

FREE RESOURCE — WEB PROJECT BRIEF

Web Project Brief Template

Lock the goals, audience, scope, deliverables, timeline, budget and success metrics for a new website — on a single A4 pack — before a developer is engaged. A clean brief is the single biggest predictor of an on-time, on-budget launch.

8

BRIEF
SECTIONS

70+

FILLABLE
FIELDS & TICKS

A4

PRINT &
SHARE READY

Fillable

TYPE & TICK
IN ANY VIEWER

GOALS & AUDIENCE

IN / OUT SCOPE

TIMELINE & BUDGET

SUCCESS METRICS

PREPARED FOR

Cloudswitched Knowledge
Library

PREPARED BY

Cloudswitched Ltd.

VERSION

2026 Edition

FORMAT

Project Brief

00

How to use this template

Complete this brief **before approaching a web developer or agency**. The cleaner the brief, the cleaner the quote, the scope, the timeline and the eventual launch. Vague briefs invite vague proposals, change requests, and budget overruns — in that order.

Work through the eight sections in order. Capture **the company behind the site**, the goals it must achieve, the people it must serve, what is and isn't in scope, the concrete deliverables, the timeline, the budget envelope, and the success metrics you'll judge it against six months after launch. Share the completed pack with every stakeholder — sponsor, marketing, IT, the developer — before kick-off.

WHAT THIS TEMPLATE IS

A structured A4 brief that captures company & contacts, project goals, target audience, in/out scope, deliverables, timeline, budget and success metrics — in a single shareable document. The yellow underscore lines become real text inputs in any modern PDF viewer; the squares become real checkboxes you can tick.

A BRIEF IS NOT A WISH LIST

Every line in this document is a commitment. Goals must be measurable, audiences must be specific, scope must be both **in** and **out**, deliverables must be testable, the timeline must have real dates, and the budget must be a number — not a band. “Modern, fresh, easy to use” is not a goal; “reduce enquiry-to-quote time from 5 days to 1 day” is.

The eight sections

- **01 Company & Contacts** — the business, the sponsor, the project manager, the day-to-day points of contact.
- **02 Project Goals** — the primary, secondary and tertiary outcomes the site must deliver.
- **03 Target Audience** — who the site is built for — in role, demographic and device terms.
- **04 Scope** — an explicit tick-list of what's **in** scope this phase and what's **out**.
- **05 Deliverables** — the concrete artefacts the developer will hand over at the end of the build.
- **06 Timeline** — phases, milestones, hard deadline drivers, decision-dependency dates.
- **07 Budget** — design & build envelope, ongoing run cost, contingency, payment milestones.
- **08 Success Metrics & Sign-off** — how you'll judge success at +6 months, plus the approval block.

01

Company & Contacts

Capture who the business is, who owns the budget, and who the developer should call when feedback contradicts. Without a named sponsor and a named project manager, decisions get stuck and the build slows to a crawl.

THE COMPANY

Company name	
Trading as <i>(if different)</i>	
Companies House / registration no.	
Sector / industry	
Head office address	
Current website <i>(if any)</i>	
Replacing an existing site	☐ Yes ☐ No

PROJECT CONTACTS

Project sponsor <i>(budget owner)</i>	
Sponsor email	
Project manager <i>(day-to-day lead)</i>	
PM email	
Marketing / content owner	
Technical / IT owner	
Brand & design approver	

NAME A SINGLE DECISION-MAKER

One sponsor with budget authority. One project manager with day-to-day authority. Any “design by committee” arrangement adds weeks. The developer needs to know whose answer is final when stakeholders disagree.

02

Project Goals

Write down what the business actually wants the website to **achieve**. Three goals, ranked. The primary goal is the one you'd defend if the budget halved. Every later design and copy decision flows from this page.

THE THREE GOALS (RANK BY BUSINESS VALUE)

Primary goal	_____
Why it matters (<i>business case in one line</i>)	_____
Secondary goal	_____
Why it matters	_____
Tertiary goal	_____
Why it matters	_____

PROBLEM BEING SOLVED (WHAT ISN'T WORKING TODAY?)

TONE & POSITIONING

Three brand adjectives	_____
What we are not	_____
Sites we admire (<i>URLs</i>)	_____
Sites we want to avoid looking like (<i>URLs</i>)	_____

MAKE GOALS MEASURABLE ON THIS PAGE, NOT AFTER KICK-OFF

"Generate more leads" isn't a goal — "double monthly enquiry-form submissions inside 6 months of launch" is. The clearer the verb and the number, the easier the design brief becomes.

03

Target Audience

Describe the people the site is built for. The more specifically you describe the primary user — their role, their device, the question they're trying to answer — the easier every later design and copy decision becomes. "Everyone" is not an audience.

AUDIENCE SEGMENTS

Primary audience _____

Secondary audience _____

Tertiary audience *(if any)* _____

PRIMARY PERSONA PROFILE

ATTRIBUTE	DESCRIPTION
Role / job title	_____
Age range	_____
Technical ability	_____
Primary device	_____
Where they find us	_____
The question they arrive with	_____

REACH & CONTEXT

Geographic focus *(UK / EU / global)* _____

Languages required _____

Desktop / mobile / tablet split *(% est.)* _____

Accessibility requirements *(WCAG level)* _____

MOBILE-FIRST OR MOBILE-ONLY?

If more than 60% of expected traffic arrives on mobile, the brief is **mobile-first** — design starts at 375px and works outward. Lock this now; retro-fitting after a desktop comp is the most expensive rework in web.

04

Scope

Tick what's **in** scope for this phase and what's explicitly **out**. Out-of-scope items are not lesser items — they're items the developer is contractually not building this phase, so they can't become arguments later.

IN SCOPE — THIS PHASE

- ☐ Responsive design (*desktop, tablet, mobile*)
- ☐ Content management system
- ☐ Contact / enquiry form
- ☐ Blog / news / resources area
- ☐ Site-wide search
- ☐ Newsletter / email capture
- ☐ SEO foundations (*meta, schema, sitemap*)
- ☐ Analytics & cookie consent
- ☐ Accessibility WCAG 2.2 AA
- ☐ Hosting setup & DNS migration
- ☐ SSL / HTTPS configuration
- ☐ Other: _____
- ☐ Other: _____
- ☐ Other: _____

OUT OF SCOPE — FUTURE PHASE

- ☐ E-commerce / online sales
- ☐ Payment processing integration
- ☐ Multi-language / localisation
- ☐ Members / login area
- ☐ Booking / appointment scheduling
- ☐ Live chat / chatbot
- ☐ Custom CRM integration
- ☐ Marketing automation tooling
- ☐ Mobile app (*iOS / Android*)
- ☐ Video production & hosting
- ☐ Photography & copywriting
- ☐ Other: _____
- ☐ Other: _____
- ☐ Other: _____

CONSTRAINTS & ASSUMPTIONS

Content provided by client ☐ Yes ☐ No ☐ Partial

Brand guidelines available ☐ Yes ☐ No

Existing hosting to be retained ☐ Yes ☐ No

Other key assumption _____

05

Deliverables

List the concrete artefacts the developer will hand over at the end of the build — not activities (“design”, “build”), but **things**. A working sitemap. A live URL. An admin login. A handover document. Each one testable on its own.

ID	DELIVERABLE	FORMAT	ACCEPTANCE CRITERIA
D-01	Sitemap & information architecture	PDF / Figma	All pages mapped, signed off by sponsor
D-02	Wireframes – key page templates	Figma	Home, services, contact, blog templates approved
D-03	Visual design comps	Figma	3 page templates approved at desktop & mobile
D-04	Functional staging site	staging URL	Every approved template built & navigable
D-05	Content management system & admin login	CMS + 1Password	Admin can create & edit pages without dev help
D-06	-----		-----
D-07	-----		-----
D-08	-----		-----
D-09	-----		-----
D-10	-----		-----

HANDOVER ARTEFACTS (TICK THE ITEMS THE DEVELOPER MUST HAND OVER AT GO-LIVE)

Admin manual / CMS training video ☐ Yes ☐ No

Source code & design files (*repo + Figma*) ☐ Yes ☐ No

Domain & hosting transferred to client account ☐ Yes ☐ No

Analytics & Search Console access ☐ Yes ☐ No

Post-launch warranty period _____

06

Timeline

Capture target dates for each phase, the hard deadline driver, and any external dependency dates the developer needs to plan around. Dates without a driver slip; dates with a driver hold.

HEADLINE DATES

Target launch date (DD/MM/YYYY) _____

Hard deadline driver (event / campaign / contract) _____

Earliest possible kick-off _____

Soft launch / private beta ☐ Yes ☐ No

PHASE MILESTONES (TARGET END-DATE PER PHASE)

#	PHASE	TARGET END-DATE	OWNER	OUTPUT
01	Discovery & brief sign-off	_____	_____	_____
02	IA & wireframes	_____	_____	_____
03	Visual design	_____	_____	_____
04	Content collection	_____	_____	_____
05	Development & CMS build	_____	_____	_____
06	QA, accessibility & UAT	_____	_____	_____
07	Go-live & handover	_____	_____	_____

EXTERNAL DEPENDENCIES & BLACKOUT DATES

Brand refresh complete by _____

Content writer engaged by _____

No-launch window (e.g. peak trading) _____

CONTENT IS THE SLOWEST DEPENDENCY ON EVERY WEB PROJECT

If copy, images and assets aren't finalised before the development phase begins, the build stalls — and stalls cost more than building. Lock content owners and content deadlines now, not after kick-off.

07

Budget

Capture the design & build envelope, the ongoing run cost the business expects to pay, the contingency reserve and how payment will be staged. Vague budget ranges invite vague quotes — commit to a number on this page.

BUDGET ENVELOPE (EX-VAT)

Design & build budget (one-off) £ _____

Contingency reserve (% of build) _____

Ongoing hosting + maintenance (monthly) £ _____

Third-party licences (per year) £ _____

Content / copy / photography budget £ _____

Total first-year cost (build + 12 months run) £ _____

PAYMENT MILESTONES (% OF BUILD BUDGET PER MILESTONE)

#	MILESTONE	% OF TOTAL	AMOUNT £	TARGET INVOICE DATE
M-01	Contract signed / kick-off	_____	_____	_____
M-02	Design comps approved	_____	_____	_____
M-03	Staging site delivered	_____	_____	_____
M-04	Go-live & sign-off	_____	_____	_____

PROCUREMENT BASICS

Purchasing entity (legal name) _____

PO required before work starts ☐ Yes ☐ No

Payment terms _____

Accounts contact (invoice recipient) _____

A 15–20% CONTINGENCY RESERVE ISN'T PESSIMISM — IT'S ARITHMETIC

On every fixed-scope web build, between 15 and 20 percent of the budget gets spent on change requests that weren't in the original brief but turn out to matter. Build the contingency into the envelope now, not as a panic ask in week six.

08

Success Metrics & Sign-off

Define how you'll judge the launched site at six months — the measurable targets that prove the goals on page 02 actually landed. Then sign off the brief. After sign-off, scope changes go through change-control, not email.

SUCCESS METRICS AT +6 MONTHS POST-LAUNCH

KPI	BASELINE TODAY	TARGET AT +6 MONTHS	MEASUREMENT SOURCE
Monthly organic visitors	-----	-----	GA4 / Search Console
Enquiry-form submissions	-----	-----	CRM / form backend
Conversion rate %	-----	-----	GA4 goal funnels
Core Web Vitals (LCP/CLS/INP)	-----	-----	Search Console / CrUX
Avg. session duration	-----	-----	GA4 engagement
-----	-----	-----	-----

Additional notes

Sign-off

PREPARED BY

DATE

APPROVED BY

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