proposal?
- ☐ Who writes and approves website copy?
- ☐ How are design previews and revisions handled?
- ☐ What happens if I need additional pages?
- ☐ Who owns and manages the domain?
- ☐ What hosting, maintenance, and ongoing costs apply?

- ☐ How will forms and mobile layouts be tested?
- ☐ What SEO setup is included at launch?
- ☐ What is the realistic timeline after materials are received?

My top three questions for the designer:

10. Final handoff

- ☐ I have attached or linked available branding assets.
- ☐ I have identified missing content.
- ☐ I have chosen one person to coordinate feedback.
- ☐ I can share my completed brief with a designer.

Additional notes:

Ready to discuss your project?

The Business Theory builds professional websites for service businesses. Share this brief when requesting a proposal so the conversation can focus on the pages, content, and features your business actually needs.

Website: <https://www.thebusinesstheory.com/web-design>

Contact: <https://www.thebusinesstheory.com/contact>