

Briefing template

Client name

Project name

Introduction to your business

Please provide an introduction to your business, who you are, what you do, where you do it, and how long you have been doing it for. Do you have a mission statement? What are the aims of your business? How many staff do you employ? Please include a link to your website and any relevant background information with regards to the project. Add any further information that will help us get a feel for your business and how it operates.

Website address:

Project background

Please describe the project in as much detail as you can or need to. Why does the project exist? What is it designed to do? Where does it fit with other initiatives within the business and does it have to work with any of them? Detail the project objectives if available, particularly with respect to business impact and what the project needs to do for the business or organisation.

Market background

Describe the market you are in, the current prevailing conditions, and what you need to do in the market. Have you any market research data to support the project, was the project based on changes within the market itself or are you looking to enter new markets?

Who is the target audience/s (customers/users) within the market you have just described? If you can, detail any demographic statistics that may be useful in identifying them more specifically. For example, what is the age, sex, income, occupation and location of your target audience?

What is the competition in your market, what does it look like, can you list websites that we can go to get a better feel of the overall landscape of the market you are describing? Which organisations do you aspire to? List any organisations that cater to the same audience or provide similar products or services.

Work to date

Detail any work (if you can) that you have carried out or completed to date that has an impact on the project. What is available? If relevant, please describe the point at which you are now at with the project. Is there anyone else working on the project? Is further information on what you have done so far available anywhere else?

Services required

Please detail what you need. It may be that you just want a brochure or alternatively it may be you are after something much more technical. If you like, be specific about what you need – or leave the brief deliberately open for discussion.

Measurement and outcomes

You may want to complete this section to communicate what you feel the deliverables above will do for the business. This should correspond with what you need the project to do for the business or organisation outlined above. How effective do you need the project to be? Use numbers or more specific targets or goals if you can, perhaps related to your business plan.

Constraints

Will we be asked to work alongside other designers or developers? Do you have existing design or brand guidelines? How will we get access to a copy of the relevant guides? Are there other constraints such as time or location, or access to key individuals or audiences? Are there any particular technical requirements?

Budget

It is entirely up to you whether you communicate the budget for the project or not. You may not know what the budget is at this point. Maybe you are looking for an estimate that helps you formulate it. We can tailor our work to fit your budget. We will do our best to provide you with an accurate estimate if necessary and will try to be as transparent as possible with regards to billing.

Timeframe

What is the timeframe for the project? This may be in the form of a project plan or just a list of dates that you need to hit.

Approval process

Typically on longer or more complicated projects there may be an approval process that allows the project to move from stage to stage. If relevant, please communicate what this process is, who is involved and how long you would need to get each stage signed off. This will allow us to plan for how long each stage may take (especially important when running projects over any key holiday periods).

Response required

Please indicate what kind of response you require back from us. Do you want us to prepare for a meeting to discuss the brief before we make a formal response, or will you just expect us to call you if we have any questions? Please explain what you are looking for, and how you would like it sent. You may require the project plan to be in a certain format or the budget estimate to be provided in a certain way. Please confirm when you want it returned by.

Additional information and attachments

If you have any supporting information or attachments, please explain what they are, why they are attached and your expectations for use. It may be that you can set up online access to guidelines and other project related materials, so detail access here.

Contact details

Please provide your preferred contact details for both our response and any questions we may have concerning our response.

WEBSITE BRIEFINGS

If you require a website, please provide a few more details.

New or replacement

Do you need a new or replacement website? Have you got a current URL and hosting? Would you like us to set up your URL and hosting?

Website aim

Identify what the website will 'do' for its audience. What are its priorities?

- ☐ Information: provide access to product catalogues, service promotion, reference materials, media releases, annual reports, legal and policy documents, etc.
- ☐ Provision of services: e-learning, online tutorials, generate documents, etc.
- ☐ Sales: online transactions, credit card payment, order-tracking, etc.
- ☐ Facilitation of events: distribute programme schedules, process bookings, etc.
- ☐ Communication: email / intranet / extranet /enquires
- ☐ Community: forums / blogs / comments
- ☐ Other (please specify)

What do you want the website to achieve?

- ☐ Public awareness, search engine ranking
- ☐ Increased traffic
- ☐ Customer/client/stakeholder enquiries
- ☐ Sales
- ☐ Email subscriptions
- ☐ Bookings/reservations
- ☐ Other (please specify)

Updating your website

How often will you need to update the content on your website? Daily, weekly, monthly or yearly? Are you familiar with a content management system (CMS)? Are you currently using one? Would you like us to update the website, or would you like to do it yourself? Do you require training on how to update the website?