

# 1. Business & Primary Contact

## Business details

1. **Business / Organization Name**
2. **Doing Business As (DBA)** (if different)
3. **Industry / Type of Business**
4. **Business Address**
5. **Business Phone Number**
6. **General Info Email** (e.g. info@yourdomain.com)

## Primary contact for this project

7. **Full Name**
  8. **Role / Title**
  9. **Best Email for Project Communication**
  10. **Best Phone / Mobile**
  11. **Preferred Contact Method** (Email / Phone / Text / Other)
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# 2. Current Website Overview

12. **Current Website URL(s)** (all domains/subdomains you use)
13. **Do you want to:** (Single choice)
  - Keep the current website as-is
  - Redesign / rebuild

- Migrate to a new host
- Consolidate multiple sites

14. **Briefly describe what your website does today**

15. **Top 3 goals for your website over the next 6–12 months**

- Goal 1
  - Goal 2
  - Goal 3
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### 3. Domain Name & DNS

16. **Primary Domain Name(s)**

17. **Where is your domain registered?** (Registrar – e.g. GoDaddy, Namecheap, Google Domains, IONOS, etc.)

18. **Who owns the domain?** (Person or company name on the registrar account)

19. **Do you have access to the domain registrar login?** (Yes / No / Not sure)

20. **Who should we contact for domain/DNS changes?** (Name, email, phone)

21. **Do you have any custom DNS records we must preserve?**

- Examples: MX (email), SPF, DKIM, DMARC, subdomains, verification records
- **If yes, list or upload details.**

**Note:** For security, please do *not* send passwords in this form. We'll use a secure method (password manager share/one-time link) for credentials.

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### 4. Hosting & Server Details

**22. Who is your current hosting provider?**

(e.g. IONOS, Bluehost, SiteGround, WP Engine, DigitalOcean, Azure, AWS, custom server, etc.)

**23. Hosting Type** (check all that apply)

- Shared hosting
- VPS / Dedicated server
- Cloud hosting (AWS/Azure/GCP)
- Managed WordPress hosting
- Other (describe)

**24. Do you know the following details?**

- Control panel type: cPanel / Plesk / Custom / Unsure
- PHP version (if applicable):
- Database: MySQL / MariaDB / SQL Server / PostgreSQL / Other / Unsure

**25. Do you have SSH, SFTP, or control panel access?**

- Yes, and I can provide access securely
- No
- Not sure

**26. Are there any other apps or sites on this same server we must not break?**

- If yes, list them.

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## **5. Platform / CMS / Tech Stack**

**27. What platform is your site built on? (If known)**

- WordPress
- Custom HTML/PHP
- Shopify
- Wix / Squarespace / Weebly
- Custom application (Laravel, Node, .NET, etc.)
- Unsure

**28. If WordPress or other CMS:**

- Approximate theme name (if you know):
- Any important plugins/apps we must keep?

**29. Does your website connect to any third-party systems?**

- Examples: CRM, booking system, payment gateway, email marketing tools, donor platform, EHR, etc.
- If yes, list them and what they do.

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## **6. Email & Communication**

**30. Do you use email addresses on this domain? (e.g. name@yourdomain.com)**

- Yes / No

**31. Who hosts your email?**

- Microsoft 365
- Google Workspace
- Hosting provider (cPanel/IONOS/etc.)
- Other / Not sure

32. **Do you use any of these?** (check all that apply)

- Contact form(s) on the website
  - Newsletter signup
  - Chat widget
  - SMS notifications
  - Support/helpdesk system
  - Other (describe)
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## 7. SEO, Analytics & Tracking

33. **Do you currently use any of the following?** (check all that apply)

- Google Analytics (UA or GA4)
- Google Search Console
- Google Tag Manager
- Facebook Pixel
- Other tracking pixels (TikTok, LinkedIn, etc.)

34. **Do you have access to those accounts?** (Yes / No / Not sure)

35. **Top 5 keywords or phrases you want to show up for in Google (if known):**

- Keyword 1
- Keyword 2
- Keyword 3
- Keyword 4

- Keyword 5
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## 8. Content & Branding

36. **Do you have an existing logo and brand assets?**

- Yes, and I can provide files
- No, we need help with branding

37. **Brand assets you can provide:** (check all that apply)

- Logo (vector/PNG)
- Brand colors
- Brand fonts
- Brand guidelines document
- Image library / product photos

38. **Who owns the content on the website now?** (You / previous agency / shared / unsure)

39. **Anything we should NOT remove or change?**

- (e.g., specific pages, PDFs, legal disclaimers, forms)
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## 9. Security, Compliance & Backups

40. **Does your site currently have an SSL certificate (HTTPS)?**

- Yes / No / Not sure

41. **Any specific compliance requirements?** (if applicable)

- HIPAA
- PCI-DSS
- ADA accessibility
- Other (describe)

**42. Do you know if regular backups are being performed today?**

- Yes, daily/weekly
- No
- Not sure

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## **10. Access & Prior Vendors**

**43. Do you currently work with another web designer/agency/IT provider?**

- Yes / No

**44. If yes, do we have permission to contact them about the site/hosting transfer?**

- Yes / No

**45. Existing providers to be aware of**

- Name / Company
- Email
- Phone
- What they handle (hosting, email, IT, marketing, etc.)

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## **11. Project Scope & Approvals**

**46. What services are you hiring us for? (check all that apply)**

- Website takeover/maintenance
- Hosting migration
- Full redesign
- New pages / features
- Ongoing updates & support
- SEO / marketing

**47. Target date for any major changes or launch (if applicable):**

**48. Budget range for this project / monthly support (optional):**

**49. Who is the final decision maker for approvals on design/content?**