

WEBSITE DESIGN BRIEF

Template for enterprises and brands planning a new website or redesign

Use this document to define what your website must achieve, what it will take to build, and how you will select and work with a web design agency. Complete it internally first, then share it with shortlisted agencies so every proposal is based on the same facts.

NOTE FROM SHANTANU PANDEY, FOUNDER AT TENET



Start with clarity

A good brief saves time and money. At Tenet, every engagement starts by understanding your business and your customers, not by making assumptions. We audit your current site, study your audience and competitors, and turn what we find into a tailored build plan, with no obligations. Use this template to capture your goals and requirements. Where gaps remain, we will help you close them on a discovery call.

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Project name	
Company / brand	
Brief owner (name, role)	
Contact email / phone	
Date issued	
Version	
Proposal deadline Date by which agencies must respond	

How to use this template

- Fill every section. Write “Unknown” or “To be defined with agency” instead of leaving fields blank; gaps that are flagged are far easier to resolve than gaps that are hidden.
- Grey italic text explains what to write. Delete it once you have completed the section.
- Where a table asks for priority, use M = Must have at launch, S = Should have, C = Could have later, N/A = Not needed.
- Circulate the draft to leadership, marketing, sales, product, IT and legal before sending it out.
- Attach supporting files (brand guidelines, analytics, sitemap) and list them in Section 13.

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1. Company and project overview

Give the agency the context to understand your business, not just your website. Two companies asking for “a new website” can need completely different solutions.

1.1 About your organisation

Company description What you do, in 3–4 sentences	
Industry and markets served Sectors, regions, countries	
Company size Employees, locations, business units or brands	
Products / services Main offerings the website must represent	
Business model B2B, B2C, marketplace, SaaS, lead generation, etc.	
Key competitors List 3–5 with URLs	
What makes you different Positioning, value proposition, tone of voice	

1.2 About the project

Project type ☐ New website ☐ Redesign ☐ Platform migration ☐ Multi-brand / multi-site ☐ Microsite ☐ Other	
Current website URL(s) Leave blank for a new website	
Why now? The business trigger: rebrand, merger, product launch, poor performance, outdated technology, new market	
Problems with the current website What is not working, with evidence (analytics, user feedback, sales feedback)	
What must not change Elements that work and should be kept	
Scope of this project Single site, multiple sites, regional versions, intranet, customer portal	
Out of scope What you already know is excluded	
Related projects Rebrand, CRM rollout, ERP change, or other dependencies that affect this project	

2. Goals, KPIs and success metrics

Define what the website must accomplish before discussing design or technology. Every goal should have a measurable KPI and a baseline, so success can be judged after launch.

2.1 Business goals

#	Goal	Why it matters	Priority (1 = highest)
Ex.	Increase qualified demo requests	Sales pipeline depends on inbound leads	1

2.2 KPIs and baselines

KPI	Current baseline	Target	Timeframe	Data source
e.g. Demo form conversion rate	1.2%	2.5%	12 months post-launch	GA4

2.3 Success definition

What does success look like at launch?	
What does success look like after 12 months?	
Who signs off on success? Name and role	

3. Target audiences and personas

A website built for everyone serves no one well. Identify primary and secondary audiences, what each needs, and what stops them from acting.

Audience	Primary / secondary	Goals and questions	Barriers / pain points	Desired action
e.g. IT procurement manager	Primary	Compare vendors, verify security	Cannot find pricing or compliance info	Request a quote

Audience insights

Existing research Personas, surveys, interviews, usability tests. Attach if available.	
Geographies and languages Where users are, and which languages they need	
Devices and contexts Mobile vs desktop split; in-store, field, or office use	
Accessibility needs Known user needs and target standard (e.g. WCAG 2.2 AA)	
Internal users Who will manage the site: editors, approvers, developers	

4. User actions and conversion paths

Every page should lead somewhere. List the actions you want visitors to take so that structure, calls-to-action and tracking are designed around outcomes.

Action	Type	Audience	Destination system	Success metric
Book a demo	Primary	Enterprise buyers	HubSpot + Calendly	Demo requests / month
Download whitepaper	Secondary	Researchers	Marketing automation	Downloads, lead quality

Ideal journey for the primary audience Describe from first visit to conversion in 4–6 steps	
Where do visitors come from today? Search, paid, email, social, referrals, direct	
Lead handling after submission Who follows up, how quickly, in which system	

5. Sitemap, pages and content

Page and content requirements discovered mid-project are the most common cause of scope growth. List everything to be created, redesigned, migrated or retired.

5.1 Page inventory

Page / section	Template type	Action	Content status	Owner
Homepage	Unique	Redesign	Needs rewrite	Marketing
Product pages (x40)	Product template	Migrate + update	Approved	Product

Action: Create / Redesign / Migrate as-is / Merge / Retire. Content status: Approved / Needs update / Needs writing / Not started.

5.2 Content summary

Total pages (approx.) Existing and new, by type	
Content to migrate Volume, source system, quality (blogs, resources, product data, documents)	
Content to be written Who writes: you, agency, or third party	
Content owner and approver Single accountable person for content sign-off	
Languages and localisation Languages, regional variants, translation process, RTL support	
Media requirements Photography, video, illustration, icons; existing vs new	
Gated or personalised content Login areas, partner portals, role-based content	

Content governance after launch

Who publishes, update frequency, workflow approvals

6. Features and integrations

Functionality often affects complexity more than page count. Mark each item and name the specific systems involved, since integrations drive cost and timeline.

6.1 Functional requirements

Requirement	Priority (M / S / C / N/A)	Details / system / notes
☐ Content management (CMS editing, workflows)		
☐ Multi-language / multi-region		
☐ Site search		
☐ Advanced filtering / product catalogue		
☐ Forms and lead capture		
☐ Booking / scheduling		
☐ E-commerce / checkout		
☐ Customer login / account area		
☐ Partner or distributor locator		
☐ Blog / resource hub		
☐ Events / webinars		
☐ Careers / job listings		
☐ Live chat / chatbot		
☐ Personalisation		
☐ Gated content / downloads		
☐ Video hosting / embeds		
☐ Cookie consent / preference centre		
☐ Multi-brand / multi-site management		
☐ Other:		

6.2 Integrations

System	Purpose	Direction (in / out / both)	API available?	Priority
Salesforce / HubSpot	Lead sync	Out	Yes	M

System	Purpose	Direction (in / out / both)	API available?	Priority

Consider: CRM, marketing automation, ERP, PIM, DAM, payment gateway, analytics, tag manager, SSO/identity, support desk, HR/ATS, email platform, translation tools, map services.

7. Existing assets

List what is already available so the agency can see what can be reused and what must be created.

Asset	Available? (Yes / Partial / No)	Location / format / condition
☐ Brand guidelines / style guide		
☐ Logo files (vector)		
☐ Design system / component library		
☐ Approved copy		
☐ Photography and video library		
☐ Case studies / testimonials		
☐ Product data / catalogue		
☐ Existing sitemap / content inventory		
☐ Analytics access (read-only)		
☐ Search Console access		
☐ Buyer persona / research documents		
☐ Legal pages (privacy, terms, cookies)		

Current technology CMS, hosting, framework, plugins, known technical debt	
Access the agency will need Admin access, analytics, DNS, code repository, third-party accounts	

8. Design direction and brand

Show, don't describe. Words like “modern” and “premium” mean different things to different people. Provide examples and say precisely what you like.

8.1 Reference websites

URL	What you like	What you dislike
<i>example.com</i>	<i>Clear navigation, bold typography</i>	<i>Too many pop-ups</i>

8.2 Brand and experience

Brand guidelines status ☐ Complete ☐ Partial ☐ In development ☐ None	
Brand personality 3–5 adjectives, and 3 adjectives to avoid	
Tone of voice Formal, conversational, technical, playful	
Design constraints Mandatory colours, fonts, layouts, legal or regulatory requirements	
Motion and interaction Animations, transitions, 3D, video backgrounds: wanted or avoided	
Design deliverables expected Wireframes, visual designs, prototype, design system, component library	
Accessibility standard WCAG 2.2 A / AA / AAA; legal obligations (ADA, EAA, etc.)	
Design rounds and feedback Number of revision rounds, who gives consolidated feedback	

9. SEO, analytics and tracking

If your site already earns organic traffic, protect it. Plan structure, URLs and redirects before design begins, not shortly before launch.

Current organic performance Monthly organic sessions, top-ranking pages, key keywords	
Target keywords / topics Priority terms and themes	
URL structure ☐ Keep existing ☐ Change (redirect map required) ☐ Undecided	
Redirect responsibility Who creates and tests the 301 redirect map	
Technical SEO requirements Schema markup, XML sitemaps, hreflang, Core Web Vitals targets, metadata templates	
SEO content scope New landing pages, blog strategy, content optimisation	
Analytics platform GA4, Adobe Analytics, other; current setup quality	
Tag manager and tracking plan GTM / Tealium; events, conversions, funnels to track	
Heatmaps / testing tools Hotjar, Clarity, A/B testing platform	
Consent and privacy tracking Consent management platform, regional rules	
Reporting Dashboards, cadence, who receives reports	

10. Technology, security and compliance

Enterprise sites must meet IT, security and legal requirements. Involve those teams now to avoid late-stage blockers.

Preferred platform / CMS Named platform, or “open to recommendation” (with reasons for any preference)	
Architecture preference Traditional CMS, headless, hybrid, static, SaaS builder	
Hosting Cloud provider, region, managed vs self-hosted, CDN, data residency	
Performance targets Page speed, Core Web Vitals, expected traffic and peak load	
Security requirements SSO, MFA, role-based permissions, penetration testing, WAF, vulnerability management	
Compliance GDPR, CCPA, DPDP Act, HIPAA, PCI-DSS, SOC 2, ISO 27001, sector-specific rules	
Browser and device support Minimum versions, mobile-first, PWA needs	
Environments and release process Dev / staging / production, CI/CD, change approvals	
Scalability and future plans Planned markets, features, brands, integrations over the next 2–3 years	
Maintenance and support SLA, response times, ongoing development, in-house vs agency	
Documentation and training Admin training, technical documentation, handover expectations	
IP and code ownership Who owns designs, code and licences; escrow or repository requirements	

11. Budget, timeline and governance

Being transparent about budget and dates leads to more relevant proposals. Agencies can shape scope and phasing to fit real constraints.

11.1 Budget

Total project budget (range) Design and build, including contingency	
Budget status ☐ Approved ☐ Pending approval ☐ Indicative only	
Ongoing budget Hosting, licences, maintenance, support, retainers	
Third-party costs Who pays for licences, stock media, plugins, translation, tools	
Pricing model preferred Fixed price, time and materials, phased, retainer	

11.2 Timeline

Milestone	Target date	Fixed or flexible?	Reason / dependency
Website live	DD/MM/YYYY	Fixed	Product launch / event

11.3 Stakeholders and approvals

Name	Role / department	Project role (Decision maker / Reviewer / Informed)	Approves

Project sponsor Executive accountable for outcome	
Day-to-day project lead Single point of contact for the agency	
Approval process Steps, number of reviewers per stage, maximum review time (e.g. 5 business days)	
Decision escalation How disagreements between stakeholders are resolved	
Internal resources available Content writers, developers, designers, QA, legal reviewers	
Communication preferences Meeting cadence, tools (Teams, Slack, Jira), reporting format	

12. Agency selection and proposal requirements

Tell agencies exactly what to include in their response so proposals can be compared fairly.

12.1 What we expect in your proposal

- Understanding of our business, goals and audiences
- Recommended approach, platform and architecture, with rationale
- Scope, deliverables and explicit exclusions
- Project plan with phases, milestones and client responsibilities
- Team structure and named key personnel
- Itemised pricing, assumptions and change-request process
- Relevant case studies and two client references, ideally in our industry
- Approach to accessibility, security, SEO and performance
- Post-launch support and maintenance options
- Risks identified and how they will be managed

12.2 Evaluation criteria

Adjust the weights to your priorities. Total must equal 100.

Criterion	Weight (%)	Notes
Understanding of our needs and strategy	20	
Relevant experience and case studies	20	
Design quality and UX thinking	15	
Technical capability and platform recommendation	15	
Team, process and communication	10	
Price and value for money	15	
Post-launch support	5	

12.3 Questions to ask agencies

- How have you delivered similar projects, and what were the measurable results?
- Who will actually work on our project, and what is their availability?
- How do you handle scope changes and what does a change request cost?
- What do you need from us, and by when, to stay on schedule?
- How do you protect SEO during migration?
- How is testing and QA managed, including accessibility and security?
- What are the ownership terms for code, design files and licences?
- What happens after launch: warranty period, support and SLAs?
- What are the biggest risks you see in our brief?

12.4 Selection process

Step	Date	Notes
Brief issued to shortlisted agencies		
Agency questions deadline		

Step	Date	Notes
<i>Clarifications issued to all agencies</i>		
<i>Proposal submission deadline</i>		
<i>Presentations / discovery calls</i>		
<i>Decision and notification</i>		
<i>Contract signed</i>		

13. Attachments and submission checklist

13.1 Attachments

Document	Included?	File name / link
<i>Brand guidelines</i>		
<i>Current sitemap / content inventory</i>		

13.2 Before you send this brief

- ☐ Goals and KPIs are measurable and agreed by leadership
- ☐ Stakeholders have reviewed and approved this brief
- ☐ Budget range and timeline are stated honestly
- ☐ Pages, integrations and languages are listed as completely as possible
- ☐ IT, security and legal requirements have been confirmed
- ☐ Access to analytics and current site is ready to share
- ☐ A single point of contact is named
- ☐ The same brief will go to every agency, with the same deadline

Confidentiality: This brief may contain sensitive business information. Share only with agencies under NDA where appropriate.

NOTE FROM SHANTANU PANDEY, FOUNDER AT TENET



Where we go from here

Once your brief is ready, we work in three steps. Audit & Discovery aligns us on your goals, users and growth opportunities. Design & Build creates a fast, mobile-first, secure and scalable website, integrated with your CRM, analytics and payment tools. Launch & Optimise covers QA, SEO foundations, analytics setup and post-launch iteration. Share your brief with us and we will respond with a clear plan.

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