



# Online Business Planner

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Prepared for: Contact Name, Company Name

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# Online Planning Brief

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## Start Here!

Coast Creative will design and develop a website that fully meets your business requirements and helps you achieve your online business goals.

This document will assist you by walking you through the preparatory steps required for a solid website implementation plan:

- **Company Details**
- **Domain**
- **Email Requirements**
- **Online Business Goals**
- **Design Needs**
- **Contents and Navigation**
- **Online Business Requirements**
- **Additional Services**
- **Timeline**
- **Budget**

\* Please refer to the end of this document for a glossary of terms and acronyms

## Company Details

Please provide us with the following information:

Company Name:

Contact Name:

Contact Phone Number(s):

Contact Email:

Project Name:

Existing Website URL (if applicable):

## Domain

If you already have a domain name, e.g. [www.mysite.com](http://www.mysite.com), please answer the following questions. If you do not have a domain, we'd be happy to help you secure one.

Domain Name:

Domain Registrar (e.g. Go Daddy):

Domain Manager Username and Password (required for hosting setup):

## Email Requirements

Please tell us about your email requirements:

Will you be using our integrated email or an external email provider?:

If **No**, please provide the name of your external email provider:

If **Yes** How many email accounts will you require?:

Email accounts allow you to receive email from a variety of email clients like Outlook, Mac Mail etc. Email accounts also come with webmail that allows you to access your email from any web browser. Additionally, email sent to your account can be routed to an existing email account with Gmail, Hotmail etc. for your convenience. If you would like any special arrangements please provide the details in the Additional Details area below.

Please list the email accounts you will require in the table below:

Full Name	Email Address	Desired Password	Account Role
Bob Loblaw	<a href="mailto:bob@mycompany.com">bob@mycompany.com</a>	abcd1234	Sales Manager

**Optional:** Email aliases allow one email account to receive email sent to a variety of addresses. In the example below bob@mycompany will receive emails sent to [sales@mycompany.com](mailto:sales@mycompany.com), [info@mycompany.com](mailto:info@mycompany.com) and [advice@mycompany.com](mailto:advice@mycompany.com). Please list the email aliases you will require in the table below:

Email Address	Email Alias 1	Email Alias 2	Email Alias 3
<a href="mailto:bob@mycompany.com">bob@mycompany.com</a>	<a href="mailto:sales@mycompany.com">sales@mycompany.com</a>	<a href="mailto:info@mycompany.com">info@mycompany.com</a>	<a href="mailto:advice@mycompany.com">advice@mycompany.com</a>

## **Additional Email Details:**

## **Online Business Goals**

Please refer to the list below as a starting point for determining your online business goals. Number each item in terms of priority. Place N/A (for Not Applicable) beside the items that don't apply.

- Selling Online
- Capturing Sales Leads
- Customer Database for Marketing
- Email Campaigns
- Booking Events
- Secure Content (free access)
- Secure Content (paid access)
- Data Collection using online forms
- Accepting Donations
- Listings (classified ads, real estate listings)

## **Additional Business Goals:**

## **Design Needs**

Please indicate your design requirements.

- I will require professional design services
- I will provide professional design services

Please note that provided designs (or designer) must be approved before the commencement of the project.

For further development of the visual design of your site please refer to our Design Survey.

## **Content and Navigation**

Please document and briefly describe the contents of each of the web pages you require. Each navigation menu selection will require an associated page. Additional pages in a given category can be accessed via sub-menus or from a main category 'landing page'. Please note that this stage will more than likely require consultation. Please contact us with any questions you may have.

A simple and effective rough outline of the structure can be created using simple bulleted lists.

Outline Example (will serve as basis for site navigation):

- Home
- About Us
- Services
  - Service One
  - Service Two
  - Service Three
- Products
  - Category One
  - Category Two
- Contact
- Shopping Cart
- Legal & Privacy
- Sitemap
- Shipping Info
- FAQ

Page Contents Example:

Home Page (main landing page):

- Images of our products in a fade in/out slide show (10 images)
- 4 On Sale items with brief description and thumbnail image
- 4 Featured items with brief description and thumbnail image
- 4 latest blog entries
- Sidebar with listing of catalogs

**Optional:** A Mind Map outline of your website can be an incredibly helpful tool. At MindMeister (<http://www.mindmeister.com/>), you can access a free tool that allows you to work on your websites structure. Mind Maps can be easily edited and shared online.

If you choose to create a Mind Map please provide us with the link:

## Online Business Requirements

Business Catalyst provides modules for all key areas of an online business implementation. We have provided a list of commonly required modules. Please review the list below and select the modules that are in keeping with the business goals you indicated in the previous section.

Functionality that falls outside of the scope of listed modules can be detailed in the Additional Details section that follows.

- Online Shopping (e-commerce)
- Email Marketing
- Content Management
- Payment Collection for Services or Donations
- Blogs and RSS Feeds
- Secure Zones
- News and Announcements
- Frequently Asked Questions
- Searchable Article Database
- Event Bookings
- Discussion Forums
- Photo or Video Galleries
- Twitter Integration
- Facebook Integration
- Event Calendar System

**Additional Business Requirements:**

**Additional Services**

Please indicate if you will require any of these additional services:

- Copy Writing
- Image processing
- Video compression
- Database design
- Web application development e.g. classified ads or real estate listings
- Search Engine Optimization
- Search Engine Marketing
- Site maintenance
- Enhanced support
- Content management
- Email marketing campaigns
- Social Media marketing

## **Timeline**

Coast creative will work with you to create an achievable schedule with milestones based on your requirements. The time required to complete a project varies greatly depending on the modules implemented and the volume of content associated with the site.

Please provide an overview of the timeline requirements of your online business project. Make sure to include any critical scheduling information and/or deadlines e.g. a 'hard' completion date.