

# BESPOKE WEBSITE

## PROJECT BRIEFING DOCUMENT

**BRIEF DATE**

**MEMBER**

## OVERVIEW

**ARE THERE ANY EXISTING SUPPLIERS  
WE NEED TO BE AWARE OF?**

**IS THERE A SPECIFIC  
COMPLETION DATE?**

## COMPLIANCE

**ARE THERE ANY LEGAL ISSUES WE  
NEED TO BE AWARE OF?**

**IF YOUR WEBSITE USES A DIFFERENT  
URL, TRADE NAME OR NAMED  
POLICY, HAS THIS BEEN REGISTERED  
WITH THE FCA?**

## CURRENT WEBSITE

**WHAT IS THE BACKGROUND TO YOUR  
CURRENT DIGITAL PRESENCE?**

**WHAT DO YOU LIKE ABOUT YOUR  
CURRENT WEBSITE?**

**WHAT DO YOU NOT LIKE?**

### DESIGN STYLE

#### DESCRIBE THE LOOK AND DESIGN OF THE NEW WEBSITE:

- |                  |                      |
|------------------|----------------------|
| a. Approachable  | m. Simple            |
| b. Corporate     | n. High Tech         |
| c. Authoritative | o. Modern            |
| d. Credible      | p. Natural / organic |
| e. Expert        | q. Playful           |
| f. Friendly      | r. Elegant           |
| g. Formal        | s. Fresh             |
| h. Informal      | t. Funky             |
| i. Sophisticated | u. Stylish           |
| j. Helpful       | v. Helpful           |
| k. Caring        | w. Slick             |
| l. Prestigious   |                      |

#### DO YOU HAVE ANY IMAGERY OR COLOURS IN MIND FOR YOUR WEBSITE?

#### ARE THERE ANY OTHER WEBSITES YOU LIKE WHICH YOU WOULD LIKE TO DRAW INSPIRATION FROM?

This does not necessarily need to be limited to other companies in the financial sector.

#### WHAT IS YOUR PREFERRED CALL TO ACTION? (PHONE/EMAIL/ENQUIRY FORM/CHAT)

#### IS THERE ANYTHING IN TERMS OF DESIGN OR CONTENT THAT YOU WANT TO AVOID?

#### DO YOU HAVE A STYLE GUIDE, BRAND DOCUMENT OR OTHER CORPORATE REQUIREMENTS?

### OBJECTIVES

**WHAT DOES THE WEBSITE NEED TO ACHIEVE?**

- |                     |              |
|---------------------|--------------|
| a. Sales reputation | d. Awareness |
| b. Traffic          | e. Content   |
| c. Sales            | f. SEO       |

### CLIENTS AND USERS

**WHO IS YOUR TARGET AUDIENCE?**

**WHAT PERCENTAGE IS COMMERCIAL VS. PERSONAL?**

**WHAT IS THE GEOGRAPHICAL SPREAD?**

**WHAT IS THE TYPICAL SIZE OF A CLIENT?**

**DO YOU WANT TO FOCUS MORE ON NEW OR EXISTING CLIENTS?**

### SEO/PPC, SOCIAL MEDIA AND BLOGGING

**DO YOU CURRENTLY DO ANY SEO OR PPC WORK? HAVE YOU IN THE PAST?**

**ARE YOU CURRENTLY USING SOCIAL MEDIA, AND DO YOU WANT THE WEBSITE TO LINK PROMINENTLY TO THIS?**

**DO YOU HAVE A BLOG OR NEWS SECTION? HOW WELL IS IT UPDATED?**

**DO YOU HAVE THE RESOURCES TO PURSUE THIS TYPE OF ACTIVITY GOING FORWARDS?**

### WEBSITE CONTENT

**DO YOU WISH TO INCLUDE  
OR HIGHLIGHT ANY OF THE  
FOLLOWING ON YOUR WEBSITE:**

- |                             |                            |
|-----------------------------|----------------------------|
| a. Enquiry forms            | e. Quote form              |
| b. Newsletter<br>signup     | f. Renewal date<br>capture |
| c. Members' only<br>section | g. News Feed               |
| d. Testimonials             |                            |

### EXTERNAL COMPANIES

**DO YOU SHARE MARKETING  
ACTIVITIES WITH ANY OTHER  
COMPANIES?**

**ARE THERE ANY ORGANISATIONS  
YOU WOULD LIKE TO LINK TO?**

### TECHNICAL

**DO YOU NEED HOSTING FROM  
BROKER NETWORK?**

**DO YOU NEED A SSL CERTIFICATE?**

Broker Network  
Grimmbald Crag Close  
Knasbrough  
HG5 8PJ

**T:** 0844 873 0191  
**E:** [membermarketing@brokernetwork.co.uk](mailto:membermarketing@brokernetwork.co.uk)  
**W:** [www.brokernetwork.co.uk](http://www.brokernetwork.co.uk)

