Hi Client Name,

It’s time to start with the discovery process of your new project! As mentioned during the kick-off call, we have a few different deliverables during the first phase of this project. I’ll be assisting with conducting and analyzing research, and then later presenting those findings with a usability study and wireframes. This will be presented during our consulting meeting according to PM Name timeline.

My goal moving forward is to gather as much information as possible in order to piece together a few wireframe options (high level blueprints). In doing so, I am going to need your help with the tasks outlined below:

**I. Get your team together and answer the Discovery Survey**

a)      **Audience:** Your **core team**, the main **decision makers** for the new website. Please **respond** to this **survey with only one response** that reflects your organization’s vision of the new website as a whole.

b)      **Location:** Survey Monkey Link

c)       **Goal Date:** Three Weeks from today

This survey makes reference to a few documents that you will use in this process. I’ve attached these documents for your convenience, but you can also find links to the various case studies from within the survey itself. As you work on it, **please allocate about 2 hours** **to respond the survey** and make comments in invision (you can find access to invision from within the survey).

**II. Website Community Survey**

a)      **Audience:** Website visitors. Please create a link on your site to this survey for your users to complete. Additionally, if you have an email campaign software I encourage you to broadcast this as a bigger sample is always preferred for statistical significance.

b)      **Location:** Survey Monkey Link

c)       **Goal Date:** Three Weeks From Today

d)      **Number of responses needed in order to get statistical significance: ###**

**III. Plug-in Heat-mapping Code**

Nothing is required from you at this point. Since Vision is hosting, we will take care of this task.

-Or-

Please see attached heatmapping code. This script will need to be placed in the head of your homepage. If you have any questions on this, let me know.

**Goal Date: ASAP**

**IV. Access to Analytics**

Please grant me access to your Google Analytics account. You can add the following email: [visioninternetsearch4@gmail.com](mailto:visioninternetsearch4@gmail.com)

**Goal Date: ASAP**

Let me know if you have any questions or concerns. Just to reiterate: PM Name will be your point of contact for all matters and concerns regarding this project and I will assist you during this first phase of the project.

Thank you,