

WEBSITE & ONLINE STORE PROJECT QUESTIONNAIRE

WordPress / WooCommerce Build, Migration and Hosting Quote

Purpose

This questionnaire collects the information needed to prepare a realistic project scope and quote. Complete what you know. Select “Not sure” where appropriate. We may confirm technical details during a short follow-up call.

Estimated time	Best completed by	What to attach
15-25 minutes	Owner or project decision-maker	Logo, brand guide, sitemap, examples or product data

Important: The quote will be based on the information supplied. Material changes to scope, content volume, integrations, product data or launch requirements may change the final price and delivery schedule.

Date completed _____	Prepared for / salesperson _____
Business name _____	Primary contact _____

1. Business and Contact Details

Quote-critical contact, ownership and approval information.

Registered business name	Trading name
Primary contact name	Position / role
Email address	Phone number
Business address	ABN / business number (optional)
Current website URL	Primary social profile

Briefly describe the business, its main products or services, and where it operates.

Who will approve the quote and final website? List any other stakeholders.

2. Project Overview

Select all that apply. This determines the quotation pathway.

What are you seeking?

- | | |
|--|---|
| ☐ New WordPress business website | ☐ Redesign of an existing website |
| ☐ New WooCommerce online store | ☐ Redesign of an existing online store |
| ☐ Migration to new hosting | ☐ Landing page or campaign microsite |
| ☐ Website care / maintenance only | ☐ Not sure - advice required |

Why is this project needed now? What problem must it solve?

List the three most important business outcomes for the project. *Examples: more enquiries, online sales, bookings, credibility, easier administration.*

What is the main action visitors should take?

- | | | |
|---|---|--|
| ☐ Call the business | ☐ Submit an enquiry or quote request | ☐ Buy online |
| ☐ Book an appointment | ☐ Visit a physical location | ☐ Join a mailing list |
| ☐ Download information | ☐ Create an account / member login | ☐ Other: _____ |

Who is the target customer? Include location, customer type, typical needs and any important segments.

3. Current Website or Store

Complete this section for redesigns, migrations or replacements. Otherwise skip to Section 4.

Current platform / CMS	Current hosting provider
Approximate site age	Approximate monthly visits (if known)
Domain registrar	DNS / CDN provider (if known)

What needs to improve?

- | | | |
|---|---|--|
| ☐ The current site generally works | ☐ Design is outdated | ☐ Site is slow |
| ☐ Site is difficult to update | ☐ Security or malware concerns | ☐ Hosting is unreliable |
| ☐ SEO / traffic has declined | ☐ Checkout or store problems | ☐ Mobile usability problems |
| ☐ Current provider support is poor | ☐ Content needs restructuring | ☐ Other: _____ |

What must be retained from the current site? Include content, features, rankings, customer data, orders or integrations.

What should not be carried into the new site?

Which account access can you provide?

- | | | |
|--|---|--|
| ☐ WordPress administrator | ☐ Hosting / cPanel | ☐ Domain registrar |
| ☐ DNS / Cloudflare | ☐ Google Analytics | ☐ Google Search Console |
| ☐ Payment gateway | ☐ Email provider | ☐ Plugin / theme licences |
| ☐ No access yet | ☐ Not sure | |

4. Website Structure and Content Scope

Use estimates where final content is not yet available.

Approximate number of standard pages at launch

- | | | |
|--------------------------------------|---|--------------------------------------|
| ☐ 1-5 pages | ☐ 6-10 pages | ☐ 11-20 pages |
| ☐ 21-40 pages | ☐ More than 40 pages | ☐ Not sure |

Pages or sections likely required

- | | | |
|--|---|--|
| ☐ Home | ☐ About | ☐ Services |
| ☐ Service detail pages | ☐ Products / shop | ☐ Contact |
| ☐ FAQ | ☐ Testimonials / reviews | ☐ Portfolio / gallery |
| ☐ Team profiles | ☐ Blog / news | ☐ Locations / service areas |
| ☐ Resources / downloads | ☐ Privacy policy | ☐ Terms and conditions |

☐ Shipping / returns ☐ Other: _____

List any known page names, service categories, product categories or proposed menu structure.

Written content status

- | | | |
|--|---|---|
| ☐ All final copy is ready | ☐ Draft copy exists | ☐ Existing website copy will be reused |
| ☐ Copy needs editing | ☐ Professional copywriting is required | ☐ Not sure |

Image and media status

- | | | |
|--|---|---|
| ☐ Professional images are ready | ☐ Existing images will be reused | ☐ Supplier images will be supplied |
| ☐ Stock images are acceptable | ☐ Photography is required | ☐ Image selection / optimisation is required |
| ☐ Not sure | | |

5. Brand and Design Direction

This defines the visual design workload and approval process.

Existing brand assets

- | | |
|--|--|
| ☐ Logo files available | ☐ Brand colours defined |
| ☐ Fonts defined | ☐ Brand guide available |
| ☐ Photography style defined | ☐ No established brand system |
| ☐ Brand refresh required | ☐ Not sure |

Describe the preferred visual style in a few words. *Examples: premium, minimal, friendly, technical, traditional, bold, editorial.*

List up to three websites you like and explain what works well.

List any websites or design styles you dislike and explain why.

Preferred design approach

- | | |
|--|--|
| ☐ Use the existing design closely | ☐ Evolve the existing brand |
| ☐ Create a substantially new design direction | ☐ Use a practical template-led approach |
| ☐ Custom design is important | ☐ Not sure - recommend an approach |

Accessibility or compliance

- | | |
|---|---|
| ☐ WCAG accessibility is a stated requirement | ☐ Government / regulated-sector requirements apply |
| ☐ Privacy or data-residency requirements apply | ☐ No special compliance requirements known |
| ☐ Not sure | |

6. Required Website Features

Select only features needed at or soon after launch.

- | | | |
|---|--|--|
| ☐ General contact form | ☐ Detailed quote request form | ☐ Booking / appointment system |
| ☐ Event calendar / registrations | ☐ Newsletter signup | ☐ CRM integration |
| ☐ Customer or member login | ☐ Paid membership / gated content | ☐ Online course / learning content |
| ☐ Directory or listings | ☐ Advanced site search | ☐ Product / content filters |
| ☐ Photo or video gallery | ☐ Testimonials / review display | ☐ Google Maps / locations |
| ☐ Live chat or chatbot | ☐ Social media feed | ☐ File downloads / document library |
| ☐ Multilingual content | ☐ User-generated content | ☐ API or custom system integration |
| ☐ Custom calculator / configurator | ☐ Donations | ☐ Other: _____ |

Describe any feature selected above that has special rules, multiple steps or external systems.

List systems the website must connect to. *Examples: accounting, CRM, email marketing, booking, POS, ERP, inventory, shipping, marketplace.*

7. WooCommerce Store Requirements

Complete this section only when products, services, bookings or subscriptions will be sold online.

What will be sold?

- | | | |
|--|--|---|
| ☐ Physical products | ☐ Digital downloads | ☐ Services |
| ☐ Subscriptions / recurring billing | ☐ Bookings / appointments | ☐ Events / tickets |
| ☐ Gift cards | ☐ Donations | ☐ Wholesale / trade ordering |
| ☐ Marketplace / multi-vendor | ☐ Not sure | |

Products / SKUs at launch	Expected products after 12 months
Approximate categories	Typical variations per product
Current customer records	Current historical orders

Product catalogue readiness

- | | | |
|---|---|--|
| ☐ Product names and descriptions ready | ☐ Pricing ready | ☐ SKU codes ready |
| ☐ Images ready | ☐ Weights / dimensions ready | ☐ Variation data ready |
| ☐ Categories ready | ☐ Data exists in CSV / spreadsheet | ☐ Data must be migrated |
| ☐ Product data entry is required | ☐ Not sure | |

Inventory requirements

- | | | |
|--|---|--|
| ☐ Single inventory location | ☐ Multiple inventory locations | ☐ Backorders allowed |
| ☐ Pre-orders required | ☐ Low-stock alerts | ☐ Serial / batch tracking |
| ☐ No stock tracking | ☐ External inventory system | ☐ Not sure |

Payment methods

- | | |
|--|---|
| ☐ Credit / debit card | ☐ PayPal |
| ☐ Bank transfer | ☐ Buy now, pay later |
| ☐ Purchase orders / account customers | ☐ Cash on delivery |
| ☐ Existing gateway to retain | ☐ Not sure |

Preferred payment provider(s), if known.

Selling and shipping regions

- | | | |
|---|--|--|
| ☐ Australia only | ☐ New Zealand | ☐ United States |
| ☐ Canada | ☐ United Kingdom | ☐ Europe |
| ☐ Worldwide | ☐ Selected countries only | ☐ Local pickup only |
| ☐ Not sure | | |

Shipping methods and rules

- | | | |
|---|---|---|
| ☐ Flat-rate shipping | ☐ Free shipping threshold | ☐ Live carrier rates |
| ☐ Shipping by weight | ☐ Shipping by size / class | ☐ Local delivery |
| ☐ Local pickup | ☐ Multiple warehouses | ☐ Dropshipping / supplier fulfilment |
| ☐ No shipping required | ☐ Not sure | |

Describe important shipping rules, carriers, excluded areas or fulfilment arrangements.

WooCommerce sales, tax and operations**Tax requirements**

- | | | |
|--|---|--|
| ☐ Prices include GST | ☐ Prices exclude GST | ☐ Australian GST only |
| ☐ International tax rules | ☐ Tax-exempt customers | ☐ Automated tax service |
| ☐ Not sure | | |

Promotions and pricing

- | | | |
|---|---|--|
| ☐ Coupon codes | ☐ Automatic discounts | ☐ Volume pricing |
| ☐ Wholesale pricing | ☐ Customer-group pricing | ☐ Gift cards |
| ☐ Loyalty / rewards | ☐ Bundles / kits | ☐ Cross-sells / upsells |
| ☐ Deposits / part payments | ☐ Pre-orders | ☐ Not sure |

Customer account and checkout

- | | | |
|---|--|--|
| ☐ Guest checkout | ☐ Customer accounts | ☐ Account approval required |
| ☐ Trade application | ☐ Saved payment methods | ☐ Wishlists |
| ☐ Reorder previous purchases | ☐ Quote before purchase | ☐ Not sure |

Order administration

- | | |
|---|---|
| ☐ Order emails only | ☐ PDF invoices |
| ☐ Packing slips | ☐ Returns workflow |
| ☐ Refund workflow | ☐ Order status customisation |
| ☐ Customer service notes | ☐ Not sure |

List required store integrations. *Examples: Xero, MYOB, QuickBooks, Australia Post, Sendle, Starshipit, POS, ERP, Amazon, eBay.*

Describe any unusual purchasing, approval, pricing or fulfilment workflow.

8. SEO, Marketing and Measurement

These items affect migration planning, launch configuration and content scope.

- | | |
|--|--|
| ☐ Basic on-page SEO setup | ☐ Keyword research |
| ☐ SEO copywriting | ☐ Local SEO |
| ☐ Technical SEO audit | ☐ Existing rankings must be protected |
| ☐ URL redirect plan | ☐ Schema / structured data |
| ☐ Google Analytics | ☐ Google Search Console |
| ☐ Google Ads tracking | ☐ Meta / social advertising tracking |
| ☐ Email marketing integration | ☐ Conversion tracking |
| ☐ Ongoing SEO support | ☐ Not sure |

What products, services, locations or search terms are most important?

List any existing analytics, advertising or marketing platforms that must be retained.

Legal and consent content

- | | | |
|---|--|--|
| ☐ Existing privacy policy | ☐ Existing cookie policy | ☐ Cookie consent required |
| ☐ Marketing consent required | ☐ Terms need legal review | ☐ Policies need drafting |
| ☐ Not sure | | |

9. Domain, Email, Hosting and Maintenance

This determines the hosting setup, migration effort and ongoing support quote.

Domain

- | | |
|---|---|
| ☐ New domain required | ☐ Existing domain will be retained |
| ☐ Additional domains / redirects | ☐ Domain ownership is unclear |
| ☐ DNS changes are permitted | ☐ Not sure |

Business email

- | | |
|--|---|
| ☐ Microsoft 365 | ☐ Google Workspace |
|--|---|

- | | |
|--|--|
| ☐ Existing cPanel email | ☐ Other external email provider |
| ☐ New business email required | ☐ Mailbox migration required |
| ☐ Website forms only | ☐ Not sure |

Approximate number of mailboxes _____	Approximate total mailbox data _____
Expected website administrators _____	Expected peak traffic / campaign volume _____

Ongoing service preference

- | | |
|---|--|
| ☐ Managed WordPress hosting | ☐ Managed WooCommerce hosting |
| ☐ Self-managed hosting | ☐ Hosting recommendation required |
| ☐ Care / maintenance plan required | ☐ One-off build only |
| ☐ Emergency support required | ☐ Not sure |

Ongoing assistance required

- | | | |
|--|---|--|
| ☐ Updates and monitoring | ☐ Daily / frequent backups | ☐ Security monitoring |
| ☐ Performance optimisation | ☐ Staging site | ☐ Content updates |
| ☐ WooCommerce operational support | ☐ Priority support | ☐ Monthly reporting |
| ☐ Staff training | ☐ Not sure | |

List any hosting, backup, security, data location or uptime requirements.

10. Delivery, Budget and Decision Process

Realistic timing and budget information prevents unsuitable quotations.

Preferred launch date _____	Hard deadline / event date _____
Main content owner _____	Main approval contact _____

What creates the deadline? Is the date fixed or preferred?

Indicative build budget

- | | |
|---|---|
| ☐ Under \$3,000 | ☐ \$3,000-\$5,000 |
| ☐ \$5,000-\$10,000 | ☐ \$10,000-\$20,000 |
| ☐ \$20,000+ | ☐ Budget not set |
| ☐ Prefer a phased proposal | ☐ Require recommendation first |

Preferred proposal format

- | | |
|---|---|
| ☐ Single fixed-scope quote | ☐ Good / better / best options |
| ☐ Phased rollout | ☐ Build plus monthly managed service |

☐ Quote must separate optional items

☐ Not sure

Who else is being considered, and what factors will determine the decision?

Current buying stage

☐ Ready to proceed after quote

☐ Comparing suppliers

☐ Seeking budget approval

☐ Early research only

☐ Tender / formal procurement

☐ Not sure

11. Supporting Material and Final Notes

Attach anything that will reduce assumptions in the quote.

Material supplied or available

☐ Logo files

☐ Brand guide

☐ Current sitemap / page list

☐ Product spreadsheet

☐ Feature requirements

☐ Examples / inspiration

☐ Analytics report

☐ SEO report

☐ Hosting details

☐ Integration documentation

☐ Policies / terms

☐ Other: _____

File links or attachment names

Anything else we should understand before preparing the quote?

☐ I confirm that the information supplied is accurate to the best of my knowledge and may be used to prepare a project scope and quotation.

Name: _____ Signature: _____ Date: _____

Thank you. We will review the information and identify any assumptions or clarification items in the quotation.

12. Internal Quote Worksheet - Office Use Only

Do not include this section in the client-facing online form.

Scope area	Low	Med	High	Notes / allowance
Discovery / planning	☐	☐	☐	
Information architecture	☐	☐	☐	
Visual design	☐	☐	☐	
Standard page build	☐	☐	☐	
Content entry / migration	☐	☐	☐	
Copywriting / editing	☐	☐	☐	
WooCommerce catalogue	☐	☐	☐	
Checkout / shipping / tax	☐	☐	☐	
Custom functionality	☐	☐	☐	
Third-party integrations	☐	☐	☐	
SEO / redirects / tracking	☐	☐	☐	
Hosting / DNS / email migration	☐	☐	☐	
Testing / training / launch	☐	☐	☐	

Risk and assumption flags

- | | |
|--|--|
| ☐ Scope not sufficiently defined | ☐ Content not ready |
| ☐ Product data not ready | ☐ Access not available |
| ☐ Integration feasibility unknown | ☐ Custom development likely |
| ☐ SEO migration risk | ☐ Email migration risk |
| ☐ Fixed / aggressive deadline | ☐ Multiple decision-makers |
| ☐ Budget and scope misaligned | ☐ Compliance / legal dependency |
| ☐ Third-party licence costs | ☐ High-volume catalogue |
| ☐ Complex shipping / tax | ☐ Other: _____ |

Recommended quotation components

Component	Include?	One-off / recurring	Estimate / notes
Discovery and solution design	☐		
WordPress website design/build	☐		
WooCommerce configuration	☐		
Catalogue import / data entry	☐		
Content / copy / image services	☐		
Migration and redirects	☐		
Premium licences	☐		

Component	Include?	One-off / recurring	Estimate / notes
Hosting plan	[]		
Care / maintenance plan	[]		
Training	[]		
Optional phase 2 items	[]		

Key assumptions to state in the quote

Clarifications required before pricing

Prepared by	Date
Quote reference	Follow-up date