

01 / DIRECTION

B2B Website Redesign Brief

Turn a redesign conversation into a usable scope. Complete this workbook with marketing, sales and the person responsible for your website before asking for proposals.

HOW TO USE THIS WORKBOOK

Start with what you know. Mark unknowns as “to confirm” and assign an owner. Print the pages or duplicate the editable prompts. Keep supporting URLs, analytics exports and specifications in a separate project folder. Do not include passwords or customer personal data.

Company / website / markets and languages in scope

Primary problem: what can the right buyer not understand or do today?

Desired buyer action and the evidence that would show improvement

HYPOTHETICAL EXAMPLE

An industrial components supplier wants engineers to find material specifications and request a suitable part. Testable outcomes: specifications are visible on approved product pages; enquiries include the required product details and reach the correct team. These are planning examples, not client results.

Brief owner / decision-maker / review date / desired launch window

02 / BUY

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Priority buyer	Question they must answer	Proof or content needed	Next action

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Page / section	Purpose and primary action	Must-have or later?
Homepage		
Capabilities / services		
Products / proof / contact		
Other		

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03 / CONTENT SCOPE

Count the real work

Inventory both visible pages and less obvious assets: downloads, campaign landing pages, specification files, distributor pages, embedded tools and links used by your sales team.

Template and content inventory

Copy this table for each site section. One reusable product template may support many product records; count both.

Template / asset	Record count	Keep / rewrite / new	Content owner / due
Homepage			
Service / capability			
Product family / detail			
Case study / article			
PDF / language version			
Other			

Who writes, checks technical claims, supplies images and uploads content?

Which claims, customer logos or images need permission or evidence?

BEFORE REQUESTING A QUOTE

Attach the full URL inventory and representative content samples. Ask the supplier to identify assumptions, missing inputs and responsibility for migration. If the inventory is unknown, make discovery a distinct scope item rather than guessing the volume.

04 / PRESERVATION

Plan the move, not just the look

A new design should not silently discard useful pages or break existing paths. Confirm the preservation plan with whoever owns search, analytics and the technical launch.

Current URL / asset	Keep, merge or retire	New destination / redirect	Owner / checked

Migration decisions to record

- ☐ Export the current URL list and identify important search, campaign and sales-linked landing pages.
- ☐ Record existing titles, descriptions, headings, internal links and important downloadable assets.
- ☐ Map changed URLs to relevant replacements. Review intentional removals instead of redirecting every URL to the homepage.
- ☐ Confirm redirect behaviour, canonical URLs, robots controls, sitemap and staging-site indexing protections.
- ☐ Document analytics events, consent behaviour, tag ownership and the baseline reporting period.
- ☐ Back up the current site and content; name the launch owner, rollback trigger and post-launch checks.

Highest-risk URLs / launch dependencies / person who signs off migration

LAUNCH GATE

Test representative redirects and key buyer journeys before launch, then check live forms, indexing controls, broken links and analytics immediately afterward. Record owners and review dates; do not assume a redirect map was implemented because it was supplied.

05 / ENQUIRY SYSTEM

Specify what happens next

Treat the form as an operational workflow. Capture only the information needed to route and answer the enquiry, and make the process work for both the buyer and your team.

Requirement	Your decision
Primary enquiry type / CTA	
Required fields and why	
Optional fields / file uploads	
Destination inbox / CRM / owner	
Routing and backup recipient	
Acknowledgement / next step	
Response target / business hours	
Spam controls / failure alert	

Integration dependencies: tool, account owner and what must pass through**Acceptance tests**

- ☐ Send test enquiries on mobile and desktop; check required-field errors and successful delivery.
- ☐ Verify keyboard access, readable labels, useful errors and a clear success message.
- ☐ Test routing, notification failure, duplicate submissions and attachments if permitted.
- ☐ Confirm agreed consent, privacy wording, retention and access controls with the responsible owner.

MINIMISE FRICTION

Separate service enquiries from recruitment or support when routing differs. Avoid collecting sensitive data in free-text fields. Never place credentials or private CRM exports in this brief.

06 / ACCEPTANCE

Agree what “finished” means

Use this page to align your internal team and proposed supplier. Specific acceptance criteria reduce subjective sign-off and make handover easier to verify.

Acceptance area	Test / evidence required	Owner / accepted on
Content completeness	Agreed page inventory approved; no placeholder content.	
Buyer journeys	Priority routes and enquiry flows tested end to end.	
Quality checks	Agreed browsers, screen sizes and accessibility checks.	
Performance	Named pages, measurement method and agreed threshold.	
Migration / measurement	Redirects, indexing controls and events verified live.	
Handover	Access, training, backups and operating instructions received.	

Handover checklist

- ☐ Record ownership of the domain, hosting, CMS, analytics and third-party licences.
- ☐ Confirm editing training, reusable templates and instructions for common updates.
- ☐ List recurring costs, renewal owners, support boundaries and the defect-reporting process.
- ☐ Keep a dated issues list with severity, owner and resolution or accepted exception.

Open decisions / person responsible / date needed

Final approver / acceptance date / exceptions recorded
