

Project goals. Crafted®

Crafted

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Defining clear project expectations is almost the most important element of the process, to ensure both teams are working towards a common goal and success can truly be attributed.

These questions break the necessary info down into an easy to digest check list to get you started:

Project details

- What is the project called – something we'll all refer to it as throughout the process for clarity?
- What brand/s are involved? (please provide website addresses for all and any supporting detail to help us understand the offering).
- Who is our primary contact for the project and who are the project stakeholders (will we meet them all)?
- Who is responsible for the appointment decision?

Project objectives

- What is the purpose of this project?
- What challenges will it help you overcome?
- How do you hope it will improve/extend your capability?
- Is there any history to the project that we should be aware of?
- Why now? What is driving the decision to commission the project?

Channels (scope) – must haves / nice to have's

- Where does the focus lie for this project? i.e. build a website, create a marketing campaign, devise, and deliver digital strategy, audit project etc.
- What's essential for the project (primary deliverable) and what's peripheral or could be considered as a second phase?
- Any obvious 'out of scope' elements or restrictions to be aware of?

Timings and process

- Please outline your pitch process, stages, deliverables, and key timings
- Provide guidance around any mandatory dates for project delivery i.e. to tie in with another project, anniversary, event, or business deadline

Budget

- Please provide guidance around budgetary expectations
- Where possible please provide detail around what your budget needs to include (for example, are licensing fees, media spend, associated 3rd party costs included or excluded)
- Where fees may be recurring (e.g. hosting or license costs)? Are these reflected in your budgeting?

Product features and benefits

- Where your project centres around a specific product or service please provide as much detail as you can about it

Audience definition

- How much detail can you provide us about the people who currently engage with your product/service and those you want to (if different)?
- Can you provide any profiling from your existing customer data? Demographics, location data, behavioural trends
- Who are they, where are they, what do they do, what do they like, how do they behave?
- Where new audiences feature – what is driving your decision to target them?
- What does your 'perfect customer' look like?
- Please share any insights you have that might help us understand your customers better

What do you want them to do? Primary and secondary goals

- When your target audience/s engage with you, what is it you want them to do? (if we focus on 'conversion' – what does that mean in your world?) Include all relevant conversion points
- Are there varying degrees of importance to that conversion? If you had to prioritise what you want your prospects and customers to do, how would that look?

What is the most important message you want to communicate?

- In terms of brand messaging – what is it that you want people to take from their engagement with you? Likely this will be supported by any central brand guidelines or campaign concepts where relevant.

Brand guidelines – what can / can't we do?

- Please provide us with current brand guidelines so that we have complete visibility of how you market your brand / product / services
- How do these relate to the overall project brief?
- Where brand guidance is unavailable, please provide some context (e.g. brand guidelines being developed, branding not current, not confined by brand guidelines)

Success metrics

- How will you measure the success of the project?
- What are your KPIs?
- Please provide any key metrics you will use to evaluate performance and where relevant provide your rationale for any targets

Data & Insights

- Can we have access to your analytics platforms account to review performance?
This could include Google Analytics, social accounts, Google Ads etc.
- Are you able to provide us with any relevant data or insights that support your project brief?
This might be research conducted, audience profiling, competitor analysis or audit data