



**C O'Malley & Associates LLC
Insurance & Finance Website Worksheet**

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The following worksheet is to clarify your needs, desires and goals with regard to your Insurance or Financial Web site design. Don't worry if you can't fill it out completely - just leave what you aren't sure about blank. Please include (or send by email) your content, photos, and anything you would like included in the website. If this form is used for an estimate, please understand some items may be more time consuming to create than others, and to give you an accurate estimate of what it will cost, we need to know what you will be sending us.

Do you need a redesign or a new Web site?

Redesign, current site. URL:

New Web site

Is this a brand new company/business? Yes No How long have you been in business?

What is the purpose of your site?

- Bring in New Clients/Customers
- To showcase products or services
- Educational, Training or Instructional
- Sell products or services online
- Strengthen Current Customer Relationships
- National Presence
- Availability 24/7
- Compete with Competitors
- Other, Please Explain:

Which goods or services does your business provide?

What types of customers are you targeting?

What will be the focus of your website? (all that apply)

- | | | |
|---|--|---|
| <input type="checkbox"/> Home Insurance | <input type="checkbox"/> Personal | <input type="checkbox"/> Tax Services |
| <input type="checkbox"/> Life | <input type="checkbox"/> Financial Planning | <input type="checkbox"/> Employee Benefits |
| <input type="checkbox"/> Automobile | <input type="checkbox"/> Retirement Plans | <input type="checkbox"/> Collections |
| <input type="checkbox"/> Casualty | <input type="checkbox"/> Renters | <input type="checkbox"/> Annuities |
| <input type="checkbox"/> Health | <input type="checkbox"/> Students | <input type="checkbox"/> Umbrellas |
| <input type="checkbox"/> Loss Prevention | <input type="checkbox"/> Business Insurances | <input type="checkbox"/> RV/Motorcycle |
| <input type="checkbox"/> Worker's Compensation Claims | <input type="checkbox"/> Builder's Risk | <input type="checkbox"/> Boat |
| <input type="checkbox"/> Disability | <input type="checkbox"/> Liability | <input type="checkbox"/> Commercial |
| | <input type="checkbox"/> Bonds | <input type="checkbox"/> Claims |
| | <input type="checkbox"/> Product Liability | <input type="checkbox"/> Other <input type="text"/> |

How do you currently market your Services?

Do you have a corporate website (usually a 1 page business card style site provided by parent company)?

Yes No Are you getting sufficient traffic on your corporate site? Yes No

Why/why not in your opinion?

How will you differentiate yourself from other businesses like yours?

Are you interested in any of our special discounted offers? (which ones)

Do you have existing material for your product/idea in the form of brochures, pamphlets, CDs, video, flyers, etc? If yes please explain:

Will you need assistance coming up with content to place on the website? Yes No

Have you considered maintaining a Blog for new content? Yes No What's a blog?

If yes, what kind of blog would you consider using?

- Sales (to market or sell products/services, make aware of services)
- Relationship (strengthen, uphold or create relationships within organizations)
- Branding (strengthen brand)
- Knowledge (provide information and insights)
- Collaboration (team tool for research, collaboration & discussion)
- Culture (information non-work related to strengthen organizational culture)

Check off pages you want below:

Which Companies do you represent?

- Home (everyone has at the very least one page)
- About Us/About the Company
- Company Profile
- Contact Us - forms and contact information
- Product Ideas & uses
- Downloadable Materials
- Password protected pages
- Company history
- Products or Services Information page
- News, what's new
- Customer Service & Support
- Informational Articles
- Staff or Company Officers
- Testimonials - good feedback from past clients
- Press Releases
- Products Carried (Companies represented)
- Claims page
- Help or Frequently Asked Questions (FAQ) information
- Privacy Statement
- Newsletter sign up (what do you need to collect? Name/Address Name/Phone Name/Email All)
- Online Quotes or Policy changes (requires software)
- Events/Seminars
- Links Page - trade links with related industries
- Other

Images & Photos

Approximately how many photos will be included?

Will you have a "staff page" and if so, how many biographies/photos?

How will these photos be supplied? (e-mailed, postal mailed photographs that need scanning, on CD?)

Do you have a logo? Yes No Will you want us to create one? Yes No

My budgeting priorities are: (choose ONLY 2) Good Fast Cheap

Please select the budget you had in mind for designing your web site? (we ask because it helps us prioritize your website needs so that we can concentrate on the features most important to you first)

- <\$700 (1-2 page business card site)
- \$700-\$1000 (2-3 page static site)
- \$1000-2500 (simple CMS site)
- \$2500-5000 (simple ecommerce site)
- \$5000-10,000 (complex dynamic site)
- >\$10,000 (very complex dynamic site)

Will you want to market your web site as a business? Yes No or Community service Yes No

Will you need us to update your site periodically? Yes No, I know HTML and can do it myself I'd like an easy way to do updates myself such as a CMS (content management system)

Getting found & Statistics: Do you want RSS feed? Yes No Will you import RSS feeds? Yes No

Google XML Site Map? Yes No Robot Text (keeps search engines out of some areas)? Yes No
 Google Analytics software for tracking? Yes No Yahoo Analytics? Yes No

Facebook page for your business? Yes No Blogging software? Yes No

Meta tags & keywords? Yes No Optimized pages (with keywords you provide)? Yes No

Permanent redirects from a previous site? Yes No (How many pages approx?)

Do you want to have access to your server's log for statistical purposes? Yes No

Timeframe: When will you want your site to be complete? I'm flexible Don't know

Special offers: Would you like to use a special offer we've advertised? Which one?

How technically savvy are you? beginner comfortable with email & internet only very savvy with most programs such as Word or Outlook I've built my own simple website with a program such as Front Page or Sitebuilder

Every website has a "style" or "look" that evokes feelings about the company. What sort of style do you want to project to your visitors?

- What "style" do you want to portray? (all that apply)**
- | | | |
|---------------------------------------|---|---------------------------------------|
| <input type="checkbox"/> Plain | <input type="checkbox"/> Whimsical | <input type="checkbox"/> Bright & Fun |
| <input type="checkbox"/> Pastels | <input type="checkbox"/> Conservative | <input type="checkbox"/> Geometric |
| <input type="checkbox"/> Elegant | <input type="checkbox"/> Serious | <input type="checkbox"/> Soft/muted |
| <input type="checkbox"/> Stylish | <input type="checkbox"/> Clean & Simple | <input type="checkbox"/> Retro |
| <input type="checkbox"/> Corporate | <input type="checkbox"/> Offbeat-unusual | <input type="checkbox"/> Not Sure |
| <input type="checkbox"/> Children's | <input type="checkbox"/> Flashy w/Movement | <input type="checkbox"/> Other |
| <input type="checkbox"/> Hi-Tech | <input type="checkbox"/> Themed with buttons/graphics | |
| <input type="checkbox"/> Professional | | |
| | <input type="checkbox"/> Colorful | |
| | <input type="checkbox"/> Respectful | |
| | <input type="checkbox"/> Monochromatic (1 color) | |
| | <input type="checkbox"/> Like others in my industry | |
| | <input type="checkbox"/> Artsy/Innovative | |

Please describe

Please list some Website URL's you like:

Please list some Website URL's you DO NOT LIKE

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Where do you want the navigation? Top Side Bottom Right (check all that apply)

Do you prefer a "busy" site with lots of information and links packed on the page, or a simple site with a clean look?

Busy Simple Somewhere in the middle Leave room to add items later

I prefer sites that fit on all screens even if there's blank areas I want to use every available space

Do you have color preferences?

Do you want a search box? Yes No Will you want statistics? Yes No

What would you like the statistics track? (Stats cannot tell you the name or email of visitors unless you specifically ask for and are granted that information – typical is screen resolution, operating system, IP address, country of origin)?

Collecting Information

Will you want to collect information from visitors to your site? Yes No

Such as?

Will this information be Emailed to you Collected in a database for later use

Do you desire to send newsletters to visitors? Yes No Do you want a "favicon" (custom icon)? Yes No

If you intend to collect information from visitors, law requires you provide a Privacy Disclosure statement somewhere on your site. (make sure you check that as one of your pages)

Content

We will need your text and photos to provide content to the pages. Please send finished, proofread copy, preferably in digital format (in email, word or plain text files on CD, Zip or email). Written content is important for search engines to find your site. Please provide content clearly labeled as to which page you'd like the information placed on.

Will you need copywriting assistance?

Yes No

I would like Custom error Pages (instead of getting a generic 404 Page Not Found, you will get one that redirects visitors back to your site (if hosting compatible). These can be even quite fun reflecting the personality of the site owner though their function is to keep you on the site even if a page moves.

Additional Features you may be interested in using on your site:

- I-Frame content (include content from other sites in your site)
- Pop-up windows
- Weblog (a blog is a way to keep content fresh easily)
- Login/Password protected areas
- RSS Feed (broadcast information to worldwide feeds for distribution)
- Web cams (real time video)
- Photo galleries
- Flash masthead, banner or splash page
- Flash Pages (this is the ONLY way you can really protect your photographs and images from theft)
- Privacy statement (should be included in all websites per the law)
- Masked photos (decorative element added to photos to make them stand out – such as a soft fade effect or cutout effect)
- Webcast/Video information (video is either downloaded or streaming. Streaming requires special server capabilities)

Database and Interactivity needed

If your project requires any interactivity that will need a back end database, please describe your needs specifically as possible below. Examples of database functionality are log in areas where users can populate information and record storage/manipulation/retrieval.

Explain the type of functionality you'll need. Be as detailed as possible

Hosting, Domain & Email Services

We recommend to our clients web hosting services tailored to their specific needs and can assist with finding and setting up hosting. We recommend hosting on your local dial-up ISP or FREE hosted sites ONLY if your page is very simple and basic since they are usually not well-prepared to meet specialized business site hosting needs. We can recommend a Web host service for you in your price range. Your hosting and domain are not included in your web design costs; they are an ongoing yearly charge.

Hosting: If you have special needs or requirements are related to bandwidth or storage, you may require a virtual dedicated server so your increased bandwidth doesn't impact others on the host machine. Generally we recommend shared hosting for most clients and the provider and features needed will depend on what you plan to do with your website.

Do you currently have hosting or know where you would like the site hosted? Yes No

If you have hosting, do you have log-in and ftp information to access the hosting? Yes No

If not, can you obtain this information? Yes No Explain any special circumstances:

Would you like us to obtain hosting for you? Yes No

About how much are you willing to spend per month? Don't know

How much traffic do you expect per day? 1-10 visitors 10-100 visitors More than 100 visitors

Do you have any ideas regarding your need for bandwidth? Storage space?

Any features that are important to you? (speed, downtime, telephone tech support, spam control, specific programs, etc.)?

Domain name:

Have you purchased a domain name? Yes No Name?

Do you have the log-in information to your registrar? Yes No Can you obtain this? Yes No

If not, would you like us to obtain a domain name for you? Yes No

If so, first choice 2nd choice

Preferred domain extension: (www.yourname.ORG) .org .com .net .info .biz Country of origin (.ca = Canada for example) .name .sr (Seniors) .us (USA) .ws (website) .md (healthcare) .cd (music industry) .cc (similar to com) .am (radio station) Note: domains other than .com/.net/.org are usually more expensive to purchase. If a domain is taken, it may still be available on a secondary market at additional cost.

Should we pursue this if your first domain choice is not available? Yes No

Shall we obtain any derivatives of that name? org net biz com us if available? Yes No

Will you want email accounts with your domain names? Yes No If so, how many?

Will you want auto-responders on those email accounts? Yes No Spam filters? Yes No

Will you want those accounts to feed into your current email account, or be "POP" mail – set up in your mail program or online access? Forward to current email POP Mail Online Access or Webmail

We will require a Credit card on file to obtain a domain name and/or hosting for you as well as any required software that pertains to your site. Credit Card information cannot be sent through email, it must be provided over the phone or by postal mail (email is NOT secure).

Site features:

The following are features that are commonly used on websites. Please check any you desire. If you are not sure or don't know what they are, leave unchecked.

Scripting & Interactive Software Features

- Informational articles to download (PDF or HTML) How many?
- Events Bulletin Board
- Events Calendar
- Community Chat Room
- Counter/Traffic Meter
- Files for Download
- Guestbook
- Web Cast
- Media Streaming
- Password Protected Area
- Image Rollovers (change look, position or color when clicked on)
- Video/Audio Streaming
- Virtual Tours
- Mailing List Software
- CMS (content management system)
- Search Site
- Form Validation
- CAPTCHA (discourages spambots from filling out bogus forms)
- Scrollers & Sliders for images
- Ecommerce
- Find Nearest Location
- ASP, PHP, Perl and other programming for custom applications
- eFriend Scripts (dating, community)
- Search by Zipcode
- Education (create online courses)
- Wiki (collaboration tool)
- Blogs (personal publishing tool)
- Community Software with login
- Classified Ads
- Customer Relation software
- Discussion Boards
- Billing Software
- Auctions
- Email Newsletter
- Booking Software
- Interactive Maps & Directions
- Helpdesk
- Journal
- Live Help
- Polls/Surveys
- Classified Advertising
- Banner Rotator
- Photo Albums
- Cost estimation script
- FAQs Generator
- Image Galleries
- Project Management
- Scheduling
- Industry Specific
- Other - Explain:

Complete this section only if you plan to have visitors buy or pay for items from your website.

Paypal Donation, Subscription, Shopping Cart or Payment Link

To accept credit cards through Paypal you will need a Verified Business Paypal account or be willing to set one up. Email address and Paypal log-in information is required to provide a working link that will pay into your Paypal account.

Do you have a Paypal account in place? Yes No

Will you be taking payment online through Paypal or another source?

Paypal Other Payment Source Will not be taking payments online

Type of link: Donation Product Purchase Donation Subscription

Will you require a shopping cart? Yes No Number of products?

With the Paypal shopping cart you can use up to 2 custom fields used for all items. (ie: color, size)

1. 2.

Simple Ecommerce Site (Paypal or no shopping cart) No more than 5-10 items

Will you want to take credit cards apart from Paypal? Yes No

Do you have a payment provider in mind? Yes No

What Features will you need in your shopping cart?

About how many products and what types of products will you sell?

Will they be unique, one of a kind items or will you have many of the same thing?

Will you need additional criteria such as size, framed, unframed, color for each item? (If so, what) Yes No

Will your items need categorizing (tshirts, sweats, patches) Yes No

We will need prices and descriptions for each item.

Will you want other features in your shopping cart such as coupons, sale items, "most popular" items featured?

What features will you need? Yes No Which features?

Will you want mailing list capability (this may or may not be included in a shopping cart)? Yes No

Contact & Response Forms

Sometimes you might want interested persons to contact you. A reply-type form uses different kinds of programming. We can add a response form to one of your pages. This is done from the server with PHP, CDO or CDONTS. Which you can use is dependent upon the server's capability. **Note:** You can set up sites that use the response form as an order form, but it will not include a secure server and secure order pick-up, so you cannot take credit card or any sensitive information in this way. This may be fine for requesting literature, information, etc. We charge extra to set up a secure ordering system.

I would like a form: Yes No

Email to submit to (email address)

Form's fields (check all you want): Name Address Country Phone Email Comments

Other Fields?

Page to put form on:

Other features you might want on your website. If you think you might want them, check the box. It's ok if you do not know what something is, don't check it.

Popular small script features:

News feeds

RSS

Printer friendly pages

PDF pages

Scroll boxes

Popup Windows

Links to other sites' databases

Page redirect

Watermark background

Hide email from spammers

No explorer Image bar

Static Map

Bookmarks

Copyright

Small feedback form

PNG replacer (for PNG images) No Right Click

Colored scrollbars in IE5 only

Static background in IE only

Marquee

Counter

No Right Click (makes it more difficult to steal images)

Sound files (auto play) MP3 Midi WAV MPEG

Video (you MUST be the copyright owner to use MP3's on your site)

Browser detection & redirect

Java applet (ie: shimmering lake)

Translation link

Text Rollovers (text changes color on click)

Something else?

Flash is an interactive and very classy way of presenting images and content on your website. It is also fairly expensive. It is used to draw attention to important items or just make your website stand out from the crowd. It is not particularly search engine friendly so we do not recommend doing an entire site in Flash.

Flash & Splash I would like to include:

- Flash Movies (a secure way to copy protect movies)
- Flash Splash Pages (fancy introductions)
- Flash Banners (to draw attention to important links or areas of your site)
- Flash Games or Interactives
- Onsite People (*people that appear to be alive on your screen talking to you*)
- Disjointed rollovers (*mouse over a picture, and the text changes is an example*)
- Please describe anything else you need:

Alternative Advertising

Would you be interested in printed materials to match your website? Yes No

Your website on CD as a promotional tool or backup? Yes No Promotional tool Backup

Basic Search Engine Optimization services? Yes No (this includes title tags, basic submissions – it does NOT include keyword searches or optimizing, submissions to many search engines, meta tags or XML site maps)

Copyright

Do you have copyright or license to your current site? Copyright License Don't know Neither

Maintenance

Website creation does not include future updates. If you are interested in a maintenance package, let us know. We have several inexpensive packages (as well as pay-as-you-go updating) available that can keep your website fresh, interesting and up to date. Many clients will occasionally add a page now and then as their business grows so that their web presence keeps pace with their brick-and-mortar business. Will you be interested in maintenance services? (we have discounted rates for signing up for 1 year of maintenance services – standard pay-as-you go services are at our regular rate).

I think I would like a maintenance package and would like to talk to you about what is available?

Yes No

Is there anything else you'd like us to know, want to add or would like to include that we haven't covered above? Please describe what you desire:

The content described within is confidential and the form shall not be used, disclosed or reproduced, in part or in whole for any reason other than for us to estimate or create your web development needs. Estimates are based on information provided in this document and are subject to change if the scope of the project changes.

Your Contact information:

Name

Business/Org: Phone

Address:

Email

When will you be ready to get started? Expect completion?

This form outlines our plans for our website. On behalf of _____ I have authority to approve the above plan. I authorize C O'Malley & Associates Web Design LLC to use this information as the basis of the project in accordance with the Web Site Development Agreement.

Signature _____ Date _____