

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
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