

EXAMPLE PROJECT PLAN

A clear plan before we build.

From your business goals to a website with a clear purpose.

This fictional mortgage broker example shows how we plan a website. We adapt the same approach for realtors and insurance agencies. The issues below are illustrative, not findings about a real company.

01 Start with the business goal

Help prospective borrowers understand the broker's services, see who they would work with and request a conversation. In this example, service information is scattered and the mobile inquiry journey is unclear. We would verify these issues before recommending a rebuild.

02 Agree the pages and their purpose

Home	Explain the offer, genuine service area and next step.
Mortgage Services	Explain the services the broker actually offers.
Buying a Home	Answer common questions and explain the next step.
Refinancing	Explain the service and route visitors to a conversation.
About	Show the team and verified qualifications or experience.
Contact	Offer a simple inquiry form and confirmed contact details.

03 Define what is included

An agreed six page structure, page copy, responsive design, development, basic search setup and inquiry measurement. Existing legal pages would be retained or linked after review. Advertising, ongoing SEO, hosting, maintenance and additional integrations would be scoped separately.

Before work begins: confirm the scope, fee, responsibilities and delivery dates in writing. Changes to scope are agreed before extra work starts.

DELIVERY AND APPROVALS

Know what happens next.

Each stage produces something you can review and approve.

01 Discovery and priorities

We confirm your audience, services, coverage, goals and current website evidence. You provide a decision maker, content owner and relevant access.

Checkpoint: A written brief and agreed scope.

02 Structure and content

We map existing URLs and plan the customer journey. You confirm services, licensing information, disclosures and approved testimonials.

Checkpoint: The sitemap and approved page copy before design.

03 Design and development

We design the key pages for mobile and desktop, then build on a private staging site. You review the design before the full build proceeds.

Checkpoint: The visual direction, then the working website.

04 Search and inquiry checks

We check page titles, headings, internal links, indexability, canonicals, sitemaps and relevant structured data. We test form receipt, confirmation, consent and analytics events without personal data.

Checkpoint: A documented launch checklist with any open issues.

05 Launch and measurement

We confirm backups and rollback, apply agreed redirects and check the live site on mobile and desktop. We verify navigation, accessibility basics and performance.

Checkpoint: Your launch approval, handover and agreed review date.

What we measure: received inquiries, qualified conversations and acquired clients, alongside search visibility. Search rankings and inclusion in AI answers cannot be guaranteed.

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