A few words from our CEO Adrian Bradley...

There are loads of factors that go into making successful digital strategies but a good briefing documents go a long way.

Most briefs go wrong because the people writing them are being asked to do something very unfamiliar. For most of our clients *digital* plays its part in a wider marketing and IT strategy. There's often a wide remit, lots of stakeholders to manage and all sorts of software products for you to consider. Where to start and how to clearly communicate what you want can be overwhelming. That's why we created this briefing document. To make things easier and more logical.

In my experience the best projects happen when clients and agencies work together as partners, relying on each other for advice and expertise. If you need our help to fill in any part of this document email the team at info@i3digital.com for a friendly no-obligation chat.

We promise not to pester you with sales calls afterwards...unless you ask us to :-)

1. Your Project: Why are you doing it?

Question 1: In a few words describe why you are undertaking this project

> E.G. 'There are changes in our sector and we need to re-invigorate our digital presence to stay competitive'
>
> E.G. 'Our old website is built on technology that is no longer supported and we need to move'

Question 2: Who is involved in the project? What are their roles? What do they want to achieve?

> E.G. Jane Bloggs, Marketing Manager, will act as Project Manager on our side. He wants a website that he can use to market our business more effectively as he thinks it looks dated at present.
>
> E.G. Andy Peters, IT Director, hold the role of Project Sponsor and is responsible for ensuring the project is delivered successfully. He wants a longer term solution to our technical challenges that minimises the risk of downtime without costing over the odds.
>
> E.G. Emma Smith, Customer Services Manager, is acting as a representative of our end customers for this project. She wants to reduce the amount of time her team spends 'firefighting' with customer enquiries that should be handled online.

Question 3: How long do you expect the project to take?

3 months or less	3 – 6 months	6 – 12 months	12 months +

Is there a deadline?	Yes	No
If yes, when?	DD	MM	YY

2. Your Users: What do they expect?

Question 3: Please use the box below to describe the users of this system.

E.G. 'We've got 2 main groups of customers. They are:
- Prospective students looking for information on courses and lifestyle
- Their parents who are interested in accommodation, fees and employability

E.G. Internal users of this system are:
- Content Administrators who need to add news stories to the website
- Student Services professionals who need to be able to receive enquiries from customers

Question 4: What should this website, app or digital strategy help users to do?

Please make this list as long as you need. We've provided an 'I need' / 'so that' format below but you don't have to follow this… it just helps us to understand the context around each requirement.

User Group	User Story / Activity
E.G. Prospective Student	As a prospective student I need to be able to find information about open days so that they can book to attend.
E.G. Student Services	As a student services advisor I need to be able to log-in to an enquiries dashboard so that I can respond correctly.
E.G. Member	As a Member of the membership association I need to be able to pay my subscription online so that I can continue to access member services.
E.G. Policy Holder	As a policy holder I need to be able to log-in and view my policy documents so that I can renew my policy without getting stuck in a call centre queue.

Top Tip: If you have any customer research or questionnaires that you would like us to review send it over to info@i3digital.com with a copy of this document.

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3.Technology: What do you need?

Question 5: Does this project require technical integration with any of your other systems? (Please mark with an 'X')

	Yes		No

If yes, please use the box below to describe what you want this integration to achieve:

> E.G. The website must integrate with our case management system. This will allow customers to login and view their documents. It will also pass any new enquiries directly to our sales teams.
>
> E.G. Customer ecommerce orders need to be passed directly to our ERP system. Product information is stored in our ERP system so the website needs to integrate product data back into the user experience.

Question 6: What volume of traffic does your website get per month? (please mark with an 'X')

	< 1000 users		<10,000 users		<100,000 users		100,000 users +

Does your website handle ecommerce sales?		Yes		No

If yes, how many orders do you handle per day?	Please insert rough number here

If yes, how many products do you have?	Please insert rough number here

Question 7: Are you planning to replace your Content Management System (CMS) as part of this project? (please mark with an 'X')

	Yes		No		Unsure

If yes or unsure, please use the box below to describe why you are looking at new systems

> E.G. We are concerned about system scalability. The website is slow. We've been advised that our other systems are not compatible with our current CMS. The costs have gone up and we do not feel we are getting value for money.

If yes, what platform are you current using?	Please insert name of supplier here
If yes, have you looked at any other systems?	Please insert name of supplier here

Question 8: Are there any technical features that you currently have, or want to have, that should know about?

E.G. Multi-lingual content, product configurators, advanced website search, SEO controls, App download links, user forums, FAQ sections, live-chat integrations, special Google Analytics reporting

4.Reference websites

Question 9: Please provide the URL's of any competitors and give comments on anything that you think that they do particularly well.

Competitor URL	Comments
123.org	Nice brand user experience isn't good though
Example.com	Good eCommerce experience. Nice and slick especially on mobiles

Question 10: Please provide the URL's of any non-competitor websites that you or your team like.

Website URL	Comments
Apple.com	Clean interface, good images, clear messaging

5.Target Results & Budgets

Question 11: Please use the box below to define what success looks like. This can be numerical or something more top level.

E.G. We want to increase conversions from X to Y and reduce the bounce rate to X%

E.G. We have to go live by September in order to get sales ahead of Christmas and be first to market

E.G. Our commercial target is to become the largest private client legal firm in the UK

Question 12: Finally, do you have a budget to deliver everything you have outlined in this document? (Please put an 'X' in one of the boxes below)

	Yes		No

If yes, can you indicate what your budget range is below? (this helps us to evaluate whether your budget is realistic based on the requirements you have outlined)

	<£20K		£20K-£50K		£50K-£100K		£100K+