

Interview Worksheet

In order to speed the development process along please start filling out the following form and gathering the materials (as applicable to this project).

Company Background Questions

- 1) What does your company do?

- 2) Who do you do it for?

- 3) What are all the different ways visitors can contact you?
 - Name

 - Address

 - Phone
 - Fax
 - 1-800
 - E-mail addresses
 - International offices

4) List hours of operation, time zone (PST, EST) and days closed.

5) What are the needs your business satisfies for your customers? What words or images will impart those needs? It is important to paint a mental picture for customers using words, colors and images. What analogies can be used to explain offers in simple, understandable terms?

6) Do you have a brick and mortar or other off-web locations or contact point (like a mail order catalog)? How do you see the website and off-line business working together? What are the weak points of each and the strong points that can be exploited? Don't try to recreate a catalog showroom on the web. Use the website to drive people to your physical location. To handle customer service support after hours, offer on-line coupons that can be printed and redeemed at the physical location (and vice versa) use the physical location to promote the website.

7) How does your business and products benefit your target audience? Please specify a clear list of bullet items of benefits. What can your business offer your visitors, what's in it for them, how can you help them? What problems do your prospects have that your business solves?

8) List features of your products and/or services? Please specify a clear list of bullet items.

9) List 30 words or phrases that describe your business. Pick words/phrases relevant to your business. List all keywords that would link search engines to your website. Phrases should be both specific and general.

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10) Write a 25 word description of your business to be displayed and used in search engine submissions. Describe what your business offers, to whom it is offered and a succinct reason your business should be considered.

11) Write a 50 word description of your business to be displayed and used in search engine submissions. Describe what your business offers, to whom it is offered and a succinct reason your business should be considered.

12) Do you have a business slogan or catch phrase?

13) Give reasons why your business clearly beats the competition? What is your USP (unique selling proposition)? Customers tend to look for information as a priority over shopping on-line. They may surf at other sites, but they will continually return to the sites they trust intuitively and can solve their problems. A visitor may need to return many times before making a purchase (studies suggest as many as 5 times). What can you do to encourage customers to purchase now and abandon the need to continue to search?

14) List some of your competitors' website URLs:

15) List any problems experienced with your existing website (poor performance, graphics, load time, design, etc.). Should you choose another web host?

16) What is your budget for the completion of the website and yearly maintenance?

Website Goal/Objective Questions

17) List the major purposes for the website, the reasons for building one (in order of importance, i.e. name branding, e-commerce, because that's what everyone else is doing, etc.)?

18) Describe your vision for this site? How will visitors interact with it? Provide sketches or other mockups if possible.

19) What are the specific short-term goals for the website (in the first 1 to 6 months, reduce customer service workload by X%, generate X volume in sales)?

20) List specific long-term goals for the website (in the first 1 to 3 years).

21) If you currently have a website, how many visitors do you receive each month? What is the expectation for future traffic and is there a plan and a budget for scaling the web hosting if traffic increases beyond its capabilities? Will you have the capability to handle increased monthly costs for service? Have you planned and accounted for possible additional costs?

22) Define the criteria you will use to determine the website's success (i.e. Internet orders of a certain volume, website traffic of a certain volume (this should not be used as the sole definition of success), X amount of sales as a percentage of hits, decrease in customer service costs, increase in productivity). There should be a trackable method to determine success.

23) Do you need domain registration and/or an ISP to host the site? What level of hosting will be required (this may need to be determined during the design)? Can you use a low cost service (\$10/month)? Do you need a higher end outsourced service? Will you be hosting and managing your own web servers (this would typically be for large companies as the costs can be very high).

24) What process will be used to integrate the website into the business on a daily, monthly, quarterly and yearly basis. Who will manage each aspect of the website once it is complete (i.e. e-mail management, system maintenance, new content, testing forms periodically, marketing, etc.)?

25) Is the site dated (for a single event)? If so what is the expiration date?

Marketing Questions

26) List audience demographics ó who you want to reach and how this will be accomplished. Be as specific as possible (age range, profession, interests, etc.).

27) Are you a local, regional, national or international business? What areas do you want to specifically target?

28) Are there any search engines, directories or sites you would like to submit to besides the industry standard top 10 that are specific to your business or industry?

29) Is this a new market you are trying to create for your product/service or is there already an existing market? Selling in an existing market is easier and less risky. The understanding of what you are offering already exists since other companies have paved the way. What existing distribution channels are you able to tap? Are there any 800-pound gorillas and if so, how can you compete against them? Microsoft and Toys R Us are considered to be gorillas in their markets.

30) What is your budget for marketing the website and how do you intend to market both on and off the Internet? You should conservatively plan for at least half of your budget to be for marketing. Simply putting up a website and submitting to search engines is not marketing. It is only one small tactic in an overall campaign. See the 1001 Killer Internet Marketing Techniques in the Appendix of Resources for assistance in drawing up a marketing battle plan.

31) Web surfers have short attention spans, may not remember your site and will probably not return unless you give them a compelling reason to do so. How can you encourage repeat visitors and referrals? Every measure should be taken to encourage visitors to voluntarily submit their email address. Free offers, contests, referral forms, surveys and requests for information forms can be useful tools to encourage email

signups. What can you offer that can be digitally delivered on site (computer wallpaper, screensavers, special reports, on-line coupons, affiliate programs, etc.) and is free?

32) Will you use a survey form to gather information from your visitors? What questions would be included on this survey? Will you offer an incentive to customers for taking part in this survey? Surveys can also be used as exit strategies to gather useful information as visitors leave the site. A cookie can be used to eliminate seeing the form for repeat visitors.

33) Include unique content on your site. Partner with a content provider to update content. Since most surfers seek information, the best sites are those that become hubs or portals. A site that contains a large amount of information (not readily available elsewhere) directly related to the product or service being sold may be far more successful than one that only offers a product or service. It has been proven that the amount of traffic, links into your site, return visits and referrals is directly proportional to the amount of unique and useful content available to your customers at the site or the amount of money spent on off-line and on-line advertising. Are you able to write articles on subjects related to your visitor's interests or can you offer to publish other works in exchange for exposure? Some companies offer content that can be leased as well. Can you provide on-line assembly instructions, how-to guides, tips and tricks information pages, etc.? This is one of the most important aspects of creating a successful site. When coupled with a quality design and competitive products and services and outstanding customer service the site becomes a winner.

34) What can be done to add value to products and services? If your prices cannot be competitive, what other methods will showcase your products/services? The addition of free bonuses, lifetime warranties, free shipping and handling, upgrades, etc. will often be perceived by the consumer as value-added especially if a dollar value can be attached to these extras.

35) Will you use an affiliate program? An affiliate program is useful for any or all of the following: allows 3rd parties to market your products and services for a commission, tracks effectiveness of individual advertisements and marketing campaigns. Some allow customization to manage signup of individuals or companies with personalized self replicated web pages. Is the ability to track effectiveness of individual ads and marketing campaigns a requirement?

36) Will you join any affiliate programs and link those sites to your website? You can signup on related sites programs and get a commission on sales made on your site. This works best when other sites are directly related to your website and affiliate links are worked into your site in context. Third party product endorsements work better than simple links to other sites.

Design Questions

37) If you do not already have a domain name choose 5 names. Your choices may already be taken. You can check www.internic.net for availability. Consider registering a few general and specific variations including .net and .org domains. Your domain name should be easily identifiable, easy to explain over the phone and print on a business card. Most short names are usually taken; long names can be good if they click in someone's mind. Try out your ideas on several people. Then ask them in a few days if they remember how to spell it. Try out the name on the phone to see if it is easily remembered and spelled by others. Resorting to lengthy explanations or spelling means problems. How long (in years) will your domain be registered?

38) List e-mail addresses you want associated with your domain name (info@cyber-sea.com, sales@cyber-sea.com, support@cyber-sea.com).

39) In order for your site to appeal to your primary audience, what style or voice will you use (conservative, hip and trendy, etc.)?

40) Which of our portfolio of sites is most appealing?

41) List a series of website URLs with designs or schemes that appeal to you and give reasons why.

42) Choose a primary color scheme for the background, text and graphics (we recommend a white background with black text and 2 or 3 colors for highlights for most sites)? This is the easiest to build, maintain and read. Be mindful of visitors with poor eyesight or color blindness when choosing text, background colors and graphics. Many of the most successful sites follow a simple scheme such as this.

43) List any particular fonts to be used. It is unwise to use more than 2-3 major fonts.

44) Please list and gather any existing materials and information (including but not limited to):

Photos (prints, slides, negatives)

Text

Brochures

Business cards

Flyers

Product shots

Product samples

Press releases

Price and part lists

Frequently Asked Questions

Shipping and handling charges and constraints

Warranty policy

Privacy policy

Return policy

Guarantees

True and believable testimonials (clients, industry figures, pros) ask for them with quantifiable results (‘I made \$10,000’ instead of ‘I loved how great it worked’)

Endorsements from known sources

Credits

Bios

History

Education

Certifications

Awards

Case studies

Photos of yourself, staff and location

Transcripts of interviews

Industry recognition

Map and directions from major airports, recommended places to stay nearby (if people visit your location)

45) Do you have any custom photography needs (still photography, product shots, stock photography, video, IPIX immersive virtual reality)? Will you supply all of the images required or will the developer be responsible for creating and acquiring images, graphics, logos, etc. For any images (and other materials) supplied by the client do you own the

copyrights? If not do you have the rights to use the materials on the website? Please check with the copyright owners if unsure to avoid any copyright violations.

46) Choose types of components to include other than still photos and text (e-commerce, affiliate programs, virtual reality images, java applets, backend database integration, survey forms, feedback forms, opt-in newsletter management, referral forms, etc.).

47) List 6 to 8 major topics for your site (i.e. Products, Services, Information, How to Contact us, Galleries, etc.). Base these topics on the visitor's view of the division of information on your site. Major topics will be broken into sub topics (i.e. Information may be broken down into Links, Frequently Asked Questions, Tips, etc). From the tree below, mark major sub-topics of interest. This sample tree can be reorganized as needed. Add topics relevant to your site as needed. Too many choices is confusing. Trying to scan major portal pages and choose from 100 links is time consuming and confusing. 7 or 8 links is the maximum amount a visitor should confront. A site with hundreds of pages can easily be created using 7 or 8 general topics. Adding a few additional general topics (e.g., "Information" or "Products") will allow room for expansion under those headings.

Splash pages
Home

Products and/or Services

- Menus
- Catalogs (static or Rich Media)
- Prices
- Testimonials
- Purchasing / Shopping Cart
- Downloadable products
- Product overview / specifications / demos
- Product features & benefits
- Warranty & Return Policy
- Licensing
- Customer Service
- Training
- Contracting & Consulting
- Stock List
- Capabilities
- Portfolio
- Parts List
- Dealer List
- Assembly Instructions
- Schematics
- Classified Ads
- Credits
- Samples / Tear sheets
- Resume
- Bookstore
- Competitive Matrix

Contact Us

Jobs

- Overview
- Job Postings
- Recruiting
- Resume submissions
- Benefits

Customer Login

- Database searching

Information

- Links
- About Us
- Reviews
- Credits
- Copyrights
- Privacy Policy
- Our Team
- Case Studies
- Awards

- News and Events
- Newsletter
- Press Releases
- Media Coverage
- Frequently Asked Questions
- Alliance Partners
- Legal Notices
- About our Industry
- Glossary of Terms
- Regional Information
- Tech Notes
- Tips and tricks
- Interesting Facts
- Articles
- Who's Who
- Site Map
- Help
- Site Quick Guide
- Galleries
- Intranet
 - Human resources
 - Document storage
 - Internal news
 - Finance
 - Project Tracking
 - Website reports
- Free Stuff
 - Downloadable screensavers/utilities
 - Computer Wallpaper
 - Contests

48) Sketch out the navigation system of a typical page. Typically major topics are in a horizontal graphic at the top. Sub page menus are positioned on a vertical menu bar on the left side. Typically there is a text-based trailer navigation bar at the bottom of each page. If we are not creating artwork for your site, please supply any artwork required for creating graphic navigation bars.

49) Are there any special needs or components required that are not already covered?

50) List any existing websites you want linked in your site. These should be sites that are related to your site and not direct competitors. Sites should be those whose services you use or that provide service or information useful to your target audience. Sites that cross-link with each other may increase both businesses targeted traffic.

51) Is interfacing with other systems (both on-line and off-line) important? Other systems could be mailing list management programs, accounting systems, custom solutions, credit card processing programs. Complicated interfaces with back end DBMS systems attached directly to the website using application servers or creation of XML or EDI data files that can be loaded by 3rd party systems. Complicated interface requirements will require detailed process and analysis. Describe the systems you will require.

52) What requirements are needed when using development tools to create your website and interfaces? Are there any compatibility issues? For example, can it be developed with Cold Fusion, Macromedia Dreamweaver or Microsoft FrontPage?

53) List any requirements for the host platform and cross compatibility (NT or Unix)? List requirements to support types of web pages. For example, static web pages, Active Server Pages, Cold Fusion pages, dynamically generated CGI pages?

54) Will there be password protected areas for dealers, members and/or downloads? Will your site use any digital delivery systems to individually password protect each customers download?

55) What security is required for the website ó Is protection of sensitive files an issue (order data, backend database access, etc.)? Do back end computers access the Internet through permanent connections? Are personal computer hard drives password protected or behind a firewall?

56) How often during the year do you anticipate updates to the website? What types of information will be updated? Employment opportunities, monthly specials, contests, new products, updated news all should be updated periodically. The less frequent a site will be updated, the more general a site should be.

57) Testing is typically done using the top web browsers (Internet Explorer and Netscape) for the Windows and Mac operating systems. List other client platforms you would require for testing and support.

58) Who will maintain the site? If another business will do site maintenance, will they have the skills and tools to support it? Will training be required?

59) List other contacts to interview regarding the design of the site. What positions of responsibility do they hold?

E-Commerce/Ordering Questions

60) What type of e-commerce solution do you require?

1. Flat file page, non-interactive. Visitors must print and fax order or phone order in.
2. Single page secure order form that sends each order as an e-mail.

3. Multi-page secure order form with shopping cart, visitors can pick products while continuing to look at the site, change their order, preview order and submit on-line. Order sent as e-mail or downloaded via FTP from the server.
4. Full e-commerce shopping cart with automated real time credit card processing, integrated with backend database.

61) How will on-line and off-line orders be managed if your site is an e-commerce site? Are the ordering systems able to generate unique distinguishable order numbers? Do you require an all web-based order system that integrates both on-line and off-line orders?

62) What is your current level of on-line business and what are the expectations for future on-line sales?

63) List all credit cards the site will accept (Visa, MasterCard, AMEX, Discover). Merchant accounts should allow for taking on-line orders from the Internet. Please check with your bank as violation of these policies can result in termination of your merchant account. Policies differ from bank to bank. List all of the methods of payment options (money order, check, internet check, various credit cards, etc.). Do you want to provide extra security checks such as CID security code checking (i.e. the 3-4 digit security code printed on most credit cards)?

64) Do your customers have buying seasons? September is the ideal month to prepare your site for the upcoming Christmas shopping season. Should the site be updated according to each season? What enticements will you offer during off seasons?

65) Will low price lead in products be followed with sales on the back end for higher priced products and services? Products up to \$20.00 meet little resistance while products in the hundreds or thousands of dollars may require a longer sales process. Complex services might only be closed using real salespeople. Is a plan in place to secure and qualify leads? How can you remove as much risk from the buyer as possible (warranty, return policy, etc.)? What is your sales cycle? Can you close sales on-line without human interaction or do you need to follow-up on leads generated?

66) List any special shipping and handling charges or constraints on international orders. How will shipping and handling charges be automatically calculated for on-line domestic and international orders? Will international order shipping charges be calculated manually? List information such as harmonized codes, taxes, duty, etc. which can help expedite orders and reduce international costs. Shipping products internationally can be complex and costly. Will a consolidator or international tracking system be helpful?

67) How will sales tax be calculated for on-line orders? Will you need to know the tax rate for multiple states?

68) What are your delivery policies? Customers will probably buy if there is immediate delivery. How long does it take for an order to be received? A customer will not buy from a site if it does not show a complete cost breakdown of their order (price, tax, shipping, etc.) on-line.

69) Are wholesale prices, drop shipping arrangements or other standard agreements put into a dealer section? Will you allow others to offer your products or services directly on their sites?

70) It is very important to have a plan to control on-line fraud. Too many charged back fraudulent orders might result in termination of your company's merchant account. The possibility of blacklisting by other merchant account providers can be a serious problem. Use manual AVS authorization and accept no unmatched orders (even if there is an approval code). Call to authorize international orders, ship only to billing address listed on credit card, double check on large orders with overnight shipping, refuse on-line orders from customers with free email domains. Consider checking IP Addresses and CID security codes for all orders. Also consider not accepting on-line orders from high fraud domains (i.e. domains that give out free and untraceable e-mail accounts).

Database Questions

71) How can you ensure information downloaded from websites against hardware failure? Information gathered should reside in multiple places. Opt-in lists, affiliate data, order data, etc. from the website needs to be backed up periodically and stored off-site. Copy files to a disk or CD-ROM and put it in a safe deposit box. Will you need a backup system to ensure safety of downloaded information?

72) What type of opt-in mail list gathering will you use? Systems range from basic free services like to systems that create mail merge opt-in lists tied into e-commerce, referral, newsletter, opt-in and other forms. Do you have a program in place to manage in-house newsletters, bulk personalized e-mails and removal requests?

Security Questions

73) Does the website require encryption of data such as SSL support, SSL certificates in the customer's name, secure e-mail for sending online order information, or other sensitive or confidential data?

74) Will the website allow downloading of application software or any other downloads that could potentially be infected with a virus? If so, will it be required to purchase or install code signing certificates to protect downloaded executable files, Word documents with macros, Java applets, Active X controls, etc.?

75) Does the customer's e-mail system need to be secured against hijacking of the e-mail server by spammers? Should anti-spam software be installed on the client side and/or secure e-mail certificate be installed for encrypting the customer's e-mails? Does the customer require contact web forms on their website to prevent e-mail harvesting and spamming instead of posting e-mail addresses directly on the website?

76) Does the web server require that anti-virus software be installed and maintained? Is this also required to be installed and maintained on the customer's in-house computers?

77) Does the website require password-protected areas to protect sensitive data? What types of sensitive data will be stored in those areas? Is there any specific information that should never be stored online for the customer?

78) Does the web server require scheduled backups to tape or a redundant drive, mirrored backups, or a completely redundant backup web server with a backup DNS in case of failure? Who will be responsible for maintaining backups?

79) What level of security is required on the web server operating system to prevent hacking attempts? Will the website(s) on the computer be high profile to attract the attention of someone wanting to hack into it?

80) What types of anti-fraud protection need to be built into the website? Typically this is for online ordering systems to prevent identity theft and credit card fraud. Simply getting approval from the credit card processor, AVS checking, and even the CVV2 code checking are not enough to prevent most fraud. More secure online order systems use a combination of techniques such as high fraud e-mail domain blocking, IP address blocking, AVS and CVV2 checks, checking originating country by IP address against the customers address, putting limits on dollar amounts or amounts ordered, etc. Also, the customer should budget for fine-tuning and altering the fraud-protection strategy over time.