

Template for briefing a website design and build project

About this template

This template is designed to help businesses develop digital marketing and Ecommerce strategies, by providing a website design brief and build project to either an in-house team or to a digital / web design partner (freelancer or agency).

The template has been designed to provide as much information as possible to allow for an accurate quote and time estimate to be created. Ultimately, the aim is to elicit an accurate, effective response to the brief and therefore a successful website.

Agencies may also find it useful for briefing in their own specialist suppliers, or to provide to clients, to define the requirements they are looking for from their clients.

Don't request or expect final interface designs back in the first response. A good agency / design partner will go through various stages before they get to final designs. Website 'design' covers a range of objectives to meet: marketing, technology and brand / creative expression, encapsulated within an engaging interface (and across a range of devices including smartphone and tablet).

Using the template as a RFP (Request for Proposals) to invite several agencies to tender

This template assumes you will be asking more than one design partner to quote for the work in the first instance. So, for larger projects, it's suitable as an RFP (Request for Proposals) to invite several agencies to tender for the design and build work.

If you're looking for more than one partner, it would make sense to restrict your briefing to between three and five prospective partners. Any more than that becomes onerous for you in the selection process and design agencies / freelancers put a lot into responding to briefs; so having a smaller pitch field will be appreciated by them and will start to develop a stronger relationship for you, should they be selected.

You should attach any additional overview documents that you think are useful to accompany this brief and email to the design partner/s. They will then come back with questions and / or an estimate.

The template is an unbranded Word template to make it easy to amend for your needs.
You can add your company name to the footer section.

You can also delete any of the italicized explanations, they are just there as a prompt for you.

Template structure

The website briefing template is available in Word format so that you modify it to best suit the amount of information you have available. Although the more comprehensive you make it, the better.

The sections of the briefing template are:

- 1. Budget guide.**
It can be a difficult to provide a guide but this will really help the design partner look at realistic creative / technology / content solutions for you.
- 2. Timescales and overall process.**
What factors are involved in your timescales? Is this a tender? Who is involved and what will the process be?
- 3. Web site objectives.** What's the site for? What is the overall purpose of the site? Do we have a defined set of KPIs?
- 4. Background to the website project.**
Is this a new site or a refresh of an existing site?
- 5. Background to your business or brand.**
Which markets do you operate in? What products or services do you provide?
- 6. Your Target Audience**
Who is the site designed to serve? What profile information do you have on your different audiences?
- 7. Your Competitor set**
What content and functions do your competitors feature on their sites? Are any of these more desirable for your business than others?
- 8. Marketing considerations**
What type of marketing support should the site provide (e.g. Lead tracking, Customer service, CRM, E-commerce)? How will Search Engine Optimisation be addressed on the website?
- 9. Content and content marketing**
What type of content do you want on the site (Video, Podcasts, etc.) and what content is already available to utilise? Which social sharing features and interaction features are required?
- 10. Creative Guidance**
Are there existing brand guidelines or creative campaign assets to be used?
- 11. Desired site functionality**
What type of widgets, tools and other functionality do you want to have on the site?
- 12. Technical considerations**
Are there additional technical considerations to be aware of beyond those that will have been detailed in the previous sections?

WEBSITE DESIGN BRIEF			
Organisation / Brand	<Insert website address or domain name>	Date Created	
Project Name		Project / Job ref	
Project Team (client)		Target website live date	
Provided to	<design partner / agency name>		
Preferred or mandatory technologies	Please define Content Management Systems or Ecommerce Platforms required for creating and managing the new system. See sections 8.4 and 12 for further detail.		

1. Budget guide	<p><i>It can be a difficult to provide a budget guide price, but this will really help the design partner look at realistic creative / technology / content solutions for you. Define ongoing costs (hosting, new content load, content creation) as separate budget lines if applicable. If you have no fixed budget the design partner will of course create an estimate but a guide upfront helps with realistic proposals from them.</i></p> <p><i>You may also find this guide to making the case and planning budgets for digital marketing useful: www.digitaliq.com.au</i></p>	
	<p>1.1 Brand development (market research, logo / colour-ways, tone of voice etc.) <i>If a <u>new branding</u> is to be developed for the website, then that may well reside within a different budget centre in a larger organisation and also may require a different partner, but if you want the website design partner to quote for this please advise here.</i></p>	£
	<p>1.2 Website design and build element <i>The design partner will, in most cases, break this down into different stages when they respond e.g. research and planning, prototype development, design, build, test, launch, etc but at this stage you can provide them with a single guide budget figure. You should ask to see costs for different stages.</i></p>	£
	<p>1.3 Ongoing maintenance, if required (monthly / annual)</p>	£
	<p>1.4 Hosting (if required) <i>This will be harder to provide a suggested budget for, unless you have hosting arrangements in place already, so leave blank if you need the design partner to recommend options / service levels available.</i></p>	£
	<p>1.5 Additional notes: <i>If you have no set budget or are not sure, complete as much of the rest of the brief as possible and ask (here) for the design partner to provide an itemised estimate you (see 1.2). This will help you compare different quotes from potential partners even though you may not get exact equivalence in the terms / process stages used by design partners.</i></p>	

<p>2. Timescales and overall process</p>	<p><i>The potential agency / design partner should be made aware of the selection process that you envisage, from initial enquiry from you (which may be this brief) through to appointing the partner.</i></p> <p>2.1 Is this a tender process? <i>If there is a separate tender document for them to supply back to you detailing trading details, Insurance cover, Indemnification, Environmental policy, etc then please attach this template (or add in a web address) .</i></p> <p>2.2 What is your decision-making and selection process? <i>Do you require a written response only, or should they attend a presentation / Q&A session with you as part of the selection process? Busy client teams may look to a written response alone as being the most efficient way of selecting either a short list of potential providers or indeed selecting a final design partner. However, meeting the team who would work with you on this project will be important and it is much better to do that prior to final selection.</i></p> <p>2.3 Are your procurement team involved? <i>Please state if so and any mandatory information that is required from the design partner. If it is covered in a Request For Tender document (see 2.1) then skip this section.</i></p> <p><i>Is there a set of criteria and scores / points allocations that will be used that the design partner should be aware of? If so detail it here. For example:</i></p> <ul style="list-style-type: none"> - Number of years design partner had been trading - Details of any relevant design / build awards gained - Details of Website projects in a related sector / or of similar requirement to your brief (e.g. Ecommerce, Blog creation etc) - Number. of in-house vs. outsourced designers and programmers <p>2.4 Are there fixed timings and / or deadline already in place? <i>E.g. to coincide with a product launch or ad campaign launch? Timescales will depend largely on your final 'wish list' of content and functionality for the website but it is still helpful to give the design partner an idea of any commercial dates they should be aware of.</i></p> <p>Please provide preferred timings:</p> <p>(a) for the briefing / tender / appointment of design partner phase</p> <p>(b) for the design, build and content population of the website</p>
<p>3. Web site objectives</p>	<p>3.1 What's the site for? What is the overall purpose of the site? <i>Please list out the objectives for the website. Typical objectives include 'To capture leads for our sale team', 'To change perceptions of our brand', 'To sell some / all of our products online', 'To provide comprehensive information on site, which reduces the demands on our call centre'.</i></p> <p><i>If one of the objectives is to generate leads for your sales team, detail any existing CRM or lead tracking systems you may have in section 12.</i></p>

	<p>3.2 Detail any specific metric objectives / KPIs. <i>This detail may well come out during an initial project workshop with the appointed design partner but it would be helpful to start thinking about them at this stage.</i></p> <p><i>Having a set of KPIs and desired metrics will help the design partner when they get to the planning process, looking at Information Architecture, Content Hierarchies, Messaging etc.</i></p> <p><i>Example KPIs would include:</i> <i>'create x number of sales enquiries on the site',</i> <i>'convert x % of site visitors to an online (shop) sale',</i> <i>'make company literature available with a target of x downloads per month',</i> <i>'for x% of all site visitors to share articles on our blog each month via social platforms' etc.</i></p>								
<p>4. Background to the website</p>	<p>4.1 Is this to be a new site? Yes / No <i>(if No, see 4.2)</i></p> <p>Type of site required:</p> <table border="1" data-bbox="487 835 1401 1404"> <tr> <td data-bbox="487 835 1276 1094"> <p>Main company ('Corporate') site Select which site types or components are most relevant from Dave Chaffey's Ebusiness and Ecommerce Management Guide:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Transactional Ecommerce site for which products or services <input type="checkbox"/> Lead-generation (e.g. B2B or high value B2C services) <input type="checkbox"/> Brand site (e.g. Fast Moving Consumer Goods) <input type="checkbox"/> Customer-service <input type="checkbox"/> Publishing of content with subscription / ad revenue <input type="checkbox"/> Social network or community <input type="checkbox"/> Other </td> <td data-bbox="1276 835 1401 1094"></td> </tr> <tr> <td data-bbox="487 1094 1276 1276"> <p>Campaign microsite <i>A campaign microsite is often a standalone, time-limited site that features content from an ad campaign or promotional (e.g. on-pack) initiative. Specify to what extent the campaign is to be integrated into the main site. Complete standalone sites can take time to gain visibility in search engines and can give poor customer journeys for customers looking to use services on the main site.</i></p> </td> <td data-bbox="1276 1094 1401 1276"></td> </tr> <tr> <td data-bbox="487 1276 1276 1304"> <p>Ecommerce site (see section 8.4)</p> </td> <td data-bbox="1276 1276 1401 1304"></td> </tr> <tr> <td data-bbox="487 1304 1276 1404"> <p>Blog <i>Blogging platforms such as Drupal or Wordpress can be used to create full websites, but if the majority of the content on the site will be news / blog articles, indicate the new site as a blog.</i></p> </td> <td data-bbox="1276 1304 1401 1404"></td> </tr> </table>	<p>Main company ('Corporate') site Select which site types or components are most relevant from Dave Chaffey's Ebusiness and Ecommerce Management Guide:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Transactional Ecommerce site for which products or services <input type="checkbox"/> Lead-generation (e.g. B2B or high value B2C services) <input type="checkbox"/> Brand site (e.g. Fast Moving Consumer Goods) <input type="checkbox"/> Customer-service <input type="checkbox"/> Publishing of content with subscription / ad revenue <input type="checkbox"/> Social network or community <input type="checkbox"/> Other 		<p>Campaign microsite <i>A campaign microsite is often a standalone, time-limited site that features content from an ad campaign or promotional (e.g. on-pack) initiative. Specify to what extent the campaign is to be integrated into the main site. Complete standalone sites can take time to gain visibility in search engines and can give poor customer journeys for customers looking to use services on the main site.</i></p>		<p>Ecommerce site (see section 8.4)</p>		<p>Blog <i>Blogging platforms such as Drupal or Wordpress can be used to create full websites, but if the majority of the content on the site will be news / blog articles, indicate the new site as a blog.</i></p>	
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	<p>4.2 is this a refresh / rebuild of an existing site? <i>If you have an existing site please detail how long it has been live for and detail the primary domain. If there are other company sites to be integrated with the refreshed site, please list sub/domains in section 12.</i></p> <p>Why does the old site need refreshing or rebuilding? <i>State the reasons for a renewed-website investment.</i></p> <p>Should this site stay live or redirect? <i>Ask the design partner to advise on any SEO implications on this.</i></p> <p>If you have an existing site, please provide any analytics (Google Analytics or other) and reports that are available for review by the design partner to make suggestions for improvement. <i>It will help the design partner to spot any current blocks to conversion or interaction on your existing site, by looking at site visitor statistics, 'bounce rates' on key pages, the amount of desk-based versus mobile usage of the site etc.</i></p> <p><i>This isn't essential in the estimation stage but will provide the design partner with insight when they start to look at design (in its widest sense) solutions.</i></p> <hr/> <p>4.3 Products / SKUs to be featured: (For both new or existing site to be refreshed):</p> <p><i>How many products / SKUs would be featured? Do these breakdown into categories? If so detail products with category groupings or provide a link to a current sitemap.</i></p> <p>Services to be featured: <i>If you offer services rather than products, please list out types of services / service categories.</i></p> <p><i>If available, please share a sitemap, schematic or overview of product or service taxonomy. This will help the design partner start to map out how many template pages may be needed and how many distinct pages for the whole site.</i></p> <hr/> <p>4.4 How many offices (and users) will require access to the website to update content?</p> <p>(For both new site or an existing site to be refreshed):</p> <p>Do you already have a workflow process for creating and managing marketing or sales content? <i>(if so and available as a schematic, attach to this brief).</i></p> <p><i>Additional technical infrastructure information including content management systems can be provided in section 12.</i></p>
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<p>5. Background to your business or brand</p>	<p>5.1 What does your business do? <i>(what are your services / products)</i> <i>Listing these out will help with an initial site map – ensuring that all aspects are covered in the architecture of the site.</i></p> <p>5.2 Are you UK based (or one country – add as applicable) or have international markets (and does the site need to be multilingual)</p> <p>5.3 Do you operate from multiple offices and will each office need to update content on the new site?</p>
<p>6. Target Audience</p>	<p>6.1 Who is this site for? <i>If you have a range of potential site users / customers, please provide or attach any quantitative or qualitative research material you have available that describes each segment.</i></p> <p><i>This can include demographics, industry classifications (if a business to business / trade website), split by country or language etc.</i></p> <p><i>If you're not sure, think about who your ideal customer/s would be and describe them using the personas technique.</i> See www.digitaliq.com.au for guidance if you need it.</p> <p>6.2 Will they be coming to the site for different reasons? <i>(What do we want them to do? List out, by audience / user segments as above, any desirable actions for each segment.)</i></p> <p>6.3 Are there any typical user journey / visitor scenarios you have already documented, that you can share?</p>
<p>7. Competitor Set</p>	<p><i>Any information you can provide at this stage may help the design partner look at desirable content and functionality, which will inform their estimate.</i></p> <p>7.1 List out competitors (website links / domain names) in your sector that you are aware of. <i>Whilst the design partner will respond initially with a well qualified-quote they may, in subsequent activity, create a score card to rank the desirable attributes of your competitor sites (to benchmark your new site against). And they will also look at wider 'usability' best practice to inform their design solutions. (During what they may term the 'discovery' phase of the website project).</i></p> <p>7.2 If you have any insight / research into on how these sites are perceived and used please provide this.</p> <p>7.3 Please also provide your views on those you like and why. <i>(Not just the design but also the content they offer.)</i></p>
<p>8. Marketing considerations</p>	<p>8.1 Consideration of current marketing activity</p> <p>8.1.1 Do you have segmented marketing / advertising campaigns running that require specific landing pages? <i>(e.g. based on a specific offer, content or product, give examples of these please.)</i></p> <p>8.1.2 When people land on the home page, what are the primary calls to action we</p>

	<p>need to address? (e.g. 'Buy Now', sign up for a newsletter etc.) (see section 6.2)</p> <p>8.1.3 Do you have existing brand / marketing videos (now or planned) we should feature? (if you have a Youtube channel, provide the url here.)</p> <p>8.1.4 Do you have animation, infographics or diagrams (now or planned) we should feature?</p> <p>8.1.5 Do you have specific mandatory information e.g. environmental policy, terms of use, privacy and / or accessibility notices (pages) we should include? (The design partner can also advise on this and would suggest mandatory pages on the draft site map).</p> <p>8.1.6 If you have existing Social Media profiles (including a blog) for the business, please list URLs here. (The design partner will also normally recommend and incorporate social share features on the site. If you don't have existing profiles, consider setting these up and creating some engagement before the new site / blog is created). If use of Social Media is new to your business, find out a lot more here: http://www.digitaliq.com.au – social media marketing</p> <p>8.2 Search Engine Optimisation</p> <p>SEO services are related to but a distinct service offer from pure website design and build but you should be considering them at this stage. Ask the potential design partner if they offer these services in-house or would work in partnership with a specialist provider if required.</p> <p>If you already have an SEO strategy in place and have a good idea of effective keywords / key phrases via scrutiny of your (existing) website analytics, provide these as an attachment to this brief.</p> <p>If SEO is a new area to you, have a look on the Digital IQ website for more information or contact a Digital IQ advisor.</p> <p>8.3 Lead generation</p> <p>If one of your website objectives is generate leads for your sales / marketing team, let the design partner know that here.</p> <p>Provide an idea of what content / service might be used to prompt the prospect to provide their contact details to you e.g. "download our white paper on (X) by leaving us your details on this form", "Leave your email details to sign up to our regular newsletter" etc.</p> <p>There is always a balance between asking for too little data (to aid your CRM initiatives) and too much (and potentially degrading the numbers of site visitors willing to provide data.) The design partner should be able to provide you with recommendations on this.</p> <p>If you have content you want to restrict to registered users, you should detail that requirement here also.</p> <p>8.4 Ecommerce (delete this section if your website is not to be an Ecommerce solution).</p> <p>Ecommerce Management Platform Do you have a current Ecommerce Management Platform technology for managing payment, or are you looking to select a new approach</p>
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	<p>If the website is to be an online store, do you have a list of desirable functionality already? <i>e.g. personalisation, up-sell and cross-sell messages, ability to see items in stock / stock levels.</i></p> <p><i>Ecommerce sites can also be feature-rich e.g. bringing in videos products (great for search engine optimisation and user experience), customer ratings, social media sharing options (even with business to business markets), data capture and possibly including a blog. These all affect budget but may be on your 'wish-list', if so please detail here.</i></p> <p><i>If you have any of the following information, please supply at this stage:</i></p> <p>How many products in total are you looking to offer on the online store? (will it be phased e.g. starting with key products or starting with a full / large range)</p> <p>Do you have specific existing logistics or fulfillment (e.g. warehousing) technology platforms that the website would need to interface with?</p> <p>Do you have any existing payment platforms to consider? If not, are there any I.T / Finance department preferences for Sage Pay / Paypal etc for customer accounts?</p>
<p>9. Site Content</p>	<p>Website content can take a number of forms, from text, video, photography, diagrams, infographics, illustrations and charts.</p> <p>Some of it possibly hosted on other platforms (e.g. Youtube or Slideshare) but all possibly requiring a 'home' within the site.</p> <p>9.1 Do you have existing text content available electronically? <i>(e.g. pdfs or Word docs describing services products, company history etc) No need to share at this stage but helps with the cost estimate.</i></p> <p>9.2 Is this content already divided into logical sections e.g. 'About Us', 'Company History', 'Services' / Product categories etc? <i>If details not already supplied in section 4.4, please state the sections here.</i></p> <p>9.3 Do you require the design partner to rewrite content with search engine optimisation in mind? <i>(recommended and very often the case.) (See section 8.2)</i></p>
<p>10. Creative Guidance</p>	<p>10.1 Do you have a single proposition and/or brand positioning to be reflected? <i>Please state here and / or attach any relevant documents with the brief.</i></p> <p>10.2 Assets:</p> <p>Can you provide any mandatory brand assets e.g. logos, colour-ways, any 'brand bibles' or style guides and / or links to a marketing asset library or photography archive etc?</p> <p>Do you have current advertising campaign assets to be included in the website? <i>(Actual assets not required at this stage but it would be good to know if they are available in a coherent form.)</i></p> <p>10.3 If original photography is to be commissioned: do you have a style guide?</p>

	<p>Or do you want the design partner to include a look and feel in their proposals? <i>If required, the design partner will look at costs for origination and / or usage of stock images and applicable usage fees for online.</i></p> <p>10.4 Is there a desired Tone of Voice for the site? <i>Please state here.</i></p> <p>10.5 As well as competitor sites (see section 7), do you like particular sites in other sectors that you have seen? List these out and detail what it is you like about them.</p> <p><i>(Note: whilst it's good to be aspirational, some features on sites you admire may not meet your budget – add them in but be aware, complicated functionality and rich content requires skill and resource and will increase budgets.)</i></p>
<p>11. Desired Functionality</p>	<p>Use this section to detail any additional functionality that might be required e.g. 'configurators' / calculator tools, interactive maps, complex data capture forms etc. <i>Much of the proposed website functionality will have been detailed already (e.g. CMS / Ecommerce) but use this section to include additional tools you see as desirable.</i> <i>The design partner will also propose engaging functionality at the short-list or appointment stage (and possibly workshop or co-create those with you) but it would be helpful to give them an initial steer here.</i></p>
<p>12. Technical Considerations</p>	<p><i>The information you've provided already will have built up a picture of the technical framework the design partner would need to work within but use this final section to confirm.</i></p> <p>Content Management System (CMS) preferences</p> <p>A note on CMS solutions: <i>The design partner will look at Content Management System or Ecommerce platform options can advise on the most appropriate, based on your needs. However, it's common to have a legacy system you will want to build on.</i></p> <p><i>If you have a preferred solution, state it here.</i></p> <p>Preferred CMS:</p> <p><i>CMS options can often seem baffling to new users but the design partner will take into account budget levels, technical skills / resources inside your business, numbers of potential users in your organisation, country or language options, security features, integration into existing technology in the organisation e.g. digital asset databases etc.</i></p> <p>12.1 Will the website need to link in with any existing databases or back-end (e.g. stock control) platforms you already use?</p> <p>12.2 Do your I.T / I.S team have a preference for a programming / build and / or hosting environment that the design partner should be aware of?</p> <p>12.3 Will the design partner need to consider site hosting or do you have your own servers / providers?</p> <p>12.4 Please list out any domain names owned by the business and where they should direct to on the new site (if known at this stage). <i>(e.g. if multiple domains are in use for different markets, products, sub-brands or services etc.)</i></p>

	<p>12.5 If you require an Ecommerce solution (see section 8.4), do you have a preferred platform? <i>(and if so please detail why that is the case, here)</i></p> <p>12.6. Do you have a preference for a particular CMS solution? <i>(related to section 4.4) - if so please detail why that is the case.</i></p>
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That's it, just delete any sections or prompts as required and send this brief (along with any additional overview documents that you think are useful) to the design partner/s.

Best wishes for both partner selection and the website design and build process! If you have any questions please ask in our Digital IQ forum or contact Digital IQ via the website.