New Website Process - Internal

29 June 2026

Website Workshop — Discovery Questionnaire & Build Process (v3)

Purpose: This document serves two functions. Part 1 is the questionnaire you fill in during or after a discovery call — the answers become the brief every agent works from. Part 2 is the end-to-end website build process, broken into six phases with defined outputs and approval gates.

v3 deliverables:

- **website-workshop-deck.v3.pptx** — Redesigned 24-slide workshop deck (dark navy theme, colour-coded sections, card layouts, process flow visuals, brand personality spectrum, competitor review templates, features checklist)
- **website-build-process.v3.docx** — Editable Word document of the full process with appendices (for Thomas to tweak)
- **new-website-process-internal.v3.pdf** — PDF reference copy

---

Part 1: Discovery Questionnaire

Running Order

The workshop follows this structure:

- Introductions
- Our Process (walk through how we work)
- Goals, Objectives & Audience Insight
- Brand & Visual Direction
- Website Review & Structure
- Competitor / Peer Review
- Features, Functionality & Wishlist
- Content & Copy
- Technical & Practical
- Next Steps

---

1. The Business

- Client name:
- Primary contact name and role:
- What does the business do? (One or two sentences, plain language):
- How long have they been operating?

- What makes them different from competitors? (In the client's own words, not marketing speak):
- Who are their main competitors? (Names and URLs if possible):
- What's working well for the business right now?
- What's not working?

2. Goals & Objectives

- What are the website's primary goals? Pick the main job:

- Generate leads (contact forms, quote requests, phone calls)

- Sell products online (ecommerce)

- Book appointments or reservations

- Inform and build trust (brochure site)

- Recruit staff

- Other:

- What is the single most important action a visitor should take?
- What are your macro business objectives over the next few years?
- Is there anything about your competitors' websites or digital presence that you know definitely works?
- How will you measure whether the website is successful?

3. Your Current Website

- Do they have a current website? (URL):
- What's wrong with it? (Slow, outdated design, no leads, bad on mobile, can't update it themselves):
- Any features they specifically need? (Online booking, payment, membership area, blog, portfolio, menu, property listings):
- Do they need to update the site themselves? If yes, how often and what kind of content?
- Any websites they admire? (URLs and what specifically they like about each):
- Any websites they dislike? (URLs and what specifically puts them off):

4. Audience Insight

Who they are:

- Who is your ideal customer? (Age range, location, income level, profession):
- What type of people are they? (Roles, personality type, male/female split):
- What are they looking for when they visit your site?
- What sells your company to them? (Expertise, trust, portfolio, price, delivery speed):
- What questions do customers ask before buying or getting in touch?
- What objections or hesitations do potential customers have?
- Are there different audience segments the site needs to speak to?

How they find you:

- In a general sense, how have people heard about you?
- How do customers currently find you? (Google, word of mouth, social media, ads, referrals):
- How educated are people when they make first contact? Do you want the website to do more (or less) of the work in educating them?
- How do they like to make contact? (Phone, email, form, WhatsApp, walk-in):
- What's the best contact method for your team?

5. The Brand

- Do they have existing brand guidelines? (Logo files, colour palette, fonts, tone of voice doc):
- If no formal guidelines, describe the brand feel they want:
- Brand colours (hex codes if available, or describe):
- Are they open to exploring additional or alternative colours?
- Are there any specific colours or visual elements they want to avoid?
- Logo files provided? (Format — SVG, PNG, AI):
- Do they have professional photography? If not, are they open to a shoot?
- Imagery style preference? (Photography, illustrations, abstract, icons):
- Tone of voice — how do they talk to customers? (Formal? Casual? Technical? Warm?):

Brand Personality Spectrum — mark a position on each scale:

- Personable & Friendly ⟵————————⟶ Corporate & Professional
- Adaptable & Flexible ⟵————————⟶ Careful & Strategic
- Contemporary & High-Tech ⟵————————⟶ Classic & Traditional
- Cutting Edge ⟵————————⟶ Established & Proven
- Accessible & Open ⟵————————⟶ Exclusive & Premium
- Playful & Bold ⟵————————⟶ Understated & Refined

6. Content and Pages

- What pages do they think they need? (List them):
- Do they have existing copy they want to keep, rewrite, or start fresh?
- Do they have testimonials or case studies they can provide?
- Do they have product/service descriptions written already?
- Are there any certifications, awards, or credentials to feature?
- Do they need a blog? If yes, who writes the posts?
- Social proof — testimonials, reviews, client logos?
- Hierarchy of services — which are most important to promote?
- Any non-sales goals the site needs to serve? (Careers, hiring, investor relations)

7. Competitor / Peer Review

During the workshop, we review competitor and peer websites together. For each site, we capture:

- Competitor name

- URL
- Design approach
- Use of colour
- Photography / imagery style
- Navigation & UX
- What works well
- What we'd avoid

8. Features, Functionality & Wishlist

Core:

- Strong call-to-action buttons
- Clean, simple design
- Conversion optimised
- Showcase products and services
- Fully responsive (mobile, tablet, desktop)
- SSL certificate / security
- Search engine friendly (SEO)
- Visually engaging
- Fast loading (under 3 seconds)
- Easy-to-read copy
- Trustmarks (accreditations, associations, testimonials)
- Measurable (analytics, micro and macro conversions)

Functionality:

- Cross-browser compatible
- Carousel / image gallery
- Social media integration
- Blog / news section
- Live chat / support widget
- Contact forms
- Site search
- External platform integrations
- Resource library / downloadable brochures
- Email newsletter subscription
- Share / print icons
- Online booking / payments
- Community forum

9. Technical and Practical

- Preferred platform if any (WordPress, custom build, Shopify, other):

- Do they have hosting already? Where?
- Do they have a domain? Who controls it?
- Any integrations needed? (CRM, email marketing, booking system, accounting software, payment gateway):
- Do they need email addresses set up on their domain?
- SEO — are they ranking for anything currently? Do they know what terms they want to rank for?
- Google Analytics or Search Console set up already?
- Cookie consent / GDPR requirements?

10. Budget, Timeline & Decision Making

- Budget range (even a rough bracket — under €2k, €2-5k, €5-10k, €10k+):
- Is there a hard deadline? (Event, season, launch date):
- What's driving the timing? Why now?
- Who signs off on the website? (Just the contact, or does a partner/board need to approve?):
- Have they been through a website project before? What went well or badly?
- How do they prefer to communicate? (Email, phone, WhatsApp, video calls):
- How involved do they want to be in the process? (Very hands-on, or "just make it good"):

Part 2: Website Build Process

Six phases. Each phase has a defined output and a sign-off point before the next begins.

Phase 1: Discovery

Who's involved: PM, Account Manager, CEO (for new clients)

What happens:

- Discovery call with the client (use the questionnaire above, or run through the workshop deck)
- PM writes up the call notes and circulates to all relevant agents
- Account Manager creates or updates the client knowledge file
- If this is a new client, CEO reviews the brief for strategic fit and sets the engagement direction

Output: Completed questionnaire, client knowledge file, call notes

Sign-off: Thomas confirms the project is a go

Phase 2: Workshop and Strategy

Who's involved: Marketing Strategist, SEO Specialist, Copywriter, Creative Director, PM

What happens:

- Marketing Strategist analyses the market, competitors, and audience using the discovery notes

- SEO Specialist runs keyword research and identifies search opportunities for the site structure
- Creative Director reviews the brand materials and any reference sites, then sets the visual direction
- Copywriter reviews the client's existing language and drafts a tone-of-voice guide if none exists
- PM compiles all findings into a single workshop document

Workshop document covers:

- Website goals (ranked by priority)
- Target audience profiles
- Sitemap and page hierarchy (informed by SEO research)
- Content requirements per page
- Visual direction (mood, references, constraints)
- Technical requirements and integrations
- Success metrics

Output: Website Workshop Document (PDF) — sitemap, wireframes, design brief

Sign-off: Thomas reviews with client. Client approves the direction before any design work starts.

Phase 3: Wireframes and Homepage Design

Who's involved: Creative Director, Graphic Designer, Copywriter, Frontend Developer

What happens:

- Creative Director produces wireframes for the homepage and two or three key interior pages
- Copywriter writes the homepage copy in full — headlines, body, calls to action
- Graphic Designer builds a high-fidelity homepage design using the wireframe, copy, and brand direction
- Frontend Developer flags any technical constraints early (animations, interactions, responsive behaviour)

Output: Wireframes (all key pages) + full homepage design mockup + homepage copy

Sign-off: Thomas presents to client. Client picks the direction. Feedback captured and actioned before Phase 4.

Phase 4: Full Design and Content

Who's involved: Graphic Designer, Copywriter, Brand Guardian, Creative Director

What happens:

- Graphic Designer rolls out the approved homepage direction across all remaining pages
- Copywriter writes copy for every page
- Brand Guardian reviews the full design for consistency — colours, typography, tone, image treatment

- Creative Director does a final review of the complete design package
- Content harvesting document issued — client supplies any remaining assets, photography, or copy inputs

Output: Full-site design mockups (all pages) + complete copy deck

Sign-off: Thomas presents to client. Client approves designs before development begins.

Phase 5: Development and Testing

Who's involved: Lead Developer, Frontend Developer, Backend Developer (if needed), WordPress Developer (if WordPress), QA Engineer

What happens:

- Lead Developer sets the technical architecture and assigns work
- Frontend Developer builds the site from the approved designs — pixel-accurate, responsive, fast
- Backend Developer handles any custom functionality, integrations, or database work
- WordPress Developer builds on WordPress/WooCommerce if that's the platform
- QA Engineer tests across devices, browsers, and screen sizes

Development stages:

- Homepage and global elements (header, footer, navigation)
- Interior pages in priority order
- Functional features (forms, booking, ecommerce, search)
- Content population and image optimisation
- QA testing round

Output: Staging site (full build, all content loaded, all features working)

Sign-off: PM runs QA review. Thomas reviews staging site. Client reviews and provides feedback. Revisions made before launch.

Phase 6: Launch and Handover

Who's involved: Lead Developer, SEO Specialist, Analytics Specialist, Account Manager, PM

Pre-launch checklist:

- All forms submit and notify correctly
- SSL certificate active, no mixed content warnings
- Mobile and tablet layouts tested
- Page speed under 3 seconds on mobile
- All images optimised and loading
- 404 page in place
- Favicon and social sharing images set
- Analytics tracking firing
- Old URL redirects in place (if applicable)

- Cookie consent / privacy policy live (if required)
- Client has CMS login credentials
- SEO: sitemap submitted, meta tags configured
- API keys and integrations tested in production
- Bug fixes resolved
- Scope creep items logged (not silently added)

Output: Live website, handover document, analytics dashboard access

Sign-off: Thomas confirms launch. Account Manager walks the client through the finished site.

Post-Launch (Ongoing)

After launch, the Account Manager owns the client relationship. Monthly check-ins cover:

- Analytics review (traffic, conversions, top pages)
- Any content updates or additions needed
- Performance monitoring (speed, uptime)
- SEO progress against target keywords
- Backlog of improvements or new features
- Quarterly business review with client