



Web Developer & Brand Strategist

Client Needs Assessment Form

# Section I: Company Information

Please fill out the following background information so that I may have a better understanding of your company.

Name:

Position:

Email:

Phone:

Are you the primary contact for this project? Yes / No

Company or Organization:

Brief description of Company's purpose:

Website address (if any):

Current social media accounts:

☐ Facebook ☐ Twitter ☐ Instagram ☐ YouTube ☐ Pinterest

☐ LinkedIn ☐ Periscope ☐ WordPress ☐ Google+ ☐ Other

Number of employees dedicated to project:

Who will be the key decision-maker(s) for this project?

# Section II: Project Specifications

**This portion of the questionnaire will help me to understand the basic needs of your project.**

This information will ensure that I can deliver an on-target, successful product to your company.

**Project type:** (Check all that apply)

## Web Design

- ☐ Brochure site
- ☐ Custom WordPress
- ☐ E-Commerce
- ☐ Blog

## Graphic Design

- ☐ Logo
- ☐ Branding
- ☐ Fliers & Print
- ☐ Email, Social Media  
Banners & Digital Graphics

## Digital Marketing

- ☐ Google Analytics
- ☐ SEO
- ☐ Copy-writing
- ☐ Social Media

☐ Custom: \_\_\_\_\_

**Please describe your project:**

**How do you envision this project helping your business' or customer's needs?**

**Target audience for project:**  
(Be as specific as possible)

**Estimated budget:**

**This project must be completed by:**

## Section II: Project Specifications (cont'd)

**Now we will dive into some more specific questions about your project.** Your responses to these questions will help guide the design process, ensuring that your final product is in line with your business goals.

### Why are you pursuing this project?

- ☐ My company is young and is looking to lay a strong foundation for building our brand and client base.
- ☐ My company is growing and we would like this to be reflected in our website/branding.
- ☐ My company is well established, but we are looking for a fresh new look to keep up with innovations (i.e. re-branding).
- ☐ My company is well established, but to better allocate our resources, we choose to contract out our web administration/graphic design/digital marketing services.
- ☐ Other: \_\_\_\_\_  
\_\_\_\_\_

### What is it about your company that sets you apart from competitors?

**Please list a few adjectives you would like to describe your company.**

_____	_____
_____	_____
_____	_____

## Section II: Project Specifications (cont'd)

Please list any examples of other company's websites/branding that feature the look and feel you would like to achieve with your project.

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

Who will be responsible for providing and/or maintaining website or social media content? If internal, how much experience and time does the employee have?

Is there anything about your current website/branding/digital marketing that you would like to keep or incorporate into the new design?

Is there anything about your current website/branding/digital marketing that you would like to change?

Is there anything NOT on your current website/branding/digital marketing that you would like to add or incorporate?

## Section II: Project Specifications (cont'd)

**Does your company have any performance metrics or analytics tools in place?**  
(E.g. Google Analytics)

☐ **Yes:** \_\_\_\_\_

☐ **No**

**Has your company ever conducted any digital marketing campaigns? If yes, please explain:**

☐ **Yes:** \_\_\_\_\_

☐ **No**

**Does your company have an accessible database with current branding materials, images, or any other relevant content?**

☐ **Yes:** \_\_\_\_\_

☐ **No**

**Is there anything else you would like to tell me about your project?**

# Section IV: Client Agreement

Please read the following agreement carefully and then sign below.

**I, the client, hereby acknowledge that I have fully read the Client Needs Assessment form and have responded to each question to the best of my ability. I understand that, should I have forgotten to disclose, chosen not to disclose, or later change or wish to add an additional project requirement, it may result in a project delay, change of deadline, and/or increase in project budget. I also accept that these changes may not be considered reasonable within project restraints and may or may not be accepted. Should I not be satisfied with the project results, I understand that I have a right to a certain number of revisions as determined by the Contract, so long as those revisions are within project requirements. I also agree to hold harmless Lauren Yockey Web Developer & Brand Strategist, the company, from any and all legal claims or liability.**

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Client Signature

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Date

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Client Print

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Date

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Company Signature

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Date

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Company Print

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Date

**Thank you!**

I look forward to working with you.

