



Client Worksheet

Branding / Web Design / Print / Marketing / Promotions / Advertising / Creative Solutions

<http://carolinesmithdesign.com>

Client Worksheet



Hello, nice to meet you and thank you for taking the time to download a Client Worksheet. Just a few quick questions are all that stands in your way of getting your dream project started.

Launching a website or starting a new design project can be a scary task. Sometimes your not too sure on excatly you want or even if it can be done. A good starting point is to fill out this Client Worksheet as it helps you to visualise your ideas and clearly articulate what you want. It also gives me some inital background information about you, your company and your idea, so we are both on the same page right from the beginning.

With a few simple questions, I will be able to generate a more accurate understanding of your projects vision. Think of it as a business plan, the more information you can give me, the more accurately I will be able to respond.

Worksheet Sections

1. General Information
2. Industy Information
3. Project Overview
4. Addition Information

Please answer as many questions as are relevant and as accurately as you can. Ignore anything that you feel does not relate to you or your project.

When you are done, please email it to hello@carolinesmithdesign.com

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1. General Information

Who are the primary contacts from your organisation? Who has final approval on the project?
Please include names, titles, email addresses and phone numbers.

What is the name of your company or your business?

Briefly describe your products or services you intend to promote or provide.

What would you like me (Caroline Smith) to help you with?
Website / Branding / Marketing

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2. Industry Information

How is your company / service currently perceived?
Do you advertise and market the business through print, we, TV or radio?

Who is your target market?
Gender, age, class, business sector etc.

Who are your main competitors in your business sector? Please list a few websites, images or concepts which you find compelling.
What do you like and dislike?

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3. The Brand

Are you looking to freshen up the style of your brand or are you in the need of a complete redesign?

What would you like to change i.e logo, corporate identity, adverts etc.

First impressions mean everything. How should people describe your marketing material?

Friendly, corporate, professional, fun, forward thinking, innovative, clean, elegant, minimal, cutting edge etc

Do you have any styles in mind? Are there any existing examples of brands you like?

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4. Website

Are you looking for a website redesign or a brand new design?

What specific areas of your current website do you feel are successful / unsuccessful?

What are your main objectives of having a website?

A static brochure style site purely to get people to contact you directly, eShop to sell products, promotional etc

Do you have any styles in mind? Are there any existing examples of website you like?

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5. Additional Information

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

What else should I know about this project?