



**1. The big picture**

This section provides your project description and background. Plan to address the following:

a) Where are you now in the process? \_\_\_\_\_  
\_\_\_\_\_

b) How is your company perceived in the marketplace? \_\_\_\_\_  
\_\_\_\_\_

c) Describe your current marketing efforts and market perceptions of your company. Lay out any insights or research you have into the length of your buying cycles, your level of brand recognition and the paths your customers typically use to find and recommend you. \_\_\_\_\_  
\_\_\_\_\_

d) What is your company's value proposition? How does your company demonstrate its value proposition in the marketplace? \_\_\_\_\_  
\_\_\_\_\_

e) What is your product proposition? Why should a customer be influenced by your product, use it and engage with it? \_\_\_\_\_  
\_\_\_\_\_

f) What are your product's benefits? Remember, there is a difference between product features and product benefits, so for every product feature, be sure to tie it to a corresponding benefit and describe what those benefits mean to your customers. \_\_\_\_\_  
\_\_\_\_\_

g) What should your website project achieve? List your goals in order of importance, for example, reinforcing branding, showing a range of products or describing service solutions.  
What do you see as your biggest obstacles to success? \_\_\_\_\_  
\_\_\_\_\_

**2. Target audience**

This section describes your website's target audience and analyzes what your customers care about: \_\_\_\_\_  
\_\_\_\_\_

a) What are your customers' motivations and inspirations? \_\_\_\_\_

b) What turns them off? \_\_\_\_\_

c) How aware is your target market of your company and your current website? \_\_\_\_\_

d) Are you selling any membership or members-only items? \_\_\_\_\_

e) What you want your website visitors to do and why should they do it? \_\_\_\_\_

f) What is the single most important takeaway you want your website visitors to experience and remember? \_\_\_\_\_

### 3. Goals and objectives

Articulate what you want your customers to think and do when they visit your website: \_\_\_\_\_

a) Do you want your customer to call? \_\_\_\_\_

b) Do you want your customer to complete the whole transaction online? \_\_\_\_\_

c) If so, what do you categorize as a transaction? \_\_\_\_\_

d) What information do you want to capture about your visitors? \_\_\_\_\_

e) What do you want your customers to do with the information they find on your website? \_\_\_\_\_

f) What are your main calls to action? \_\_\_\_\_

### 4. Your current website

If you already have a website, provide some insights into how well it is currently functioning: \_\_\_\_\_

a) What is good about your current website? \_\_\_\_\_

b) What would you like to change or upgrade about your current website, for example, its mobile-responsiveness, its design or its navigation? \_\_\_\_\_

c) How much traffic is your website currently receiving? \_\_\_\_\_

d) Where are your visitors coming from? \_\_\_\_\_

e) How many conversions are you getting from your current website in the form of inquiries, leads and sales? \_\_\_\_\_

### 5. Competitors

Describe your company's and industry's competitive landscape: \_\_\_\_\_

a) What are your competitors doing? Include any notable marketing activities your competitors are using and assess the strengths and weaknesses of their tactics. \_\_\_\_\_

b) Describe any competitive pressures on your business. \_\_\_\_\_

c) What do you like and dislike about your competitors' websites? \_\_\_\_\_

d) Are there any specific aspects of their functionality you would like to replicate on your own site?

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## 6. Project Management and Timeline

It's important for everyone to know what actions must be coordinated and the order in which the various parts need to be completed. This will help you and your agency best allocate the necessary resources to your project. Some factors to consider are:

a) How many people will be on your project team? \_\_\_\_\_

b) Who will be on the project team? Include job titles, roles and responsibilities. \_\_\_\_\_

c) Who is sourcing content? Possibly the greatest cause of delays in web projects come from an under-appreciation of just how much time it will take to source images, text and quotes for your site. \_\_\_\_\_

d) Do you have a specific go-live date in mind? \_\_\_\_\_

e) Is your go-live date determined by any business-critical timing such as a product launch or industry event? \_\_\_\_\_

## 7. Technical

a) Do you currently have web hosting for your business? If so, detail what company you are hosted with and what hosting package you have. \_\_\_\_\_

b) Do you want your site to be available in different languages? If so, which ones? \_\_\_\_\_

c) Do you want to set up admin permissions to restrict user access to all or part of your site? \_\_\_\_\_

## 8. Ecommerce

Is your site transactional, meaning, do you want your customers to buy directly from your site? If so, the details should be scoped out in a separate functional specification document but the basics should include: \_\_\_\_\_

a) How many products will there be? \_\_\_\_\_

b) What do you estimate your volume of business to be? \_\_\_\_\_

c) How would you like your customers to be able to search for products? For example, by title, description, category, SKU or price? \_\_\_\_\_  
\_\_\_\_\_

d) Which countries will you ship to? \_\_\_\_\_  
\_\_\_\_\_

Does your site need back-office integration with third-party systems? If so, which ones? \_\_\_\_\_  
\_\_\_\_\_

### 9. Budget

What is your budget for design and development of your website? Some clients are very reluctant to discuss their budgets with agencies as early as the brief stage, but being open and honest about financial expectations means you will get better, more accurate price quotes in response. One way to finesse the situation is not to offer a fixed budget number but rather a budget range. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

a) Also explore whether additional expenses have been included: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

b) Do you need a budget for ongoing support and maintenance? \_\_\_\_\_  
\_\_\_\_\_

c) Is there a marketing budget allocated to promote and drive traffic to the website? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_