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DESIGN

How to write a website brief

Helpful guidance to ensure your
web project has the best start.

Welcome

A website brief is a key first step in any new website development project. An effective brief helps you and your team develop a plan and create a website that ultimately meets all of your requirements visually and financially.

The purpose of a project brief is to outline all of the requirements of the project as well as giving prospective suppliers all of the information they need to provide an accurate proposal.

A comprehensive website brief not only helps the outcome of your project, but also reduces the risk of unexpected costs once the project is underway, due to additional requirements being added to the project. It can also help focus your thinking as an internal project team and cover off any key questions as early as possible.

In this guide, we have listed some key elements you may want to include within your next website brief, along with some questions you may need to consider with your project team. Some of the sections may not be relevant to your website project, but are useful to ensure they are considered before embarking on creating a new website.

We hope you find the information contained in this document useful. If you have any questions or suggestions for new sections, email us at hello@oysterdesign.co.uk. We look forward to hearing from you.

Contents

1 Project overview

The project overview covers the why. In this section it is important to expand on why you are looking for a new website and set the basis of what you are looking for in a new website and a new agency partner.

- Why you are looking for a new website?

- What are you hoping to achieve with your website?

- What are the important aspects of the project that should be considered in relation to your organisation?

2 Goal and objectives

This section details the key goals and objectives for the project to help prospective partners understand all of your aims and goals.

How will you measure the success of your new website?

- What qualitative goals/objectives do you have for a new website?

- What quantitative goals/objectives do you have for a new website?

- Are there key failure points that you can foresee?

3 Features and functionality

Including a full list of any features and functionality your new website requires is imperative when writing a website brief. Outlining all of your requirements in this section will ensure any agency pitching for your website will include all of them within their estimate, ensuring they are able to provide a true cost for your project.

- What features does your new website require?

- Does your website require a shop/ecommerce platform?
  - Do you have a payment gateway set up?
  - Do you require recommendations on a payment gateway?

- Does your website require a donation tool?

- Does your website require any lead generation functionality?

- Do you require a blog/news section?

- Do you require a document library/knowledge hub?

- Do you require a secure login area?

- Does your site require site search?
  - Does your site require any filtering within the search?

- Do you require any booking functionality?

- Do you require a calendar on your new website?
 - If so, where is this information stored?

GLOSSARY

Payment gateway – A payment gateway is a third party system that allows you to take payments via your website. The payment gateway handles all of the complex money transactions, meaning less development work and a lot less risk for your websites security. Typical examples of payment gateways include Paypal and Stripe.

Lead generation – Many websites are designed to help generate leads, especially websites for commercial businesses. It is important to consider how you want to generate leads (form sign ups, chat bots, phone calls) and how they are managed (details are emailed to a staff member/team, placed in a CRM via an integration, reports run from the website etc).

Secure login area – A secure login area allows a website to host content and information that is protected behind a login screen. When considering a login screen, it is important to consider:

- How do users sign up for an account?
- Are they auto-authorised, or does a person need to authenticate them?
- How long do they have access?
- Can they download anything from the secure area (e.g. PDFs, Excel sheets etc).

Site search – Site search covers any search functionality on your website. Site search functionality can range from basic site search using text, to more complex search algorithms using specific weightings and filtering to help users find the content they are looking for. Consideration should be given to this when designing a website as it can be challenging to add in once the content has been created.
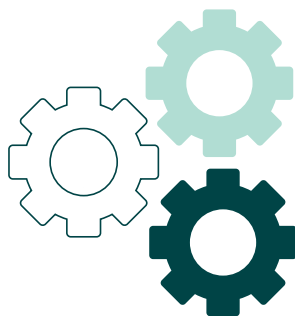
4 Integration

Integrations with third party systems can be a great way to make your data entry and management tasks more efficient, they also reduce the risk of human error. Common website integrations can be with Customer Relationship Management (CRM) systems, Stock management systems, Accountancy platforms or other web-based systems and databases.

Ensuring you include as much information as possible about any third party integration systems and how you envisage them working helps your new potential agencies scope the project effectively. Often larger third party platforms will have integration teams and portals that can be useful for an agency scoping the project.

- Do you require your site to integrate with any third party systems?

- If so, when do you want this integration to trigger?

- What information needs to be passed between the two systems?

- Does the third party system have any integration examples/ documentation that can be included within the brief?

What is an API? – API stands for Application Programming Interface, in practice, an API allows two systems to communicate and pass information between each other. An API integration is often the best choice for an integration as it is the more secure and quickest way of passing data. Other types of integration include CSV and FTP.

5 Design, branding and messaging

Within the brief, it is important to include any design guidelines that an agency may need to consider. Once the project has been given the go-ahead, your chosen agency will work with you on a design, including any assets, guidelines and standards you need the website to comply with. This can help ensure they are all included in the design stage of the project.

- Do you require a new brand, tweaks to your existing brand or the agency to comply fully with your brand guidelines?

- Do you need the website to comply with any accessibility standards?

- Are there any websites you like the design of?

  – This can include specific elements such as menu, banners and specific features

  – This can also include competitor sites

- Are there any websites you do not like the look of/would like to avoid?

6 Target audience

Understanding who your target audiences are when creating a website is essential for making sure they are tailored for. These may be your ideal clients, service users or internal stakeholders, listing them all, and the sort of content and experience they are looking for from your website will help ensure they are all catered for.

- Who are your ideal website users?

- Who uses your website currently?

- Who are you looking to attract to your business/website?

- What key actions do you want them to take? (shop, fill in a form, engage with content)
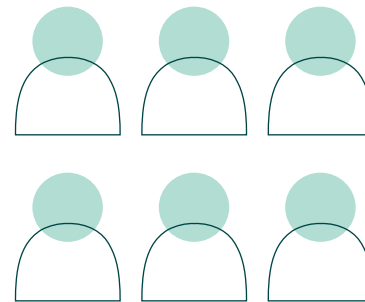
7 Pages and sitemap

While your new agency will help you develop a sitemap for your new website, including details of key pages you need to include within the site and how deep your sites content will need to be is important for allowing an agency to scope your website properly.

- Can you include an example sitemap of your new site and how it is structured?

- Do you have a list of pages you would like to include?

- Do you have a list of page types/designs you would like to include within the design stage?
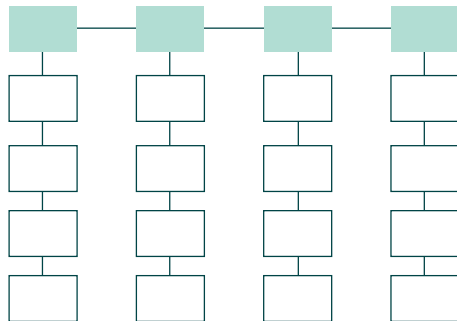
What is a sitemap? – A sitemap is a chart which details all of the pages on your new website, it normally looks like a company structure chart, showing the page on your site and the structure of the site including the homepage, key landing pages and subpages. It is a very useful tool when planning design and content for your website.

8 On-page content

Web content is the key to a successful website. Content should be tailored to the website and its desired effect on the user. It can often be the largest aspect of a website and can be managed either internally, or by the agency.

Considering where this is going to come from, who is creating/editing it and new content and how it is going to be loaded to the website, is a key part of any website build project.

- Are you writing new content for the new website?

- Are you using old content from the existing website?

- Do you require any photography?

- Do you require any videos created?

- Do you wish to include animations?

- Do you need the agency to load the content to the website for you? Or will your team do this?

- Who will manage the content in the longer term?

- Are there any SEO considerations when planning, adding and editing content on the website?

On-page content is one of the most important aspects of SEO success. Ensuring the content you create is going to improve your SEO rankings will help drive additional traffic to your website. Many agencies will be able to advise on an SEO strategy during the design and build process, however each agency will have varying levels of ability to support you in SEO (and Digital Marketing) so if you need additional support, this is something you should consider during the selection process.

9 Content Management System (CMS)

Most new websites will be built upon a Content Management System (CMS). This will be the admin area your website administrators interact with. If you have any specific areas of concern or requirements from your CMS, you should include them here.

- Do you have a preferred CMS?

- Do you have any automated actions you need your CMS to make?

- Do you have any issues with your existing website CMS that you would like addressed in your new site?

What is a Content Management System/CMS? – A CMS or Content Management System, is an interface that your website administrators use to manage the content on your website. This will be the interface they use to create new web pages, edit existing content and manage the website structure. Every CMS has advantages and disadvantages over the rest of the market. If an agency is suggesting a particular CMS, it can be useful to know why they have picked that CMS for your project. Common examples of a CMS are Wordpress, Wix, Squarespace and Drupal.

10 Ongoing support and hosting

A website is a long-term investment, it is important to clarify what sort of ongoing support you need from the successful web agency. This can include technical support, website software and security updates or ongoing digital marketing support.

- What support do you require from a successful agency?

- What services do they need to be able to provide?

- What is your budget for this support?

- Do you require the successful agency to host the website as well?

11 Timeline

If you have any deadlines/timescales for the project, include them here. Most agencies will provide feedback on whether they think the timescale is achievable. It can also be useful to outline any key milestones for the project e.g. designs need to be ready for ready for a certain date.

- Are there any deadlines for the project?
- Is the website part of a larger project?
- Do you have any required timescales for the project?
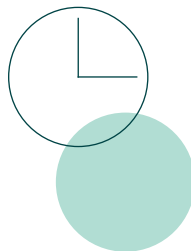
12 Budget

Including a budget allows a web agency to pitch a website that fits within your budget. Web project budgets can vary from low four figure amounts to six figures. Ensuring the agencies you are contacting are working within the same budget environment as you is crucial when gathering proposals.

- What is the budget of the project?
- Are there any invoicing requirements?
  E.g. invoice by/after a certain date
- Payment term details
- Budget for ongoing support
- Who has a budgetary sign off for additional work?

13 Submissions, selection process and project team details

Here you should include any details of how proposals should be submitted, how the selection process will run (including timescales). It can also be useful to outline who is on the internal project team/selection team.

- When should proposals be submitted?
- How should questions be submitted?
- Who should proposals be submitted to?
- When can feedback on proposals be expected?
- What are the next steps? (in-person pitches, video call pitches etc.)

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We are a creative design agency

Oyster are a full service agency who handle everything. Design, creative, copy, web, video, animation, email marketing – the list goes on. We offer well considered creative to those who know what they want and ideas and solutions for those who aren't sure.

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