



Brief Your Agency Properly Checklist

A non-technical guide to writing a project brief that gets results, avoids hidden costs, and turns suppliers into partners.



Before You Start...

A brief isn't a contract! It's a conversation starter...

If your document feels unfinished or if you are worried about "Frank from IT's" legacy code, don't panic.

The best projects often start with a Discovery Phase where we help you unpick the requirements, run audits, and build prototypes before a single line of production code is written.

At **Make Do**, we act as an extension of your team to ensure your project doesn't just look modern, but actually works for your business.

Now, grab the checklist and get to work!

Page 1: The Foundation

- ☐ **The Business "Why":** Clearly state the primary business problem this project is solving rather than just listing features.
- ☐ **Success Metrics:** Define what "good" looks like—whether it is reducing support tickets, increasing conversion, or automating a manual process.
- ☐ **Target Audience Profile:** Describe who will use the system and what their specific pain points are.
- ☐ **Current Limitations:** List what is wrong with your current system (e.g., it is slow, "decrepit," or technically un-updatable).
- ☐ **Budget Transparency:** Provide a realistic budget range to allow the agency to suggest the most effective solution for your resources.
- ☐ **Timeline & Hard Deadlines:** Identify any immovable dates, such as a product launch or a legacy system "End of Life" date.

Page 2: Technical Scope

- ☐ **Integration Requirements:** List any third-party systems, ERPs, or CRMs that the new site must talk to.
- ☐ **Content Migration Strategy:** Decide if you are moving all legacy data (like 20,000 pieces of content) or starting with a clean slate.
- ☐ **Internal Resources:** Identify who on your team will be the "co-pilot" AKA the primary point of contact for feedback and decision-making.
- ☐ **Platform Specifics:** State if you have a preferred platform or if you are open to honest advice on whether to use a custom build vs. off-the-shelf tools.
- ☐ **Compliance & Security:** Detail any specific industry regulations, accessibility standards, or SLA requirements for 24/7 support.
- ☐ **The "Red Flag" Check:** Ensure you aren't saying "we'll figure it out as we go" but if you are, mark those areas for a Discovery Phase.



Let's Build It Together

If your brief is still just a rough idea on the back of a napkin, we can help. Book a chat with our team today.

BOOK A CHAT