

Project Planner

Thank you for considering Otreva for your project.

Step 2: Kindly complete this Project Planner so we can determine if the unique aspects of your project align with our capabilities and availability. We realize it's quite a bit to ask of you up front, but those that go on to become Otreva clients often tell us it's a worthwhile exercise.

When you're finished, please fax to (570) 955-3845, email the document to projects@otreva.com or upload it at our website's [contact form](#). Please allow up to two weeks for a response.

Who are you?

Your name:

Your title:

Organization name:

Where do you work? (not necessarily where your organization is, where YOU are):

Email address:

Business phone including area and/or country code:

Responding to inquiries generally takes up to a week. If you need us to move more quickly than that, please indicate below:

- I'm in a rush and I need a Proposal/Statement of Work from you as soon as possible
- Take the normal amount of time

Background information

How did you hear about us? (check all that apply):

I was referred by a friend or colleague

I know someone at Otreva

I found you from a search engine

I never knew of Otreva before now

Other?

Are you familiar with the concept of web standards?

Yes

Kind of

No

Have you been through a website redesign effort before?

Yes

No

If you answered yes, how long ago?

If you answered yes, what role did you play?

A few more details about your organization

What does your organization do? Why does it matter?

Check the box(es) that best describes your organization:

Fortune 500 corporation

Nonprofit organization

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- Educational institution
- Startup
- Small business (less than 50 employees)
- Just an individual with a site/idea

Where is your organization located?

How many people does your organization employ?

How many people would be involved in this project at your organization?

Is your organization receptive to working with vendors remotely (understanding at certain points face-to-face meetings may be necessary)?

About your project

Is this a redesign of an existing site, or a new site altogether?

- Redesign
- New site

If you answered 'Redesign', what is the site's URL?

If you answered 'Redesign', when was the last time the site was redesigned?

Describe the concept, project or service this site is intended to provide or promote.

What are some of the fundamental issues you're trying to improve or business problems you're trying to solve with a site redesign? Or, if this is a new site, what's its purpose?

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What sites do you consider competitors? Please comment on their strengths and/or weaknesses.

Aside from competitors, are there any sites you consider best-of-breed? (Could be completely outside of your business or industry)

What differentiates your site or idea from the competition?

Who on your end will guide this project to completion?

Who will be responsible for maintaining the site after launch?

About your audience

To the best of your ability, describe the primary and secondary users of your site.

What known needs are they bringing to your website? (Examples include: Curiosity about or passionate interest in subject matter, desire to help a cause/become involved, business need requiring software solution.)

Into what general demographic or user groups do they fall? (Examples of user groups, on an educational site, might include parents, teachers, students, donors, and alumni.)

For the purposes of this new site or redesign, which of these groups are most important?

What *primary action* should a primary user take when visiting your site? (Examples include: registering for an account, subscribing to a newsletter, making a donation, reading editorial content, referring a friend.)

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What user needs does your existing site fulfill?

What needs aren't being met? Where does the site fall short?

Has your site undergone formal or informal usability testing?

Yes

No

If you answered 'Yes', please describe the methods (examples include formal lab testing, informal guerilla testing, paper prototypes, low-fi clickable prototypes) and the findings you observed.

Why else do you seek a redesign?

About your brand

Describe in as few sentences or words as possible the *feelings* you wish your site to evoke, and the *brand attributes* you want it to convey. (Sample feelings might include: warmth, friendliness, reassurance, comfort, or excitement. Sample brand attributes might include: caring, honesty, humor, professionalism, intelligence, technological savvy, sophistication, reliability, and trustworthiness.)

Using adjectives and short phrases, describe the site's desired look and feel. ("Easy to look at, edgy, classic, up-to-date, crisp, modern, traditional, understated," etc.)

Do you have a visual identity established, or is that something you need designed or evolved?

Features and scope

Does your plan include community or social features, such as user profiles, commenting, RSS feeds, forums, sharing, friend lists, rating/voting, user-generated content, etc.?

Does your plan include media-intensive components such as video, audio, podcasts and other rich media?

Is your current site powered by a content management system or publishing platform?

Yes

No

If you answered 'Yes', which CMS or platform are you using?

If you answered 'Yes', what do you like/dislike about it?

Are you looking for the redesigned/new site to be powered by a content management system or publishing platform?

Yes

No

If you answered 'Yes', do you have an idea of what solution you're considering, or are you looking for us to provide recommendations?

Are there any third-party integration points we need to know about (interfaces to a CRM, e-commerce, mapping solution, social site or other use of a third party API?)

What are the estimated number of pages for your site?

Would you prefer to complete this project in a single pass or split it up into phases (each requiring separate budgets)?

Have you already created the site copy?

- All of it
- Some of it
- None of it

If you answered 'Some of it' or 'None of it', do you have a plan for tackling this effort? Do you need help establishing styles, devising a content strategy, or actually writing copy?

Design technology

Describe any technological requirements you haven't mentioned in this Planner.

To deliver the best experience to the most users and to build pages that will last, we use modern standards-based methods. As a result, our sites may not look exactly the same in an old, non-compliant browser like Internet Explorer 6 as they do in newer browsers like Firefox, Safari, and Internet Explorer 7 and 8.

- My site has to look and work exactly the same way in older as it does in newer browsers.
- I understand that the site may not look as good or work as well in an outdated browsers.

Time and money

If you're working within a time frame, or have been given a mandatory launch date, list it here. If the project will launch in phases, list proposed milestones and dates.

Please tell us your budget for this project.

Note: Sharing a realistic assessment of what you have to spend on this effort will help us scope the engagement appropriately. While disclosing your budget might not be something you typically do, sharing this information with us now will greatly reduce the likelihood of both sides spending significant time and resources "shooting in the dark."

Thanks!

We know this is a lot to ask right now, but it is a big, big help.

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