How to write a website brief

BONUS: SAMPLE BRIEF INCLUDED

Table of contents

Introduction

When it's time to build your website, a detailed website brief is your road map to success. This document outlines your project goals, requirements and constraints, allowing a prospective agency to ascertain whether they are the right fit for the project, and what the project timeline and budget will be.

In short, a detailed brief:

- Gives clarity to the project scope
- Saves time on project discovery
- Reduces the likelihood of costly assumptions

How long does it take to write a brief? A brief on a simple "about us" website may take a few days to put together. However, a brief on an enterprise-level site or custom online application may take several weeks to compile, especially if it requires input from multiple stakeholders. The time spent on your brief is time well invested because it means you're focused on your project's success before it even begins.

Give us an overview of your organisation

Let's dive into the website brief. Where do you start?

Many briefs forget to include background information on the business or organisation. While it is useful to include links to any existing offline / online marketing collateral, a quick overview of your organisation is immensely helpful at the briefing stage.

Start your brief with information like:

- When was your organisation established? Where do you operate? What are the main products or services you offer?

- Who are your major competitors?

- Tell us about your DNA. What are you known for? What is your vision and mission? How do you differentiate yourself from your competitors?

- What is the main message that you wish your website to convey? (If you have an existing content strategy, please include your key messaging from that strategy here.) Examples are:

  ‣ We are market leaders in [X]

  ‣ We deliver thought leadership in the areas of [X] and [Y]

  ‣ We have an international [X] team of [Y]

  ‣ We are technical experts in [X]

  ‣ We have vast expertise advising clients on all forms of [X]

Give us an overview of the problems you are solving

Now that we know who you are and what you stand for, it's time to tell us more about the overarching business problem you want your website to solve.

If you are building a new site, we want to know:

- Are you hoping for the website to drive sales? Build brand awareness? Generate leads?
- What business function will the website support through its existence?

If you are revamping an existing site, what are your reasons for doing so?

- Is the existing site dated? Does it have issues with traffic, stickiness or customer retention? Does it need to be refreshed to reflect an updated brand identity?
- What are the major paint points that users have described on the current website?
- What are your main likes and dislikes about your current web presence?
- Are there existing processes (such as billing, invoicing and content management) that could be streamlined or improved?

Here are examples of high-level business goals for a site:

- Help raise the firm's profile in the areas of [X]
- Reflect updated brand message of [X]
- Communicate our expertise and experience in [X]
- Rank alongside our competitors but differentiate us in terms of [X]
- Drive [X] amount of high-quality monthly leads
- Increase the scope of enquiries from [X] type of client
- Drive subscriptions
- Boost online sales of products / services
- Attract the best recruits
- Build a community of [X]
- Build and strengthen our network of [X]
- Serve as a hub for connecting [X] to [Y]
- Consolidate existing content channels into [X]
- Streamline existing processes (such as online billing and invoicing)
- Increase efficiencies in areas of [X]

Tell us about your target audience

To create a website that addresses your goals, we need to get to know your target audience. Specifically, we would like to know:

- What does your typical client look like?
- What sectors and geographies do they operate in?
- What are the main problems they are trying to solve when enlisting your services?
- Is your audience segmented into specific groups with different needs (e.g. clients, prospective employees, media and press)?
- What online user activity would you define as a "success"?

Examples of "success" could be:

- Purchase a product / subscription
- Sign up for a newsletter
- Contact a member of your team
- Access resources in a knowledge centre
- Sign up for events / webinars
- Fill out an enquiry / registration / quote form

Outline the website scope and features

With a fuller picture of what you do, who your audience is, and what you want to achieve, it's time to dive into the details of your prospective website. We consider this the 'meat and potatoes' of the brief because it's where the technical and creative possibilities are addressed.

Please give us an outline – a rough draft is okay – of your prospective website navigation structure.

Next, please list the major features that need to be coded. Here is an example overview of potential features:

- User registration and login
- Member management interface
- Member restricted resources
- Ecommerce platform and online billing

- Blog or news platform
- Events and online bookings
- Knowledge centre
- Help desk
- Vacancy portal
- Search functionality
- Contact forms or other online forms
- PDF converter
- Interactive map
- Social media integration
- Multi-lingual platform

Where possible, please include a brief description of each feature, with links to online references.

Information is power, so you can never send us too many illustrative examples.

Outline project responsibilities

Who's going to do what as we work together on this project? It's time to outline the project responsibilities:

- **Design:** Does your firm have existing brand guidelines that dictate the suitable approach with regards to fonts, colours and photography, or do these need to be compiled as part of the project? Do you have other branding collateral (brochures, guides) that the site should tie in with?

- **Content:** Will you be writing the content for the website, or do you expect a web agency to provide copywriting services? Do you require assistance with the editing and proofreading of content?

- **Imagery:** Do you have professional photography available for the project, or does the project require custom photography services? Do you anticipate using stock photography / illustrations in the project?

- **Translations:** If the site is multi-lingual, do you require the services of a translation agency or will you provide all translated text?

- **Post-launch marketing:** What are your post-launch website marketing plans (e.g. PPC, social media marketing, email marketing) and do you need assistance with post-launch marketing efforts?

- **Post-launch content updates:** Do you require assistance managing the website content over time, or do you have an in-house team that will be responsible for post-launch content updates to the site?

If you're not sure where some of the elements will come from yet, that's okay. Let us know what pieces are missing, and we can help you source them.
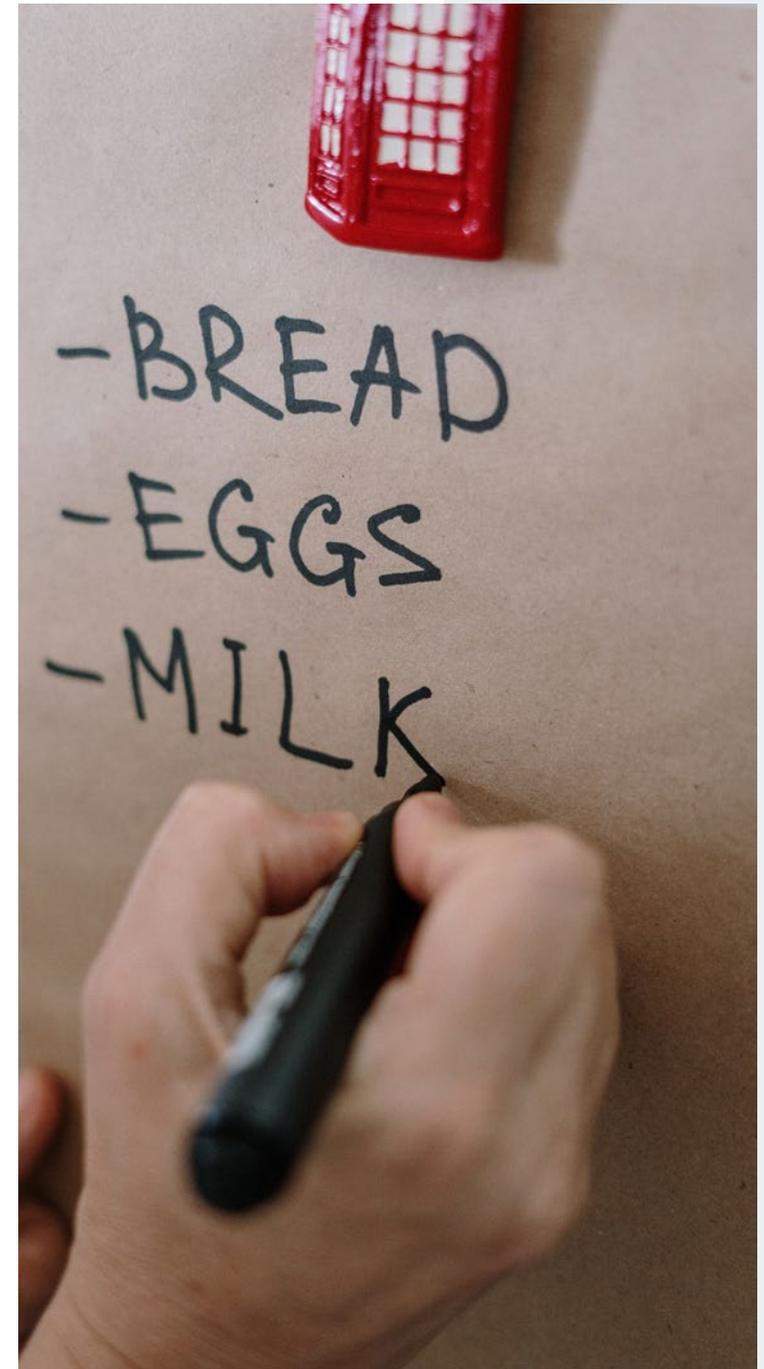
How will you measure success?

Imagine: your brand-new website is up and running. It's fast, user-friendly and feature-rich. But is it solving the problems you articulated early on in your brief? There's no way to find out without testing.

We would like to address success metrics at the briefing stage of a project. Here are examples you might want to consider:

- Google Analytics usage metrics
- Number of subscribers and their usage of the site
- Monthly increase in leads
- Scope of event registrations
- Scope of newsletter subscriptions
- Website rankings compared to competitors in a post-launch client survey
- Feedback from clients during project pitches
- Feedback from prospective job applicants
- Company press coverage
- Recognition from external bodies and industry awards
- Cost savings achieved as a result of specific online features

Ideally, the metrics used to measure your site's success should be "SMART": specific, measurable, attainable, relevant, and time-bound.

Please include legal and technical requirements

Where are nearly there! Before you hit send, please give us an overview of legal and technical requirements relevant to your region.

Here are a few questions to get you thinking:

- Does the site need to meet WCAG or ADA accessibility requirements?

- Does it need to comply with EU cookie regulations and GDPR?

- Is there a specific platform it needs to tie in with? Do you have a preferred CMS?

- Do you have a preferred payment gateway when it comes to online billing?

- Do certain features of the site need to integrate with an existing CRM or accounting platform?

- Does the site require integration with third-party APIs?

- What are your hosting requirements, and do you have an existing hosting provider?

Outline the project timeline, key contacts and agency requirements

For the concluding portion of your brief, please let us know when the project is due, how many people will be involved, and what you are looking for in a prospective agency.

Please outline the project timelines:

- What is the proposal due date?
- How long will you take to review the proposal and by when will you appoint an agency?
- What is the targeted project kick-off date?
- Do you have a target launch date? Should this be divided into specific project phases?

Please also tell us about your team:

- How many decision-makers will be involved in the project?
- Will the project have multiple points of contact or a single project manager at your firm?
- Who is the point of contact for questions surrounding the project brief?

Please tell us about your agency requirements:

- What are you looking for in a web agency?
- What skills and experise do they need to demonstrate?
- What aspects of the proposal are most important to you?

Bonus: Sample website brief

The following is a fictional brief based on a non-profit organisation.
All names, email addresses and organisational references are fictional.

1. INTRODUCTION

The Green Foundation is currently accepting proposals to redesign and redevelop its website on www.greenfoundation.org. The project will cover concept, design, development and hosting, as well as post-launch maintenance and support.

2. BID TIMELINES

Bids should be submitted to Samantha Green via email (samantha.green@greenfoundation.org) by September 30th 2020.

We will choose a supplier within two weeks of receiving bids. All other candidates will be notified by October 31st 2020. The project will commence on November 1st 2020 and our target launch date is June 1st 2021.

Here is a summary of timelines:

Agency appointed: 16 October 2020

Desired project kick-off: 01 November 2020

Target launch date: 01 June 2021

Please address any questions to Samantha Green via telephone on +27 11 782 0759. In her absence, please contact Christina Henley (christina.henley@greenfoundation.org; +27 11 782 9851).

3. ABOUT THE ORGANISATION

The Green Foundation was founded in August 2005 and is a non-profit organisation that aims to assist rural communities in Sub-Saharan Africa through restorative eco-projects and agroforestry. We have raised more than R 40 million to date and have won the HOPE Award in 2012. To date, we have assisted 85 rural communities in South Africa, Botswana and Zambia and planted more than 800,000 trees. For a full outline of our projects, please see our projects booklet, attached.

Our key message is "Uplifting communities and alleviating poverty through restorative eco-projects".

4. CURRENT WEBSITE ISSUES

Our current website was developed 6 years ago and is slow, dated and hard to navigate. It is also difficult and time-consuming to maintain. We would like to revamp the site to better reflect our mission and messaging, as well as make better use of our project photography and multimedia. A summary of feedback from previous web surveys is attached.

5. TARGET AUDIENCE AND GOALS

a. The general public. 75% of our funding comes from individuals who hear about our message through our marketing channels. The remainder comes from corporate sponsorship and internal profit generation (such as fundraising activities and sale of our branded merchandise).

b. Businesses. Businesses contribute 15% to our funding. We would like to strengthen our focus on corporate sponsorship during 2021 and use the website to support co-branded sponsorship projects like the SASA green campaign.

c. Volunteering students. Once a year we run a volunteer program in conjunction with Rand University. Social studies students donate 100 hours of their time to an NGO of their choice as part of their year-end thesis. We typically receive 300 hours of donated time each year. The website should act as a recruitment drive for these volunteers, as well as other non-student volunteers.

d. Accreditation agencies. We are in the process of securing accreditation from Charity Navigator and ECFA. A professional web presence will assist in this evaluation.

e. Partners. We are continually expanding our partnership network to environmental organisations and lateral NGOs. The website should act as a vehicle to strengthen this network.

f. Employees. The strength of our efforts relies on the quality of our people. We would like the website to attract job applications from qualified individuals in the fields of marketing, business development and project management. The website should successfully convey our values, mission and core beliefs.

g. Photographers. Photographers typically spend 40 hours a year to profile our projects. They are selected on a competitive basis but often donate free hours to capture specific projects and events. We would like the 'photo blog' feature (described below) to inspire professional photographers to get involved in our projects.

h. Design students. We sell branded merchandise (such as t-shirts, caps and bags) in our online shop as part of our fundraising. The merchandise designs and illustrations are donated by designers and final year design students. We would like the site to attract further contributions in this area. An online competition platform might be worth exploring.

i. Media. We have been featured in a variety of local magazines, online publications and radio stations. We would like the website to attract further positive press attention and enable interested parties to download our resources and press kits.

6. WEBSITE ACTIVITIES AND OBJECTIVES

We would like users to engage in the following activities on our website.

- **General user:**
  - ▶ Donate online
  - ▶ Subscribe to our newsletter
  - ▶ Register for an event
  - ▶ Sign up for volunteering programmes (donate time, photography hours or design hours)
  - ▶ Download resources on sustainable agriculture, agroforestry and related topics
  - ▶ Purchase our merchandise
  - ▶ Follow us on social media channels like Twitter and Facebook

- **Prospective recruits:**
  - ▶ Apply for a job vacancy
  - ▶ Register for an event
  - ▶ Follow us on social media channels like Twitter and Facebook

- **Press:**
  - ▶ Subscribe to our newsletter
  - ▶ Download our press kit
  - ▶ Follow us on social media channels like Twitter and Facebook

The above ties in with our major website objectives:

- Boost awareness of the Green Foundation
- Advertise the uniqueness of our programme to partners, volunteers and the media
- Raise funding through donations and merchandise sales
- Serve as a hub for connecting programme partners, volunteers and community participants
- Become an online destination for resources on sustainable agriculture and agroforestry in the areas served
- Create and inspire community discussion around the issues our communities face

7. WEBSITE SCOPE

The website will contain the following navigation structure. Alternative suggestions on page structure are encouraged:

- **Home**
- **About**
  - ► Our story
  - ► Core values
  - ► Our team (30 profiles)
  - ► Annual reports
  - ► Our partners
  - ► Press kit
- **Projects**
  - ► Outline per project with image galleries and videos (60 projects for launch)
- **Get involved**
  - ► Donate
  - ► Online shop (40 products for launch)
  - ► Volunteer
  - ► Photographers
  - ► Designers
  - ► Partnerships

- **Resources**
  - ► Knowledge center with downloadable resources, videos, whitepapers and guides
- **What's new**
  - ► News articles
  - ► Events calendar
  - ► Photo blog
  - ► Image galleries
- **Careers**
  - ► Overview
  - ► Our vacancies
- **Contact us**
  - ► Locations (3 offices)
  - ► Contact form

8. WEBSITE FEATURES

The website should contain the following custom features. Additional feature suggestions are welcome:

- Interactive map of projects in Southern African with ability to zoom in on countries and click markers to access project pages (for launch we will feature 60 projects across 3 countries)
- Online donation form with ability to pay via EFT, PayPal or credit card. We would like users to choose between recurring and once-off donations (please see www.plantwithpurpose.org/donate as a reference).
- Online shop selling our branded merchandise (this should accept payment via EFT, PayPal or credit card); we currently have 40 products in our shop ranging from branded t-shirts to bags
- Resource centre with robust search and filter functionality; resources may be in HTML, PDF, video or podcast format
- News platform with search and filter functionality
- Newsletter subscription form and mailer
- Events calendar with online events booking form
- Photo blog, showcasing the best photos of the month. This needs to include comment functionality tied to social media login accounts.
- Interactive image galleries with dynamic captions
- Vacancy platform with online job application form
- Contact form, routing enquiries to specific mailboxes at the organization based on the subject matter selected
- Website keyword search form

9. COMPETITOR WEBSITES

Competitor website worth referencing are:

Plant with Purpose – www.plantwithpurpose.org

We like the design of the site, the high quality photography and interactive village feature.

Charity Water – www.charitywater.org

We like the projects landing page with map, "stories from the field" section and visual approach to storytelling on the site.

10. PROJECT RESPONSIBILITIES

The Green Foundation has an existing logo and well established colour palette. We have many high quality photographs from past projects and events we have hosted. We also have a few regular fonts that we tend to use but are open to new typography suggestions.

Post-launch, our marketing team will be responsible for the creation and population of new content on the site, but we wish to review options for website maintenance and support.

11. MEASURES OF SUCCESS

We have not yet defined metrics for success and wish to do so in collaboration with our vendor.

12. LEGAL AND TECHNICAL REQUIREMENTS

We are looking for an affordable and reliable hosting solution that can handle up to 30 GB monthly traffic and up to 10,000 monthly visitors.

Due to the global nature of our audience, the site should meet ADA Requirements and as well as Web Content Accessibility Guidelines 2.1, as set out by the W3C.

13. AGENCY REQUIREMENTS

Proposals that meet the mandatory requirements will be evaluated with the following criteria in mind:

- Experience working with nonprofit organizations
- Experience creating sites with similar level of functionality (such as knowledge center, events calendar and online donations platform)
- Aesthetic capabilities of vendor based on quality of portfolio and project references provided
- Expertise in communicating appropriate technical and creative solutions
- Proven track record with successful project delivery

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About
Helios Design

We are a dedicated team of designers, developers and strategic thinkers who are passionate about bringing clients' ideas to life. Since our founding in 2005, our mission has been to do exceptional work, build great relationships, collaborate with great minds, and keep learning. Get in touch below to discuss your next project.

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