

This document accompanies the [Winning at Discovery](#) talk given at WordCamp Manchester 2017 by Barbara Saul with the intention of providing a list of questions from which you can pick and choose for your Discovery Process.

Your questions are welcome - please add these as comments and I will add them regularly.

Who:

Who pays the invoice?
What are the payment terms?
Do you need to negotiate between theirs and yours?

Who is involved with the decision processes at each stage?

- Scope
- Accepting proposal
- Design
- Sign-off
- After-care

Whose input needs to be heeded/considered?
Who has the final word?
Who else in the organisation needs to know what's happening?
Who takes priority?

What is the tone of the organisation?
Polished, proper, professional, laid-back, young, not-so-young, etc?
Do they have a mission statement?

Locations:

Where are they?
Languages to be included:

Competitors

Which competitors do they watch?
Who are most important competitors?
How is the client different to their competitors?

Clients:

Who are they?
Where are they, how old are they?
Who are the ideal clients for your client?
Where do their clients hang out online?
What websites do your clients really like?

What?

What is the budget?

What is their marketing plan?

What do they expect visitors to their website to do and why?

What is the sales process?

What do visitors to their website want when they visit?

What are they expecting to find?

What are the client's business goals?

What does your client expect of their new website?

What are the challenges - for your client and for their client?

Ecommerce

Here I will refer you to Kathir Sid Vel's slides from his talk in Manchester which very clearly laid out the things you will need to discover about an Ecommerce site.

What is your client's discovery process?

Why do they want a new website? What's wrong with their old one? Do they really need one or just want to do it because they think they should?

When?

When do you want to start? When would they like to go live?

Are there any significant dates to be aware of - are there marketing dates to know about?

When will the content be ready, or any other items essential to the project?

When will the items below from the list be available?

When will the content be ready, or any other items essential to the project? In what format?

Will they add the content directly themselves? Is training needed and to what level?

How do people find their website now? What does your client think they search for?

How many people visit their website now?

What Google webmaster and analytics data is available?

How will your client attract people to their website?

How does the client expect or want to communicate with you?

The Tech Stuff...

Who is their current website host? Can that support WordPress?

Any data involved with the project - you need to see that or at least a sample, so you know exactly what you're dealing with.

Items required:

Organisation chart

High res logo

Branding detail - fonts, colours

Sitemap

Social Media links

Newsletter

Any subscription items

Blog link if elsewhere (Blogspot, etc)

Full product/services list

Best product

All marketing resources -