

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
signup | f. Renewal date
capture |
| c. Members' only
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

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E: membermarketing@brokernetwork.co.uk
W: www.brokernetwork.co.uk

