Client Project Preparation Kit

What to gather before a branding, website, print or advertising project begins.



WHERE YOUR BUSINESS COMES TO LIFE!

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Your project snapshot

01 Project and purpose

Describe the work and the business problem it should address.

02 Audience and action

Who is it for, and what should they do?

03 Deadline and decision-maker

List the target date and the person authorized to approve work.

Type your answers in the fields, then save a copy. You can also print this worksheet.

What to gather by project type

Project	Useful materials	Confirm before production
Branding	Business name, audience, references	Correct spelling and usage needs
Website	Page list, copy, images, domain details	Features, integrations and content owner
Print	Copy, logo, size and quantity	Finishes, delivery and proof approval
Advertising	Offer, audience, landing page, assets	Budget, placements and launch date

Prepare files and account access



Organize assets

Use one shared folder with approved logos, images, copy and a clear file naming system.



Provide access safely

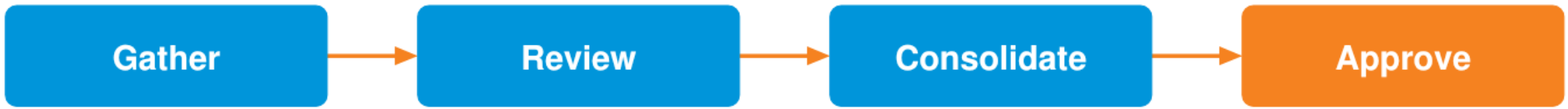
Invite the agency through account permissions where available. Agree on a secure method for any credentials.



Check ownership

Confirm who controls the domain, hosting, ad accounts and licensed creative assets.

A clear feedback and approval process



Provide the agreed materials.

Check the complete draft.

Send one set of comments.

Confirm the approved version.

Confirm review rounds, approval authority and timing in your project agreement.

A client review checklist

Content accuracy	Check names, descriptions, addresses, prices, dates and contact information.
Customer experience	Test the intended action, form, link or ordering path on the supplied proof or draft.
Final approval	Resolve outstanding comments and identify the version approved for the next stage.

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Your project handoff checklist

01 Materials still needed

List missing content, files or access and who will supply each.

02 Open decisions

Record unresolved features, formats, quantities or approvals.

03 Ready-to-begin confirmation

Note the next meeting or milestone agreed with your project contact.

Type your answers in the fields, then save a copy. You can also print this worksheet.

YOUR NEXT STEP

Let us help with your next step

Send your project brief and available materials. Required Marketing Group can help define the scope and identify what is needed before production.



Request a consultation

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