

# FAST TRACK 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 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)

