

**basic
project
brief.**

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01. general information

1. What is the name of your company?
2. Who are the primary contacts from your organization? Who has final sign-off?
3. How long do you need for approvals?
4. Are there any outside considerations that might affect a schedule such as vacations, closures, presentations, conferences, etc.?
5. What is your business strategy and how does this project tie into it? Do you have set goals, requirements, or milestones? What are they?

02. brand overview

1. Please provide a short company overview.
2. What are the top 3-5 compelling reasons to engage with you? Please list in order of importance.
3. What is your brand vision? This is the single intangible attribute that differentiates your brand from your comp set, in other words the essence or “soul” of your brand.
4. What are your core brand values? These are the internal guiding principles that dictate behavior and help you determine you are on the right path and fulfilling your brand vision. No more than 5 and no less than 3 (example: people first sustainability).
5. What is your brand personality? These are the characteristics of the truth of your brand which is primarily delivered through visual expression, voice and tone (example: strong, strategic, flawless).
6. What is your brand positioning/messaging/tagline? This is the way you want your audience to think and feel about your brand. Most importantly, it communicates how you differentiate yourself in the market.

03. competition

1. Who are your main competitors?
2. Who do you want to compete with (aspirational)?
3. What makes you different from other competitor's programs? Think of this both locally and globally.
4. List/show any industry campaigns/ logos/ branding you find compelling. What specifically do you like about these campaigns? What do you think falls flat or is inauthentic?
5. On a scale of 1 (conservative) to 10 (far out) where do you want your campaign to be compared to your comp set? Please use examples and does not need to be industry specific.

04. audience

1. Please describe your current audience demographic. What are their pain points you're attempting to address? Do you have any concerns regarding this demographic?
2. What is your sales cycle and timeline for engagements with this audience? Why do they hire you and what is the process?
3. Please describe your ideal target audience/the audience segments you aspire to reach in detail.
4. Do you want to change your current audience and if so, what is the perceived benefit?

05. visual brand expression

1. If you were a car/magazine/store it would be: please name analogous entity and (most importantly) the reason for choosing it.
 - I. Car:
 - II. Magazine:
 - III. Store:
 - IV. Spokesperson:
2. Do you have brand guidelines? If yes, is there any part of your current look and feel, logo, color palettes, typography and other brand elements you do NOT want to keep? Why?
3. Is there any part of your current look and feel, logo, color palettes, typography and other brand elements you do want to keep? Why?
4. Understanding your personal aesthetic, please give us your top 5 favorite brands and why? Please provide examples of websites and campaigns you like that are NOT in your industry.

06. content

1. Do you have Tone and Voice guidelines?
2. Do you have an editorial calendar that outlines regular updates, who is responsible, what platforms you're using, and what departments are being supported?
3. Do you have a copy writer and have they ever worked with SEO?
4. Do you have photography or video? Do you have a contact sheet of all available assets? Are they high res?
5. Do you have other graphics, PDFs, white-papers, or offline collateral such as a sales deck? Please list out your collateral in detail.
6. List out any collateral that you would like to add to your toolbox. Email signatures, business cards, digital sales decks, etc.

07. marketing and pr

1. How do you currently market your services? Where, how, and how often for each platform. Include both offline and online. Which performs best and which not so well?
2. Explain how marketing, sales, and finance teams work together. For example, does revenue forecast seasonality swings and provide that data? Does sales review projections and targets, requesting marketing assistance for goals?
3. How much time per week are you able to commit to your business development and marketing?
4. How do you manage your lists of potential clients and customers? Does this tie into your sales cycle outlined above?
5. Have you ever done search engine optimization? Do you have a GTM account? Please provide us with access.
6. Do you use google local? What about Bing? Any others?
7. Do you have a google ads account and have you used it? What is your average spend and conversion rate monthly?
8. Do you have a PR company? Who are they, what is their scope, and can we see a monthly report.
9. What marketing techniques/platforms are you aware of and have yet to try: newsletters, face to face networking, meet-ups, conferences, industry associations, instagram, other social media, etc.
10. Do you have a content calendar that ties your marketing, social, and PR together?

08. technology

1. Do you have specific requirements for hosting? At 3FO, our recommendation is to host on Pantheon as they are responsive, secure, provide a multi-dev environment that speeds up development and testing. Who on your team needs access? Who on your team can assist us and is responsible for hosting on your end?
2. Most people want to control their content, with WordPress being the most popular and well supported option. Is there another content management system (CMS) you would prefer?
3. HTTPS is required for all our builds. On top of that, we recommend all clients install Cloudflare for speed and security. Do you have any questions or concerns? Will you be hosting sensitive data?
4. How often will you be updating your website with blogs, new content, new images? Do you have a content schedule and a team to support your needs? We can create login accounts for each person so please list them here and what type of access you'd like for them (editor, admin, reviewer, creator).
5. What type of functionality do you need on your website? Newsletter sign up, blog, contact form, photo or video gallery, location map, gated content, password protected areas, app integration, downloads, forms.
6. Do we need any third-party integrations such as Salesforce, Marketo, MailChimp, e-commerce, or donation support?
7. Do you need any type of database development for marketing, sales, or customer management?
8. Please list all your domain names.
9. How are you planning on conducting server and website maintenance for security and browser updates?
10. Do you have a privacy policy or terms of use for compliance with California state and European (CCPA & GDPR) privacy regulations? Do you have someone who manages all of your data in house?
11. Do you have accessibility requirements such as section 508?

09. miscellaneous

1. What will make this project a success for you?

let's do this.

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