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Website Redesign Planning Workbook

Nine worksheets that get a website redesign properly scoped before anyone opens a design tool — so you brief it once, price it once, and do not discover the hard questions halfway through the build.

How to use this workbook

Work through the sections in order. Sections 1 to 4 are decisions you make internally; sections 5 to 7 are what you hand to whoever builds the site; sections 8 and 9 are what you check before and after launch. Each worksheet is deliberately short — a redesign brief that nobody finishes is worth nothing.

Print it, or annotate the PDF. Either way, do section 1 with the person who owns the revenue number, not only with whoever owns the website.

1. Why are you redesigning?

Most redesigns fail here. 'It looks dated' is not a business reason, and a site rebuilt on that basis usually performs the same as the one it replaced. Write the actual reason, then the measurable thing that would prove it was solved.

The problem, in one sentence	How we would know it is fixed	Current value	Target

Common real reasons

- The site does not convert the traffic it already gets.
- Nobody internally can update it without a developer.
- It does not work properly on a phone, where most of the traffic is.
- It cannot support a product, pricing or market the business has moved into.
- It is slow enough that people leave before it renders.
- It represents the business the company was three years ago, not the one it is now.

2. Who is the site for?

One primary audience. A site built for three equally-weighted audiences is built for none of them. Secondary audiences get accommodated, not designed for.

Audience	Primary or secondary	What they came to do	What stops them today

3. The three jobs the site must do

Rank them. When a design decision is contested later, the ranking decides it — which is the whole point of writing it down now rather than arguing in a review meeting.

Rank	Job	Example
1	The thing the site exists to do	Generate qualified enquiries
2	The thing it must also do well	Explain what the company actually does
3	The thing it must not get wrong	Let existing customers find support

Rank	Our job	How a visitor completes it

4. Content inventory and cull

Run this before the sitemap, not after. Most sites carry pages nobody reads and nobody will miss, and every one of them is scope you would otherwise pay to rebuild.

Decision	Criterion	What happens
Keep	Earns traffic, conversions or support deflection	Migrate as is
Rewrite	Right topic, wrong or outdated content	Rewrite before build, not during
Merge	Several thin pages covering one topic	Consolidate; redirect the others
Retire	No traffic, no links, no purpose	Remove and redirect to the nearest relevant page

Every retired or merged URL needs a 301 redirect to its closest equivalent. Redirecting everything to the homepage is the standard mistake and it loses most of the value those pages carried.

URL	Keep / rewrite / merge / retire	Redirect to

5. Sitemap and page templates

Count templates, not pages. Fifty pages built from six templates is a far smaller project than twelve pages each designed individually — and it is the number that actually drives the quote.

Template	Typical count	Notes
Home	1	Usually the most contested; design it last
Service or product detail	1 template, many pages	Must work at the shortest and longest content you have
Landing page	1	No global navigation; single action
Article or blog post	1	Includes author, date, related content
Listing or index	1	Filtering and pagination behaviour defined here
Standard content page	1	About, contact, legal, careers

Template	Pages using it	Who writes the content	Due

6. Functional requirements

Separate what the site must do from what it would be nice for it to do. Everything in the second column is where redesign budgets disappear.

Must have	Nice to have	Explicitly out of scope

Questions people forget to ask

— Who needs to be able to edit the site without a developer, and which parts?

— Which existing systems must it connect to — CRM, marketing automation, booking, payments, support?

— What happens to existing form submissions and the data behind them?

— Which analytics and conversion tracking must carry over, and who owns those accounts?

— What are the accessibility requirements, and are any of them contractual or legal for your market?

— Does anything need to work in more than one language or currency?

7. Measurement plan

Define this before the build, because the baseline has to be captured from the current site while it is still live. A redesign with no before-figures can never be shown to have worked.

Metric	How it is measured	Baseline (current site)	Target

Capture at minimum: sessions and source, conversion rate on the primary action, page speed on mobile for your three most-visited templates, and the number of enquiries that turn into real opportunities. The last one is the only one the business genuinely cares about.

8. Pre-launch checklist

- Every old URL has a 301 to its closest equivalent, tested as a list rather than spot-checked.
- Analytics and conversion tracking fire on the new site and have been verified with a real submission.
- Every form has been submitted end to end and the notification arrived at a monitored address.
- Page titles and meta descriptions written for each template, not inherited from a default.
- The site renders and is usable on a mid-range phone on a slow connection, not only on your laptop.
- Legal pages present and current: privacy, terms, cookie notice, and anything your market requires.
- A staging password or noindex has been removed before launch — and confirmed removed.
- Someone owns the DNS change and knows how to reverse it.

9. The first thirty days after launch

Launch is the start of the work, not the end of it. Book the time now, while there is still goodwill and budget.

When	Do this
Day 1	Check for crawl errors, broken redirects and failed forms. Watch analytics for a traffic cliff.
Week 1	Review search console coverage. Fix anything returning an error or excluded unexpectedly.
Week 2	Compare conversion rate against the baseline. Investigate any drop before assuming it will settle.
Week 4	Full comparison against section 7. Write down what the redesign actually changed, including what it did not.

A drop in traffic in the first fortnight is common while search engines recrawl. A drop that is still there at week four is a problem, not a settling period.

Using this with a partner

If you are briefing an agency or a freelancer, sections 1 through 7 are the brief. Handing those over complete will get you a more accurate quote and a shorter project than any conversation will, because most of what inflates a redesign estimate is uncertainty rather than work.

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