

Marketing Services Project Worksheet

This worksheet will help you and I put together a solution that best reflects you and the goals of your business. Also, and equally as important, this worksheet will help you capture your vision for the project. What you say will help to determine what we create. Think of this document as a business plan for your marketing services project. The more detailed information you give, the better I'll be able to respond. Answer each question in a clear and concise manner and skip any questions that don't pertain to you or your project.

Project Details

- 1) What is the name of your company, your website, and your current or intended web address?

- 2) Describe your company and the concept, product or service you provide.

- 3) How soon do you need the project completed? Has this date been chosen for a reason?

- 4) Approximately how many deliverables will this project yield?

- 5) Do you already have a logo or branded materials such as business cards or stationery?

- 6) Who are the main contacts for this project? Who has final approval?
(Please list names, email addresses and phone numbers).

Current Website (If Applicable)

7) Who do you currently host your website with?

8) Do you feel your current website promotes a favorable user experience?

9) What shortcomings exist on your current website, and which aspects would you like to keep?

10) Will the existing website content be used?

Your Customers/Users

11) What types of people do you expect will visit your website most often?
(i.e. age, industry, male/female, income, etc.)

12) How is your business currently perceived? Do you want to portray the same sort of image through your stationery, collateral, website?

13) The importance of first impressions cannot be underestimated. How should people describe your new marketing? (Some examples include prestigious, friendly, corporate, trustworthy, fun, innovative, bright, bold, calming, elegant, clean, sharp, minimal, or cutting edge.)

14) What colors and/or imagery convey the personality and tone of your business?

15) Do you already make use of a consistent color scheme?

16) Who is in charge of producing/editing your new site content?

17) Do you require professional copy writing services?

18) Please list your main competitors. What do you like and dislike about your competitor's marketing?

19) Are there any particular websites that you like? Why?
(i.e. specific page elements, colors, typography, photos, etc...)

20) Will your new website feature any video, music, or animated content?

21) Do you have photos or do we need to go and gather those?

22) How will you know if the project is a success?
(i.e. 20% increase in sales, 70% of surveyed users expressing satisfaction, 30% reduction in time spent searching for info).

23) Outline any ideas you may have for your marketing project.

Additional Comments

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

Thank you for taking the time to fill out the worksheet.

You can email this document to helpme@successXdesign.com