



ALIGN^{by}DESIGN

BUSINESS & WEBSITE BUILDING CHECKLIST

Name: _____

Cell: _____ Email: _____

Business name: _____

Business address: _____

Business phone: _____ Business email: _____

Logo

- ☐ I have a logo
- ☐ I can provide the necessary logo files for the website
- ☐ I have created a logo style that I like on Canva but I need help making it mine (** some Canva images are considered trademarked or intellectual property and so you won't be able to trademark them for your own use)
- ☐ I have ideas sketched for a logo that I need help turning into a final design
- ☐ I don't have a logo and I have no idea what I want
- ☐ Other _____

Branding

- ☐ I have a color scheme that I'm interested in
- ☐ The colors I like are already in my logo
- ☐ I don't have any particular colors in mind
- ☐ I need help picking a color scheme for my website
- ☐ I would like a referral to a branding partner so that I can come up with my unique brand
- ☐ Other _____

Domain Name

- ☐ I know the name of the website I would like to have
- ☐ I have already checked Godaddy.com (or another site) to see if that name is available
- ☐ The name I want is available
- ☐ I have already bought the domain name
- ☐ I don't know what name I want for my website
- ☐ The name I want for my website is not available
- ☐ I need help coming up with an alternative name for my website
- ☐ I need help purchasing the domain name
- ☐ Other _____
- ☐ Ideal Name _____
- ☐ Alternate Names: _____

Website Design and Hosting Platforms

- ☐ I have looked into various platforms and I know which one I want to use (example: GoDaddy, Wix, Squarespace, Sitebuilder, Weebly etc): _____
- ☐ I have looked into various platforms but I don't know which one I prefer
- ☐ I need help to decide which platform will work best for me and my needs
- ☐ I already have an old website that needs updating
- ☐ I already have an old website but I want to cancel it and start over somewhere new
- ☐ Other _____

Website Host Pricing

- ☐ I have compared pricing on different website hosting services
- ☐ I decided I want a Basic Plan and I am aware of the monthly/yearly cost
- ☐ I decided I want a Small Business plan and I am aware of the monthly/yearly cost
- ☐ I decided I want a Pro Plan and I am aware of the monthly/yearly cost
- ☐ I realize that based on the cost, I need to factor in whether the following items come with my plan for free or if they incur extra charges each month:
 1. Email marketing
 2. Blog
 3. Ability to accept online payments in US
 4. Ability to accept online payments International
 5. Ability to integrate a calendar/booking program like Calendly or Acuity
 6. Shop
 7. Bookings only
 8. Bookings with payments
 9. Other _____

Website Administration

- ☐ I am willing to learn how to maintain my website so I can make changes on my own at any time
- ☐ I do not want to learn how to maintain my website and will pay for someone else to make changes
- ☐ I do not want to learn how to maintain my website and will pay you (Karen) to make changes
- ☐ Other _____

Content

- ☐ I have a file folder that contains all or most of the images that I want to use on my site
- ☐ I have a file folder that contains all or most of the content that I want to use on my site
- ☐ The content that I want to use on my site is typed out so that it can be copied & pasted
- ☐ I need help narrowing down my ideas and creating content for my site
- ☐ I have photos or artwork that I can provide to give my website a more dynamic interface for users
- ☐ I plan to take some photos and provide artwork while the website is being created
- ☐ I will use stock photos from my website hosting service
- ☐ Other _____

Accepting Online Payments

- ☐ My website DOES need to be able to accept online payments
- ☐ My website DOES NOT need to be able to accept online payments
- ☐ I have a business PayPal account (it doesn't matter if you have a personal PayPal acct.)
- ☐ I need to open a PayPal business account
- ☐ I have a Square account
- ☐ I have a Venmo account
- ☐ I have a Stripe account
- ☐ I have another type of financial app/acct: _____
- ☐ I am aware that if I want to accept credit card payments through PayPal, I need to have a business PayPal account because most website hosting services will not allow a personal PayPal account to be used
- ☐ I am willing to link my bank account to my website and can provide the correct information to do so
- ☐ I would rather let the website handle all credit card transactions and then deposit the money into my account or bank** (discuss with Karen, some websites/financial institutions will not allow this if it doesn't fall within their personal morality parameters....such as cannabis, psychic, etc)
- ☐ Other _____

Social Media

- ☐ I have the following social media accounts: _____
- ☐ I plan to link to these accounts
- ☐ I don't have social media accounts
- ☐ I need help setting up social media accounts
- ☐ Other _____

Linktree/Social Media

- ☐ I currently have a Linktree on my social media accounts
- ☐ I would like to consider creating a link page that exists on my website instead so all traffic is always routed through my site instead of through a third party
- ☐ Other _____

Email Marketing

- ☐ I plan on sending emails to my customers through my website
- ☐ I plan on having someone else send my emails through my website
- ☐ I plan to have Karen send emails through my website
- ☐ I plan to use another email marketing tool, such as: _____

- ☐ I am aware that most platforms will let you send approx 4 free emails a month but that I may need to upgrade my plan if I want to send more
- ☐ I plan to send out marketing emails this often:
- ☐ I would like to send out newsletters in addition to - or instead of marketing emails
- ☐ Other _____

Subscribers

- ☐ I would like to have a Subscribe feature on my website
- ☐ I plan to use the email marketing feature of my sight with my subscribers
- ☐ I would like to offer a freebie to those who subscribe to my site
- ☐ I already know what freebie I will offer
- ☐ I have no idea what freebie to offer
- ☐ I need help creating a freebie to offer
- ☐ Other _____

Services

- ☐ I have one or more services that I would like to offer
- ☐ I have all of the descriptions I need for each service so it can be copied and pasted into the pages
- ☐ I need help refining my services and descriptions
- ☐ I know how much I am charging per service
- ☐ I realize that for each payment that is taken on the website, there will be a fee (from Square, PayPal, etc), and I have built that fee into my pricing
- ☐ I did not realize that for each payment that is taken on the website, there will be a fee (from Square, PayPal, etc), and I need to build that fee into my pricing
- ☐ I opt to not pass on that fee to my customers
- ☐ Other _____

Gift Cards/Gift Certificates

- ☐ I would like to offer gift cards on my website
- ☐ I would like to offer paper gift certificates
- ☐ I need help with the design of paper gift certificates
- ☐ I do not need gift cards or gift certificates
- ☐ Other _____

Bookings of Services

- ☐ I plan to allow services to be booked on my website
- ☐ I am aware that having the ability to accept bookings with payments on my website might incur an extra monthly/yearly charge for this feature
- ☐ I have Calendly
- ☐ I have Acuity
- ☐ I have a CRM program that I would like to attach to my website via coding or a link
- ☐ I have another booking platform: _____
- ☐ I have checked to see if my booking platform will integrate with my preferred website hosting platform
- ☐ I prefer to use the booking platform that comes with my website
- ☐ I would like the ability to accept payment upon booking
- ☐ I would like to accept payment in person

☐ Other _____

Shop

- ☐ I plan to have a shop on my website
- ☐ I do not plan to have a shop on my website
- ☐ I am aware that having a shop on a website might incur an extra monthly/yearly charge for this feature
- ☐ I plan to use my own form of accepting credit cards through my PayPal or other account
- ☐ I plan to use the website to process and collect all charges from my shop ** (See Accepting Online Payment section above regarding morality clause)
- ☐ I am willing to input my banking information so that the website can deposit my earnings in my account
- ☐ I am aware of the tax implications in regards to my online shop
- ☐ I have a business sales tax number
- ☐ I do not have a business sales tax number
- ☐ I have products available through third parties that I would like to link out to from my website
- ☐ Other _____

Testimonials

- ☐ I would like to have a testimonials page
- ☐ I don't need a testimonials page
- ☐ I have testimonials already, that can be added to the page
- ☐ I will ask for testimonials so that they can be added to the page
- ☐ I will provide testimonials in text form that can be copied and pasted
- ☐ I can add a testimonials page in the future
- ☐ Other _____

About Me

- ☐ I would like an About Me page
- ☐ I have information ready
- ☐ I have a photo of me that can be used in this section
- ☐ I will provide About Me info in text form that can be copied and pasted
- ☐ Other _____

Search Engine Optimization (SEO) / Google Business Page

- ☐ I am interested in having a Google Business Page so that people can search for and find me
- ☐ I already have a Google Business Page
- ☐ I need help creating a Google Business Page
- ☐ I am willing to learn how to add SEO keywords to all of my pages
- ☐ I would prefer to have all of the SEO keywords added to my pages for me
- ☐ I have a list of all the keywords that I would like to be added to my website
- ☐ I need help coming up with keywords to add to my site
- ☐ Other _____

Blog

- ☐ I plan on starting a blog
- ☐ I would like to be able to publish the blog to my social media sites in addition to my website

- ☐ I do not plan on doing a blog, but I understand that I can add one in at any time
- ☐ Other _____

Events

- ☐ I plan to have an events page
- ☐ I plan to link my events to outside websites, links, or bookings
- ☐ I plan to allow paid tickets, free tickets, and RSVP buttons
- ☐ I do not plan on having an events page
- ☐ Other _____

Forms

- ☐ I plan to use a Google Form on my site (for contact or informational purposes)
- ☐ I have the Google Form already created so it can easily be linked to my site
- ☐ I would like to use a Google Form on my site
- ☐ I need help creating a Google Form to use on my site
- ☐ I plan to use the Form feature on my web hosting service
- ☐ I use Jotform or other form hosting platform and I will link to that
- ☐ Other _____

Course/Program

- ☐ I plan to offer an online course or a program
- ☐ I do not plan to offer an online course or a program
- ☐ I have a course platform that I want to link to: Kajabi, Teachable, etc
- ☐ I do not have a course platform that I want to link to: Kajabi, Teachable, etc
- ☐ I want to use the course/program feature on the website
- ☐ I plan to set the course up myself
- ☐ I need help setting up the course
- ☐ Other _____

Subscriptions

- ☐ I plan to offer subscriptions or recurring payments
- ☐ I already have this set up in Square/PayPal/Other
- ☐ I do not have this set up
- ☐ I do not plan to offer subscriptions or recurring payments
- ☐ Other _____

Private Membership/Group access

- ☐ I plan on having this feature on my website
- ☐ I would like to charge a subscription fee for this feature
- ☐ I do not plan on having this available on my website
- ☐ Other _____