The Client Info Sheet

Whilst I appreciate that you are busy and I'm asking you to fill out yet another form during your hectic day (Yes, I know exactly how you feel!) I can't stress enough how important it is to have a proper plan in place for your website and/or web promotion.

After all would you start a business or a new project without having a sound plan down on paper? Exactly.

The information you give me within this worksheet will assist massively in helping me discover exactly what your looking to achieve and advise you of the best way of reaching that goal.

The more information you can give me, the better I'll be able to do my job. Answer each question in a clear and concise manner, and skip any questions that are not relevant to your project or that you don't understand.

If you are part of a team or if there is more than one decision maker in your organisation I recommend completing this info sheet as a group because it is possible that each member of your team may have a different vision for the project. That way we won't miss any important opinions. Once you're happy that the info sheet clearly describes your project, email it to infosheet@jamesjacobs.me and I'll craft the most effective web solution for your requirements to discuss at our first meeting.

All about you

What's the name of your company and intended website?

Describe your company

Describe the concept/product/service your site will provide

I like to keep my address book up-to-date. Who are the main contacts for this project and what are their roles?

When would you like to start (tomorrow is pretty unlikely, sorry!)?

When does it need to be completed (yesterday is definitely out)?

What is your specific reason for these dates?
(eg, tradeshow, product launch, before the pub shuts?)

Your budget dictates how much time I can devote to your website. What are you looking to spend to achieve your vision? (eg, £1-2k, £3-4k, £5k+)

What are you trying to do?

Give me your main reasons for commissioning a new website

In order of importance (most important first) what are the business objectives for your site (eg, improving sales rate, increase customer satisfaction, reduce time searching)

What is your measure for success, and what are you hoping to achieve?(ie, 20% increase in sales)

What aspects of your current site work well and why are they successful?

What's not so great and why do you think that is?

Who are you doing it for?

How do you intend on getting people to visit your site? Advertising – pay per click, offline etc?

Who's coming to your site? Describe the different types of visitors to your website in as much detail as possible.

How do you think your audience currently perceives your company and the services you offer?

What do you imagine people using your site for? What will they want to do there?

Why will people choose your site over others?

Outline any ideas for features you have for your site

How do these features support your business goals and the goals of your user?

Design Concept

People are coming to your new site for the first time. How do you want

them to feel about your company?

Tell us a bit about your competition. Who are the runners and riders in your field (including their website addresses)?

What works for them? What doesn't?

Leaving your competitors aside, have you seen any sites recently that you've liked the visual design of? What did you like about it?
(if you can't think of any have a look through cssdrive.com or unmatchedstyle.com for a catalogue of good looking websites)

Let's briefly talk content. Aside from the features we discussed above, what else do you want your site to do?

Additional Comments

I've tried to keep this worksheet as general as possible, but every project is unique. Here is your chance to add any extra information you think will be helpful.