

Website Planning Prep Guide

Think of this as your web project's pre-flight checklist. Collect everything now, and you'll shave days, sometimes weeks, off the build. When in doubt, over-share. We love context!

ACCESS AND ADMIN INFO

Make sure you have access to.

- ☐ Website platform/CMS login (e.g. WordPress, Webflow, Shopify)
- ☐ Domain registrar (e.g. GoDaddy, Namecheap)
- ☐ Website hosting account (if separate)
- ☐ Google Analytics and/or Tag Manager
- ☐ Email marketing platform (e.g. Mailchimp, Klaviyo)
- ☐ Ad platform or Meta Pixel account (if relevant)

BRAND ASSETS

Gather your core brand materials.

- ☐ Logo files (SVG or high-res PNG)
- ☐ Color palette and brand fonts
- ☐ Brand guidelines or style guide
- ☐ Approved photography or stock image library
- ☐ Icons, illustrations, or design elements
- ☐ Video assets (e.g. promos, interviews, b-roll)

CONTENT AND COPY

Draft or collect key messaging and written content.

- ☐ Homepage headline or positioning statement
- ☐ About Us / Mission / Vision
- ☐ Product or service descriptions
- ☐ Team bios and headshots
- ☐ Testimonials or client quotes
- ☐ Contact info (email, phone, address)
- ☐ Legal content (Privacy Policy, Terms of Use)

PAGES AND CONTENT MAP

Outline the structure of your site.

- ☐ Page list or rough sitemap
- ☐ Navigation menu structure
- ☐ Content to reuse or repurpose
- ☐ Blog or news posts to migrate
- ☐ Downloadable assets (PDFs, whitepapers, etc.)
- ☐ SEO keywords or meta descriptions (if available)

FUNCTIONAL REQUIREMENTS

- ☐ List any features or integrations you'll need.
- ☐ Contact forms
- ☐ Newsletter sign-up
- ☐ Appointment booking or event registration
- ☐ Ecommerce functionality (store, cart, checkout)
- ☐ Member login or gated content
- ☐ Multilingual support
- ☐ Accessibility compliance
- ☐ CRM or third-party platform integrations

PROJECT LOGISTICS

Clarify how the project will run.

- ☐ Ideal launch date
- ☐ Internal stakeholders or decision-makers
- ☐ Team responsible for content, feedback, and approvals
- ☐ Budget range
- ☐ Known challenges or blockers