

**GUIDE**

Guide · 8 min read

Digital project briefing

The questions we ask before we write a proposal. Useful even if you end up hiring another agency.

- ✓ The questions that define scope, timeline and budget
- ✓ Why each question matters (and what happens without it)
- ✓ A briefing you can fill in on the page and download ready to send
- ✓ The signs that a proposal you received didn't understand the project

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By Manary · Updated October 2026 · 8 min read

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This PDF is the version to keep and print. The interactive version is at manary.co/en/ebooks/digital-project-briefing/

THE 30-SECOND SUMMARY

- A good proposal starts with a good briefing. Without one, every agency quotes a different project and you end up comparing things that can't be compared.
- There are 36 questions in 10 sections: business, goals, audience, offer, numbers, competition, scope, content, technology and decision.
- You can fill it in right here, save it in your browser and download the finished briefing to send to anyone you like.

Before proposing any project, Manáry asks a set of questions. It isn't a formality: the answers decide whether the project will be a website, a campaign, an automation or all three, how long it will take and how much it will cost. When those questions go unanswered, the client ends up paying for it in rework, change orders and blown deadlines.

This guide brings those questions together. It's useful even if you hire another agency: a well-answered briefing improves any proposal and makes comparing vendors much fairer.

Why the briefing makes or breaks the project

Asking for a quote on "a new website" or "paid media management" with no context produces proposals that can't be compared. One agency quotes a five-page site; another, a portal with a client area. One includes content creation; the other doesn't. Prices vary tenfold and nobody is wrong: each agency answered a different question.

Proposals

WITHOUT A BRIEFING

Generic, each with its own scope

WITH A BRIEFING

Comparable, all addressing the same problem

Timeline

WITHOUT A BRIEFING

Estimated in the dark, blown halfway through

WITH A BRIEFING

Based on what actually needs to be done

Price

WITHOUT A BRIEFING

Cheap at first, expensive in change orders

WITH A BRIEFING

Predictable, with what is and isn't included

Results

WITHOUT A BRIEFING

Looks good, but no goal to measure against

WITH A BRIEFING

A clear goal from day one

One hour spent on the briefing saves weeks of meetings, rework and arguments over what was or wasn't agreed.

How to use this guide

1

Get the decision-makers together

The best answers come from a conversation between the people who know the business, the people who sell and the people who will run the project day to day.

2

Answer with numbers when you can

"We want to grow" doesn't guide anyone. "We want to double our quote requests in six months" does.

3

Leave blank what you don't know

An honest gap beats a guess. A good agency will help you answer whatever is still open.

4

Download it and send the same briefing to everyone

That way, every proposal you get back answers the same questions, and you can compare them side by side.

The fill-in briefing

Your answers are saved only in this browser while you work. When you're done, copy or download the finished briefing.

Digital project briefing

Fill in what you know. You can come back later: your answers will still be here.

1. Company and business

What does the company sell, and to whom?

E.g., practice management software for small and mid-sized dental clinics

How does the company make money today (products, services, recurring revenue)?

Where does the company operate (cities, states, countries)?

What stage is the company at (getting started, growing, expanding, repositioning)?

2. Goals and targets

What problem does this project need to solve?

E.g., the website doesn't generate quote requests; we rely entirely on referrals

How will you know the project worked? What number, and by when?

Is there a date you can't miss (a launch, an event, a seasonal peak)?

What have you already tried that didn't work? Why?

3. Audience

Who is the ideal customer (profile, job title, company size, region)?

What makes this person look for a solution like yours? What questions do they have before buying?

Who else is involved in the buying decision besides the person doing the research?

4. Offer and differentiators

Which product or service is the priority for this project?

Why does a customer choose you over a competitor?

What proof do you have (case studies, numbers, testimonials, certifications, guarantees)?

5. Numbers and track record

Average ticket and approximate margin for the priority product

How many leads or inquiries come in per month today? From which channels?

Out of every 10 contacts, how many become customers? How long does it take?

How much do you invest in marketing per month today (media, agency, tools)?

6. Competition and references

Who are your three main competitors? What do they do well?

Websites, campaigns or brands you admire (from any industry), and why

What do you absolutely not want (style, tone, practices)?

7. Scope and deliverables

What do you think needs to be done (website, landing pages, campaigns, SEO, automation, CRM, dashboard)?

If it's a website: how many pages, which sections, and do you need a blog, client area, online store or multiple languages?

If it's paid media: which channels, what budget and which regions?

What stays with your in-house team, and what needs to go to the agency?

8. Content, brand and assets

Do you have a visual identity (logo, colors, fonts, brand guidelines)?

Who produces copy, photos and videos? Is any material ready to use?

Are there industry rules on advertising and communication (healthcare, finance, legal, education)?

9. Technology and integrations

Where does the website live today (platform, hosting, domain), and who has the logins?

Which tools does the company use (CRM, ERP, email, WhatsApp, customer support)?

What needs to connect to what (form to CRM, order to ERP, lead to WhatsApp)?

How are results measured today (GA4, dashboard, spreadsheet)?

10. Budget, timeline and decision

What budget range do you have in mind for the project and for media?

When does the project need to go live?

Who approves the project, and who will manage it day to day?

How will the company choose a vendor (criteria and decision deadline)?

Why each section matters

If you're going to rush through the briefing, at least know what each section protects you from. Here's what happens when it gets left out.

Company and business

Without understanding the business model, the agency proposes the project it usually sells, not the one the company needs. A recurring-revenue business calls for a focus on retention; a high-value one-time sale calls for a focus on trust and proof.

Goals and targets

Without a goal, there's no way to tell whether the project worked. And without a critical date, the schedule gets drawn up with no priorities, and the important launch slips.

Audience

It shapes the message, the channels and the structure of the pages. Talking to a business owner is different from talking to a technical buyer; the website and the campaign change accordingly.

Offer and differentiators

Without a clear differentiator, you end up with messaging that sounds just like your competitor's and competes on price alone. Proof (case studies, numbers) is what converts a skeptical visitor.

Numbers and track record

Ticket, margin and conversion rate determine how much can go into media and which goals are realistic. Without them, the proposal promises what the math can't support.

Competition and references

References cut weeks of back-and-forth on design. Knowing what you don't want is just as useful as knowing what you do.

Scope and deliverables

This is the section that generates the most change orders when it's vague. "Website" can mean five pages or a full portal; "media management" may or may not include ad creative.

Content, brand and assets

Copy and images are the most common cause of delays. Knowing who produces what keeps the website from sitting finished and empty, waiting for content.

Technology and integrations

A forgotten integration turns into a surprise cost at the end of the project. And lost access to a domain or hosting account can hold up a launch for days.

Budget, timeline and decision

A budget range makes it possible to propose the best solution within it, instead of a proposal that's out of touch with reality. Knowing who decides keeps you from pitching to the wrong person.

Briefing ready?

Send it to Manáry. We'll come back with a diagnosis of the project and a proposal that responds to exactly what you wrote.

[Request a proposal](#)

Signs a proposal didn't understand the project

- **It doesn't mention a single goal from the briefing.** The proposal talks about deliverables (pages, posts, ads) but not about results.
- **It would fit any company.** Swap in another client's name and does it still make sense? Then it wasn't written for you.
- **It doesn't say what's not included.** A proposal without clear limits turns into change orders later.
- **It doesn't mention measurement.** If it doesn't say how results will be measured, they won't be.
- **It doesn't ask anything.** Every briefing has gaps. An agency that asks no questions probably didn't read it carefully.
- **The timeline is too short for the scope.** Be wary of a complete website, content included, in two weeks: the content usually gets left out.

How to compare proposals

Understanding

WHAT TO LOOK FOR

Does the proposal restate, in its own words, the problem and the goal from the briefing?

Scope

WHAT TO LOOK FOR

Does it list what is and isn't included, with quantities?

Measurement

WHAT TO LOOK FOR

Does it say which metrics will be tracked and how often?

Timeline

WHAT TO LOOK FOR

Does it show phases, interim deliveries and what depends on you?

Team

WHAT TO LOOK FOR

Does it say who will work on the project and who your point of contact is?

Ownership

WHAT TO LOOK FOR

Do the accounts, domain, website and data stay in your company's name?

Exit

WHAT TO LOOK FOR

If the contract ends, what do you keep? Is there a cancellation fee or a minimum term?

Frequently asked questions

Do I need to answer every question?

No. Answer what you know and leave the rest blank. The unanswered questions become the agenda for the first meeting.

Should I share my budget with the agency?

A range helps a lot. It isn't there so the agency can "spend it all," but so it can propose the best possible solution within your company's reality.

Are my answers saved on a server?

No. What you type into the briefing stays only in your browser, until you download, copy or clear it.

Can I use this briefing with other agencies?

You can, and you should. That's what it was made for: the more vendors answer the same questions, the fairer the comparison.



NEXT STEP

Want us to apply this to your business?

This material is what Manary does every day with clients. If it makes sense, a specialist looks at your numbers and hands back the priorities, with no sales pitch.

[Get my diagnostic](#)

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