

Your Blueprint for Digital Success

Website Vision & Strategy Planner

What's in this doc?

This is a three part document to help you organize your ideas and plans for a great website. Use as much or little as you'd like. This is YOUR tool.

1. **"How to" guide** - Guidance for using the planner to strategize for your website
 2. **Comprehensive Website Vision & Strategy Planner worksheet** - Thought provoking questions to help you plan for your perfect website with examples and inspiration
 3. **Blank Answer Sheet** for your comments and answers (use additional sheets if necessary)
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How to Use This Planner

This document is your strategy guide AND worksheet rolled into one.

Option 1: Create Your Own Response Document

- Read through each question and its guidance below
- Create a new document with just the question numbers (1-18)
- Write your detailed answers in your own format
- Use this guide as reference while you work

Option 2: Use the answer sheet provided at the end of this document

- Print the entire planner
- Write your answers directly in the spaces provided after each question section in the answer sheet
- The examples and guidance will be right there to inspire you

Pro Tips:

- Don't rush - great websites come from thoughtful planning
- Be specific in your answers - details make all the difference
- If you get stuck on a question, move on and come back to it
- Share this with your team or trusted advisors for input
- Keep your answers handy when talking to web designers

Ready? Let's build something amazing together.

Website Vision & Strategy Planner

Your Digital Transformation Journey

1. What's driving your website vision?

Think bigger than "I need a website" – what's the dream you're building toward?

Share your story: Are you launching something exciting? Scaling your success? Ready to reach customers you've never connected with before? Maybe your current site feels like it's holding back your growth?

Example: "Our handmade jewelry has a waitlist, but our outdated site makes us look like hobbyists instead of the premium artisans we are."

2. What's at stake if you don't make this change?

Sometimes the cost of staying the same is higher than the investment in growth.

Paint the picture: What opportunities are you missing right now? What keeps you up at night about your current digital presence?

Example: "We're losing customers to competitors who look more professional online, even though our service is superior."

Your Unique Story & Value

3. Tell us about your business in a way that makes people lean in

Skip the corporate speak – what's the real story behind what you do?

Think about what you'd tell someone at a coffee shop who genuinely wanted to know about your work. What lights you up about it?

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4. What's your secret sauce?

Every business has something special – what's yours?

Maybe it's your 20 years of experience, your innovative approach, your family recipes, or the way you make clients feel. What do people tell their friends about you?

Example: "I'm the only wedding photographer in the area who also happens to be a licensed therapist – I can calm even the most anxious couples."

5. What problem do you solve that keeps your customers up at night?

The bigger the problem you solve, the more valuable your solution becomes.

Think beyond features – what transformation do you provide? What relief? What dreams do you help make possible?

6. Why are YOU the right person for this work?

Your background isn't just credentials – it's proof you understand your customers' world.

What experiences prepared you for this? What gives you insight others don't have?

7. What would make someone choose you over your biggest competitor?

This isn't about being better at everything – it's about being irreplaceable for the right people.

Think about your last few favorite customers – why did they ultimately choose you?

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8. Can you capture your magic in a phrase?

The best taglines make people nod and think "that's exactly what I need."

Don't have one yet? No problem! Think about the transformation you provide or the feeling people have after working with you.

Examples: "Turning house hunters into homeowners" or "Where stressed becomes blessed"

Your Ideal Customers

9. Who are the people you do your best work for?

The more specific you get, the more powerfully you can connect.

Think about demographics, but go deeper: What are their interests? What challenges do they face? What do they value? How do they prefer to research and buy?

Example: "Busy working moms aged 28-42 who value quality over quantity, shop on mobile during lunch breaks, and want solutions that just work."

Inspiration & Competition Intelligence

10. What are your competitors doing online?

Knowledge is power – and knowing what NOT to do is just as valuable.

Have you explored what's out there? What gaps do you see that your website could fill? What are they doing that you could do better?

11. What absolutely should NOT be on your website?

Sometimes knowing what you don't want is clearer than knowing what you do want.

Think about websites that made you leave immediately. What turned you off? What feels inauthentic to your brand?

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12. Show us 5 websites that make you think "I wish my site felt like this"

Don't limit yourself to your industry – great design inspiration comes from everywhere.

For each website, share:

- **Website URL:**
- **What immediately caught your attention:**
- **Specific elements you love:** (colors, fonts, layout, navigation, etc.)
- **How it makes you feel:** (professional, welcoming, trustworthy, exciting?)
- **What they do better than others:** (storytelling, product showcase, easy contact, etc.)
- **One thing you'd want to adapt for your site:**

Think beyond just "looks nice" – what makes you want to stay and explore? What builds trust? What makes complex information feel simple?

E-commerce & Sales Strategy

13. Are you ready to sell online?

If so, let's make sure your customers have an amazing buying experience.

What will you sell? What does the perfect purchase process look like from your customer's perspective? Digital products, physical goods, services, or bookings?

Getting Found & Growing Traffic

14. How will your ideal customers search for you?

Put yourself in their shoes – what would you type into Google?

List 5-10 terms, then rank your top 3. Think like your customer, not like someone in your industry.

Example: Instead of "financial planning services," they might search "help with retirement savings" or "how to pay for kids' college."

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15. Beyond Google, how will people discover your amazing website?

The best websites have multiple ways for people to find them.

Social media? Referrals? Partnerships? Email marketing? Speaking engagements? Get creative!

16. How will you turn one-time visitors into raving fans?

The magic happens in the follow-up and ongoing relationship.

Email newsletters? Exclusive content? Loyalty programs? Social media community? What would make people excited to hear from you regularly?

Site Structure & Content Planning

17. What pages will tell your complete story?

Think of your website like chapters in a book – what story are you telling?

Essential pages most businesses need:

- Homepage (your front door)
- About (your story)
- Services/Products (what you offer)
- Testimonials/Portfolio (proof you're amazing)
- Contact (how to start working together)

Pages that might elevate your site:

- FAQ, Blog, Resource Library, Case Studies, Team Bios
-

18. If you have a current website, what's working and what isn't?

Let's build on your strengths and fix what's broken.

List your current pages and note: What do visitors love? What confuses them? What's missing?

Website Vision & Strategy Planner

Ready to Begin?

Your website isn't just a digital business card – it's your 24/7 sales team, your credibility builder, and your connection to customers you haven't even met yet. What excites you most about having a website that truly represents your business?

The businesses thriving online aren't necessarily the ones with the biggest budgets – they're the ones with the clearest vision and the most authentic connection to their customers.

Next Steps: Once you've worked through these questions, you'll have a clear roadmap for creating a website that doesn't just look good – it works hard for your business every single day.

Website Vision & Strategy Planner

Answer Sheet

Use this worksheet alongside the full planner guide for detailed explanations and examples.

Your Digital Transformation Journey

1. What's driving your website vision?

2. What's at stake if you don't make this change?

Your Unique Story & Value

3. Tell us about your business in a way that makes people lean in

4. What's your secret sauce?

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5. What problem do you solve that keeps your customers up at night?

6. Why are YOU the right person for this work?

7. What would make someone choose you over your biggest competitor?

8. Can you capture your magic in a phrase?

Your Ideal Customers

9. Who are the people you do your best work for?

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Inspiration & Competition Intelligence

10. What are your competitors doing online?

10. What absolutely should NOT be on your website?

12. Show us about 5 websites that make you think "I wish my site felt like this"

Website #1: URL: _____

What caught your attention? Name some specific elements you love. How does it make you feel?
What do they do better? Name one thing to adapt.

Website #2: URL: _____

What caught your attention? Name some specific elements you love. How does it make you feel?
What do they do better? Name one thing to adapt.

Website #3: URL: _____

What caught your attention? Name some specific elements you love. How does it make you feel?
What do they do better? Name one thing to adapt.

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Website #4: URL: _____

What caught your attention? Name some specific elements you love. How does it make you feel?
What do they do better? Name one thing to adapt.

Website #5: URL: _____

What caught your attention? Name some specific elements you love. How does it make you feel?
What do they do better? Name one thing to adapt.

E-commerce & Sales Strategy

13. Are you ready to sell online? If so, what are you using for e-commerce? How many products do you plan to sell?

Getting Found & Growing Traffic

14. How will your ideal customers search for you?

Top 10 search terms:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

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7.

8.

9.

10.

Most important:

Second most important:

Third most important:

15. Beyond Google, how will people discover your amazing website?

16. How will you turn one-time visitors into raving fans?

Site Structure & Content Planning

17. What pages will tell your complete story?

Essential pages:

- Homepage ☐ About ☐ Services/Products ☐ Testimonials/Portfolio ☐ Contact
- Others

Additional pages you want:

- FAQ ☐ Blog ☐ Resource Library ☐ Case Studies ☐ Team Bios
- Others

Website Vision & Strategy Planner

Assess your current website

18. If you have a current website, what's working and what isn't?

What is the URL?

Are you currently gathering analytics such as Google Analytics or Hotjar?

List current pages:

What do visitors love?

What confuses them?

What's missing?

Your Vision Summary

What excites you most about having a website that truly represents your business?

Ready to bring this vision to life? Let's connect and discuss how to make it happen!