



CLIENT-READY PLANNING RESOURCE

Agency Website Brief Template

A practical working document for agencies to define a client website before design, development and pricing begin.



Agency	Agency name
Client	Client organisation
Prepared by	Name and role
Version	Version and date

How to use this template. Complete it with the client, record assumptions instead of hiding them, and secure approval before final quotation or production. Delete prompts that do not apply.

Project snapshot

Capture the commercial and delivery context so everyone starts with the same understanding.

Project name	Working project title
Client organisation	Legal or trading name
Primary client contact	Name, role, email and phone
Agency project owner	Name, role and contact details
Final approver	Person authorised to approve scope and launch
Target launch	Preferred date and whether it is fixed or flexible
Budget range	Approved range or commercial constraint
Current website	URL and platform, if applicable

Why is this project happening now?

Type your response here

What must be true for the project to be considered successful?

Type your response here

Business goals and measures

Define the outcome before discussing pages, platforms or visual direction.

Primary business objective

Type your response here

Secondary objectives

Type your response here

Primary website action visitors should take

Type your response here

Business goals and measures continued

How success will be measured

Type your response here

Current performance baseline, if known

Type your response here

Checklist

- ☐ Generate qualified enquiries
- ☐ Sell products or services online
- ☐ Improve trust and sales enablement
- ☐ Support recruitment or partnerships
- ☐ Reduce support or administrative work
- ☐ Replace an outdated or difficult-to-manage website

Audience and journeys

Describe the people the website must serve and the decisions they need to make.

Primary audience	Role, sector, organisation size and geography
Secondary audience	Other meaningful visitor group
Decision stage	Awareness, comparison, purchase or retention
Common device	Desktop, mobile, tablet or unknown

What is the primary audience trying to achieve?

Type your response here

What questions or objections prevent action?

Type your response here

Audience and journeys continued

What proof will help them decide?

Type your response here

Describe the most important journey from entry to conversion

Type your response here

Pages and content structure

Plan the website around user needs and reusable page types, not only a page count.

Estimated page count	Number of published pages
Unique page templates	Number and names of distinct layouts
CMS collections	Services, work, team, locations, insights or other
Languages	Current and future languages

Proposed top-level navigation

Type your response here

Required pages and purpose of each page

Type your response here

Pages and content structure continued

Reusable content types and relationships

Type your response here

Pages or content explicitly outside this phase

Type your response here

Functionality and integrations

Record what the website must do and which external systems affect delivery.

Checklist

- ☐ Contact or enquiry forms
- ☐ Calendar or appointment booking
- ☐ Email marketing or CRM integration
- ☐ Payments, ecommerce or subscriptions
- ☐ Search, filtering or gated content
- ☐ Membership, accounts or authentication
- ☐ Maps, directories or location search
- ☐ Multilingual or localisation features
- ☐ Cookie consent and analytics
- ☐ Accessibility or compliance requirements

Functionality and integrations continued

Describe each required function and its expected user outcome

Type your response here

List integrations, owners, documentation and access status

Type your response here

Identify technical unknowns that require discovery

Type your response here

Content and assets

Make ownership and readiness visible before the delivery clock starts.

Copy owner	Client, agency, Oncreation or specialist partner
Image owner	Source, permissions and required production
Brand assets	Logo, fonts, colours and guidelines available
Migration	Content, media, products or records to migrate
Final content date	Date production-ready content will be supplied

Checklist

- ☐ Approved logo files in usable formats
- ☐ Brand guidelines and licensed fonts
- ☐ Final page copy
- ☐ Photography, illustration and video
- ☐ Testimonials, case studies and permissions
- ☐ Team biographies and headshots
- ☐ Legal, privacy and cookie content
- ☐ Product or service data

Content and assets continued

Content gaps, risks and agreed actions

Type your response here

Design direction

Give the design team useful constraints without asking the client to design the solution.

Existing identity	Keep, evolve or replace
Accessibility target	Required standard or known user needs
Design approver	Name and role
Reference format	Links, moodboard, existing files or none

What should the website communicate immediately?

Type your response here

Brands or websites the client finds effective, and why

Type your response here

Design direction continued

Visual approaches to avoid, and why

Type your response here

Required design system, components or brand constraints

Type your response here

SEO measurement and migration

Protect existing visibility and define the measurement setup required for launch.

Primary markets	Countries, regions or cities genuinely served
Existing analytics	GA4, Tag Manager or other
Search Console	Property owner and access status
Primary conversions	Calls, forms, purchases, downloads or other
Reporting owner	Client, agency or specialist partner

Known organic traffic, ranking or migration risks

Type your response here

Checklist

- ☐ Current URL inventory reviewed
- ☐ Redirect requirements documented
- ☐ Priority pages and search intent agreed
- ☐ Titles, descriptions and heading ownership agreed
- ☐ Analytics and conversion events specified
- ☐ Cookie and consent requirements confirmed
- ☐ Sitemap, robots and indexability checks included

Delivery roles and communication

Assign responsibility before work begins so approvals and dependencies do not stall production.

Client decision-maker	Name, role and response expectation
Agency project owner	Name, role and responsibilities
Design owner	Agency, Oncreation or another supplier
Development owner	Agency, Oncreation or another supplier
Content owner	Name and responsibility
Communication channel	Slack, email, ClickUp or agreed alternative
Review cadence	Days, meetings and expected response time

Who consolidates client feedback into one approved response?

Type your response here

Which decisions require client approval and which can the agency make?

Type your response here

Approvals revisions and change control

Agree how feedback works and how new requirements affect time, cost and priority.

Approval stages	Structure, design, development, QA and launch
Revision approach	Rounds, active-plan policy or project allowance
Approval timeframe	Expected working days per review
Change authority	Person who may approve extra scope or cost

Project-specific approval or change-control rules

Type your response here

Checklist

- ☐ Feedback will be consolidated by one accountable person
- ☐ New requests will be assessed before work begins
- ☐ A change may be added, swapped, deferred or declined
- ☐ Timeline and cost effects will be documented
- ☐ Silence does not equal approval unless the agreement states otherwise

Technical setup and access

Confirm the operating environment, ownership and access needed for a safe build and launch.

Preferred platform	WordPress, Webflow, Framer, Squarespace, Shopify, Next.js or undecided
Domain owner	Organisation and registrar
Hosting owner	Organisation and provider
Repository owner	Organisation and platform, if applicable
Form destination	Inbox, CRM or other system
Backup owner	Person or provider responsible after launch

Security, privacy, compliance or data-handling requirements

Type your response here

Checklist

- ☐ Domain and DNS access
- ☐ Hosting or platform access
- ☐ Existing website administrator access
- ☐ Analytics and Search Console access
- ☐ CRM, email and form credentials
- ☐ Third-party API keys or integration accounts
- ☐ Repository and deployment access

Launch and post-launch ownership

Define what must be checked, who approves release and what happens after the website goes live.

Launch owner	Person responsible for coordinating release
Final approver	Person authorised to approve production launch
Launch window	Date, time zone and fallback window
Post-launch support	Owner, period and included work
Ongoing maintenance	Updates, hosting, licences, backups and security

Known launch dependencies and fallback plan

Type your response here

Checklist

- ☐ Responsive and browser QA completed
- ☐ Forms and conversion paths tested
- ☐ Content and legal review approved
- ☐ Redirects and indexability checked
- ☐ Analytics and consent tested
- ☐ Backups and rollback route confirmed
- ☐ Training or handover completed
- ☐ Written launch approval received

Assumptions risks and readiness

Finish by making uncertainty visible and confirming whether the project is ready to quote or begin.

Assumptions used for scope, timing or price

Type your response here

Known risks and the person responsible for each response

Type your response here

Open questions that require discovery

Type your response here

Assumptions risks and readiness continued

Items explicitly excluded from the current scope

Type your response here

Checklist

- ☐ Business objective and success measures are clear
- ☐ Audiences and priority journeys are agreed
- ☐ Pages, templates and CMS types are understood
- ☐ Functionality and integrations are documented
- ☐ Content ownership and readiness dates are agreed
- ☐ Roles, approvals and change control are defined
- ☐ Technical access and launch ownership are confirmed
- ☐ Remaining uncertainty is acceptable or discovery is scheduled

Brief approval

Record agreement that this brief is accurate enough to proceed into discovery, quotation or delivery.

Approved next stage	Discovery, quotation, design, development or hold
Client approver	Name and role
Approval date	Date
Agency approver	Name and role
Approval date	Date
Brief version	Approved version number

Approval notes or conditions

Type your response here

Need a delivery partner after the brief is approved? Oncreation supports agencies with website structure, custom UI, development, QA and launch under the agency's brand.

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