Planning Your Website Redesign

62 Questions to Ask Before You Get Started
When it comes to redesigning your website, you’ll need to do some specific preparation to assess the true scope of work and required resources. The more up-front planning you do to clearly define a project, the lower your risk for running into increased time and costs. Taking the time to properly pre-plan will also reduce your exposure to conflict and confusion through the project. By following this checklist, you’ll be asking key questions that will allow your digital marketing partner to accurately assess the overall effort required to build your site.

Proper planning and expectation setting are the keys to a successful website redesign effort. Thinking through your requirements fully will ensure more accurate proposals from vendors and a clearer understanding of the overall goals and expected results for the project. Whether you’re engaging in an extensive redesign or a small effort, ensuring that you have a common understanding of your scope of work with your partner agency will help clear the path to reaching your goals.
General/Project Overview

1. Identify all current URLs involved and how they will be impacted

2. Determine your primary business and technical goals for the project

3. Select the options that best describe the high-level project needs:
   - New website (website does not currently exist)
   - Website redesign
   - Responsive website
   - Mobile application
   - Social media strategy
   - Content strategy & development
   - Brand Review/Rebranding
   - User research/focus groups
   - CMS implementation (vs. static HTML)
   - Opportunity to integrate systems
   - Custom software application
4. Do you have current brand guidelines (including logos, fonts, colors) that vendors will be expected to incorporate? If not, is developing brand guidelines part of this project?

5. Have you conducted an assessment of your brand to ensure that it is communicating the essence of your organization and speaks effectively to your customer?

6. Have you clearly identified and documented your messaging statement or strategy? If not, would you like the vendor to create a marketing message or strategy?

7. If you are currently employing an SEO strategy, have you documented your requirements and expectations? If not, would you like the vendor to create an SEO strategy?

**Research & User Experience Testing**

8. Have you identified and documented your internal (e.g. employees, shareholders) and external audiences (e.g. customers, prospects, community members)?

9. Have you conducted a comprehensive information gathering session to understand their needs and expectations for this project and documented your findings?

10. Have you rated your internal and external audiences by importance in order to prioritize their needs for this project?
Content Audit, Migration & Strategy

11. Do you have an existing content strategy (copy, photography, video) that governs content across the site? If not, would you like the vendor to create a content strategy?

12. Has a content inventory or site audit been conducted with accompanying documentation? If not, would you like the vendor to conduct a content inventory/site audit?
   - Survey of existing site
   - Documentation of current files, associated assets, integration points

13. If content migration is part of this project, do you want the vendor to provide a migration strategy? Have you identified participants from your team for this migration?

14. Do you currently employ a content approval process and is it clearly documented? If not, would you like the vendor to create and document a process for you?

Information Architecture

15. Which websites will be included in this project?

16. Will this project follow a pre-defined site map or use the existing site navigation? If not, is creating a new site map or analyzing an existing site map required?
Design

17. Is the goal of this project an update of the current site design or is the vendor creating a new design concept?

18. Is there an existing creative style guide that must be adhered to?

19. If this project spans multiple websites, are multiple designs required?

20. Does the design need to accommodate multiple languages? If so, please specify.

Mobile Presentation

21. What is your requirement for how your website will render on a mobile device?
   - Responsive Design
   - “Mobile-friendly” site
   - Separate mobile site
   - Mobile apps

22. Do you currently employ a mobile solution for your website? Please describe.

23. Would you like the vendor to create a mobile strategy as part of this project?

24. Is your current website mobile-enabled?

Social Media Requirements

25. If you currently employ a social media strategy (including posting guidelines), is it documented? If not, would you like the vendor to craft a social media strategy?
Search

26. Will you continue to use your site’s current search solution? If so, what is it? If not, would you like the vendor to recommend a search solution?

27. Do you require specific search features as part of this project?
   - Faceted search
   - Federated search
   - Ad hoc / complete site search
   - Ability to select sub-sections of site to search
   - Other:

Interactive Elements

28. If there are interactive elements on your current website that will be used on the new website (e.g. maps, calculators), have you documented them?

29. Have you identified interactive elements you would like the vendor to create specific to this project? Would you like the vendor to make recommendations?

30. For any required new interactive elements, do you have a technology preference (e.g. Flash, JQuery)?

31. Are there any special features on your current site that will be used on the new site (e.g. blogs, RSS feeds, discussion boards)?

Training & Support

32. Is on-site training required as part of this project? If so, will the format be one-on-one training or group training led by an instructor?

33. Will documentation be required for training?

34. Will you require a retainer for follow-up training or technical support services after the completion of the project?
Governance

35. Do you have a plan in place that outlines standards for updating and maintaining your website including defined and documented:
   - Roles and permissions
   - Web standards

36. If no plan exists, would you like the vendor to create a governance plan as part of this project?

Project Management & Parameters

37. Will your team provide a dedicated co-project manager to liaise with the vendor’s project manager?

38. Will you involve any internal resources in the website building to help reduce expenditures?

39. Who are the members of your web project team (including senior stakeholders/executive committees) and how will they participate in the website redesign project?

40. Are there key deadlines or crucial meetings that the vendor should be aware of before the project begins?

41. Do you require help from the vendor to define the project budget? If not, are there budget limitations of which the vendor should be aware?
Technology, Integration & 3rd-Party Vendors

42. If you have an existing website, on which platform is it built
   (e.g. WordPress, Drupal, Sitecore, custom, etc.)?

43. If you have an existing website, on which server platform is it hosted
   (e.g. Apache/Linux, Microsoft/ASP.NET, etc.)?

44. Does your site need to be optimized for older browsers?

45. If you have requirements for any specific technologies or platforms,
   have you documented them? Would you prefer the vendor to make
   recommendations on technologies or platforms?

46. If you have requirements for specific browsers for which the new site will
   be optimized, have you documented them? If not, would you like the to
   make a recommendation?

47. List integration points for the new website and specify name and version
   where applicable:
   · Content Management System · Hubspot
   · Salesforce · Other sites within your organization
   · Marketo · Other third party integration points
   · Eloqua

48. List which 3rd-party products will be used on the new website
   and specify name and version where applicable:
   · Multimedia · Online view-book/flip-book
   · Broadcast email · Other

49. Do you require recommendation and/or implementation of new back-end
   systems or 3rd-party tools as part of this project?

50. Will the site be hosted within your organization’s IT infrastructure?
   If not, do you require the vendor to recommend options for hosting
   and ongoing support?
Forms

51. What is the format of your current forms (e.g. PDF, online forms)? Are they interactive?

52. Will the format of your current forms stay the same or change with the new website?

53. How many forms do you currently have?

54. How many existing forms will be migrated to the new website?

55. How many new forms will be created for the new website?

56. Do you have a technology preference for new forms?

eCommerce

57. If your current site has eCommerce capabilities, have you documented them and the technologies they use?

58. Will the new website require eCommerce capabilities? If so, have all use cases been documented? Will scoping and recommendation of an eCommerce platform be required from the vendor?

59. Approximately how many products will the site have?

Special Considerations

60. Are there any special considerations for compliance and/or accessibility?

61. Have you defined and documented all departments that require special consideration?

62. Do you have examples of competitive or other websites that relate to the RFP either because they have a similar feel to your ideal website or are examples of what you do NOT want?
About OHO Interactive

OHO Interactive creates exceptional digital experiences that engage and inspire users, drive key performance metrics, and help clients win. Our in-house team uses market-tested user experiences to create award-winning websites that leverage our research, visual design, development, and content management systems expertise. OHO has helped clients across industries, including Higher Education, Publishing, Healthcare, Consumer Goods, and Technology. For more information visit www.oho.com or email us at sales@oho.com.