
Website Design Questionnaire

An effective website is one that communicates your core message to your audience. The answers to the questions below will help us get a good idea of what that message is. Please review the questions below with your team and then provide your answers online in the Client Care Center at mmsusersupport.com. We will review this questionnaire in further detail during your Planning Meeting to ensure we are creating the right website to meet your needs. Thank you!

Organization Information

Organization Name

Year Established

Office Address, City, State/Province, Zip/Postal Code

Billing Address (if different from office address above)

Office Phone Number

Type of Organization

- Non-Profit
- Professional
- Trade
- Chamber of Commerce
- Advocacy
- Community Services
- Homeowners' Association
- Networking
- Political
- Recreation/Sports
- School Groups
- Social Cause
- Other

Geographical Type of Organization

- Stand Alone
- International
- National
- State

- Regional
- Chapter
- Other

Does your organization have chapters?

Are there any specifics we should know about that are unique to your organization?

Leadership and Administration

How many full Admins will you have who will need full access to everything, including all the confidential and financial information?

How many partial Admins will you have, who will only have access to certain modules?

How many staff does your organization have?

How many volunteers does your organization have?

Project Management Information

Project Manager's Name, Phone Number, Email

Project Timeline

What day are you looking to "go live" with your new website or integration?

Please explain if you have a major event coming up that you need to start your call for proposals or open event registration before the 'go live' date.

Project Overview

What are your top five pain points you are looking to solve by using our membership management system?*

Project Budget

Do you have a specific budget that you have to stay within, or do you have a target price for overall costs?

Will you need to amortize the project's initial setup costs to be able to stay within your budget?

Do you have any specific requirements for budgetary purposes (need all invoices in by a certain date, need to split the initial setup costs for this year and next, need to see first year costs, second year costs, etc.)?

Initial Setup Costs and Monthly MemberLeap Fees

We prefer our clients enroll in our automatic payment program for their monthly MemberLeap dues. Do you have a bank or credit union account (United States institutions only) or credit card that could be used for an automatic payment?

Do you have a bank or credit union account (United States institutions only) or credit card that could be used for an automatic payment?

Would you like to use this same AutoPay setup to pay for your initial setup fees as well?

Website and Hosting Information

What is your organization's main website address?

Is your current website mobile-friendly? Perform an analysis at <https://www.google.com/webmasters/tools/mobile-friendly/>

About how many webpages does your current website have?

Approximately how many webpages will your new website have?

If you have additional website addresses that are automatically redirected to the main website, please list them here and include .com, .net, .info, etc.

Are we creating a new website for you, or are we integrating MemberLeap with your existing website?

- New Custom Website
- New Template Website
- Integration Only
- Considering Options

If we are creating a new website, please tell us who your current website hosting account is with (where the files are located for your current website, so we can make a backup copy of the files for you).

How many years have you been using this host?

What problems are you having with this host?

Web Design and Branding Information

Please disregard this section if we are only integrating MemberLeap into your existing website.

Do you have a current "brand" or theme?

Do you need templates created for newsletters, broadcast email, or invitations to events based on your "brand"?

Do you already have images you want to use on the website?

If you have any sub-sites (convention websites, chapter/regional/committee websites, foundations, secondary organizations, etc.), how many webpages will they have collectively?

Is there anything specifically unique to your organization that is pertinent to the design of your website (i.e. unique systems built into for use by members or the public)?

Would you like us to design a new logo or redesign your current logo? We can provide you with a quote after gathering additional info.

Membership Information

How many records do you currently have that will require unique usernames and passwords?

Do you have any members or non-members that live within or spend a portion of their time living in the European Union?*

How many different membership plans do you offer?

Please list your different membership plans.

Are your membership plans annual or monthly?

- Annual
- Monthly
- Both Annual and Monthly

When do your membership plans run?

- January - December
- April - March
- June - July
- October - September
- Month the member joins
- Other

When is your next membership renewal date?

Do you need any special pricing structures, membership types, subscription services, add-ons at joining and renewal, etc.? If so, please explain what/how they need to work.

Current Database Hosting

Where is your current database being hosted - another software vendor, Access, Excel, or a multitude of places?

Are you able to export a single comma delimited (CSV, XLS, TXT) file of this data with data fields/columns labeled?

Does your member data include more than 50 fields (i.e. first name, last name, address, city, state, zip, phone, email, member plan, member status, etc.)?

Do you have any non-member records (prospects, list only, sponsors, exhibitors, community partners, etc.) to add to your database (from your current database or third party software - Constant Contact, MailChimp, Survey Monkey, Eventbrite, Cvent, etc.)?

Email Account Information

How many domain-based email accounts (i.e. name@domain.org) would you like us to setup?

Please list all domain-based email accounts (only if Vieth Consulting will be moving or hosting them).

How many email forwards are there from these domain-based email accounts? These forwards will automatically redirect name@domain.org to another email address (i.e. name@gmail.com).

Online Payment Gateway Information

Which merchant account, payment gateway company (Authorize.net), PayPal account, etc., do you currently use for online payments?

Would you be interested in changing your merchant gateway service if you could save money in doing so?

Accounting Information

If you are using QuickBooks, would you be interested in our QB Interface to keep the A/R functions of MemberLeap and your QB account in sync without having to build reports and manually enter data into QB?

If you are using another accounting system, would you like a quote for possibly integrating it with the MemberLeap A/R functions? What system are you using now?

Do you have a foundation that requires a separate account, separate general ledger account codes, or split between the two accounts? If yes, please explain.

Member Directory

Do you need a public member directory with limited information and/or a private member directory?

What are the most important search options needed for your directory search?

Do you have any specific requirements for either member directory?

Would you like a Google Map included with your directory?

Video/Audio Management

Do you offer streaming of video or audio recordings?

Can we gain access to them for our cost analysis?

Legislative Action/Political Action Committee

Do you have your own Political Action Committee (PAC) or belong to one for your industry?

Do you need your members to be able to contact their political representatives through the organization?

Do you have specific requirements for any legislative action activities?

Donations

Do you need a donations webpage setup?

Do you also collect online donations for another organization or foundation that would require separate tracking?

Do you have specific needs for separation of financial transactions of donations (foundation, etc.)?

Online Store/E-Commerce

If you currently have an online store, what e-commerce platform do you use?

Will we be integrating these services, or will you be moving to our platform within MemberLeap?

- Integration with existing e-commerce platform
- MemberLeap's online store

Education, Training, and Certifications

Do you plan to offer any online learning or continuing education courses?

Do you offer a license program or training?

Do you offer any certificate programs or printed certificates?

If you offer a recertification process, how long is the certification for (# years)?

Mobile Application

The Mobile App is included in some packages; otherwise, it can be purchased now or at a later time.

Would you like to purchase a mobile application for your members to easily access your MemberLeap modules (i.e. member only content, membership directory, calendar, etc.)?

Would you like an option for a full graphics package for the mobile app (available for an additional cost)?

Third Party/Legacy Systems

Can you provide us with information on what is being tracked and stored to determine how (or if) we can replicate, integrate, or interact with it?

Please let us know if you are interested in integrating any of the following systems with your MemberLeap account?

- Joomla database
- Call for proposals/Abstract management
- Continuing education
- Email marketing (Constant Contact, Mail Chimp, etc.)
- Event registration
- Journals
- Publications
- Surveys
- Voting

Custom Programming

Please explain any custom-built systems or functionality not included above that you will require.

Additional Information

Please provide any additional comments or information needed for this project.