



Website Planning Worksheet

Client _____ Project _____ Target launch _____

01 Define the desired customer response

What should visitors do — and what should they feel, believe, or understand before doing it?

02 Choose the website template

Selected template name or URL:

03 Adapt the template to the brand

Which current brand assets do you have?

- | | | | |
|--------------------------------------|---|---|---|
| ☐ Logo files | ☐ Color palette | ☐ Brand typefaces | ☐ Brand guidelines |
| ☐ Photography | ☐ Illustrations or icons | ☐ Voice or writing guide | ☐ Other: _____ |

04 Define and prioritize the pages

List the required pages in priority order:

- | | |
|----------|----------|
| 1. _____ | 5. _____ |
| 2. _____ | 6. _____ |
| 3. _____ | 7. _____ |
| 4. _____ | 8. _____ |

05 Assemble the pages

Are any specific components or functionality required?

06 Develop and insert the content

Who is responsible for writing and approving the content?

Writer _____

Approver _____

07 Configure functionality and quality

What integrations are needed?

- | | | | |
|---------------------------------------|---|--|---|
| ☐ CRM | ☐ Analytics or tag manager | ☐ Email marketing | ☐ Scheduling |
| ☐ Payments | ☐ Search | ☐ Forms | ☐ Social platforms |
| ☐ Other: _____ | | | |

08 Client approval

Who needs to say yes before the website can go live?

09 Launch and observe

What is the live URL? _____

How will customer behavior be observed?

- | | | |
|---|--|---|
| ☐ Analytics | ☐ Search Console | ☐ Form or CRM activity |
| ☐ Heatmaps or session recordings | ☐ Customer feedback | ☐ Other: _____ |

10 Improve through PDSA

What is the first improvement hypothesis to test?

We predict that _____

will result in _____

Review date _____

Owner _____