Website Planning Questionnaire

Please complete this questionnaire to help us create a website that reflects your new consulting business and goals.

1. Business Overview

Business Name: _____

Tagline (if any): _____

Please describe your consulting services:

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Your target audience (check all that apply):

- ☐ New agents just starting out
- ☐ Experienced agents seeking coaching
- ☐ Brokerages looking for training support
- ☐ Other: _____

2. Website Goals

Top goals for your website (check up to 3):

- ☐ Attract new clients
- ☐ Establish credibility/authority
- ☐ Share training/resources
- ☐ Allow online booking
- ☐ Capture email sign-ups/newsletter
- ☐ Other: _____

What actions should visitors take on your site?

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3. Content

Do you already have:

- ☐ Written content (bio, services, pricing, testimonials)
- ☐ Professional photos/headshots
- ☐ None of the above – I'll need help with content

Would you like to include any of the following?

- ☐ Blog/articles
- ☐ Training guides/resources
- ☐ Videos
- ☐ Testimonials/reviews
- ☐ Other: _____

4. Branding & Style

Do you have existing branding (logo, colors, etc.)?

- ☐ Yes – I will provide
- ☐ No – I need help creating a brand

If you need brand design, what colors or style do you prefer?

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Website style preference:

- ☐ Professional & Polished
- ☐ Warm & Approachable
- ☐ Modern & Minimal
- ☐ Bold & Eye-catching
- ☐ Other: _____

Websites you like for inspiration:

5. Functionality

Would you like your site to include:

- ☐ Online scheduling/booking

- ☐ Online payments

- ☐ Blog or resource library

- ☐ Email newsletter sign-up

- ☐ Contact form

- ☐ Other: _____

6. Technical Details

Do you already have a domain name?

- ☐ Yes – domain is: _____

- ☐ No – I'll need help securing one

Do you already have hosting?

- ☐ Yes

- ☐ No – I'll need help setting it up

Preferred timeline for launch: _____

7. Future Growth

Do you see your website as:

- ☐ A simple introduction + contact page

- ☐ A growing platform with resources/courses in the future

For ongoing management:

- ☐ I want to be trained to update my own site

- ☐ I prefer ongoing support/maintenance

8. Final Notes

Is there anything else you'd like me to know?