



WEBSITE DESIGN & DEVELOPMENT

DETAILED CLIENT INFORMATION FORM

For company / organisation websites, professional services, institutions, NGOs, shops and other businesses.

Client / organisation name	
Date of discussion	
Prepared / received by	
Preferred contact method	☐ Phone ☐ WhatsApp ☐ Email ☐ In-person
Proposed project / reference no.	

HOW TO COMPLETE: Tick applicable boxes, fill in the spaces, and write “Not applicable” where a question does not apply. If unsure, write “Need advice”. This form helps prepare the sitemap, proposal and project scope; it is not itself a quotation or contract.

SECTION 1 — ORGANISATION / COMPANY PROFILE

Full legal / registered name	
Brand / trading name	
Organisation type	☐ Proprietorship ☐ Partnership ☐ LLP ☐ Pvt Ltd ☐ Public Ltd ☐ Society/Trust/NGO ☐ Other
Industry / business category	
Year established	
Registration / licence (if relevant)	Type and number, only if intended for publication
Registered office address	
Office / branch address	
City / district / state / PIN	
Primary contact person	Name and designation
Mobile / WhatsApp number	
Official email address	
Alternative contact	Name / phone / email
Current website / domain	
Social media pages	Paste URLs or attach a separate list

SECTION 2 — BUSINESS OVERVIEW & OBJECTIVES

Describe the organisation	What do you do? Who do you serve?
Main products / services	List the main offerings
Unique selling points	What makes you different from competitors?
Main reason for a website	☐ Awareness ☐ Enquiries ☐ Sales ☐ Bookings ☐ Recruitment ☐ Information ☐ Other
Three most important goals	1. _____ 2. _____ 3. _____
Main action visitors should take	☐ Call ☐ WhatsApp ☐ Enquire ☐ Buy ☐ Book ☐ Visit ☐ Apply ☐ Download
Competitors	Names / website URLs
Reference websites	Websites you like and what you like about them

Additional business details:

**SECTION 3 — TARGET AUDIENCE & MARKET**

Main customer / visitor groups	☐ General public ☐ Businesses ☐ Students ☐ Government ☐ Members ☐ Other
Target geographic area	☐ Local ☐ West Bengal ☐ India ☐ International; specify:
Target languages	☐ English ☐ Bengali ☐ Hindi ☐ Other:
Typical visitor needs / questions	
Key customer concerns to address	
Accessibility requirements	e.g., readable text, keyboard access, language needs

SECTION 4 — WEBSITE PAGES & NAVIGATION

Tick the pages needed. Add a page name or topic where applicable.

☐ Home	☐ About Us	☐ Products
☐ Services	☐ Individual service pages	☐ Industries / solutions
☐ Our team	☐ Leadership	☐ Portfolio / gallery
☐ Projects / case studies	☐ Testimonials	☐ Clients / partners
☐ Blog / news	☐ Events	☐ Careers / jobs
☐ Downloads / resources	☐ FAQ	☐ Contact Us
☐ Shop / catalogue	☐ Cart / checkout	☐ Booking / appointments
☐ Courses / LMS	☐ Member login	☐ Customer login
☐ Privacy policy	☐ Terms & conditions	☐ Refund / cancellation
☐ Shipping / delivery	☐ Other: _____	

Preferred menu order	List the main menu items in order
Important sub-pages	
Page(s) required at launch	
Pages/features for a later phase	
Preferred calls to action	e.g., Get a Quote, Enquire Now, Book a Visit

Special instructions for page structure:

SECTION 5 — BRANDING & VISUAL DESIGN

Logo available?	☐ Yes ☐ No ☐ Needs redesign; format: ☐ PNG ☐ JPG ☐ SVG ☐ AI/EPS ☐ Other
Brand colours	Names / colour codes, if known
Preferred website style	☐ Corporate ☐ Modern ☐ Premium ☐ Minimal ☐ Traditional ☐ Creative ☐ Other
Preferred colours / colours to avoid	
Fonts / brand guidelines	☐ Available ☐ Not available; attach if available
Photos / videos available?	☐ Yes ☐ No ☐ Some; who will supply them?
Brochure / catalogue / profile	☐ Available ☐ Not available
Reference site 1	URL and what you like
Reference site 2	URL and what you dislike / want changed

Design ideas or visual preferences:

**SECTION 6 — WEBSITE CONTENT & DOCUMENTS**

☐ Company profile	☐ About-us text	☐ Product descriptions
☐ Service descriptions	☐ Price list	

☐ Team photos / bios	☐ Office / facility photos	☐ Product photos
☐ Videos	☐ Testimonials	

☐ Certificates / awards	☐ Client logos	☐ FAQs
☐ Brochures / PDFs	☐ Policies / legal text	

Who will write the content?	☐ Client ☐ Developer ☐ Copywriter ☐ Shared responsibility
Who approves the content?	Name / designation
Content / document delivery date	
Content languages	
Content requiring special care	e.g., claims, regulated services, technical information
Material that must not be published	

Missing content / documents to be supplied:

SECTION 7 — FEATURES & FUNCTIONAL REQUIREMENTS

☐ Contact / enquiry form	☐ WhatsApp button	☐ Click-to-call
☐ Google Maps	☐ Live chat	

☐ Newsletter signup	☐ Search function	☐ Appointment booking
☐ Event registration	☐ File downloads	

☐ Product catalogue	☐ Online payment	☐ Shopping cart
☐ Shipping integration	☐ Coupons / discounts	

☐ Customer / member login	☐ Admin dashboard	☐ Staff / role-based access
☐ Course / LMS	☐ Job application form	

☐ Review / testimonial system	☐ Multi-language switcher	☐ Chatbot
☐ CRM / ERP connection	☐ API integration	

Contact form fields	e.g., name, phone, email, subject, message
Where should enquiries go?	Email address(es), CRM, or other destination
Automated response needed?	☐ Yes ☐ No; message / recipient
Booking rules	Availability, duration, confirmation, cancellation
Payment needs	Provider, products/services, refund process; no credentials
Third-party tools / systems	Name and purpose
User roles	Who can view, edit, publish, approve, or administer?

Other features and how they should work:



SECTION 8 — DOMAIN, HOSTING, EMAIL & PLATFORM

Preferred domain name(s)	
Domain already owned?	☐ Yes ☐ No; registrar / expiry date if known
Hosting already available?	☐ Yes ☐ No; provider / plan / renewal date
Preferred platform	☐ WordPress ☐ Shopify ☐ Custom ☐ Other ☐ Need advice
Business email accounts	e.g., info@, sales@; number of mailboxes
SSL / HTTPS	☐ Existing ☐ Required ☐ Need advice
Existing website to migrate?	☐ Yes ☐ No; pages, blog, products, files, email, redirects
Domain / hosting account owner	Name / organisation; do not write password

Security note: Share access only through an agreed secure method. Never record passwords, OTPs, recovery codes, API secrets or payment-card details in this form.

SECTION 9 — SEO, ANALYTICS & DIGITAL MARKETING

☐ Basic on-page SEO	☐ Keyword research	☐ Google Search Console
☐ Google Analytics		
☐ Google Business Profile	☐ Meta Pixel	☐ Conversion tracking
☐ Schema / structured data		
☐ Blog / content strategy	☐ Landing pages	☐ Local SEO
☐ Email marketing integration		

Main keywords / search phrases	
Priority locations for search	
Existing SEO / analytics accounts	Who owns them and who can grant access securely?
Paid advertising planned?	☐ Google ☐ Facebook/Instagram ☐ LinkedIn ☐ Other
Conversions to measure	Calls, forms, purchases, bookings, downloads, etc.
Competitor websites for SEO	

Marketing goals / campaign details:

SECTION 10 — PRIVACY, SECURITY & COMPLIANCE

☐ Privacy policy	☐ Terms & conditions	☐ Cookie notice if applicable
☐ Consent checkbox		
☐ Refund / cancellation policy	☐ Spam protection	☐ Regular backups
☐ Security monitoring		
☐ Secure uploads	☐ Restricted admin access	☐ Accessibility considerations
☐ Other: _____		

Types of data collected	Describe categories only; do not provide real customer data
Sensitive or regulated information?	☐ No ☐ Yes; explain the requirement, not actual data
Industry-specific rules	
Data access / retention requirements	
Who handles privacy/legal text?	☐ Client/legal adviser ☐ Developer ☐ To be agreed

**SECTION 11 — TIMELINE, BUDGET & APPROVAL**

Preferred start date	
Target launch date	
Reason for deadline	e.g., launch, event, campaign
Indicative budget	₹ _____ ☐ Need quotation first
Essential launch features	
Optional / future features	
Project coordinator	Name / phone / email
Final decision-maker	Name / designation
Who gives design approval?	
Expected feedback time	e.g., within 2–3 working days
Maintenance / support required?	☐ Yes ☐ No ☐ Need proposal

SECTION 12 — MIGRATION, ACCESS & HANDOVER

☐ Domain access to be arranged securely	☐ Hosting access to be arranged securely	☐ DNS access to be arranged securely
☐ Logo / brand files supplied	☐ Text / images supplied	☐ Social / analytics access arranged securely
☐ Existing-site backup required	☐ Email migration required	☐ Redirects / SEO preservation required
☐ Admin training	☐ Content editing training	☐ Written user guide
☐ Maintenance agreement		

Who owns the website and domain?	
Who will manage the website after launch?	
Number of people needing training	
Handover items expected	e.g., admin access, backups, documentation, licences

SECTION 13 — CLIENT CHECKLIST & ATTACHMENTS

Please tick items already provided or arranged.

☐ Logo	☐ Company profile	☐ Product / service content
☐ Photographs / videos		
☐ Brand guidelines	☐ Brochures / catalogues	☐ Team details
☐ Testimonials / client logos		
☐ Domain / hosting details (not passwords)	☐ Policies / legal text	☐ Reference website list
☐ Other: _____		

Attachments submitted	List file names / number of pages
Items still pending	
Expected date for pending items	



SECTION 14 — ADDITIONAL NOTES

Special requirements, concerns, examples, or instructions:

SECTION 15 — CLIENT DECLARATION

I confirm that the information supplied is accurate to the best of my knowledge. I understand that this form is for requirements gathering and does not itself constitute a final quotation, contract, or guarantee of specific results. The final scope, deliverables, timeline, price, third-party charges, payment milestones, ownership, and maintenance terms will be agreed separately in writing.

Authorised representative	
Designation	
Signature and organisation seal	
Date	

DEVELOPER'S INTERNAL USE ONLY

Project / quotation reference	
Initial assessment	☐ Informational ☐ Lead generation ☐ E-commerce ☐ Booking ☐ Custom
Proposed sitemap prepared	☐ Yes ☐ No
Technical feasibility checked	☐ Yes ☐ No
Proposal / quotation sent on	
Agreed scope / exclusions	
Delivery estimate	
Payment milestones	
Open questions / action owner	
Next follow-up date	