



WP EXPERT / CLIENT PREPARATION GUIDE

Website Project Ready Checklist

Everything we need from you to plan, design, build and launch a successful WordPress website.

A smoother project starts with clear inputs

Use this checklist before kickoff. You do not need every detail to contact us, but the items marked REQUIRED must be available before the related phase can begin.

01

Choose your path

New website or redesign? Each path has a few specific requirements.

02

Gather your materials

Brand, structure, content, functionality and legal information.

03

Prepare for launch

Domain, DNS, hosting and third-party service access.

TIP: Assign one person on your team to consolidate feedback, approvals and files.

1. Project foundations

Start with the big picture

These decisions give us the context to recommend the right structure, scope and approach.

For every website project

- ☐ Primary contact and decision-maker **REQUIRED**
Name, role, email, phone and who has final approval.
- ☐ Business overview **REQUIRED**
What you do, who you serve, your positioning and what makes you different.
- ☐ Project goals **REQUIRED**
For example: generate qualified leads, sell products, recruit staff, increase bookings or improve credibility.
- ☐ Target audiences
Key customer groups, locations, needs, questions and preferred languages.
- ☐ Success measures
How will we know the new site is working? Examples: leads, sales, bookings, downloads or engagement.
- ☐ Budget range and desired launch date **REQUIRED**
Include any fixed event, campaign or operational deadline.
- ☐ Internal stakeholders
Everyone who will review content, design, legal requirements or technical decisions.

If this is a new website

- ☐ Existing brand or style guide
Logo files, colours, fonts, photography direction, icon style and usage rules.
- ☐ Logo source files
Preferred: SVG, EPS or AI. Also provide transparent PNG versions.
- ☐ Inspiration and competitor sites
Share 3-5 examples and explain what you like or dislike about each.
- ☐ Proposed sitemap **REQUIRED**
A list of pages and how they relate. We can help refine it if needed.

If this is a redesign

- ☐ Access to the current website **REQUIRED**
WordPress administrator login, hosting panel and staging site if one exists.
- ☐ Current-site review
What works, what does not, what must stay and what can be removed.
- ☐ Analytics and search data
Google Analytics, Search Console, heatmaps or recent performance reports.
- ☐ Migration requirements
Pages, posts, users, products, orders, forms, redirects, media and historical data to retain.

2. Build-ready materials

Content, features and compliance

Final content reduces delays and lets design decisions reflect the real message, hierarchy and user journey.

Content and media

- ☐ Approved page copy **REQUIRED**
Organized by page, with headings, body text, calls to action and link destinations.
- ☐ Images and video
High-resolution, clearly named, with confirmation that you own or license their use.
- ☐ Team and contact details
Names, titles, biographies, headshots, locations, hours, phone numbers and email addresses.
- ☐ Products, services or listings
Descriptions, prices, categories, specifications, downloads and imagery as applicable.
- ☐ Testimonials, case studies and credentials
Include client approval where required.
- ☐ SEO inputs
Priority services, locations, keywords, existing metadata and pages that already rank well.
- ☐ Translation-ready content
For bilingual or multilingual sites, identify the source language and provide approved translations or a translation workflow.

Functionality and integrations

- ☐ Feature list with examples **REQUIRED**
Describe what each feature should do, who uses it and what happens after an action.
- ☐ Bilingual or multilingual requirements
Languages, translation ownership, language switcher, multilingual SEO and any locale-specific content.
- ☐ Forms and workflows
Fields, conditional logic, file uploads, notifications, confirmations, CRM routing and anti-spam needs.
- ☐ E-commerce
Products, variations, taxes, shipping, discounts, payment gateways, subscriptions and order emails.
- ☐ Bookings, memberships or gated content
Roles, permissions, schedules, payments, renewals and automated messages.
- ☐ Third-party services
CRM, email marketing, payments, maps, reviews, chat, analytics, social feeds or external APIs.
- ☐ User roles and editing needs
Who will update the site, what they can change and whether training is needed.

Legal, privacy and accessibility

- ☐ Privacy policy, terms and required notices
Provide approved legal text; WP Expert does not provide legal advice.
- ☐ Cookie and consent requirements
Identify advertising, analytics and embedded services used on the site.
- ☐ Accessibility requirements
Tell us about applicable standards, procurement rules or organizational policies.

3. Launch preparation

Access needed to go live

Please share credentials securely through an approved password manager or encrypted method - never by ordinary email.

Domain, DNS and hosting

- ☐ Domain registrar access **REQUIRED**
Access to the account where the domain is registered, or a technical contact authorized to make changes.
- ☐ DNS management access **REQUIRED**
Access to the active DNS provider so we can update website records at launch.
- ☐ Hosting access
Hosting dashboard, SFTP/SSH, database access and staging environment as applicable.
- ☐ Current DNS record inventory
Especially email records such as MX, SPF, DKIM and DMARC, plus any subdomains or verification records.
- ☐ SSL and security services
Details for certificates, CDN, firewall, Cloudflare or other proxy/security tools.

Connected services

- ☐ Analytics and webmaster tools
Google Analytics, Tag Manager, Search Console, Bing Webmaster Tools or alternatives.
- ☐ Email delivery
SMTP or transactional email provider access and the approved sender address.
- ☐ Integration credentials
API keys or delegated access for payments, CRM, booking, newsletter and other services.
- ☐ Licences and premium accounts
Active plugin, font, stock media or service licences that the client owns.

Final approval

- ☐ Content sign-off **REQUIRED**
Names, prices, claims, contact details, legal text and translations have been checked.
- ☐ Functional acceptance **REQUIRED**
Forms, payments, bookings, notifications and key user journeys have been tested and approved.
- ☐ Launch window and contacts **REQUIRED**
Confirm the date, time, approver and who is available if a third-party account needs verification.
- ☐ Post-launch ownership
Confirm maintenance, backups, updates, monitoring, support and staff training responsibilities.

**READY TO
BEGIN?**

Share this completed checklist and your available materials with your WP Expert project lead. We will review everything with you, identify any missing items and confirm the next steps for your project.