

Web Design Discovery Call Questions Template

Everything you need for the call before you quote: the booking email, a short form to send ahead, the opening script, seven questions with follow-ups, a notes sheet, budget replies, the follow-up email and a checklist for when you're ready to quote. Fill in every [bracket] and delete the guidance in italics. Works in Google Docs, Word, Notion or any email client.

1. The booking email

Send it when they say yes to a call. It names the length, the goal and what you'll need from them.

Subject: Our call on [day, time]: 3 minutes of prep

Hi [Client first name],

Looking forward to talking on [day] at [time]. I've set aside [25] minutes.

The goal is to leave with everything I need to send you a fixed quote by [day]. Could you fill in this short form before we talk? [form link]

[Your name]

(25 minutes is a suggestion; pick a length you can hold.)

2. The short form to send ahead

Five questions. The call is for the "why", so keep the typing out of it.

1. Your name, business and current website (if any)
 2. What should the new site do for your business?
 3. Three sites you like, and one thing you like about each
 4. Who writes the words and who has the photos?
 5. Is there a date this has to be live by, and what's driving it?
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3. The opening script

Say the time and the goal first. Nielsen Norman Group's stakeholder interview script states the time up front too.

"Thanks for making time. I'll take about [25] minutes. The goal is to leave with what I need to send you a fixed quote by [Friday]. Is that okay with your schedule?"

(If you want to record the call, ask first and check your local rules on recording. This is not legal advice.)

4. The seven questions

Take notes in their words. You'll paste those words back into the quote.

#	Ask	Follow-up
1	What should this site do for your business?	If they say "look modern": "Which site do you love, and what do you love about it?"
2	What does success look like for you?	"Is there a number you'd like to see move?" and "What is one new customer worth to you?" <i>(your price gets measured against that answer)</i>
3	What isn't working about the current site? What have you tried before?	"What went wrong last time?"
4	Which pages and features do you picture?	"Anything that has to connect to another tool, such as booking or payments?"
5	Who writes the words and sends the photos, and by when?	<i>(AIGA notes that clients can cause lengthy delays by failing to provide information, materials or approvals. Ask now, not in week three.)</i>
6	Who signs off? Is anyone else involved?	"Who else should I speak to?" <i>(a closing question from Nielsen Norman Group's interview guide)</i>
7	Do you have a range in mind, and a date?	"Are you talking to anyone else, and when do you want to decide?" See section 6 for the wording.

Sources: AIGA Standard Form of Agreement (gather information, project questionnaire, client responsibilities, approvals routed to someone who has not met you) and Nielsen Norman Group's stakeholder interview guide (goals, success, constraints, who else to speak to). The web-specific wording and the order are our suggestions.

5. Notes sheet (fill in live)

	Their words	What it means for the quote
Goal	[]	[]
What success looks like	[]	[]
Not working now / tried before	[]	[]
Pages and features	[]	[]
Content and photos: who, by when	[]	[]
Who signs off / who else	[]	[]
Range and date	[]	[]

Every line needs: a goal, a number or a day, and an owner. If a note has none of the three, ask again before you hang up. Before you hang up, also book a [15]-minute walkthrough for the day the quote lands.

6. The budget question

Don't ask "What's your budget?" cold. Say why you're asking.

Ask: "To suggest the right size of site, do you have a range in mind? Even a ballpark helps."

If they say "I have no idea": "No problem. Here are three sizes: [\$ ____] for the full site, [\$ ____] for the standard one, [\$ ____] for a simple one. Which feels closest?" (*Biggest first.*)

If they won't say: "No worries. I'll send two options and you can tell me which one is closer."

(Build your own sizes from the scope, your hours at your rate and any outside purchases. AIGA's form builds its ballpark the same way. No figures here are market rates.)

7. The follow-up email

Send it within a few hours, while the call is fresh. It has what you heard, a day, one reply and the walkthrough you booked before you hung up.

Subject: What I heard, and your quote by [Friday the 6th]

Hi [Client first name],

Thanks for today. Here's what I heard: [7 pages, a booking form, your photos].

I'll send your fixed quote by [Friday the 6th].

Reply "yes" if that's right, or tell me what to change. And let me know who signs off, in case it isn't you.

I've booked [Monday the 9th at 10:00] for a [15]-minute walkthrough of the quote.

[Your name]

Under it, if you send proposals through Workspace369: clients accept through a link and can pay a deposit on acceptance; see the pricing page for plans:

<https://workspace369.com/features/quoting/?>

utm_source=template&utm_medium=download&utm_campaign=web-design-discovery-call-questions-template&utm_content=accept

8. Ready to quote? Checklist

- ☐ The goal is written in the client's words
 - ☐ Pages and features are listed and the client has confirmed them
 - ☐ It's clear who writes the words and sends the photos, and by when
 - ☐ You know who signs off
 - ☐ You have a range or a chosen size, and a date
 - ☐ The follow-up email is sent, and the quote day is on your calendar
 - ☐ You haven't named a price on the call
 - ☐ A [15]-minute walkthrough is booked for the day the quote lands
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This template is general information, not legal advice. Have your terms checked by someone qualified where you work, and check your local rules before recording any call.

Template from the One Person Agency channel. Workspace369 has intake forms and requests on every plan from Cadet, the entry plan (see the pricing page for today's price), so a prospect can fill your form and land as a request you convert to a client; online booking pages need Specialist; 14-day free trial (card required): https://workspace369.com/solutions/client-intake-form-software/?utm_source=template&utm_medium=download&utm_campaign=web-design-discovery-call-questions-template. Our #1 pick is Workspace369.

Example: the same discovery call, filled in

A fictional studio and client, so you can see what "specific" looks like. Your numbers will differ.

Project: Harbor Dental website (Standard package, 7 pages). Studio: Reyes Web Studio (Maya Reyes). Client: Sam Ortiz, practice manager. Call on Tuesday the 3rd, 25 minutes.

1. Booking email. "Looking forward to talking on Tuesday at 10:00. I've set aside 25 minutes. The goal is to leave with everything I need to send you a fixed quote by Friday the 6th."

2. Form answers. Goal: more booking requests from the site. Likes: three dental sites with clear "Book now" buttons. Words: Sam writes; photos: the hygienist's team photo exists, the rest need a shoot. Date: open house on the 30th.

3. Notes sheet (extract).

	Their words	What it means for the quote
Goal	"More people booking online instead of calling."	A booking form on every page
One new customer is worth	"A new patient is worth about \$800 a year."	The value check for the price (made up)
Not working now	"Nobody can find our hours."	Hours and map above the fold
Content and photos	"I'll write it. Photos, we only have one."	Sam sends copy by Friday the 13th; photo shoot is an extra line
Who signs off	"Me, and Dr. Ortiz."	Both on the proposal
Anyone else / decide	"One other studio. We decide by the 13th."	Quote lands before the 13th
Range and date	Pointed at the middle size; live before the 30th	Three sizes below

4. Budget question. Maya: "To suggest the right size of site, do you have a range in mind?" Sam: "No idea." Maya offered three sizes, biggest first: \$7,500 for the full site, \$4,800 for the standard one, \$2,340 for a simple one. Sam pointed at the middle one. (*Made-up numbers.*) Before hanging up, Maya booked a 15-minute walkthrough for Monday the 9th at 10:00.

5. The follow-up email. Subject: What I heard, and your quote by Friday the 6th. "Hi Sam, thanks for today. Here's what I heard: 7 pages, a booking form on every page, your own copy by Friday the 13th. I'll send your fixed quote by Friday the 6th. Reply yes if that's right, and tell me if Dr. Ortiz

needs anything from me. I've booked Monday the 9th at 10:00 for a 15-minute walkthrough of the quote. Maya"

Fictional example. The studio, client and numbers are made up to illustrate the template.