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Vital Information For A Web Design Project Request Form

by [Alyssa Gregory](#)

When I start a new design project, part of my intake process is requesting that clients complete a project request form, even if we've had phone conversations in advance. I've found that asking the client to spend some time thinking about the project and writing (or typing) down the specifics is a great exercise to flesh out the work, including what they want and don't want the site to accomplish. The information becomes a tool to scope the project and create a project plan. If the right information is provided, it can save time and resources throughout the entire project.



The challenge is making the form long enough to include all of the questions you want to ask, while avoiding making it so long that it's overwhelming. The method of submission can facilitate this process, too. I tend to tailor my request format in a way that suits each individual client and their preferences. Some formats I use include a Microsoft Word form (e-mailed, faxed or mailed back), an online form, copying and pasting the questions into an e-mail, and even verbally running down the list and writing their answers myself on occasion.

Here is some of the information I aim to gather from new clients:

Contact Information

- Name

- Company name
- Mailing address
- Phone number
- E-mail address

Business Information

- Year the business was established
- How the business name was chosen
- Nature of the business
- Target audience
- Main competitors
- Any existing branding (logo, colors, fonts)

Website Information

- Domain name
- Purpose of the site
- What information they will provide
- Style of design they like best
- Desired functionality/special features
- Other sites they like and why

Other

- Budget
- Timeline
- Communication preference
- Contact person
- Additional services they may need

At the time they submit the form, I ask that they send me all of the information they have for the site: content, logo, photos, other graphics, marketing materials, hosting account information. Usually, I get this information piecemeal, in forwarded e-mails, mailed hard copies, or various attachments, but I file and log everything I receive so it becomes a part of the client's files.

What's your process for gathering information for a design project and what do you consider the most important information to collect?

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