

## **Client-Project Information Sheet Instructions**

Use the following form (or your own form designed along these lines) to get basic information about the client and the proposed project.

**The Client** section is straightforward contact information. Be sure to find out the preferred method of contact. Directions to where the company is located would also be a good idea if you are meeting elsewhere for the initial visit with the client.

**The Business** section can help you to better serve the client when it comes to developing a style for logos, graphics, layout, etc. and making suggestions for additional materials.

**The Project** section is where you get an initial feel for the size and scope of the project and the direction the client wishes to move in. While specifications may change during the development of the project, use this space to find out what the client hopes to accomplish with this project, it's "importance" to the client and to the company as a whole. Whether or not others are involved is important in determining a timeframe for completion of the project. Knowing the client's experience in working with designers will help you determine how much "hand-holding" and detailed explanations might be necessary.

You may not obtain all information during the initial meeting with the client but try to fill in the blanks as soon as possible.

File this sheet in your project folder.

Create a new sheet for each new project, even if it is with the same client. Reverify the client and business information each time to insure it is current and accurate.

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Date:

Client-Project Code:

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# Client - Project Information Sheet

## The Client

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Client Name

Position in Company

Company

Address

Telephone

Fax

Email

Website

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## The Business

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Type of business

Time in business

Size of business

Company's competitors

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## The Project

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General description/specifications

Purpose of project

Budget

Desired completion date

Others involved (such as copywriters, etc.)?

Has client ever worked with a designer before? In what capacity?

Client's expectations (for project, from the designer)

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