



PURPLE, ROCK, SCISSORS, LLC

Client Homework Sheet

Client Information	Client:
	Location:
	Contact Emails:

PRPL / Internal Information	Project Manager:
	Job Code(s) & Project(s):

In order to hit the ground running, we need quite a bit of information from you about your current business and systems. We're asking for a lot here, so if you're unsure about a specific item, please let your project manager know and we can walk you through it.

If you're uncomfortable providing certain credentials or secured information in this document, let your project manager know, and we can discuss alternative methods of getting this information to your PRPL team.

System Access & Credentials

<p>Analytics Access</p> <p>Add purplerockscissors@gmail.com as an admin or read-only user to Google Analytics, Search Console, Facebook Insights, and any other relevant existing analytics platform.</p>	<p>List each domain and platform we should expect:</p>
<p>CMS / System Access</p> <p>Create an admin account for your PRPL project manager within your existing CMS or relevant production site.</p>	<p>Login URL:</p> <p>Username / Email:</p> <p>Password:</p>
<p>Server and Infrastructure Access</p> <p>Provide access credentials to the current environments including virtual or physical servers, app store accounts, necessary VPN access, code repositories, and third-party services related to the development and operation of your existing product/platform.</p>	<p>Username / Email:</p> <p>Password:</p> <p>Infrastructure Background & Specs:</p> <p>Login Access Instructions:</p>
<p>Marketing Tools (If Applicable)</p> <p>Add purplerockscissors@gmail.com as an admin or read-only user to your CRM, AdWords, email management system, social accounts, font services, and other relevant platforms.</p>	<p>List each tool and platform we should expect:</p>

Design Resources

<p>Brand Guidelines</p> <p>Provide any resources that outline rules for logo usage, voice and tone, color palettes, fonts, and any other important standards for our design and content team.</p>	<p>Please list resources and upload links & files to Basecamp.</p>
<p>Sales Collateral & Marketing Materials</p> <p>Provide existing web or print materials your company uses to interface with customers, such as brochures, one-sheeters, case studies, videos, catalogs, links to landing pages, and other relevant marketing materials for reference.</p>	<p>Please list resources and upload links & files to Basecamp.</p>
<p>Asset Libraries</p> <p>Provide access to existing photography and video libraries.</p>	<p>Please upload links & files to Basecamp.</p> <p>Mail hard drives to: 189 S. Orange Ave. Ste. 2020 Orlando, FL 32801</p>

Project Objectives

<p>Key Dates Are there any critical deadlines which affect the timing of this project, such as expiring licenses, corporate events, or major marketing initiatives?</p>	<p>Dates:</p> <p>Reasons:</p>
<p>Business & Brand Goals What do you want your users to do, think, and feel? Describe your business goals, whether or not they pertain to our services. Your goals inform the “why” behind our digital strategy.</p>	<p>State each goal in as much detail as you like:</p>
<p>Key Performance Indicators (KPIs) Share any measurable values that demonstrate key business objectives your company hopes to achieve, and when, especially as they pertain to digital. (If these aren’t currently defined, we can help!)</p>	<p>Business Goal:</p> <p>KPI:</p> <p>Benchmark Amount:</p> <p>Goal Amount:</p> <p>Timeframe:</p> <hr/> <p>Business Goal:</p> <p>KPI:</p> <p>Benchmark Amount:</p> <p>Goal Amount:</p> <p>Timeframe:</p> <hr/> <p>Business Goal:</p> <p>KPI:</p> <p>Benchmark Amount:</p> <p>Goal Amount:</p> <p>Timeframe:</p>

Key Stakeholders & Client Team Members

Identify anyone at your organization who will serve as a stakeholder for this project. To what extent should each be involved in discovery, collaboration, the review process, and approvals?

Name:

.....

Job Title:

.....

Role in this Project:

.....

Level of Involvement:

.....

Additional Stakeholders:

System Requirements & Integrations

Although our entire discovery, research, and planning & content phases will be dedicated to answering this question, let us know if there are system constraints, platform limitations, or other must-haves you're already aware of (technology stack requirements, CRM integrations, etc).

Describe each requirement in as much detail as you like:

Key User Stories

What do your users want to be able to do? User stories help us start to brainstorm the user experience. Start writing any that come to mind, and we'll continue fleshing them out together.

Please describe: