



## Project Worksheet

I'd like to extend sincere thanks for considering me for your upcoming project. In order to provide an accurate proposal, I ask that you complete this Project Worksheet. I find this not only aids in my overall assessment, but it also defines what you really want and need. Though I'd like you to be as specific as possible, we know some areas may remain a bit grey at this point. I'm happy to discuss those details later.

After completion, please email the document to [hello@matthewmcpeak.com](mailto:hello@matthewmcpeak.com)

### The Introduction

Your name, title, and company name:

Your snail mail and email addresses, phone number, and URL:

Describe your company:

(i.e., Fortune 500, nonprofit, academic, startup; industry; number of employees; years in business; mission statements, goals, manifestos)

Describe the concept, product, or service you are aiming to promote:

The type of project you are requesting:

(i.e., branding, interactive, graphic design, editorial/content, or technology development)

The deadline for completion of the project:

(Either a final end date or list of milestones if creative is done in phases)

The budget for the project:

(This helps greatly to determine our capabilities, so even a rough estimate is encouraged.)

## **Just curious...**

How did you hear about me?

(i.e., referral, media piece, conference, search engine result)

Do you have any objections to working remotely with a designer?

(I will make accommodations for occasional face-to-face meetings should they be necessary for the integrity of the project.)

## **The Details**

(Please note: Depending on type of project you are requesting, some questions may not apply.)

Is this project a refresh of current creative, brand new creative, or an add-on to the current creative?

(i.e., re-skin of website, overhaul of brand identity, complete creative package)

What sparked the need for an update?

(i.e., new product or service, new business model, outdated creative)

What elements about your current creative works? What doesn't work?

Who do you consider as your competition?

What are your competitors' strengths and weaknesses?

Aside from direct competitors, what other companies have stellar creative that inspires you or you wish to emulate?

What makes your company stand apart from the competition that we can highlight?

## **Your Loyal Followers**

Describe your primary audience:

(i.e., age, occupation, income, location, size of audience)

Are you looking to widen the demographic range to appeal to a larger audience or simply appeal to more people within that demographic?

Why do you think your audience chooses you over your competitors?

What should be the goal or actions of your audience?

(i.e., signing up for new service, purchasing a product, merely being entertained or educated)

## **Look and Feel**

How is your company currently perceived?

Do you have a visual identity in place that meets your needs?

If you had to describe your company in one-word adjectives, what would they be?  
(i.e., eco-friendly, sophisticated, trustworthy)

What *should* they be?

Are there any colors, graphical treatments, typography that you wish to employ in new/updated creative?

Do you have copy or overall content created?

## **Technology**

(Please note: These questions mostly pertain to interactive and technology development.)

Social media: What do you like? Dislike? Want? Not want?

(This includes forums, comment sections, RSS feeds, sharing, user-generated content, etc.)

Will your website require media components like video, audio, podcasts, or photo galleries?

How many pages will the site consist of?

(i.e., home page, about, contact; any subdivisions within sections)

Do you have wireframes, a sitemap, or outline for the site?

Do you currently have a content management system or publishing platform in place?

(Please list what you like/dislike. We may offer recommendations on switching depending on your needs.)

If not, what is your experience level with CMS?

(Technologically-savvy vs. computers are scary)

Will you require other programming needs?

(i.e., third-party integration such as e-commerce or social sites, web apps, mobile-friendly)

Do you have specifications on noncompliant older browsers?

(I tend to stick with the modern browsers that adhere to current web standards such as Firefox, Safari, and IE 7 & 8, so I can't always guarantee the website will look and function the same in older browsers.)

## **Anything Else?**

We've covered a broad range of topics, but in case we missed anything you feel is vital to your project, please let me know.

Again, many thanks for considering me. I'll get back to you shortly.