

THE NEXA SOLUTIONS

AI Automation · AI Agents · Websites · Digital Marketing

Website Redesign Planning Workbook

A structured, fillable way to scope goals, content, and requirements before a rebuild — so the project starts with clarity, not just enthusiasm.

A free workbook from The Nexa Solutions · thanexasolutions.com

Fill This Out Before You Talk to a Developer or Agency

Most website redesigns that go over budget or drag on for months don't fail because of the design or the code — they fail because the goals, audience, and content weren't actually agreed on before work started. This workbook is meant to be filled out by hand (print it, or type directly into the PDF) before your first conversation with whoever is building the site.

Work through it with whoever else has a stake in the outcome — a founder, a marketing lead, whoever approves the final result. Disagreements are far cheaper to resolve on paper here than three weeks into development.

What you'll walk away with

A written project brief covering goals, audience, content, must-have requirements, and budget — the exact document most agencies (including us) ask for before providing an accurate quote.

SECTION 1

Project Goals & Success Criteria

1. Why are we redesigning the site now? What specifically isn't working today?

e.g. outdated design, not generating leads, hard to update, doesn't work well on mobile

2. What should someone do after visiting the new site? (the single most important action)

e.g. book a call, request a quote, make a purchase, sign up

3. How will we know six months from now whether this redesign worked?

Write a specific, measurable outcome — not "it looks more professional."

SECTION 2

Audience & Use Cases

4. Who is the primary visitor to this site? Describe them specifically.

e.g. "operations managers at 20–50 person logistics companies researching automation options"

5. What question is that visitor trying to answer when they land on the site?

e.g. "can this company actually solve my specific problem, and can I trust them?"

6. Are there a second and third audience we also need to serve? (e.g. job candidates, investors, press)

SECTION 3

Content Inventory

List every page on your current site (or every page you expect the new one to need) and decide its fate. Being honest here — most sites can lose 20–30% of their pages without anyone noticing — saves real time and money later.

Page / Content	Keep as-is	Rewrite	Cut

SECTION 4

Must-Have Requirements

Check anything that's a genuine requirement, not a nice-to-have.

- ☐ Blog or content publishing system the team can update without a developer
- ☐ E-commerce / online store functionality
- ☐ Online booking or scheduling
- ☐ Multi-language support
- ☐ Integration with our existing CRM
- ☐ Integration with our existing email marketing tool
- ☐ Member login / gated content area
- ☐ Advanced search or filtering (e.g. large product catalog)
- ☐ Specific accessibility compliance requirement (e.g. WCAG 2.1 AA)
- ☐ Migration of existing content/URLs without breaking SEO rankings

Anything else that's a hard requirement, not listed above:

SECTION 5

Technical & Platform Considerations

7. What platform is the current site built on, if any?

e.g. WordPress, Shopify, Squarespace, custom-built, or "this is our first website"

8. Who will maintain and update the site day-to-day after launch?

This affects whether a fully custom build or a more editable platform is the right choice.

9. Are there any existing brand guidelines, logo files, or design assets to provide?

SECTION 6

Budget & Timeline

10. What's the budget range for this project?

A range is fine — this shapes what's realistic far more than most people expect.

11. Is there a hard deadline this needs to launch by? (an event, a season, a contract renewal)

If not, what's a realistic target?

12. Who has final sign-off approval on design and launch?

Name the specific person — "the team" approving something rarely works in practice.

SECTION 7

Stakeholders & Approval Process

Name	Role in Project	What They Need to Approve

How The Nexa Solutions can help

Once this workbook is filled out, you have exactly what we (or any agency) need to provide an accurate scope and quote — no back-and-forth guessing. Visit thanexasolutions.com/contact to send us your completed workbook and book a free consultation.