



# **Project Planner**

#### **Your Business**

- 1) Give me brief history of your business:
  - When you started
  - Why you started
  - What the business looked like when you started
  - What it looks like now
  - Offices? Locations?
  - Any staff with expertise?
- 2) What services does your company offer?
- 3) What are you most proud of?
- 4) What are your values?
- 5) Which of those services is the most profitable?
- 6) What is the aim of this website project? What problem will the project solve for you or your company?

## **Target Customers**

- 7) Which industries do you work in?
- 8) Who are your best clients?
  - What makes them your best clients?
  - Do they all have anything in common?
- 9) Who is your target audience for this project? If you have more than one, who are the segments?
- 10) What's the one thing each segment wants? What are they most commonly looking for?
- 11) What do they want you to help them with? What is the purpose of the work?
- 12) What are their fears and worries?

- 13) What have they tried before finding you?
- 14) How do they usually find you? What does your funnel look like?
- 15) What problems does your product or service solve for the customer?
- 16) As part of my research, I'd like to speak to some of your clients. This can be done over the phone or by email. Can you give me a list of clients you think would be open to this? (Ideally not just clients who you get on with. Clients who are straight talkers). Can you please let them know I'll be getting in touch?
- 17) I'd also love to see any examples of 'first contact' emails you have?
- 18) What questions do your customers have that they need answered before they agree to work with you?
- 19) What are your answers to these questions?

## Positioning / Offer

- 20) What proposition are we offering to the customer?
- 21) Do you have a customer value proposition?
- 22) What is the main claim are we making? What are we saying we'll do?
- 23) Do you have a USP?
- 24) What are the alternatives to your product/service?
- 25) What are the benefits of using your service as opposed to these alternatives?

#### **Social Proof**

- 26) Credibility and believability are so important (especially when selling a professional service). How can you back up any claims made?
- 27) Do you have any testimonials you'd like to use?
- 28) Do you have facebook/Google/Trustpilot reviews?
- 29) Would any of your customers give you a video testimonial?
- 30) Case studies are perfect social proof do you have any clients who would make a great case study?

31)Do you have any snippets of great results for clients? (e.g blogs I wrote for a HR Consultant led to her winning a new retainer client (worth over £5000). If you've got a pitch deck, the info from there would be great.

## The Copy

- 32) How does the reader feel about the thing you're selling before reading the copy, and how do we want them to feel after it? (e.g are they an existing customer? Or a new prospect? Do they trust you?)
- 33) What objections do you anticipate the reader will have about your product? Do you have any responses to them?
- 34) What style/tone would you like the content written in (chatty or formal)? Feel free to include any examples of copywriting that you like.
- 35) Is there anyone in your industry (or you know of) who have a tone of voice you like?
- 36)Do you have any specific content you'd like mentioned on any of the pages? If so, could you send me bullet points for each page?
- 37) Can you send me keywords for each page?

## The Competition

- 38) Can you give me the names of five companies who do something similar to you?
- 39) Who would you say the market leader is? What do they do well?
- 40) Are there any trends in your industry that you hate?
- 41) Are there any industry bad practices? Especially anything customers will be aware of?

#### Action

- 42) What exactly do you want the customer to do after reading the copy? How will they do it? (e.g if they should call a number, include the number here)
- 43) What does your onboarding process look like? If someone thinks "you are what I've been looking for", what does the customer journey look like?
- 44) Do you have any special offers/lead magnets/any time sensitive promotions?

#### Cost

45) How much does your product or service cost?

## Finally...

46) Anything else useful that will help me?

First draft deadline: 16th April