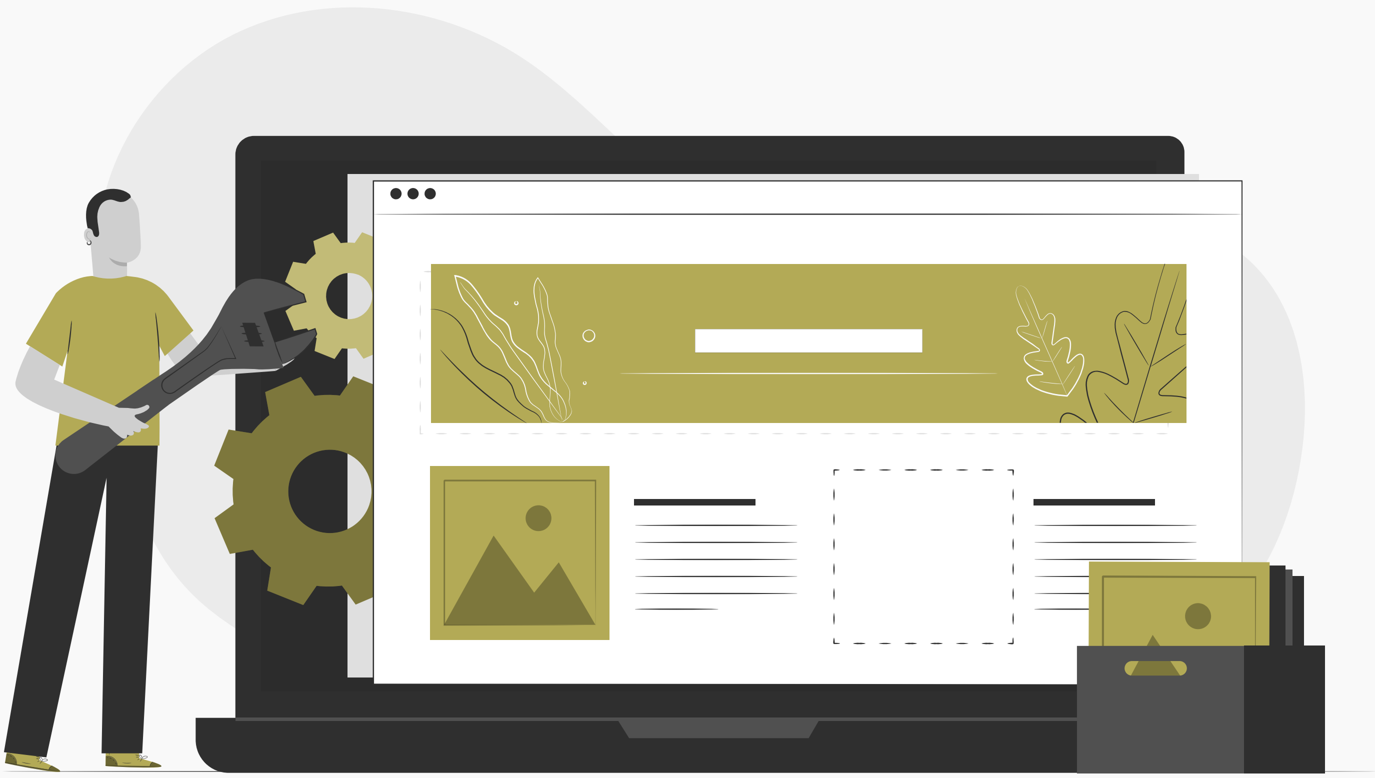
The Website Planning Workbook

A Step-by-Step Planning Tool for Midsized Companies



At Levo, we help midsized companies plan and launch websites that drive real business results. This workbook distills our proven process into practical worksheets you can use with your team—or hand to a digital partner to accelerate execution.

Whether you're refreshing your current site or building from scratch, this framework keeps your project on track, protects your investment, and avoids costly missteps.

Define Business Goals + KPIs

01

Prompt

- What 3–5 outcomes must this website deliver?
- Which KPIs prove success (leads, revenue, traffic, engagement)?

Business Goals

1	
2	
3	

KPIs to Track

1	
2	
3	

Pro Tip:

Treat your website like a growth channel, not a brochure.

Align Stakeholders

02

Prompt

- Who needs a voice (Leadership, Marketing, Sales, IT, Service)?
- How will you gather input + make decisions?

Stakeholder Alignment Worksheet

Stakeholder	Department	Priorities + Concerns:

Pro Tip:

Use this worksheet to resolve disagreements before they derail timelines.

Audit Your Current Website

03

Prompt

- Which pages currently drive the most traffic, conversions, or SEO value? Why?
- Where are visitors dropping off or bouncing?
- What content feels outdated, duplicated, or off-brand?
- Are there technical issues (slow load times, broken links, mobile problems)?
- Which pages should be kept, improved, or retired?

Website Audit Action Table

Top Performing Pages	Reasons Based on Data

Drop off / Bounce Points	Reasons Based on Data

Weak/Duplicate Pages	Keep	Fix	Retire	Notes

Technical Issues	Notes

Pro Tip:

Let data guide your audit. Use analytics, heatmaps, and SEO tools to confirm what's working—don't rely only on opinions.

Build Buyer Personas

04

Prompt

- Who are your 2–3 most important customer types?
- What are their primary goals and frustrations?
- What objections or barriers might stop them from engaging with you?
- What decision triggers move them forward (e.g., trust signals, proof, urgency)?

Buyer Persona Profile Template

Persona	Needs / Pain Points	Objections	Decision Triggers

Pro Tip:

A strong persona isn't just demographics—it's motivations. Focus on what they're trying to achieve and why your website should matter to them.

Plan Site Architecture + Content

05

Prompt

- What core pages will your site include (Homepage, Services, About, Contact, Blog, Careers, etc.)?
- What is the goal of each page (inform, convert, build trust)?
- What content is required (copy, video, case studies, testimonials, images)?
- What functionality should each page support (forms, chat, downloads, integrations)?
- Who is responsible for creating or providing the content?

Page-by-Page Content + Functionality Template

Page Name	
Page Goal (1 sentence)	
Content Needed	
Functionality	
Owner	
Due Date	

Pro Tip:

If you can't explain the goal of a page in one sentence, it probably doesn't need to exist.

Address SEO + Technical Needs

06

Prompt

- Which keywords and phrases are most important to target?
- What technical requirements must be included (CRM integrations, analytics, forms, chat, security)?
- Do you need to redirect old URLs to new ones to protect rankings?
- Who is responsible for SEO tasks and technical implementation?

SEO + Redirect Mapping Template

Old URL	New URL	Keyword Focus	Redirect Complete? (Y/N)	Notes
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	

Old URL	New URL	Keyword Focus	Redirect Complete? (Y/N)	Notes
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	

➤ Technical Requirements Checklist

☐	Analytics tracking (Google Analytics, Tag Manager, CRM)
☐	XML sitemap submission
☐	Redirect plan completed
☐	SSL certificate installed
☐	Mobile optimization tested
☐	Page speed optimized

Pro Tip:

Redirects protect your search rankings. Missing even a handful of key pages can cause a sudden drop in traffic.

Establish Design + UX Principles

07

Prompt

- What brand guidelines (colors, fonts, imagery, tone) must be applied?
- What user experience standards should guide your site (accessibility, mobile-first, intuitive navigation)?
- What are the main calls-to-action (CTAs) you want users to take on each page?
- How will you ensure consistency across all pages and devices?

Design + UX Planning Table

Element	Details/Guidelines	Owner	Status
Brand Colors			☐
Typography			☐
Imagery/Photography			☐
Accessibility			☐
Primary CTA(s)			☐
Navigation/Structure			☐
Mobile Responsiveness			☐
			☐
			☐

Element	Details/Guidelines	Owner	Status
			☐
			☐
			☐
			☐
			☐
			☐

Pro Tip:

Great design is invisible. If users have to “figure out” how to use your site, your UX needs work.

Create a Prelim Timeline + Budget

Prompt

- What is your target launch date?
- Which steps will your project include (Discovery, Content, Design, Development, Testing, Launch)?
- Who owns each step, and what's the expected duration?
- How will you allocate budget across steps (and where do you need buffer)?

Project Timeline + Budget Table

Step	Start Date	End Date	Owner	Budget	Notes
Discovery				$	
Content Creation				$	
Design				$	
Development				$	
Testing/QA				$	
Launch				$	

This is your rough order-of-magnitude budget. After selecting your build approach in Step 9, refine these numbers with real quotes/estimates.

Pro Tip:

Always build in a 20% time and budget buffer for content delays, stakeholder reviews, and technical surprises. It's easier to finish early and under budget than to explain overruns.

Decide Build Approach

09

Prompt

- Do you have the internal capacity (time, skills, tools) to manage this project in-house?
- Would an external partner like Levo provide needed expertise, speed, or scalability?
- What are the pros and cons of each option for your company?
- Who will own the final decision, and when must it be made?

Build Approach Comparison Table

Option	Pros	Cons	Estimated Cost	Decision Maker
Build In-House			$	
Partner with Agency			$	
Hybrid Approach			$	

Once you've chosen an approach (in-house, agency, hybrid), revisit Step 8 to finalize budget and timeline with actual proposals or vendor quotes.

Pro Tip:

Be realistic about bandwidth. Many midsized teams can "get it done" in-house—but at the expense of other priorities.

Build + Launch

10

Prompt

- Who owns development tasks (in-house team or agency partner)?
- What tools and platforms (CMS, hosting, integrations) are being used?
- What milestones must be completed before launch (staging reviews, QA, approvals)?
- Who signs off on each milestone?
- What's the rollback plan if issues appear at launch?

Build Task Tracker

Phase	Task	Owner	Due Date	Status	Notes
Development	CMS setup, template build			☐	
Content Integration	Copy + assets loaded			☐	
Design QA	Browser + device testing			☐	
SEO QA	Redirects, meta, sitemap			☐	
Stakeholder Review	Final sign-off			☐	
Launch Execution	Go-live + monitoring			☐	

Launch Checklist

☐	Run QA across browsers & devices
☐	Test all forms, buttons, and CTAs
☐	Monitor crawl errors in Search Console
☐	Confirm redirect plan is in place
☐	Check analytics setup and goal tracking
☐	Compare results against baseline benchmarks

Pro Tip:

Treat launch as a phase, not a day. Build in time for final QA, approvals, and a 24–48 hour monitoring window after go-live.

After the Launch: Optimize, Measure, Grow

Congrats! You've launched your website — the result of months of planning, collaboration, and hard work. But launch isn't the finish line; it's the beginning of ongoing performance management. Now that your site is live, it's time to:

- Monitor key KPIs regularly to confirm the site is meeting business goals.
- Schedule monthly performance reviews for the first 90 days, then shift to a quarterly cadence.
- Hold stakeholder check-ins to share results, collect feedback, and prioritize improvements.
- Continuously optimize content, design, and functionality based on real user behavior.

Treat this phase as an ongoing campaign. A well-managed post-launch process keeps your site healthy, competitive, and aligned with your business objectives — long after the initial excitement of launch day.

Prompt

- Who is responsible for monitoring and reporting on site performance?
- Which KPIs will define success long-term (traffic, conversions, SEO rankings, load speed, leads)?
- What tools will you use to measure results (Google Analytics, HubSpot, SEMrush, heatmaps)?
- How often will you review performance and update/optimize content?
- What is your process for continuous improvement after launch?

KPI Tracker

KPI	Target	Actual	Owner	Notes

Pro Tip:

A website isn't "finished" at launch—it's just beginning. Treat post-launch like an ongoing campaign, not a one-time event.

Avoid These Common Pitfalls

Even experienced teams run into trouble when planning a website. Use this checklist to stay on track and avoid the mistakes that cause delays, budget overruns, and lost results.

Designing before strategy.
We set clear goals, personas, and content requirements before moving into design.

Forgetting SEO.
We created a redirect plan, keyword strategy, and SEO checklist to protect rankings.

Too many stakeholders.
We gathered broad input once, then empowered a small decision-making group.

Underestimating content.
We assigned content owners, set deadlines, and built accountability into our plan.

Treating launch as the finish line.
We documented our post-launch plan to track KPIs, run QA, and optimize continuously.

Pro Tip:

If you can't check off each box with confidence, pause before moving forward. It's easier to fix gaps now than to untangle them during development.

FAQs

1. How long does planning take?

4–6 weeks, depending on content and stakeholder speed.

2. What if stakeholders can't agree?

Use the alignment worksheet to capture all input, then rank and prioritize together.

3. Will this help avoid SEO issues?

Yes. The guide includes a redirect mapping template and SEO checklist to protect traffic and rankings.

4. Can this be reused?

Absolutely—this framework can guide future redesigns, saving time and budget.

3. Do I need an agency?

Not necessarily. But many midsized teams use Levo to lead and execute while they focus on strategy.

Ready to Launch Smarter?

You've mapped out the steps, captured the details, and built the framework. Now it's time to bring your website to life.

If you'd like a partner to guide you through execution—protecting SEO, aligning stakeholders, and making sure your launch goes smoothly—Levo is here to help.

Book a free 30-minute consult with Levo and let's turn your plan into a powerful website that drives real results.

www.golevo.com