

Your business & priorities

Complete this page, then the website and/or AI sections relevant to you.

Fill in, save a copy and email to tom@testinvest.com.au. No commitment required.

Business, website URL & industry

Your name, role, email & phone

What do you sell, and who are your ideal customers?

What prompted this project? What are the three main problems to solve?

What would success look like? Include a measurable target if possible.

Project type: website / AI / both. Decision-maker and other stakeholders?

Website project

Skip this page if you only need AI implementation.

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New website or refresh? Current platform, hosting and domain ownership?

Main visitor action and required pages (e.g. enquire, book, buy)?

Must-have features and integrations; list nice-to-haves separately.

Who will provide copy, branding, photos and video? What exists already?

Two or three reference websites: what do you like or dislike about each?

SEO priorities: services, locations, search terms, existing analytics and redirects?

Who will approve the site, update it and handle enquiries after launch?

AI agents & automation

Choose one priority workflow. Attach a redacted example if helpful.

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Which task should improve? Describe the trigger, steps and desired output.

Who does it today? How often? Approximate minutes per task and bottlenecks?

Which apps, accounts or data sources are involved? Who owns access?

What information may the agent use? Any sensitive data or storage constraints?

What can run automatically, and what requires a person to approve it?

What should happen if information is missing, a tool fails or the AI is unsure?

How will we test success? Give an example of a good result and an unacceptable one.

Budget, timing & next steps

Rough estimates are fine. Write “unsure” where you need guidance.

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Available setup budget (AUD) and comfortable monthly software/support budget?

Preferred launch date, any fixed deadline, and why that date matters?

Existing supplier contracts, approvals, access or dependencies to account for?

Who will own the system internally? Training and ongoing support required?

Relevant links, redacted examples and anything else I should know?

What happens next

1. Save your completed brief and email it with any relevant attachments.
 2. I review your business, current systems and priorities before we meet.
 3. We clarify the scope, then agree deliverables, timing and a proposal.
- Please do not include passwords, API keys or identifiable customer data.
For best results, complete this PDF in Adobe Acrobat Reader and save it.