

WEBSITE SCOPING

B2B website proposal scorecard

Print one for each agency you are comparing, or fill it in on screen. Tick what the proposal covers, note who owns it, and write in the cost. What is left blank is what you will end up paying for later.

AGENCY

DATE

Scope and scale

IN?	WHAT TO CHECK	OWNER	COST
	Number of components (blocks) included, and the reasoning behind that number		
	Multi-region, multi-language or multi-brand requirements, including translation		
	Number of customer segments the site has to serve		
	Build approach: fully custom, design system, or off-the-shelf theme		
	Demonstration of comparable sites the agency has built, and how flexible they are		
	Browser and device support required, checked against your analytics		

Platform

IN?	WHAT TO CHECK	OWNER	COST
	Platform named, and whether it is licensed or open source		
	Who owns the code, and whether the site can be moved to another host or agency		
	What the platform or licence fee covers after launch		

Strategy and discovery

IN?	WHAT TO CHECK	OWNER	COST
	Workshops and meeting cadence		
	User research, personas and journey mapping		
	Competitor and market analysis		
	Information architecture and sitemap development		
	Prototyping and usability design		

IN?	WHAT TO CHECK	OWNER	COST
	SEO migration planning		

Integrations

List every system the website has to talk to.

IN?	WHAT TO CHECK	OWNER	COST
	CRM and marketing automation (HubSpot, Salesforce)		
	ERP (NetSuite, Brightpearl, Dynamics 365 Business Central)		
	Applicant tracking system (Greenhouse, Recrutee)		
	Digital asset management		
	Organisational single sign-on		
	Booking system		
	Membership or customer portal		
	Plugin and extension licence costs, and whether each one is actively maintained		

Design

IN?	WHAT TO CHECK	OWNER	COST
	Brand guidelines: do they exist, are they current, or do they need creating		
	Illustration and animation, and who produces it		
	Font licensing, priced against your monthly traffic		
	Number of design revision rounds included, and who signs off on your side		

Content

IN?	WHAT TO CHECK	OWNER	COST
	Copywriting: internal, agency, or an external specialist		
	Photography and video		
	Stock photography: subscription or per-image licences, and how many images you need		
	Migrating existing content: how much, and how much can be scripted rather than typed		
	Site setup and page population: who does it, and who gets trained first		

SEO and what is actually included

IN?	WHAT TO CHECK	OWNER	COST
	Alt text across the site		
	Meta titles and descriptions		
	Structured data templates for home, service and product pages		
	Redirect mapping from the old site to the new one		

Transactions and ecommerce

Skip this section if you are not selling online.

IN?	WHAT TO CHECK	OWNER	COST
	Catalogue size, variants, and where the master product data lives		
	B2B pricing logic: customer-specific pricing, tiers, minimum order quantities, quote requests		
	Tax and shipping rules, including anything you ship outside the UK		
	Payment gateway, plus accounts, saved carts, credit terms and purchase orders		
	Transactional email: order confirmations, quote follow-ups, account emails		

Training and warranty

IN?	WHAT TO CHECK	OWNER	COST
	Training: how many sessions, what format, and are they recorded		
	Written documentation of how the site is built and how the components work		
	Warranty period, and the written definition of a defect rather than a change request		

Performance and reporting

IN?	WHAT TO CHECK	OWNER	COST
	Core Web Vitals targets in the specification as numbers: LCP, INP and CLS		
	GA4 and Google Tag Manager configured, with consent handled		

IN?	WHAT TO CHECK	OWNER	COST
	Event tracking configured during the build: forms, downloads, quote requests, phone clicks		
	Dashboards and reporting: who builds them, who reads them, how often		

Compliance

IN?	WHAT TO CHECK	OWNER	COST
	GDPR, consent management platform, and analytics consent mode		
	Accessibility standard targeted, plus the audit and published statement		
	Security: penetration testing, Cyber Essentials, ISO 27001, customer security questionnaires		

Costs that will not appear on the invoice

IN?	WHAT TO PLAN FOR	NOTES
	Legacy data and undocumented technical debt in the current site	
	Sector regulation and procurement review cycles (medical, financial, public sector)	
	Project management resource on your side to chase decisions and hold the scope	
	Your team's time in workshops, reviews and content gathering	
	Your responsiveness: how quickly feedback and approvals come back	

Ongoing costs

IN?	WHAT TO CHECK	OWNER	PER YEAR
	Support and maintenance tier, and SLA response times		
	Hosting, backups, CDN, staging environments and certificates		
	Licences and subscriptions: plugins, fonts, search, forms		
	SEO, CRO and content after launch		
	Phase two: the things you agreed to park		