

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

**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
- b. Traffic
- c. Sales
- d. Awareness
- e. Content
- 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
- b. Newsletter signup
- c. Members' only section
- d. Testimonials
- e. Quote form
- f. Renewal date capture
- g. News Feed

### EXTERNAL COMPANIES

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

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

### TECHNICAL

**DO 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)  
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