## **Client-Project Information Sheet Instructions**

Use the following form (or your own form designed along these lines) to get basic information about the client and the proposed project.

**The Client** section is straightforward contact information. Be sure to find out the preferred method of contact. Directions to where the company is located would also be a good idea if you are meeting elsewhere for the initial visit with the client.

The Business section can help you to better serve the client when it comes to developing a style for logos, graphics, layout, etc. and making suggestions for additional materials.

The Project section is where you get an initial feel for the size and scope of the project and the direction the client wishes to move in. While specifications may change during the development of the project, use this space to find out what the client hopes to accomplish with this project, it's "importance" to the client and to the company as a whole. Whether or not others are involved is important in determining a timeframe for completion of the project. Knowing the client's experience in working with designers will help you determine how much "hand-holding" and detailed explanations might be necessary.

You may not obtain all information during the initial meeting with the client but try to fill in the blanks as soon as possible.

File this sheet in your project folder.

Create a new sheet for each new project, even if it is with the same client. Reverify the client and business information each time to insure it is current and accurate.

Date: Client-Project Code:	Date.	Chent-Project Code.
Date.	Date.	Chefit Project Code.

The Client		
The Client Client Name	Position in Company	
Company	r osition in company	
Address		
Telephone	Fax	
Email	Website	
The Business		
Type of business		
Time in business	Size of business	
Company's competitors		
The Project		
General description/specfications		
Purpose of project		
Budget		
Desired completion date		
Others involved (such as copywriters, etc.)?		
Has client ever worked with a designer before? In what capacity?		
Client's expectations (for project, from the designer)		