



Client Website Brief

Webinar worksheet

Qualify your Leads

You might not be in a position to pick and choose the work you take on (yet!), but filtering your leads helps you avoid spending time on dead ends.

You need to:

- determine they're a good fit for your process
- ensure they can afford to work with you
- ensure they have realistic time frames

At a base level, you should aim to have the following questions answered BEFORE you agree to a briefing meeting:

- 1) What is your budget?
- 2) What is your deadline?

PRO TIP: Take this a step further and add these questions to the website quote enquiry form on your website - make them mandatory.

Position yourself as the expert

Once you've qualified that the client has enough money to work with you and their time frame is adequate for your production schedule, setting up a meeting to take a website brief is a whole lot sweeter.

Don't meet in a cafe!

Nothing screams 'cheap freelancer' to a client more than meeting in a cafe, and you're a professional, so avoid it.

Do a little research

Knowing your client's industry and being armed with a little bit of info is going to help you assert yourself as being genuinely interested in their project. You don't need stats, but knowing who a few of the key players are, or their customer demographic, is an easy way to establish your professionalism.

Set a time frame for your meeting - 45 minutes is perfect

The client briefing meeting is NOT a workshop. When you book the meeting, try to let your client know you have a set time - 45 mins is perfect - for this meeting. And when you get started, remind them of it.

Have an agenda

It's up to you to get the information that will help you to submit an accurate and articulate proposal.

PRO TIP: Use an online calendar to make choosing a meeting time easier - set the meeting time at 45 mins or an hour. Go one step further and have a pre-populated email to send them with the calendar link.

Website Briefing Agenda

Thanks so much for meeting with me today. In order to keep this as quick and painless as possible, I've got a number of questions I'd love to ask you. I hope that's ok? And do you mind if I record the session so I can refer back when I'm writing your proposal?

Why do you need a (new) website? What are the primary business functions will it provide?

Ask what else, what else, what else. Competitors? Industry factors? New products? Expansion plans?

Of those reasons, what is the number one objective for needing a website?

Ask why that is important. And ask why again. Until you discover the most vital reason they need the website. Satisfying this primary objective is going to be the focus of your proposal.

Tell us about your ideal customer. Who are they? How old are they? What gender are they? Where do they hang out online? What are their interests?

What are the top 5 reasons your ideal customer will visit your website?

Who are your key competitors?

Design Brief

Do you have established branding and style guides?

How do you want people to feel when they interact with your brand? Safe and secure, edgy and excited, exclusive and cool, or like they belong?

What are your competitors websites - do you like any of them - why or why not?

Tell us about your competitors. Who else is competing for the attention of your ideal customer and what are they doing that you think is working?

What are some websites you love the look of, regardless of industry?

Final Questions

If we were to be celebrating a successful website strategy in 12 months time, what would that have to look like? How many website visitors? How many leads? How many sales?

This is an opportunity to reflect back on their answer to your first question. Go deep on this question.

Is your content, such as text, imagery or product information ready to go?

Let's revisit your budget. Is it allocated? Are there any other decision makers or factors that may affect the budget?

It's important you know what you have to work with up front so you don't over promise.

And finally, what is my superpower? Why did you chose me (my business) as an option to build your website?

Do you any questions at this stage?

Resist the urge to talk about your skill set, plugins, technology or specifics. Just say, "I'll take a listen over our meeting and come back with the best solution". If they press you on specifics, try and stay as vague as you can.

Wrap it up

Sign off by thanking them for their time and letting them know you'll chat with your colleagues and get a proposal back to them in the next few days. Don't commit to 24 hours or 48 hours.

Send an email within 12-24 hours of meeting with them (or on the Monday if the meeting was a Friday) letting the client know you (and your team, if you have one), is excited about the brief and will have a proposal over to them in the next few days.

Next Steps

We hope you've found this worksheet helpful. Refer to the blog post or training webinar that accompanies this worksheet for more detailed information on how to take a take a client website brief.