Bigfork

B2B web specialists

Website discovery workshop

How does it work?

A website discovery workshop is key for any web or digital project.

It's a session between you and Bigfork to find out exactly what needs building and who it's being built for. It's done through a series of open-ended questions that are designed to promote discussion.

Depending on the scope of the project, we expect it to take anything from 1 to 3 hours. At the end of the discovery session, we will have enough information to produce an accurate project specification with clear goals, so we can create a website or digital product that really helps your business.

Who should be involved?

Your account manager or project manager from Bigfork will run the workshop, either in person or on a video call. We might bring in designers or developers if we require specific expertise for the project.

We would recommend that you include:

- Someone with high level knowledge of your business, including your culture, products and services, and your customers.

- At least one person who is "on the ground" e.g., a marketing manager, who will be directly affected by this project

- A key decision maker, as it's important they are involved throughout the process.

Let's get started

The agenda

1. Who are you?

2. Why do you need a new website?

3. What does success look like for you?

4. Who are your competitors?

5. What are your products and services?

6. Who are your customers?

7. What's the plan for your content?

8. Where will your content come from?

9. How will your customers find you?

10. Will you be using any paid digital ads?

11. Are there specific technical requirements?

12. Who's in charge of this project?

13. Wrapping up

1

Who are you?

Tell us about your company / organisation

☐ **What is your purpose?**
Where did it all start, what are your mission and vision, and your values?

About your brand

Brand is the identity of your company. It's not just your logo, it's what you stand for and how your customers perceive you.

☐ **Do you have any existing brand assets?**
These include logo, guidelines, fonts, colours, and tone of voice.

☐ **How do you want to be viewed by your target audiences?**
E.g., trustworthy, authoritative, approachable.

☐ **Do you have a brand value offering?**
This is a statement that simply explains how you help your customers.

☐ **What is your market positioning?**
Premium, middle-market or value?

2

Why do you need a new website?

What challenges are you facing?

☐ Is your current website underperforming, maybe the design is no longer relevant, or perhaps you're unhappy with the CMS? Or it could be all of these reasons and more.

What does your new website need to achieve?

How will it contribute to your company / organisation?
Think wider than just sales and enquiries. For example, your website could:

☐ Support existing customers
Online tools, customer portal, downloads, contacts

☐ Help with recruitment
Show benefits of working for you, online vacancies and applications

☐ Decrease business costs
Reduce phone calls, save on printing costs

When is your ideal launch date?

☐ And is there a specific deadline e.g., in time for a trade show?

3 What does success look like for you?

What's your absolute priority goal?

☐ The one thing that the new website needs to do above all else.

Any other goals?

These should be SMART (Specific, Measurable, Achievable, Realistic, Timely).They're normally things that could be tracked in Google Analytics, for example:

☐ **Get more website enquiries**
Increase the conversion rate of website enquiries from 1% to 2% within a year of launching the new website.

☐ **Make the website more engaging**
Increase the length of the average website visit to at least 3 minutes within 6 months of launching the website.

ⓘ If you have Google Analytics installed on your current website you should review your current data to set a baseline for your goals.

4

Who are your competitors?

By analysing your competitors, we can make sure your website is differentiated in its design and offering.

☐ **Who are your main competitors?**
Include the ones you know about and the ones who appear in online search.

☐ **Which competitor websites do you like?**
What do you like about them and why?

☐ **Why should someone choose your over your competitors?**
What makes you different and better in some way?

☐ **Is their a competitor that stands out?**
Which one and why?

☐ **How do they position themselves?**
Premium, middle-market or value?

☐ **Do they have a clear offering or message?**
E.g., a statement that simply explains how they help their customers.

What does a great website look like?

☐ Competitor websites aside, what do you think is a really great website, and what's good about it?

5 What are your products and services?

Let's talk about your products and services and how they help your customers..

☐ **About your products and services**

What are they, and what are their features and benefits?

☐ **Which are the most important?**

Think about your best sellers or key services.

☐ **Do you have a unique offering?**

Do you have any products or services that are unique to you,
or something you're famous for?

☐ **What are your main messages?**

Think about the message(s) the new website needs to get across
to promote your products and services.

☐ **Can you back up your claims?**

Do you have accreditations, awards, trade memberships and testimonials
that can help establish trust and credibility with your customers?

6 Who are your customers?

It's important to design a website that appeals to your customers.
To do this we need to understand what makes them tick and what they need from you.

☐ **Who are your existing customers?**
List out your different types of customers and what they are like
– demographics, motivations, challenges and so on.

☐ **Why do they buy from you?**
What problems do you solve for them?

☐ **What's their typical buying process?**
How can your website support every stage of their journey.
What can you do to help potential customers make a decision?

☐ **What do you want them to do when they are on your website?**
This may be different for your different types of customer.

☐ **What do your customers want to do when they are on your website?**
If you don't know, consider a user survey or some interviews.

☐ **How will you get people to visit your website?**
Search engines, online and offline marketing, email, social...

7 What's the plan for your content?

Successful website design starts with your content. What content does your website need to achieve your goals?

How can you answer your customers questions?
Think about the buying process your customers go through and what questions they have at every stage.

This might include:

☐ **What are you product / service features and benefits?**
How do they choose the right product (comparison tables, product selectors)? What information would they find useful?

☐ **Why choose your company?**
Company values, messages, information, team.

☐ **What do we need to establish credibility and trust?**
Case studies, major clients, testimonials, reviews, expertise in sectors, accreditations, standards, awards.

☐ **How can you help people at the start of their buying process?**
Articles, product demos, FAQs, chatbots, live chat, whitepapers, research.

☐ **What legal / compliance content do you need?**
Terms and conditions, privacy policy, cookie policy etc.

☐ **How can you support existing customers?**
Product news, updates, downloads, training resources, customer portal, online buying/ordering, contact info.

☐ **Could your website support recruitment?**
Vacancies, benefits of working for you, staff testimonials.

☐ **Can we help improve productivity of your team?**
Websites can help your team by digitising processes they need to do, such as forms, surveys, client data management.

☐ **What content do you need to support ongoing marketing?**
News, social media, events, podcasts, landing pages, campaign pages, data capture for email marketing.

☐ **How do your customers want to contact you?**
Phone, email, online forms, video calls, live chat.

8 Where will your content come from?

- [ ] **What content do you already have?**
  For example website copy, images, videos, documents.

And the rest of the content?

- [ ] **Who is producing content?**
  Create a list of who will produce what.

- [ ] **Do you need any outside help?**
  For example copywriters, stock images, photography, videography.
  We can help put you in touch with professionals if you do need help.

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How will your customers find you?

If your website needs search traffic, it's vital to start planning for it now.

☐ **What keywords will your customers use to search for you?**
They might be related to your products and services, or could be questions related to your business / industry.

☐ **How well you rank for these keywords?**
If you don't know, it's worth finding out. Google Search Console or a mini SEO audit can get this information.

☐ **Do you do any SEO at the moment, or have done previously?**
If so what work have you had done? It's important to know this so it's preserved with a new website.

☐ **Are you Google'd up?**
Do you have Google Analytics, Search Console and Business Profile accounts all set up?

☐ **Do you target multiple locations?**
Either nationally or internationally?

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Will you be using any paid digital ads?

It's important to plan ahead as your website will support these.

☐ **Do you plan to run any pay per click campaigns?**
For example Google Ads, Facebook, LinkedIn.

☐ **Will the new website need landing pages now or in future?**
Landing pages are pages on your website designed for specific search terms or campaigns.

☐ **Do you currently use social media for your business?**
If so, which channels? LinkedIn, Facebook, Twitter, Instagram, YouTube, TikTok…

☐ **And email marketing?**
Do you do it, or plan to do it? If so, which provider do / will you use (e.g., Mailchimp), do you have a list, and how will you grow your list?

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Are there specific technical requirements?

☐ **Does your website need any integrations with third-party systems?**
For example a CRM, email provider, data sources, APIs.

☐ **Do you want / need to meet an accessibility standard?**
We recommend WCAG 2.1 AA, or as close as possible.

☐ **What user requirements do you have for the CMS?**
How many users need logins, do they need different levels of access, is extra security required such as multi-factor authentication?

☐ **Are there any things you must be able to edit yourself?**
We'll make your CMS as flexible as possible, if there's any must-have editing requirements it helps to know early on.

☐ **Would you like us to host your new website?**
If so, we'll need a contact to help manage pointing your domain to our servers. If you plan to host the site yourself, who is the contact and where will it need to be hosted?

☐ **What does your website traffic look like?**
Assuming you have analytics or server logs to check, how much traffic does your website get? Is it consistent or are there frequent spikes?

☐ **Do you have access to your Google Analytics setup?**
If so can you grant us access, or would you like us to set up a new one? If you use Tag Manager, we'd like access to that too.

Who's in charge of this project?

Who are the people who will make this project journey a smooth one?

☐ **Who will be our main point(s) of contact?**
The people we will deal with day to day.

☐ **Who are the key decision makers?**
Those who will be responsible for signing off the specification, design, website launch, and invoices.

☐ **Is there a separate contact for billing?**
If we have any queries with invoices or payments.

☐ **How do you prefer to communicate?**
Email, video calls (Teams, Zoom, Google Meet), telephone, WhatsApp, face to face meetings?

Nearly there...

Before we wrap up, is there anything we've missed or something you'd like to ask?

What's next?

We'll use the notes from this discovery session to write a draft project specification. This will cover everything from this session and include extra details about the website we're going to create for you.

Once this is approved, we can start designing your new website.

Action points and timescales

Lastly, if there are any specific actions or timescales, what are they, who is responsible, and when do they need doing?

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Thank you for
taking part.