

1 Your Business or House

Business or house name

Your name

Work email

Work phone

Current website, if any

Domain name you own, if any

Type of organization

- | | |
|---|--|
| ☐ Sober living | ☐ Independent living |
| ☐ Transitional house | ☐ Recovery residence |
| ☐ Clinic or office | ☐ Church or nonprofit |
| ☐ Other | |

Who owns your domain and hosting accounts today?

- | | |
|-----------------------------------|---|
| ☐ I do | ☐ My old developer |
| ☐ Not sure | ☐ No domain yet |

Do not include passwords or private client records.

2 The Goal

What are you interested in? Check any that apply

- | | |
|---|---|
| ☐ House check in station | ☐ Online application or intake |
| ☐ Fee and payment ledger | ☐ Partner outreach emails |
| ☐ Website | ☐ Care Plan |
| ☐ Something else | |

What should a visitor or resident be able to do?

Who are your customers, residents, or intended visitors?

Main action. Check any that apply

- | | |
|--|---|
| ☐ Call | ☐ Book |
| ☐ Request a quote | ☐ Buy |
| ☐ Sign up | ☐ Apply |
| ☐ Donate | ☐ Get directions |

How will you know it is working?

List 2 or 3 sites or systems you like and why

3 Time and Materials

When do you hope to launch?

Comfortable budget or range

What do you already have?

☐

Logo

☐

Written text

☐

Photos

☐

Domain

☐

Brand colors

☐

Social accounts

Date you can deliver your logo, text, and photos

The launch date depends on receiving your materials. Late materials move the launch date.

4 What Needs to Happen

Which features might you need?

- | | |
|--|--|
| ☐ Contact form | ☐ Booking |
| ☐ Payments | ☐ User accounts |
| ☐ Saved records | ☐ File uploads |
| ☐ Email signup | ☐ Blog or news |
| ☐ GPS location checks | ☐ Sign in photos |
| ☐ Facial verification | ☐ Approval codes and handoff sign off |
| ☐ Payroll and time controls | ☐ Claim.MD billing |
| ☐ Specialist finder | |

Describe the task the site or system should make easier

Who on your team would use it, and what should they see?

Tools it needs to work with (Google Workspace, Square, Calendly, etc.)

5 Data and Decisions

Could it collect any sensitive information?

☐ Health

☐ Legal

☐ None

☐ Biometric

☐ Financial

☐ Children

☐ Location

If sensitive data is involved, we agree on data and security requirements before quoting the build.

Who will approve the content and final site?

Approver email or phone

6 After Launch

Who will keep it updated?

☐ I will, with training

☐ Only as needed

☐ Monthly Care Plan

☐ Not sure yet

Who should hold the accounts when the project is done?

☐ I own all accounts

☐ Not sure yet

☐ Healing Tek manages them for me

Anything else we should know? No private customer or resident details.

Submitted by

Date

Save the file and send it to:

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