CREATIVE BRIEF COMPLETE OWNER'S MANUAL

The Marketing Professional's Complete Guide to Creative Briefs

V1.2011

Process Boom!™ BETA

Get there faster.

About Process Boom™

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Bad process inhibits good work. Process Boom!™ provides robust suite of tools and manuals that help marketing professionals improve their internal processes and produce better marketing. Even the most experienced advertising agencies and corporate marketing departments can struggle with the basics of getting things done. Using years of experience combined with industry best practices, Process Boom! provides simple, common sense manuals that have been tested in real-world marketing environments.

Process Boom! is dedicated to helping marketing professionals:

- Solve their marketing problems faster.
- Replace bad processes with good.
- Get teams working together using the same standards

Who uses Process Boom!? Creative Directors, Marketing Managers, CMOs, pretty much anyone who is involved with an advertising agency or internal marketing department.

Jon Anderson, Founder & Process Advocate
As the founder and creator of Process Boom!, Jon is tirelessly dedicated to improving processes wherever he can. Jon has helped advertising agencies revamp their systems, unified corporate marketing departments, and built common sense process models that have helped companies save on their bottom line. Jon started his career in advertising in 1995 and has worked at leading agencies and corporations. He has helped build brands and revitalize product lines creating award winning campaigns along the way.

Keven Smith, Marketing Professional
Keven Smith is a 12-year veteran of the marketing trenches. After holding two staff copywriter positions in the software industry, Keven launched a successful freelance copywriting business in 2003. He continues to work with clients in the software, financial, fitness, and nonprofit sectors. Keven holds degrees from Curtis Institute of Music and the University of Southern California.

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This manual is dedicated to my very very patient wife.

Creative Brief Owner's Manual

Welcome.

I wish I'd had this manual on Day One of my career. It would have made many projects less painful. It would have eliminated extra rounds of presentations, prevented much client frustration, and saved me countless late nights. Of course, the most painful experiences are actually useful if you're willing to learn from them.

This manual is the culmination of many such learnings over the course of my 15 years in marketing and advertising. It's the product of pain and love—of successful projects and disastrous presentations (well, just a couple). It was spawned from disagreements with project mangers and total synergy with strategists. It's something I hope will become a valuable—and perhaps even indispensable—tool in your career, whether you're a hungry rookie, an established veteran, or a perennial All-Star.

Over the years, some of the greats of advertising have applied sound logic and common sense to the way they approach Creative Briefs. Their methods have been adopted and passed from one generation to the next. This manual seeks to build on their momentum and wisdom, while providing a knowledge base that allows for individual freedom.

The categories and principles we outline here are not meant to be authoritative, but rather to help you become your own authority. The knowledge you gain will enable you to act with confidence, forge better relationships with your clients, and make more successful creative presentations. Ultimately, the goal is for you to build processes that foster great work.

I wish you all the best on your own journey to find the Big Idea.

Jon Anderson, Founder

Creative Brief Owner's Manual

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Visit www.processboom.com for a full list of up-to-date industry links and resources.

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Creative Brief Owner's Manual

Introduction

Take an initial look at the Whos, Whats, and Whys of the Creative Brief.

Planning

Learn more about gathering input and mapping out your Creative Brief process.

Deployment & Post Deployment

Follow our detailed step-by-step outline of how to deploy and manage a new Creative Brief program.

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(All forms are in Mircosoft® Word™)

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Section 1:

Introduction

Before we get down to business, let's talk about why creative services departments and agencies use Creative Briefs in the first place, who's involved in the process, and what you can expect from the rest of this manual.

1. Why Use Creative Briefs?
2. What's the Value of the Creative Brief?
3. Who Creates a Creative Brief?
4. What's the Secret Ingredient to Any Good Brief?
5. How to Use This Manual

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1.1: **Why Use Creative Briefs**

The Key to Successful Campaigns

In the ever-changing marketing landscape, tactics and media are constantly changing, yet the fundamental principles of marketing communication remain valid. A great idea still has value. A strong message still resonates—but only if it's articulated clearly and pointed at the right audience.

That's why **nothing is more pivotal to the success of a campaign than the Creative Brief.** This is as true for an internal creative services department as it is for an advertising agency. At its best, the brief is a clear and focused piece that guides a project from start to finish. It's the one salient document that all parties agree to, and the foundation of the creative process. It's the information kiosk, the project constitution, and the handbook of good marketing principles.

To begin a creative project without a good brief is like jumping into a car and driving off without a final destination in mind. Even simple campaigns can run off the road quickly—and the process of trying to steer out of a creative ditch is both painful and time-consuming.

Spare yourself the trouble. Write a good brief instead.

Briefs can come in many forms, including all-encompassing briefs, short assignment briefs, brand briefs, and website briefs. But in every case, the brief serves the same greater purpose: **to define every aspect of a creative project's objectives.**

Knowing Right from Wrong

Considering there are so many types of briefs, is there really a right or wrong way to write one? Absolutely!

Most good advertising agencies (agency-side) have at least a decent brief format. The best of the best start every project with a solid brief—no exceptions. While some agencies keep their briefs, well, brief, others use the brief as a tool to capture all the critical details of a project, resulting in a much longer document. Unfortunately, a surprising number of agencies lack consistency, under-train their account teams, or leave too much control in the hands of their clients. **The most common mistake is to put too much superfluous content in the brief,** rather than using critical thinking to simplify and focus it.

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Among creative services departments (client-side), it's surprisingly rare to find a team that has consistent, effective brief-writing processes in place. Most poorly-written briefs result in wasted time and resources, frustrating presentations, and muddy creative products.

Where to Begin

Brief writing is a learned skill that takes lots of practice. If you understand that, you're already one step ahead of the game (actually, two steps, because you also bought this manual).

Every marketing department and agency should have a clear brief policy that's updated regularly. In addition, they should hold brief-writing workshops for their teams. With the right brief process in place, creative teams can flourish, internal departments can run like well-oiled machines, and the Creative Brief can live up to its massive potential.

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1.2: **What's the Value of the Creative Brief?**

The Little Document with the Great Bottom Line

If you really want to know the bottom-line value of a good Creative Brief, think about how many millions of marketing dollars are wasted each year on creative work that doesn't resonate.

American consumers are the most heavily marketed-to people in the world, encountering between 600 and 3,000 commercial messages every day. They're experienced, savvy, and unequivocally impatient—and in the online environment, their attention span becomes even shorter. That's why there's a greater need than ever for agencies and marketing departments to create smart, relevant work.

When you stop and think about the truly great advertising campaigns, engaging interactive websites, or smart lead generation programs, they all tend to have one common trait: **a singular message and focus.** This doesn't happen by accident. A significant amount of work goes into the Creative Brief to make it possible to produce a simple yet powerful creative product. Along the way, a clear, strategic brief can boost accountability and efficiency, and drive cost and time savings.

Boosting Accountability and Efficiency

One way to guide a creative project along to successful completion is to hold everyone—creatives and clients alike—to a common set of standards. The Creative Brief is a contractual document that's designed to do just that. So, in your haste to kick off a project, don't overlook the need to let all relevant parties review the proposed brief in a formal meeting, and be sure to get the sign-off of key decision-makers. (This is especially important for agencies because it's actually a *liability* to start creative work without your client's agreement.) Once everyone approves the brief, you and your team can move forward knowing that everyone is speaking the same language and working toward the same objectives.

If an issue arises during your project, your brief will function as a contractual backstop and a tool for enforcing accountability. Sudden changes in the strategic direction of the campaign? The brief will help you validate extra funding and schedule extensions. Scope creep? Renegade meeting comments? Overzealous client feedback? Your trusty brief will serve as a wonderful checks-and-balances tool. (Which reminds us: you'll want to bring extra copies of the brief to every meeting.)

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Driving Cost and Time Savings

Want to increase your profit margins and protect against budget overruns? Of course you do. That's why you'll use your well-written Creative Brief to run your projects efficiently.

By helping teams start each project with a clear direction, a good brief can help save enormous amounts of time and improve the final creative product. Take, for example, a website project that doesn't clearly identify the target audience due to a poorly-written (or non-existent) brief. The hired agency will probably jump to conclusions about the audience and develop graphics and copy that don't quite ring true. Then they'll waste days of production time incorporating client edits as deadlines loom.

Sadly, the Creative Brief can't make deadlines disappear. But when you kick off each campaign with a sound brief, you'll stand a much better chance of **keeping each project on schedule and on budget.**

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1.3: **Who Creates a Creative Brief**

To answer this question, let's work backwards. At the project kickoff meeting, everyone involved with a creative project should receive a copy of the Creative Brief. Before that point, all key decision-makers should have seen, contributed to, and signed off on the brief—but without muddying up the objectives and strategy.

Pulling this off is no small feat. Along the way, you'll need to:

Get the overall **market situation**, **project objectives**, **metrics**, and **target audience data** from CMOs, marketing executives, and marketing or marcom managers.

- ☐ Let senior creative teams take this data and apply critical thinking to **develop a project strategy.** On the agency side, this is usually handled by the strategist, account planner, or senior account executive.

- ☐ Engage marketing personnel to **fill in the main section of the brief.** This task may also fall to the mid-level marketing team or agency account team.

- ☐ Let creative directors and senior creatives **review the brief before kickoff.** This will help prevent the catastrophe of discovering during the kickoff meeting that the strategy is unworkable, the target is under-defined, or the key message is misguided.

- ☐ (For major briefs) **Get signoff from decision-makers** such as clients, CMOs, and agency partners, especially if they are going to be present in creative presentations.

If this process seems daunting, don't worry. This manual will show you exactly how to navigate each step, ensuring that all players are involved at the right stages and that your creative team can begin work with confidence and clarity.

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1.4: **What's the Secret Ingredient to Any Good Brief?**

One might be tempted to think that the best creative projects are the ones with the most input material. After all, copywriters and designers can't create in a vacuum.

With this in mind, some clients "help" the creative team by throwing PowerPoint slides, product data sheets, brand style guides, competitive analysis, sales managers' presentation videos, and endless email chains over the fence. Unwitting project managers will simply paste much of this information into the Creative Brief and hope for the best.

But if there's a hole in the logic of a creative campaign, it invariably becomes all too obvious on the pages of the Creative Brief. Which proves that the key ingredient to a good brief isn't background material—it's **critical thinking.**

For our purposes, critical thinking is the art of choosing which information will be most valuable to carry the storyline forward. Sticking too much information in the brief to avoid missing any details is not helpful—it only pushes the critical thinking process down the line to the creative team, who should be focusing on the creative product.

To be clear, **it is the marketing or account team's job to pare down input material to the most mission-critical components.** Choosing which content to include takes lots of practice. Good brief writing requires constant diligence and a knack for self-editing. When in doubt, ask the creative director or creative team if "borderline" information will be helpful to them. In the end, the best Creative Briefs trickle down gracefully from high-level objectives and only include the details that matter most.

The reason for this relentless editing ties back to the one person who really matters: the consumer or recipient of the marketing. Remind yourself how many times your audience is exposed to advertising each day and how little time they actually spend reading or reviewing ads. The best tactic for good marketing is clear, simple messaging and creative. The simpler the brief, the better the creative result.

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1.5: **How to Use Manual**

We've organized this manual to be used in several ways:

- As a tool to refine existing Creative Briefs and processes
- As a comprehensive training tool for existing staff and new hires alike
- As a guide for Creative Brief-writing workshops
- To help develop consistent workflow with clients and agencies
- As a checks-and-balances tool for senior staff

Refining Existing Creative Briefs and Processes

Although the basic principles of good marketing have remained consistent for years, the marketing environment changes all the time. For example, just a few years ago, there was no Twitter™, no Facebook™, and no need to address information architecture. Good briefs, like good marketing, change with the times.

Want to upgrade or fine-tune your current Creative Brief format and process? Every project represents an opportunity to learn and change—but it's best to limit major Creative Brief changes to once or twice per year. Changes of any kind should be communicated to the team along with a new version number. We'll discuss these topics in more detail in Section 4 of this manual.

Training Existing Staff and New Hires

Ensuring that all marketing staff are familiar with the Creative Brief program is a key aspect of running marketing campaigns to their potential. A good training program is as important for current staff as it is for new hires. Even experienced staff can benefit from regular check-ins—bad habits in brief writing often need to be ironed out. When you approach changes as a program or major department initiative, teams will be more likely to accept and adopt new standards. This manual will help.

Guiding Creative Brief-Writing Workshops

Workshops are a great way to get your team in sync on brief writing. By reviewing the components of the brief and sample briefs (both good and bad) in an interactive setting, teams can see firsthand how all sections of the brief should be addressed. Use this manual to help you offer one or two workshops per year.

Developing Consistent Workflows with Clients and Agencies

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Agencies and clients aren't always on the same page when it comes to marketing processes and project workflow. The Creative Brief is a useful document for finding common ground.

Getting all parties to agree upon a project's direction is both time consuming and challenging, but once you're in rhythm, this process helps foster healthy client relationships. The use of an "Input Doc" is a important first step (see Section 2.2) in getting a Creative Brief written quickly. It's also a handy tool for identifying gaps early in the process.

Establishing Checks and Balances for Senior Staff

Getting Creative Briefs or creative work approved by senior staff can be challenging even in the best of circumstances. Having a signed document that validates the strategic approach or creative execution is an effective way to keep a project on course—much more so than an agreement made verbally or by email. Briefs can be especially useful during creative presentations to help balance that vocal Sales Director, Product Manager, or other staffer who volunteers too many unhelpful comments.

Naturally, there will be times when the strategic direction of a project changes. The benefit of having a more formal brief process is that it's much easier to validate additional costs and schedule extensions. If the direction of the campaign or marketing changes, then a new brief should be drafted and approved. This manual is designed to help you through these and other common challenges.

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Section 2:

Planning & Process

Let's get your plan rolling. Before you actually start building your Creative Brief template, you'll need to evaluate your methods of gathering input, think about which type of brief would best meet your needs, and decide how your new brief will fit into the way you work.

1. The Benefits of Planning a Creative Brief Program
2. Gathering Input Before You Begin
3. Choosing a Brief Format
4. Process: The Foundation for Good Creative
5. How Creative Briefs Fit Into Your Workflow

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2.1: **The Benefits of Planning a Creative Brief Program**

Whether you're trying to build a Creative Brief program at an advertising agency or in a creative services department, you're about to establish a standard process that will benefit everyone involved in your creative campaigns. But although creative services departments and advertising agencies share many similar traits—such as creative goals, staffing models, and equipment—they operate quite differently. As a result, you'll derive slightly different benefits from the Creative Brief.

For Advertising Agencies

Agencies come in all shapes and sizes and span many disciplines. A recent study of advertising agencies in the San Francisco Bay Area found that of 200 agencies, approximately 60% were boutique shops, 30% were medium-sized agencies, and 10% were large shops with more than 75 employees. Services offered covered the entire marketing spectrum, including brand, online, digital, lead generation, direct, guerilla, social, broadcast, and media specialists.

Boutique agencies (those with two to 10 employees) face unique challenges based their size. Having fewer resources means wearing more hats and taking on more responsibilities. This makes it all the more important to have a brief that clearly defines all aspects of each project along with effective processes.

Most medium to large agencies have solid processes in place and are often well equipped to handle more complicated projects. Business can run more smoothly if everyone understands their specific role. The flip side is when too much process bogs down a project. In any case, a simple, well-crafted Creative Brief can guide processes and set project guardrails, allowing teams to stay focused.

For Creative Services Departments

Creative services departments also vary widely. Although there's no standard in what they're called —"brand department," "creative group," "the art department,"—when it comes to Creative Briefs, standardization is exactly what they need to keep projects running smoothly. Whether a creative services team consists of a couple of designers, a copywriter, and a web designer, or comprises several dozen people, it will benefit from building a process around writing creative briefs.

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Companies in startup mode may begin with a great product or service idea but be woefully thin on process. This lack of process can affect the creative product and hinder the ability to meet deadlines. On the other end of the spectrum, many corporate environments have too many layers of process, which hampers creativity. In either case, a standardized Creative Brief program will not only provide a better working environment, but also foster a much more efficient creative process.

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2.2: **Gather Input Before You Begin**

Before you launch any creative campaign, you should outline all relevant information in a Creative Brief. But is there a document you can use to solicit this information from project stakeholders? Yes. It's called an **Input Doc.**

Also known as a Client Briefing Doc, Project Kickoff Doc, or Project Download Doc, the Input Doc is one of the unsung heroes of any Creative Brief program. The purpose of this discovery document is to **get a baseline assessment of a project by asking high-level questions.** The Input Doc:

- Helps gather basic project information, such as name, participants, and PO number
- Sets goals and metrics for the project
- Provides a sense of timing and budget
- Provides high-level input on the project and market situation
- Lists possible deliverables
- Sets up messaging or messaging strategy
- Provides key client support documents

Not every company or agency uses an Input Doc. Some roll input directly into the brief, while others collect the input more casually through conversations and emails. But many agencies rely heavily on the Input Doc in determining the overall scope of work and which resources they should assign.

At its best, the Input Doc helps define a project from the outset, and saves time by forcing stakeholders to put critical details down in writing. It's a major improvement over long email chains. By developing a custom Input Doc that fits your agency or creative services department's needs, you can ensure that important questions will be addressed early in the planning process, before you even begin writing the Creative Brief.

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2.3: **Choosing a Brief Format**

As we've discussed, there's no such thing as a one-size-fits-all Creative Brief. Which type of brief is right for you?

That depends. Creative Briefs should ultimately be structured to serve the type of company and project they're written for. For example, direct response agencies will use different briefs than agencies that build corporate websites. Design shops will use different briefs than brand agencies.

Since good briefs require a significant amount of work to construct—and unless your company only does one type of project—it's beneficial to have a couple of different brief templates. You might elect to create a robust brief template that encompasses all aspects of a marketing campaign, and also a shorter version that can be used for smaller projects with tight schedules.

Whatever you decide to do, keep your fundamental marketing principles intact. We'll go into greater detail and indicate which components of a Creative Brief are essential in Section 5 of this manual. But for now, let's explore three common types of briefs:

1. The Campaign Brief
The Campaign Brief covers all relevant components of a large marketing campaign. It holds the greatest amount of information in terms of scope, detail, and variables. Designed to capture every possible aspect of a project, the Campaign Brief is especially useful for campaigns that extend into several different media and deliverables. This makes it an excellent choice for integrated campaigns, or projects that include lead generation, branding, and a website—provided all project components are strategically tied together.

2. The Creative Brief
The Creative Brief is the baseline standard for all projects. It works for any large project, such as an ad campaign, direct mail program, broadcast, or web video.

3. The Assignment or Project Brief
The Assignment Brief is simply a shorter version of the Creative Brief. Projects that are on tight deadlines and share key information in common—for example, the same brand standards or target audience

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2.4: **Process: The foundation for creative**

Don't assume that creative types will recoil at the idea of following standardized processes. To the contrary, most creatives truly appreciate a good Creative Brief and a consistent process. For a litany of reasons, marketing projects are too often rushed through creative departments. As a result, the work gets compromised.

A good baseline process for creative projects should include:

- Basic planning that considers strategy, budget, and timing.
- A single point of contact to manage the project.
- An efficient project management tool for posting work and tracking jobs (not email).
- A complete and focused Creative Brief or assignment brief.
- A kickoff meeting with all relevant players.
- A schedule that allows for each group to do their job within a reasonable timeframe, and includes specific creative rounds and presentation dates.
- Formal review meetings that directly tie back to the brief.
- Consolidated feedback on the creative work.

All of this sounds quite basic, but a surprising number of agencies and creative services departments miss the mark on the fundamentals. Yes, there will always be exceptions, and rush jobs are a fact of life. But if you put some basic processes in place, even your rush jobs will be much better positioned for success.

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2.5: **How Creative Briefs Fit Into Your Workflow**

Where should the Creative Brief fit into your workflow? The following table shows how it would work for a larger project. But in principle, the steps will remain the same for all projects.

	Stage	Tasks	Impact on Creative Brief	Agency Owner	Creative Services / Marketing Owner
1	**Project preparation**	**Gather input and collect information from the client (internal or external) by way of phone call, meetings, emails, or Input Doc**	Project information that is collected will later be refined when put in the brief. Keep information organized and well documented	• Account Services • Agency Partner • Director of Strategy • Creative Director	• Creative Services Manager • Traffic Manager • Marketing Manager • Project Manager
2	**Build out scope of work**	**Define deliverables, process, and high-level budget or estimate**	Keep a record of final deliverables. For agencies, keep track of hours spent	• Account Services	• Creative Services Manager • Traffic Manager • Marketing Manager • Project Manager
3	**Project contract (agency)**	**Finalize Statement of Work or Project Contract if on a project-based relationship**	Keep a record of final deliverables	• Account Services	• Creative Services Manager • Traffic Manager • Marketing Manager • Project Manager
4	**First draft of creative brief**	**Write up the first draft of the Creative Brief based on client or team input**	This is the time to scrutinize and cull down information. Culminate and summarize all the relevant information that came from the planning and discovery process	• Account Services	• Marketing Manager • Project Manager
5	**Internal review, revisions, and final approval of brief**	**The first draft of the brief should be circulated to major stakeholders for approvals**	Managing approval of the brief is mission-critical (See Section 3.3: Managing Approvals for Your Creative Briefs)	• All stakeholders should review and approve major briefs	• All stakeholders should review and approve major briefs
6	**Client approval**	**Review Creative Brief with client or primary marketing contact**	The account team should walk the client through the brief, make changes, and get an approval signature	• Account Services	• Marketing Manager • Project Manager
7	**Project kickoff**	**The project kickoff meeting is intended to get the entire team working in unison and answer any remaining questions**	At this point, the brief should be final and approved. It is now the lead document of the project	• All stakeholders	• All stakeholders
8	**Creative reviews**	**Review of creative work**	The key points of the brief should be reviewed at the beginning of meetings to provide context for the creative, and can be referenced throughout the meeting as necessary to keep comments focused	• All stakeholders	• All stakeholders

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Section 3:

Deploying Your Creative Brief Program

Here's where the rubber meets the road. We're going to take you step-by-step through the process of launching your Creative Brief program.

3.1. Deploying Your Creative Brief Program: Checklist
3.2. Deploying Your Creative Brief Program: Details
3.3. Managing Approvals for Your Creative Briefs
3.4. Running Creative Review Meetings

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3.1: **Creative Brief program check list**

Every agency or company's Creative Brief program is different. Large creative services departments may have a sophisticated and formal process along with a continued training program. Boutique agencies may simply send an email letting staff know that there is a new form on their Wiki.

The following overview represents a fairly elaborate brief program. Depending on your needs, you may use it as-is, or as a starting point for your own plan.

> **Note:** *Be sure that your agency or department has a good file naming convention and file organizing system. This will ensure that the most current briefs will be easy to find at a moment's notice.*

Rolling out a Creative Brief program - overview:

- ☐ **Step 1:** Define high-level issues
- ☐ **Step 2:** Get executive support
- ☐ **Step 3:** Communicate your initiative to the team
- ☐ **Step 4:** Ask for feedback on the current format
- ☐ **Step 5:** Identify and review successful briefs
- ☐ **Step 6:** Ask the best brief writer on staff for help
- ☐ **Step 7:** Write a brief template that's tailored to your specific deliverables
- ☐ **Step 8:** Have key stakeholders review and approve the revised brief
- ☐ **Step 9:** Develop the Creative Brief rollout plan
- ☐ **Step 10:** Kick off the program with the entire team
- ☐ **Step 11:** Review suggestions and make final edits
- ☐ **Step 12:** Conduct one brief-writing workshop
- ☐ **Step 13:** Launch the new brief program
- ☐ **Step 14:**Check in with your teams after 6 weeks
- ☐ **Step 15:** Schedule ongoing workshops and train new hires
- ☐ **Step 16:** Regularly update the brief

Read on for a full explanation of each step.

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3.2: **Deploying Your Creative Brief Program: Details**

GDeploying your brief program properly helps ensure that all the effort you put into creating the program will be carried forward. Include your whole team in the process—and make a big deal out of it.

Teams should be clear that this is a major initiative and that management is behind the effort. A solid Creative Brief program will improve how projects are run, saving you time and money.

Here are the steps, explained in detail:

☐ **Step 1: Define high-level issues**

If you're considering rolling out a Creative Brief program, chances are you've already experienced some issues and have a pretty good idea of what's working and what's not. Either way, it's worth setting up an informal meeting to get some input.

Questions can be about the brief itself, or about the high-level issues that are plaguing the department as a result of poor Creative Briefs. Here are few questions to consider:

- Are deadlines being met or missed?
- Are project objectives creating clarity or confusion?
- Do creative kickoff meetings run smoothly? Is the information coherent?
- Are details getting missed at creative kickoffs that result in extra rounds or presentations, or work that is off-strategy?
- Are teams frustrated?
- Do the creative team and the account team get along?
- Are projects going over budget or beyond allocated hours?

A good Creative Brief program can go a long way towards mitigating these issues—if not solving them completely—and can send a clear signal to the team that things are about to change.

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☐ **Step 2: Get executive support**

Management support is absolutely critical to your Creative Brief program. Since the brief will affect so many team members across your department or agency, it's essential that people understand the importance of this initiative.

Getting buy-in is much easier when you have a list of department pains that can be addressed —even more so if that punch-list includes some quantifiable numbers. For example, if your advertising agency is struggling with profit margins because unexpected extra rounds of creative review are causing projects to exceed budgeted hours, then set a goal of 70% utilization with 30% profit margin based on the potential increase in efficiency. After all, Creative Brief programs are not only about improving the creative product, but also the bottom line. In one case, a Bay Area *Fortune* 500 company increased the quantity of projects it could execute by 50% based mostly on fixing its Creative Briefs and process.

☐ **Step 3: Communicate your initiative to the team**

Send an email or announce to the team that the new initiative is rolling out, and that their involvement is critical to the program's success. This better prepares them to respond in a timely manner when things get going. Here's a sample email:

> *Subject Line: New Creative Brief Program Coming Soon.*
>
> *Team:*
>
> *I am very pleased to announce that ACME will be deploying a new Creative Brief program. This is a major initiative that has the leadership team's full support and will be launching on September 15. Please be ready to provide input and attend two meetings over the next month.*
>
> *This program will be beneficial on a number of levels, and aims to:*
>
> - *Increase the overall efficiency of marketing department projects*
> - *Ensure that objectives are clear at the outset of each project*
> - *Cut down on the number of creative review cycles*
> - *Set a streamlined and standardized format for all briefs*
>
> *Keep an eye out for updates and meetings. Your participation will help make this program a success.*

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☐ **Step 4: Ask for feedback on the current format**

Following the initial announcement, run a survey or schedule a meeting to get the team's input on what specific issues they're having with the brief format.

Surveys are a simple way to get everyone's feedback—especially in a larger environment. The results can both validate your current project strategy and inform your future decisions. If your company doesn't already use a survey tool, there are several good inexpensive or free options available, including Google Forms and Survey Monkey. I recommend a shorter survey as a way to capture a snapshot of overall issues.

The following sample survey is based on five questions plus a comments area. Each question is worth up to 5 points, with a total of 25 possible points. This makes it easier to yield a percentage. (For example: total response points = 23. Multiply 23 x 4 = 92%)

New Creative Brief Program Survey: Your input is needed by August 15.

As part of the new ACME Creative Brief program, we're asking for your input. Please answer the questions below. Completing the survey will only take a couple minutes. Deadline: August 15.

Q: Please rate the effectiveness of the current brief format. (1 - 5)

Q: The brief meet the needs of the client (or marketing team, or creative team).

- Yes, the current brief meets all our needs (5 points)
- Mostly, but not all the time (4 points)
- Some of the time (3 points)
- Not at all (2 points)
- The brief has a negative effect on projects (1 point)

Q: Does the brief improve the end creative product?

- Strongly agree (5 points)
- Mostly, but not all the time (4 points)
- Partially agree (3 points)
- Don't agree (2 points)
- Ultimately, the brief hurts the creative product (1 point)

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Q: Team members have a solid understanding of the brief.

- Strongly agree (5 points)
- Mostly, but not completely (4 points)
- Partially agree (3 points)
- Don't agree (2 points)
- General lack of understanding creates more issues (1 point)

Q: The brief improves the overall efficiency of the creative department.

- Strongly agree (5 points)
- Mostly, but not all the time (4 points)
- Partially agree (3 points)
- Don't agree (2 points)
- The brief is making things worse (1 point)

Q: Please provide any suggestions on how we can improve the Creative Brief.
(Area for notes)

☐ **Step 5: Identify and review successful briefs**

Collect briefs from each of your team members along with a couple of briefs from recent successful projects. Spend some time analyzing what is working and what's not, while trying to identify the best brief writers on your staff. If you have a couple of people on your team who are particularly good at writing briefs, they can be part of the committee to help get everyone up to speed. (See Step 6 for more information)

As you review the briefs you've collected, look for patterns. Is there too much information? Are the goals unfocused? Do people understand what psychographics are? Build a list of items that you feel need improvement, and plan to use them as discussion points.

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☐ **Step 6: Ask the best brief writer on staff for help**

Building a successful Creative Brief program is no small undertaking. It will be at least a 4–6 week process in a medium or large environment, but can go faster if other managers or team leaders are involved. Ask the most proficient brief writers to be part of the initiative and to help support the program. Give their role a name, such as Team Leader, Manager, Creative Brief Commissioner, or Creative Brief Committee.

☐ **Step 7: Write a brief template that's tailored to your specific deliverables**

Although the core elements of a good brief should be consistent, most companies and agencies customize their briefs to fit their needs and reflect management's marketing philosophies. Ultimately, the document will need to be useful and effective for the environment or project. By doing research ahead of time, you should have a fairly clear idea of what to tweak.

☐ **Step 8: Have key stakeholders review and approve the revised brief**

Once you've configured the components of the brief, run it by the major stakeholders and the Creative Brief committee. This meeting should be less of a brainstorming meeting and more of a presentation of the new Creative Brief format.

Present the overall findings from the research and the key benefits of the new program, and ask for **minor changes only**. If there are requests for major changes—or if there's a squeaky wheel in the group—consider taking that conversation offline to address specific suggestions. Once the brief is approved by key stakeholders, it will be much easier to implement.

☐ **Step 9: Develop the Creative Brief rollout plan**

The process surrounding a brief program can vary greatly depending on the company or agency. In a corporate setting, your new process may need to comply with other formal processes, whereas at an agency, it may be reviewed at an "all hands" meeting featuring a

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full lunch spread. In either scenario, having a basic and well-organized outline can help provide context for the new program.

Possible program materials:

- Program overview and objectives.
- Simple step-by-step process outline of how a brief gets created and who is responsible for approvals.
- Ground rules, or a list of do's and don'ts:
- Every project must have a brief before creative development can start.
- Clients and key decision-makers must approve briefs for all major projects.
- Dates for upcoming review meetings and workshops.
- Definition of Creative Brief components.
- Sample briefs.

☐ **Step 10: Kick off the program with the entire team**

The first kickoff is an opportunity to review the program and get final feedback from the team. Any lingering issues should be taken offline to make sure the meeting stays on track. Here's a suggestion on how to break down a 90-minute meeting:

0:15 Introduction of the brief program and objectives
0:15 Review of team feedback and problems that will be solved by the new program
0:15 Review of the new process and dates for upcoming brief workshops
0:30 Review of the new brief format
0:15 Team feedback on the new brief format

☐ **Step 11: Review suggestions and make final edits**

By this stage, all final feedback should have been submitted and incorporated as needed. Materials should be assembled in a PDF and/or in printed form. Be sure to spend a little extra time formatting and packaging your documents to create a visually attractive presentation.

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☐ **Step 12: Conduct one brief-writing workshop**

Your first brief writing workshop will be a foundational piece of your larger program. This hands-on workshop is an excellent way to let the team practice newfound skills. If there are team leaders or a Creative Brief Commissioner present, they should be heavily involved in this meeting. (See Section 4.1 for more information.)

☐ **Step 13: Launch the new brief program**

Launching a new Creative Brief program is a significant event—especially if the previous brief program floundered, or if there was no program at all. It's worth making a formal announcement about your program to clients and other departments.

Subject Line: New Creative Brief Program 1.0 Has Officially Launched

Team:

After only 6 weeks and with input from the entire team across all departments, it gives me great pleasure to announce that our new Creative Brief program is live. Thank you to everyone for their participation and input.

This new program will be a significant improvement in a number of areas:

- *Increasing overall efficiency of projects*
- *Ensuring that objectives are clear from the onset of the project*
- *Cutting down on the number of creative review cycles*

Moving forward, we'll be conducting bi-annual writing workshops and formally asking for feedback. Mary Y. and Courtney M. will be available to provide feedback, answer questions, and train new hires. Each team member should consider themselves an advocate of the new brief, and should actively provide suggestions.

You can find the final manual and templates on the server with the following file names…Again, thank you for your ongoing participation.

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☐ **Step 14: Check in with your teams after 6 weeks**

Check in every so often with teams that are using the brief, just to see how things are going. Often, small issues will arise, or certain team members will struggle a bit. Checking in is a fast, easy way to keep your finger on the pulse.

☐ **Step 15: Schedule ongoing workshops and train new hires**

(See Section 4.1)

☐ **Step 16: Regularly update the brief**

(See Section 4.3)

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3.4: **Managing Approvals for Your Creative Briefs**

When stakeholders make too many changes to a brief, it invariably becomes overloaded with information. This distracts everyone from the purpose of writing a brief in the first place: to establish a focused and concise direction for a project.

That's why managing the approval of a Creative Brief is a mission-critical task. By getting stakeholders to agree to the contents of a brief up front, you can prevent many headaches down the road. The challenge comes in knowing how to approach this task. Every company and agency has its own internal processes and politics to navigate. Reviewers often forget that the goal is to make the brief better, not necessarily longer.

Here's what we recommend: Once the first draft of your brief is written, circulate it for internal feedback. The key to getting the right kind of feedback is to **ask very specific questions.** For example, if the sales team is involved in the project, ask them to look specifically at the metrics goals, or to verify that the prospect's pain points align with what they are hearing in the field.

What if a team member insists on trying to dismantle the brief? Schedule a time to review the document with them in person. This will help you prevent misunderstandings and eliminate hours of "email ping-pong."

That said, there are three distinct approaches you can take to circulating a brief for approval, each with its own pros and cons:

The "Single Point of Contact" Approach

This approach is all about designating one project manager to coordinate the brief. This point of contact will manage the documents and work directly with key stakeholders. Responsibilities include:

- Collecting all input and information from the discovery process.
- Working with the strategist, account planner, or marketing manager on high-level planning.
- Writing and managing all the core elements in the brief.
- Working directly with team leaders on getting feedback from a creative, user/information architecture, production, and traffic standpoint.
- Managing client approvals and kickoff meetings.

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The Single Point of Contact approach can be time-consuming for the project manager in charge of approvals—but it's time well spent. By keeping all stakeholders on task and pushing the approval process forward, he or she can save the department or agency countless hours of wasted time later on.

The "Team Meeting" Approach

The Team Meeting approach is less time-consuming than the Single Point of Contact approach. It consists of bringing team leaders together to hash out the brief in one or more meetings.

You'll still need to designate someone—probably a project manager—to manage the meeting(s). This person will help ensure that project objectives are adhered to and the contents of the brief remain streamlined. Be sure that key stakeholders are present at the meeting to provide feedback in their specific areas of expertise. But if any item in the brief has already been "locked down" before the meeting, be sure to call that out.

The "Circulate by Email" Approach (CAUTION!)

Perhaps you're wondering, "Can't I just send a brief around by email, tell stakeholders to make any comments by 5:00 PM on Friday, and be done with it?" Well, sure. But this approach typically only works well with a marketing team that has extensive experience reviewing briefs in this manner. More commonly, circulating by email results in a "feeding frenzy" of edits. Too many players get involved, the feedback gets muddy, and the content becomes over-saturated.

If you still feel compelled to circulate a brief by email, be sure to ask each team member to review the document from their specific areas of expertise. Also, advise reviewers that for political reasons, not all feedback will be applied to the final brief. Encourage anyone who has major concerns to see you directly.

Getting Client Approvals

Regardless of how you decide to manage approvals, getting client approval will be a major milestone for your project. Once you get your client's signature on the brief, you'll head into the project knowing that everyone understands—and will adhere to—the parameters and details of the project.

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3.4: **Running Creative Review Meetings**

When will the strength of your Creative Brief really begin to shine through? During creative review meetings. The Creative Brief is a backstop of accountability that keeps everyone on track and focused through internal reviews and client meetings alike.

Now, we understand that every agency and internal creative services department runs its meetings differently and allows varying degrees of input. And each Account Supervisor or Creative Director has their own style of collecting and responding to feedback. In addition, some advertising agencies will customize one particular presentation to fit their creative, or completely break the mold to win a pitch. But in spite of these differences, the following steps will give you a baseline approach for leveraging your Creative Brief during creative presentations:

1. Start by reviewing the project objectives from the brief.
To get everyone in the meeting focused and in the right mindset, briefly recap the project and its objectives.

2. Review the #1 big issue for the project.
Each project has one underlying issue or challenge that the creative can solve. It may tie back to the KPI, or it may be the client's underlying pain point. Being conscious of what matters most to your audience makes a huge difference in your ability to evaluate the creative.

3. Communicate to the group what they will be reviewing and how to provide feedback.
Have you ever received totally irrelevant feedback during a presentation and wondered whether all your hard work on the project was a complete waste of time? Relax. Quite often, the people who offer this frustrating feedback are just trying to be helpful, but haven't been told how to provide input.

It's a courtesy to your reviewers to make it clear what kind of feedback you're expecting at every stage of a project. For example, you might tell them: "Today we'll be reviewing three conceptual directions with print ads and initial microsite designs. We are at Round 1, so these are **directional only.** The artwork and copy are not final. Let's run through the creative, and at the end of the presentation, we'll be looking for feedback on the direction of the ideas as they relate to the brief."

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4. Ask everyone to hold their feedback until all the creative has been presented.
Most people in meetings will be respectful of the speaker. But it doesn't hurt to gently remind your audience to hold their questions and comments until after the presentation. (Naturally, members of your presentation team may chime in to make key points that help flesh out the story.)

It's fairly common to have a reviewer interrupt a presenter with feedback—even when asked ahead of time not to. When this happens, simply remind them to hold their feedback. If you're presenting to a large group, consider using a method called the **silent review.** It takes a little practice, but it can be very helpful when you're subjecting your creative to multiple opinions. It works like this:

- Buy a box of gold stars or stickers from your local office (or school) supply store.
- Tell the group they'll be participating in a silent review of the creative.
- Ask everyone to refrain from making comments during the presentation.

At the end of the presentation, give everyone a gold star and ask them to cast their vote by placing their star on a creative direction. This method usually determines an immediate creative winner and loser. It also allows any born critics in your audience to channel their negative energy towards the creative directions that have already been eliminated. In short, the silent review is a simple yet effective way to manage group dynamics and make sure everyone's opinion carries equal weight.

5. Ask reviewers to differentiate between personal opinions and feedback that is directly related to the brief.
When you ask reviewers to tie back their comments to the brief, they'll tend to be more selective about what they say. This is a good thing. By the time they present concepts, the creative team has invested a lot of work and resources in the project. Any comments at that point should be based on critical thinking and strategy, not subjective opinions. Thus, if someone doesn't like a creative approach, they should have a reason that ties back to the brief. For example, if someone objects to a green callout box on a direct mailer because the creative mandatories say to stay within a red and orange color palette, that's a valid point. But if you suspect they just don't like green, ask them to expand their comment in relation to the brief.

6. Consolidate feedback through a single point of contact whenever possible.
After creative work is presented, have the project manager review and consolidate feedback and present it to the creative team in one batch.

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Section 4:

Managing Your Creative Brief Program

You've launched your Creative Brief program. How do you keep it running effectively? Read on to find out.

4.1 Providing Ongoing Training
4.2 Updating Your Creative Brief
4.3 Policing Your Creative Briefs

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4.1: **Providing Ongoing Training**

You've planned, launched, and announced your new Creative Brief. Your superiors and colleagues are thrilled.

But as time goes by, the initial momentum of your new Creative Brief program will naturally fade. Demanding clients and rush projects will make it all too tempting to "just get it done."

How can you keep your teams from falling back into bad habits? By providing ongoing training.

Plan to provide one or two Creative Brief workshops throughout the year for your entire project team. Designate a Creative Brief Commissioner or small committee to run your training program. These refresher courses can be an excellent way to iron out issues and improve on the format of your brief. By getting your whole team involved with the program, you'll enable each member to become an advocate for producing good briefs.

Your Commissioner or committee can:

- Review team members' briefs and provide suggestions
- Solicit feedback from all team members on the brief program
- Plan writing workshops
- Train new team members on the brief program
- Ensure that everyone has the most up-to-date documents

Workshops will probably run 2 to 4 hours, depending on the size of the group and the skill level of the team. There are many different ways to run a workshop. Meeting agendas should be tailored to fit the unique needs of the company and group. Here's a possible agenda:

0:15	Introduction and review of the agenda and workshop goals
0:15	Review the company's Creative Brief program goals
0:30	Review the team's feedback and suggestions on improving the program
0:45	Review sample Creative Briefs, both good and bad
0:45	Practice writing key messages (ask the group to improve some poor examples)

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4.3: **Updating Your Creative Brief**

Upgrading a company's software is typically a formal process that occurs at regularly scheduled intervals and is marked by clear communication. The process of changing and updating your Creative Brief should be no different.

Over time, you'll need to update your Creative Brief based on the changing needs of your organization. Keep these guidelines in mind:

- Updating your master template too often can create version control issues and widespread
- confusion. Aim to perform any major updates once per year, with minor tweaks occurring at the six-month mark if necessary.

- Base your updates on internal surveys and workshops.

- Your Creative Brief Commissioner or manager will have the best insight into your entire team's pain points in using the current brief. Let him or her be the final approver of any updated brief format.

- Always indicate the version number of the brief somewhere on the document. **Example:** ACME Inc. Creative Brief Template – Version 3.0

- Your Creative Brief is an indispensable document. Send out an official email to stakeholders to announce any specific updates and improvements to the format.

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4.2: **Policing Your Creative Briefs**

Ever heard of “Brand Police” or a “Brand Sheriff”? You’re more likely to hear these affectionate nicknames in corporations than in agencies. They refer to someone whose job it is to make sure a company’s brand is 100% on target across all touch-points.

Your Creative Brief Commissioner has a similar job, but it applies to the way people use the Creative Brief. Ideally, your Commissioner will **review a few samples of campaign briefs per month to make sure the official format is being followed as closely as possible.** He or she can deliver minor corrections or comments on the fly. (Compliments are also helpful.) And if anyone is having major problems sticking to the format, your Commissioner can schedule a meeting to refresh the team’s memory on what a successful brief looks like.

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Section 5:

Types of Briefs

Now that you know how to run a Creative Brief program and what key elements to include in your briefs, let's take another look at popular brief formats and discuss how to tweak these formats to meet your needs.

5.1. The Three Most Commonly Encountered Briefs
5.2. Customizing Your Creative Briefs

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5.1: **The Three Most Commonly Encountered Briefs**

Campaign Briefs

The Campaign Brief encompasses all aspects of a marketing campaign. It's the "largest" brief in terms of scope and detail. The Campaign Brief is designed to capture every possible aspect of a project, especially if that project extends to several types of deliverables. It's an excellent choice for integrated campaigns or a project that includes branding and a website—provided that all project components are strategically tied together.

Creative Briefs

The standard Creative Brief is the baseline document for most projects. It works for sizable projects, such as ads or campaigns, direct mail programs, broadcast, or web video. While agencies tend to keep their briefs extra-short, creative service departments and corporate environments will often build more robust and content-rich briefs. Either way, it's the creative team that will ultimately need to sit down to concept and figure out how to execute the marketing. If they have the aid of a streamlined brief that covers the fundamental components, then the entire process has a much greater chance of being successful.

Assignment or Project Briefs

Assignment briefs are for quick-turn or small projects. Like their larger counterparts, they include the relevant content for the project but omit certain big-picture items and have less information. For example, an email or banner for an established brand doesn't necessarily need a Situational Overview or Development Considerations. Because Assignment Briefs are easier to fill out, they sometimes seem like the fastest way to get a project moving. But they should only be used for small projects.

If there's a question about which brief format to use in your organization, ask your Creative Brief Commissioner or read through the sections of the Creative Brief to see if any of the categories are relevant. Some creative services departments or agencies will predefine when it's appropriate to use an Assignment or Project Brief and on which types of projects.

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5.2: **Customizing Your Creative Brief**

Consistent Creative Briefs help build a rhythm of how information will flow and be absorbed throughout a creative services department or agency. By using the same descriptions and categories, account teams can begin to communicate more effectively with creatives and clients. After a few projects, teams get in sync, start to better understand their roles, and begin to add more value to meetings.

But most companies or agencies do customize their briefs to meet their specific needs and unique environments. The following chart represents which sections would be most essential to include in each type of brief.

It's better to keep the most fundamental categories—even if they only have limited content—than to strip out too many sections. If a category does not apply to a project, it's better to write "Does not apply" in the brief than to change the brief format. Once a Creative Brief template is locked down, it should not be modified unless the brief is undergoing an official update.

Section	Campaign Brief	Creative Brief	Assignment Brief
Situational Overview	**X**	**X**	**Optional**
Program Summary	**X**	**X**	**X**
Key Objective	**X**	**X**	**X**
Metrics	**X**	**Optional**	**Optional**
Target Audience	**X**	**X**	**X**
Demographics	**X**	**X**	**X**
Psychographics	**X**	**X**	**X**
Net-Take-Away	**X**	**X**	**X**
Key Experiences	**X**	**Optional**	**Optional**

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Section	Campaign Brief	Creative Brief	Assignment Brief
Point of Difference	X	X	Optional
Key Message	X	X	X
Benefits	X	X	X
Features	X	X	X
Tone and Personality	X	X	X
Creative Considerations	X	X	X
Development Considerations	X	Optional	Optional
Deliverables	X	X	X
Offers and Testing	X	Optional	Optional
Call-to-Action	X	Optional	Optional
Budget and Timing	X	X	X
Brief Approval	X	X	X
Addendum	X	X	X

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Section 6:

Key Components of a Creative Brief

What goes into a good Creative Brief? After reading this section of the manual, you'll never have to ask that question again. We're about to walk you through every key element of a Creative Brief.

6.1. Header and Version Control
6.2. Situational Overview
6.3. Program Summary
6.4. Key Objective
6.5. Metrics
6.6. Target Audience
6.7. Demographics
6.8. Psychographics
6.9. Net Take-Away
6.10. Key Experience
6.11. Point of Difference
6.12. Key Message
6.13. Benefits
6.14. Features
6.15. Tone and Personality
6.16. Creative Considerations
6.17. Development Considerations
6.18. Deliverables
6.19. Offer and Testing
6.20. Call-to-Action
6.21. Budget and Timing
6.22. Brief Approval
6.23. Addendum

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6.1: **Header and Version Control**

Purpose: Clearly label the administrative details of the project and provide version control

Importance: Essential

Also called: N/A

At the beginning of a rush project, we all tend to overlook basic information. But taking the time to set up the administrative aspects of a project right away can prevent confusion and wasted time later. For example, everyone should know the correct name, job number, and PO number of a new project at its inception. In addition, having a chart for document version control can be a lifesaver.

You can accomplish these goals by including a Header and Version Control in your brief.

The Header and Version Control section:

- Provides basic project identification information at a glance
- Informs the team of who the stakeholders are
- Provides a summarized history of the brief's development

Header and Version Control example:

Project Name: ACME Fall Offer Campaign
Job Number: JAA-103-11
PO #: 7564-09-87-2011

Primary Agency Contact: Ronald J
Account Team: Courtney M.
Creative Director: Frank R.
Development: Martin F.
Key Client Approvals: Kristen R, Candice M, Mike M.

Version Control:

Version	Reviewer	Date	Summary of Edits
1.0	Ron Johnson	9/10	First Draft of Brief
2.0	Frank Ruez	9/11	Added Key Message

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6.2: **Situational Overview**

Purpose: Provide context for the project and an understanding of relevant market circumstances
Importance: Essential
Also called: Market Overview, Situational Analysis, Project Background, Current Market Situation, Market Opportunities

The Situational Overview is an opportunity to provide a high-level description of the market circumstances and opportunities that surround a project. As a rule-of-thumb, it's best to limit this section to a summary because it functions as a way to provide context for the rest of the brief. If it's more than two or three paragraphs, it's too long.

The Situational Overview section:

- Provides a summary of the high-level marketing plan or objectives
- Describes the issues and opportunities that exist in the marketplace
- Provides context for the project

Situational Overview example:

ACME ACCOUNTING is the number one web-based accounting software and currently holds an 18% share of the web-based accounting software market with 50–60% brand awareness. Despite those healthy industry numbers, a large majority of prospects are unclear of the range of services and cost savings benefits that ACME ACCOUNTING offers in comparison to other traditional solutions.

Businesses have an array of operational and financial management issues that ACME ACCOUNTING can address, greatly improving their profitability. Business owners are receptive to learning how they can operate more efficiently, increase revenue, and spend less time dealing with administrative hassles.

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6.3: **Program Summary**

Purpose: Provide an overall description and purpose for the project
Importance: Essential
Ties back to: Situational Overview
Also called: Project Overview

The Program Summary is a culminating overview of the campaign or project delivered in a crisp and consolidated summary. It should explain what type of program it is, how it will benefit the target audience, and how it will work. It should also include the basic deliverables that will be produced in the program.

The Program Summary section:

- Clearly states the type of marketing program, such as “brand awareness” or “lead-gen”
- Explains what the project is and how it takes advantage of opportunities in the marketplace
- Provides a summary of deliverables

Program Summary example:

The primary objective of this campaign is lead generation.

In an effort to provide prospects with a more comprehensive explanation of the company’s services, ACME ACCOUNTING is producing a four-page marketing collateral piece that will be leveraged in several different ways. Respondents will be driven to a landing page environment where they will watch a brief product demonstration. Once there, they will be prompted to participate in a full tour of ACME ACCOUNTING via WebEx from an ACME ACCOUNTING sales associate. They will enter their name, email, and phone number. That information will be sent to the ACME ACCOUNTING Sales Team, who will follow up with the prospect.

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6.4: **Key Objective**

Purpose: Singularly define what would make the project a success
Importance: Essential
Ties back to: Situational Overview and Program Overview
Also called: Main Objective, Primary Objective

The Key Objective is the salient goal of the project. It provides a big-picture view that encompasses all aspects of the campaign. Because it can be challenging to boil down a project to one strong message, the task of crafting the Key Objective is often driven by the Director of Strategy, Account Planner, or another senior staff member. But despite the difficulty of the exercise, it's an important process that helps iron out flawed thinking and unify the team.

The Key Objective section:

- Focuses the entire team on the main objective of the project
- Creates a sense of accountability in which all efforts tie back to the main goal

Remember, **simplicity is key.** Simple messaging will communicate more effectively to busy and overloaded consumers. And your creative team will be grateful to have clear objectives at the start of the project.

Key Objective examples:

Convert prospects to leads with a compelling direct mail piece that highlights ACME's new brand.

Provide customers and prospects with an exciting and user-friendly experience that drives response.

Drive prospects to a landing environment that captures their imagination and ultimately changes their hearts and minds.

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6.5: **Metrics**

Purpose: Establish measurable benchmarks that will be addressed by the specific marketing efforts
Importance: Essential for projects that have measurable deliverables
Ties back to: Program Objective
Also called: Key Performance Index, Analytics, Performance Metrics, Success Metrics

Each type of campaign or project is measured differently. A banner ad campaign takes a much different approach to measurements than a direct response mail project. Some agencies live and die by campaign measurements and analyze every possible aspect of response—especially when it comes to optimizing emails and landing pages. But they'll take a different approach to measuring the success of an awareness or brand identity campaign, where the results are less tangible.

Your metrics should be specific to each marketing campaign, and not tied to tactics beyond the reach of the marketing deliverable you're creating. For example, if a campaign drives leads to Sales, then your campaign metric should be percentage of leads to Sales—**not** the final sales conversion figures, since much of that responsibility belongs to the Sales team.

When applicable, the Metrics section:

- Provides a sense of purpose for the campaign
- Provides the creative team with benchmarks
- Manages the client's expectations
- Helps quantify campaign success

Metrics example:

<u>Lead Generation Campaign for Sales.</u>

- Overall campaign goal: 6%
- Email open rate: 35%
- Email click-through: 10%
- Qualified leads to Sales: 4%

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6.6: **Target Audience**

Purpose: Summarize the main group at which the campaign is directed
Importance: Essential; sometimes combined with Demographics and Psychographics
Ties back to: Situational Overview, Program Objective
Also called: Core Target, Primary Audience

Knowing your audience is essential to any program, campaign, website, or ad. You can set up the Target Audience section of your brief in a couple of different ways. Some agencies like to write one comprehensive paragraph that explains their core audience, including their demographics and pain points. This paragraph will be similar to the Situational Overview, but will be written strictly from the viewpoint of the Target Audience.

Alternatively, you can write a short paragraph and list the demographics and psychographics separately. As with all sections of the brief, it's helpful to be as succinct and to-the-point as possible. If there's an abundance of information—as is often the case in corporate environments—distilling the target down will truly help the creative process. The best-of-the-best agencies often have the shortest target audience descriptions.

The Target Audience section provides a summary of:

- The audience's beliefs and perceptions
- The audience's issues or pain points
- Why the audience should care
- How the campaign will make the audience's lives better

Target Audience example as a single paragraph:

Accountants spend their entire day trying to make sense of the details. They crunch numbers for their clients and dedicate themselves to finding balance (literally) in their work. Most available business management software is clumsy and difficult to use. As small business owners, accountants would rather spend time helping their clients than trying to wrangle their software. Time is their most precious commodity. Accountants are looking for a tool that is as effective as it is easy to use—something that will help them get back to what matters most: their clients' needs.

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6.7: **Demographics**

Purpose: Define the specific characteristics and attributes of your target audience
Importance: Essential
Ties back to: Target Audience
Also called: Target Audience Demographics, Target Audience Profile

Knowing demographic information such as age, gender, location, or income bracket can greatly affect the outcome of your creative. It's not hard to see why. A conversation with a 20-year-old female college student will undoubtedly be different from a chat with a 45-year-old male entrepreneur.

That's why demographic information is an essential part of any brief. If there are segmented demographic groups to include in the brief, simply label each one and provide specific profiles. But as always, simplicity is best. The more complex this section of the brief becomes, the more watered-down the creative concepts will be.

The Demographic section may include:

- Age and gender
- Location
- Income bracket (if relevant)
- Ethnicity (if relevant)

Demographics example:

Average annual billings and revenue: $350k-$500k per business

Job titles: Patient Care Coordinators (receptionists), audiologists/dispensers, offices managers, business owners

Geography: All over the US

Average number of employees: 2-15

Average number of customers: 3,000 patients per business, with 1,000 of them buying hearing aids at any given time.

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6.8: **Psychographics**

Purpose: Define the pain points that the campaign can solve
Importance: Essential
Ties back to: Target Audience, Demographics
Also called: Current Perceptions, Current Behavior, Pain Points, Emotional Triggers

For all the strategy, spreadsheets, and analytics we can come up with, nothing is nearly as powerful as the emotional outcome driven by the Psychographics section of the brief. Psychographics are attributes relating to characteristics such as personality, perceptions, and attitudes. For the purposes of a Creative Brief, they should be narrowed down to only those items that marketing campaign will address and solve from the target audience's point of view.

In the case of a brand campaign, there might only be one pain point that an ad will solve. In contrast, a lead-generation website may include multiple audiences with multiple pain points that are addressed throughout the site based on user flows.

Almost without exception, people put their emotions before their rationale when buying a product. The Psychographics section of the brief is an excellent place to capture that variable.

The Psychographics section answers these questions:

- What is the one thing the target audience cares about most?
- What are the target's top 3–5 pain points that the campaign will address?

Psychographics example:

In general, accountants want a solution but are putting it off because they don't like change. They are afraid the transition will be difficult. They are afraid they will lose data during the migration from their current system. They are afraid their staff won't like it. They have a misunderstanding of what it will cost, and they are very, very cheap.

Pain Points:

1. Inability to track sales
2. Inability to easily market to their client database
3. Inability to manage multiple offices
4. Overall inability to stay organized and manage their businesses

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6.9: **Net-Take-Away**

Purpose: Define what we want the Target Audience to think and feel
Importance: Essential
Ties back to: Psychographics
Also called: Desired Perception, Desired Behavior

Each person's perception is their truth. That is to say, what they believe becomes what is true to them. Each marketing communication represents an opportunity to change a person's perception. Marketing can inspire, educate, change minds, and even change behaviors.

The Net Take-Away is a description of what the Target Audience might think or feel after they have interacted with the marketing. This summary should be written in first person ("I" or "We") in a succinct, proactive tone.

The Net Take-Away section:

- Summarizes what the desired perception of the target audience should be
- Helps identify which perceptions tie back to the campaign
- Highlights a specific desired behavior
- Provides the creative team with an emotional destination

Net Take-Away examples:

"If I partner with ACME ACCOUNTING, my business will improve, things will run better, and the extra revenue will free up my time. I need to look into this further."

"eDistuto looks like the coolest outside enthusiast magazine on the web."

"I'm inspired to learn how to rollerblade."

"JetMind Software looks like a great way to organize my to-do list."

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6.10: **Key Experiences**

Purpose: Explain what kind of experience the target will have for each specific touch point
Importance: Essential for online marketing
Ties back to: Target Audience
Also called: User Experience, Communication Flow, Interactive Experience

When online marketing exploded onto the scene, Creative Briefs quickly changed to meet the new demands of the medium. Although these changes were significant, they did not alter the core marketing principles of the brief, but rather added new dimensions.

The Key Experience section of the brief provides a specific step-by-step outline of the type of experience the target/user/visitor will have on a website, microsite, banner, email, or landing page, at every touch point.

The Key Experience section:

- Defines each step of the communication process
  - For example: Banner > landing page > form > thank you page
  - For websites, a summary of the user flows is best
- Describes what needs to happen at each touch point
- If relevant, describes which pain points are addressed

Key Experience example:

Communication Flow:

Magazine Insert > Landing Environment > Fulfillment Page: Download offer > Thank You Page > Home Page > Sales to follow up.

Touch Points:

Magazine Insert: The first touch point is primarily awareness. Although ACME holds 50% brand awareness, this new launch should treat this as a new product. Prospects will be made aware of ACME's new software and special offer.

Landing Environment: The landing environment should talk about the features and benefits of the product first, and the special offer second.

Fulfillment Page: Responders will get a white paper. The page should have a sense of urgency.

Thank You Page > Home Page: The thank-you page should offer a cross-sell and link to the home page.

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6.11: **Point of Difference**

Purpose: Define the one thing that is unique about the product or service
Importance: Essential
Ties back to: Project Summary
Also called: Unique Selling Proposition

The Point of Difference is the single most compelling attribute of the product or service that will make a difference to your target audience. Figuring out which characteristic will have the most impact can sometimes be a difficult task. Hopefully, this information will come from the CMO or marketing team and will be reworked by the Strategist, Account Team, or Creative Director into a razor-sharp point.

In all honesty, most companies share common values and are often similar in many ways to their competition. But there is almost always one thing that can be highlighted as the best characteristic of a product. **Good creative is built on simple and unique selling propositions.**

The Point of Difference section:

- Pinpoints the single most compelling selling attribute
- Provides the anchor on which the creative will rest
- Helps differentiate the product or service in the marketplace.

Point of Difference examples:

ACME ACCOUNTING is the leading provider of business management software and offers the only complete solution in the marketplace.

Get personalized IT support and information from the only free source in the U.S.

Chi Chi Gelato is the only local source for organic gelato made daily.

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6.12: **Key Message**

Purpose: One main idea that describes the most important message of the communication piece
Importance: Essential
Ties back to: Point of Difference
Also called: Key Performance Index, Lead Thought

The power of a good Key Message lies in its simplicity. It's the tip of the spear or lead thought. It's the first thing the target audience will see and read—and use to decide whether to click or respond. It's the one hook that can get them to take action.

You can also think of the Key Message as the beginning of the story, or the umbrella underneath which all support points and benefits can fit. **The more focused the Key Message, the more focused the creative work will be.** A laser-focused Key Message is exactly what a creative team needs to do its job. Strategists and Creative Directors should be involved in crafting the Key Message for all major campaigns. **Key Tip:** Challenge yourself to write Key Messages that don't contain the word "and." A Key Message that reads "ACME enables me to get more done and save money so that I can please my clients and enhance my career" leaves the creative team too many options. Paring down this Key Message ("ACME enables me to get more done so that I can please clients") will result in a far more focused creative product.

The Key Message section:

- Focuses all relevant information into one compelling, marketing-driven message
- Puts the target audience's needs first
- Builds an umbrella that will cover all relevant benefits and support points

Key Message examples:

ACME ACCOUNTING empowers you to take 100% control of your business.

ACME's ultra high-speed DSL brings unparalleled productivity to your business.

ACME webinars give you the information you need at your fingertips.

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6.13: **Benefits**

Purpose: Informs the target audience of how their lives will be improved
Importance: Essential
Ties back to: Key Message, Psychographics, Net Take-Away
Also called: Support Points, Features and Benefits

The Benefits section of the brief ties back directly to the Key Message and helps explain how the target audience's lives will improve as a result of the product or service. Benefits are best described from the target's point of view and should address their specific pain points. They are not product features (which is the next component in the brief), but they are very important in helping move prospects to the next step.

If the Key Message is the introduction of the story, the Benefits are a continuation. If the Key Message is the headline, the Benefits are the body copy. Some agencies prefer to combine the Features and Benefits, which is fine as long as this information still addresses the needs of the target audience.

The Benefits section:

- Provides the target audience with specifics on how their lives will improve or which of their needs will be met
- Addresses the audience's specific pain points

Benefits examples:

1. Sell more hearing aids to your clients
2. Eliminate double entry
3. Increase your overall business productivity and efficiency
4. Gain visibility over your entire business
5. Save money on hardware, software, data security, backups, and tech support

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6.14: **Features**

Purpose: Outline the specific product features and services
Importance: Optional
Ties back to: Key Message, Benefits
Also called: Features and Benefits, Support Pillars

When relevant, the Features section of the brief provides a platform to list the product or service features that will be covered in the marketing. The list can include anything from product attributes to technical specifications to key service strengths. This list should support the Benefits and, ultimately, the Key Message.

It's best not to go overboard with Features. Product Marketing teams should **focus only on those items that are critically necessary.** One exception to this rule is if you're planning a content-rich website.

The Features section:

- Specifies which product or service features are relevant for the marketing
- Provides a strong rationale for the Key Message and Benefits
- Helps product teams distill down the most important features

Features examples:

1. 100% web-based solution
2. Incredible marketing list generation
3. Efficient scheduler
4. Integrated electronic insurance billing eliminates double entry
5. QuickBooks interface eliminates double entry
6. Referral tracking shows which marketing works and which does not
7. Robust, real time sales reports
8. Automated patient recall mail

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6.15: **Tone and Personality**

Purpose: Clearly define the personality and voice the marketing needs to communicate
Importance: Essential
Ties back to: Brand Style Guide or equivalent, Psychographics
Also called: Brand Personality, Positioning

The Tone and Personality section of the brief simply communicates what the voice of the marketing should be, and, equally importantly, what it shouldn't be. When you're writing this section, take the target audience's perceptions into consideration. Tone can also be used to describe how the target audience should react. Should they respond now? Today? Later? Providing this guidance helps the creative team fine-tune their messaging.

The Tone and Personality section:

- Communicates what the voice and personality of the campaign will be
- Clearly states what the campaign voice should not be
- Leverages relevant brand personality traits

Tone and Personality examples:

ACME ACCOUNTING is a technology leader that is dedicated, helpful, and a trusted friend.

ACME ACCOUNTING is not stuffy, arrogant, or trendy.

ACME Tools are tough and rugged.

ACME Tools are not passive or cute.

Offers are only available for a limited time, so respondents need to reply with a sense of urgency.

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6.16: **Creative Considerations**

Purpose: Provide a list of items to include or not include in the creative execution
Importance: Essential
Ties back to: Brand Style Guide or equivalent
Also called: Creative Mandatories, Executional Mandatories

The Creative Considerations section is the place to list specific items that need to appear in the creative work. These may include logos, color and font requirements, taglines, URLs, and legal disclaimers. This section should also provide links to, and file names of, any resources that will be helpful to the creative team.

The Creative Considerations section is also a good place to capture other valuable customer or client insights, such as: “Our target audience is afraid of clowns, so please avoid any circus visuals,” or, “The CMO requests that we don’t use the color lavender.”

The Creative Considerations section:

- Lists the specific brand elements that must be included in the creative
- Captures target audience insights or best practices
- Accounts for client or agency requirements
- Provides resources such as links and file names

Creative Considerations example:

Please adhere to ACME ACCOUNTING brand guidelines.

Be sure to use the new 2011 logo and tagline, “Making Accounting Count.”
“2011_Brand_Style_Guide_v3.pdf” is available on the server in the “Creative” folder.

Please use the following URL: “www.ACME-ACCOUNTING.com/freesoftware”
The development team will handle all redirects.

See “Addendum” for Legal disclaimers.

In addition, recent feedback by the client has indicated that the target did not respond well to visuals of piles of money in a recent focus group.

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6.17: **Development Considerations**

Purpose: Provide a summary of development requirements that will influence the creative process
Importance: Essential for online projects
Ties back to: Business Requirements Document, Technical Specification Document
Also called: Technical Considerations

For any project that has a back-end development process, it's critical to ensure that the creative and development teams are in sync. If the teams are not communicating well, execution of online and interactive projects, microsites, and websites can get messy. The purpose of the Development Considerations section of the brief, then, is to provide the creative team with a summary of the functional requirements for the project, or the basic technologies that will be used. For example, if the microsite will be created using a CMS (Content Management System) that does not support Flash™, it's important to communicate that to the creative team *before* they start the creative process.

The Development Considerations section of the brief should focus on and summarize only those items that may affect the creative process. If there is too much information in this section, it can make the concepting process more difficult. If there are specific documents—such as a business requirements document or schematics document—that the creative teams need to review, then they can be referenced in the Development Considerations section and handed out separately.

The Development Considerations section:

- Provides a summary of technologies that will be used
- Provides information on technology limitations

Development Considerations example:

> Please use the standard width of 720 px for the email. Please ensure that main messaging is text-based and adheres to email best practices.
>
> Landing pages will be loaded on the RGP Content Management System, which supports both Flash and streaming video.

Please allow a minimum of 5 days for development and testing.

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6.18: **Deliverables**

Purpose: Define all the deliverables of the campaign
Importance: Essential
Ties back to: Program Objective
Also called: Production Deliverables, Execution Deliverables

The Deliverables section of the brief is a complete list of all the creative components that will be produced in the campaign, along with any basic supportive details. For example, if the campaign includes banners, list the sizes. If the project is a single print ad, include the dimensions and production specifications.

If the creative may need to be tailored for different uses in the future—such as different banner sizes, or two-page ads versus single pages—be sure to note this information in the Deliverables Section so the creative team can design for all possible executions. It can be frustrating and expensive to execute a photoshoot and find out that the proportions of the images are unusable for future ads—or to purchase and retouch low resolution images for a website only to find out that they will be needed for a large trade show booth.

The Deliverables section:

- Lists the specific deliverables of the campaign
- Provides details such as sizes and production specifications
- Lists all mediums that may be used in the future
- Helps creative teams concept with different mediums and execution in mind

Deliverables example:

Final Deliverables:

See "ACME_Email_Invite_wireframes_v4.pdf" for final content layout

- 3 HTML emails: Design and Copy
    - 1 email: Invitation based on messaging for Segment A
    - 1 email: Follow up to be sent 3 weeks prior to end of event
    - 1 email: Last chance for sign-up. To be sent 4 days before event
- Email width: 720 pixels

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6.19: **Offers and Testing**

Purpose: Define what is being offered in exchange for a response
Importance: Essential for any marketing with an offer component
Ties back to: Metrics
Also called: Offering

In the world of lead generation and direct response, the Offer carries significant weight. This section of the brief helps to define not only what the Offer is, but also its value to the recipient. According to the 40/40/20 rule—a common theory used in Direct Response Marketing—40 percent of your response rate will be based on the prospect's perceived value of the Offer, with another 40 percent based on the list and 20 percent based on the creative.

It's equally important for the brief to outline why the target audience will think the Offer is compelling. Have they seen it before? What's the dollar value? How can it make their lives better? Providing some context around the Offer helps creative teams figure out how to make it sound as attractive as possible. In projects where the Offer will be defined as part of the creative process, be sure to provide some context, objectives, and a budget for the creative team.

The Offer section:

- Defines the Offer
- Explains how the Offer is relevant and valuable to the target audience
- Provide details around dollar value, fulfillment, authors, and so on

Offer and Testing examples:

A / B Split Test

Register to watch a product demo with a sales associate and get the following:

Offer A: Get a free 60-day trial.

Offer B: Get free tech support for 6 months.

Prospects perceive accounting software to be difficult to use and are reluctant to change from their existing tools. A free 60-day trial (the longest in the industry) and free tech support will help ease their concerns. No other accounting software company currently matches these offers.

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6.20: **Call-to-Action**

Purpose: Define what action the viewer or recipient needs to take
Importance: Essential for marketing with an offer component
Ties back to: Metrics, Key Experience
Also called: CTA, Response Requirements (can be combined with the Offer and Testing Section)

The Call-to-Action section of the brief is simply a place to define what action the prospect needs to take. Do they need to fill out a BRC (Business Reply Card), or click to a URL? If there's a specific communication flow and the CTA needs to be adjusted for each component, make a note of that. If the campaign has an email, landing page, form, and thank-you page, be sure to list the CTA for each touch point. If there is specific agency or corporate-approved language that needs to be used, such as "Download Now" or "Learn More," include that as well. The CTA can also be rolled into the Key Experience section of the brief.

The Call-to-Action section:

- Defines the manner in which the recipient or viewer needs to respond
- Provides the Call-to-Action for all the specific touch points
- Defines any specific language that needs to be used

Call-to-Action example:

<u>ACME Prospects:</u>

Find a class near you >

Check for classes in your area >

<u>Professional Accountants:</u>

Enroll in the program today >

Find out how >

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6.21: **Budget and Timing**

Purpose: Provide a high-level summary of the overall budget and timing of the project
Importance: Optional
Ties back to: Program Objective
Also called: Execution Plan

Budget and timing information can help the creative team figure out how to approach the execution of the creative. Project timelines can strongly influence how far the creative can be pushed. For example, if the budget for a TV spot is only $50,000, then filming a helicopter chase scene will be too expensive. As for timing, if the team has only 4 days to produce an ad, then an on-location photoshoot in the Bahamas won't be possible.

Budget information should simply cover the basics. Since the Creative Brief is a public-facing document, it only needs to provide the budget details that are relevant to the creative process. For example, is there a budget for stock photography, original photography, and so on?

Timing information only needs to focus on key deadlines—specifically, what dates the first, second, and third round of creative are due and what the production deadlines will be. Final schedules should not be kept in the brief. You can provide a URL or other location where the official schedule will be kept, along with the name of the file.

The Budget and Timing section:

- Provides a sense of high-level or preliminary timing for the campaign
- Helps get agreement from the creative team on timing
- Defines the creative budget as needed

Budget and Timing example:

$15,000 for creative, imagery, and fulfillment

Finalize Creative Brief:	Monday, 8/31
Round 1: Internal creative review	Tuesday, 9/13
Round 1: Creative presentation to client	Friday, 9/16
Round 2: Client presentation	Friday, 9/30
Round 3: Begin production	Thursday, 10/5
Round 4: Final client approval	Wednesday, 10/11
Round 4: Final files due	Friday, 10/13

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6.22: **Brief Approval**

Purpose: Ensures the client and key stakeholders have approved the direction of the project
Importance: Essential on major projects, optional on minor projects
Ties back to: Entire brief
Also called: Client Approval, Client Authorization, Client and Team Approvals

The client's approval of the Creative Brief confirms that everyone has committed to the overall direction of the project. For agencies, this approval is especially important from a liability standpoint. When clients want to change direction during a project, the approved brief will enable the agency to justify change orders, additional costs, and extended schedules. That's why good agencies will not start the creative process without an approved brief, even for small projects.

In corporate marketing environments, Creative Brief approval is helpful as a backstop. You can always add extra spaces to the brief for internal team members and key stakeholders who need to sign their approval.

The Brief Approval section:

- Holds the client accountable to what was agreed upon at the start of a project
- Provides validation for change orders and schedule extensions
- Validates additional costs associated with changes in direction

Brief Approval Example:

Agency Approval: _____ Date: _____

Client Approval: _____ Date: _____

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6.23: **Addendum**

Purpose: Allow for additional support documentation to be included in the brief
Importance: Essential
Ties back to: Entire brief
Also called: Support Materials, Resources, Additional Information

Ideally, all information that really matters should be placed in the main body of the Creative Brief. More realistically, there always seems to be some information that doesn't quite fit anywhere—especially on projects that start with a great deal of input information. The Addendum section is the perfect place to put this information.

The Addendum section of the brief can house various support items, including documents, visuals, and references. It's a good place for a screen shot of a sample website, links to research, past learnings, product information, additional competitive analysis—or anything else that may be useful to the creative team.

As with the rest of the Creative Brief, everything in the Addendum section should be relevant to the project. This is not a dumping ground, but a place to supplement and support the contents of the brief—and, ultimately, the creative process.

The Addendum section:

- Provides a place to hold support information such as visuals, links, references, and quotes
- Helps keep the brief focused
- Provides an area for team members who insist on including extra content

Addendum example:

Resources and Files:

1. **ACME Brand Style Guide:** *File name: "ACME_Style_Guide_v3.pdf"*

2. Site Map: *File name: "ACME_Site_Map_v1.pdf"*

3. Wireframes: *File name: "ACME_Wireframes_v1.pdf"*

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