

# **Successful Creative Briefs: Linking Business Objectives and Creative Strategies**

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**A Q U E N T**

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## Introduction

Call them what you will—“creative briefs,” “design briefs,” “marketing briefs,” “communications briefs,” or even “objectives and strategies statements”—the actual name is less important than helping creative and marketing professionals to fully understand and appreciate their potential value to any design initiative within your organization. Whatever your role in the creative development process, you have no doubt heard about these briefs, perhaps you even use them on a regular basis. The reality is, however, that many designers and their clients have yet to completely embrace the creative brief as a vital part of the design process to share valuable information, build consensus, align expectations, and set clear objectives.

Having worked with hundreds of creative professionals to hone their business skills in order to improve communications and relationships between them and their clients, I am confident that the creative brief—when properly developed and adhered to—is one of the most valuable tools in the design process, providing a vital connection between business objectives and creative strategies. For clients, account managers, and creatives, a clear and well-prepared design brief can help make a project, just as a long-winded and unfocused brief can lead to its ultimate demise. While briefs should be customized to each individual discipline, company, and project, there are some common techniques that you can use to help ensure that your organization is not only creating impactful briefs, but is also getting the most out of them.

## The Creative Brief: What Is It and Who Decides Whether to Use One?

The creative brief is a written document that summarizes—comprehensively and concisely—both the business and creative requirements for a specific project or relationship. It is not a proposal, RFP, or initiation form, but instead the brief details the overriding business objectives. A brief digs deep into a project and identifies the main factors that drive the entire creative strategy.

When developed by clients or designers working independently of each other, cut and pasted from pre-existing irrelevant documents, or written on the fly without any significant customer, market, or competitive research, a creative brief can become more of a hindrance than a driving force in the overall design process. If half-heartedly put together without the input of key stakeholders, it can actually confuse a project's overarching goals while sabotaging any real chance for success.

But if properly developed, a brief can mean stronger business results and a more cohesive and efficient creative process. "A well-written design brief is a written agreement, or contract, between the parties involved with the project," writes Peter L. Phillips in his book *Creating the Perfect Design Brief: How to Manage Design for Strategic Advantage*. "A design brief is also a road map, if you will, that defines the various steps that will be followed from the inception of the project to its completion. Design briefs must include a considerable amount of both business strategy and design strategy." As Phillips himself admits in his book, he is "quite taken" with the title "innovation brief," a term commonly used in Europe, because he likes what it implies about design being an innovative or strategic business process.

Some industry professionals believe creative briefs should be used for any design project, no matter how small; others advocate using them only for larger-scale or longer-term initiatives because of the time and expense that can be involved in creating a useable brief. Examples of these large-scope projects include advertising campaigns, branding, logo development, naming, packaging, integrated communications programs, and Web site projects. While the decision whether a given project might benefit from a creative brief is ultimately up to the client and the design team, an outside consultant is sometimes brought in to help evaluate a project's overall mission—and to see if using a brief would add any significant value to the design process.

### WHAT MAKES A CREATIVE BRIEF SO VALUABLE?

When crafted properly, a creative brief:

- Links business objectives to creative strategies
- Guides the approval and decision process
- Mediates disagreements
- Provides a clear set of expectations and defines measurable objectives (metrics) to measure the progress and success of a project

## The One-Size-Fits-All Brief Often Fails to Fit Anyone

Jennifer Miller is one such consultant. Her diverse career includes experience as a designer, a director of experiential and Internet marketing, and a creative director for a large ad agency. Miller now helps Aquent clients evaluate and improve their creative operations and processes. In this role she sees creative briefs in all shapes and sizes; she's a strong proponent of using three different levels of briefs depending on the scope of an initiative. "The first level is for the largest projects with overarching messaging and the most long-term objectives," Miller explains. "This brief should be developed at the beginning of any new client/creative relationship and it should be referred back to as necessary for any future initiatives. The second level brief is for mid-sized projects, and the third level is a rapid request form to be used for more tactical projects. Most creative initiatives I've come across could likely fit into the latter two levels, yet I often see companies mistakenly using one brief for all of their projects. This often results in individuals completing disjointed briefs that are left either mostly blank or containing information that is not especially pertinent to the specific goal."

That's why Miller says it's important for the individual tasked with writing a brief to understand that the document cannot cover everything, from high-level strategy to print specs. She believes the most effective brief begins with a templated format that can be automated, easily completed and customized to meet specific client needs.

## Demonstrating the Brief's Value—and Your Own—to the Client

If you are a designer faced with a client who fails to see the value of a creative brief, you may want to consider selling this "service" as part of your overall marketing strategy and in your promotional materials—on your Web site and in your initial sales pitch and proposal. Tell the client in every communication that the brief is an integral part of your process. If they know about the brief in advance, they can allow time in their budget and schedule for it. Include a description of what the brief is and its purpose as a deliverable during the planning phase and you'll likely get more clients to sign on for this step of the process.

When the designer is not directly involved in developing the creative brief, miscommunication and misunderstandings can arise. On the other hand, when designers participate and lead in the process of creating a design brief, they express and reinforce the value of their insight and contribution to the client. They also reiterate their role as the client's partner, rather than a vendor, an artist, or someone who simply executes ideas, and ensure buy-in to the entire process. Clients who include designers in the research and development process gain from the designers' insight and industry expertise. Both benefit from a mutually agreed upon set of expectations, objectives, and success criteria.

A creative brief also provides an opportunity to determine ROI (return on investment), a term clients love but designers hate because it's often difficult to measure. But if designers ask clients the right

questions, they can gather great information, testimonials, and case studies to add to their resumes. Clients also can use this information as proof of the project's success and, thus, better define the value of their contributions and defend themselves to management.

If you are a designer handed an already finished creative brief, you must decide how to best interject yourself into the brief's development process without disregarding—or alienating—the client. Instead of discounting work already done, simply rename the document (for instance, as an objective and strategy document) and build upon what's there, adding your own thoughts to make it even more useful. This way, you demonstrate that you appreciate your client's efforts, and you prove your own value and willingness to collaborate. Many designers fail to be seen as total partners because they work on a "one-off" project basis without selling more integrated, bigger-picture strategic thinking. Whether based on your client's initial information or created jointly with them, the creative brief is one way to incorporate strategy into the relationship and be seen as a valuable long-term asset.

### **Writing Your Brief: Who to Include and When to Begin?**

Anyone with a true stake in the project should play an active role in the brief's development, including the entire creative team and the client's key stakeholders. Identify those responsible for writing the brief, and most important, guiding/managing the project both internally and externally. Also include those individuals who contribute both internally and externally, as well as the approvers—those who have the necessary insight into the project and the clout and expertise to make all critical decisions during the process.

In some cases, designers receive the creative brief from their client; other times they write it in a vacuum without any client input. As a designer, if you're given a completed brief, you're not going to digest and absorb the information. If you try to create it on your own, there's a good chance you're not going to deliver what the client wants; as a result the client won't fully buy in to the project.

Briefs are best written at the start of any relationship, prior to the development of a specific design solution, but after the research and discovery phase. The process of developing a creative brief generally includes the following steps: identifying key stakeholders, decision makers, and those individuals on your team who will be part of the process; reviewing any relevant background material provided by the client (including existing market research, business plans, audience profiles, branding guidelines, etc.); conducting a planning meeting with the client and stakeholders; conducting research to dig deep into individual issues and preferences before arriving at a collective decision; discussing conclusions and key information gathered from the research; discussing creative strategies; obtaining stakeholder buy-in to conclusions; and finally, drafting and issuing the brief for feedback and final approval.

The brief should provide a clear set of expectations and summarize everything you've learned during this process, including findings and related recommendations. It's your opportunity to align the client's business objectives with your creative strategy. Depending on how extensive the research is and how long any feedback and approval takes, the entire creative brief process can take anywhere from 1 week and 3 months.

Miller says that the brief can originate with the client but only after a long strategy discussion between the client and the creative team. "We advocate that everyone meet to get on the same page, even before the discovery phase or any work gets under way," she says. "This workshop session should include a discussion about overall objectives and also any recent trends in design and marketing so that all key participants are working with the same market information. It's a strategy summit, allowing each 'side' to share their expertise with the other 'side.' The discovery and research phase follows, and from there the actual brief gets developed for a specific initiative. Aligning on overall strategy *before* the brief is written is critical to its ultimate usefulness—and success."

"Typically, in my experience, the account person crafts the brief since they are closest to the client," says David Haskell, senior copywriter at Boston-based Digitas. "Ideally it's a working session with the account person and the entire creative team to reach consensus on the brief's content. Afterwards, one person on the team writes the actual brief based on the meeting's results, and this document then goes to the client for input and buy-in."

It's always best to present the brief to your client in person so you can walk them through it point by point. Otherwise, there's a good chance they won't thoroughly and completely read it. By reviewing the document with key stakeholders, you can make sure that they review it carefully and that everyone agrees on the content and direction. Be sure to schedule enough time for the writing and review of the brief—the entire brief development process can sometimes take weeks or even months to complete, depending on the project's scope. It's also crucial to provide clear deadlines for feedback and approval on the brief and identify who will actually sign off on it.

## Content Guidelines for a Compelling Brief

Although there is no one "right" way to develop a creative brief, there are certain guidelines you should consider following when beginning the crafting process (keeping in mind that to be most constructive, any content should be customized for each specific project or relationship).

Key categories of the brief might include:

- **Background information on company, product, or service.** Introduce the project and any background information that will drive its progress or success (e.g., new products, positioning strategies). Ideally, the designer should already have a good understanding of the client's organization, product, or service before the creative brief process has begun, so this section should be kept brief.

- **User and target audience groups.** Identify the gender, age, geographic location, characteristics, priorities, occupations, and cultural considerations for each group. Find out what motivates and inspires each group and identify differences and similarities between the sub-groups.
- **Brand attributes, promise, and mission.** Brand equity, assets, and strengths. Primary and secondary brand attributes. Differentiators. Expected brand perceptions and adjectives.
- **Competitive landscape.** Refer to the client's Web site or research you've already collected; analyze the competitive landscape, chart strengths and weaknesses, and determine how these are relevant to what you will be developing for the client. Best practices—inspirational (e.g., What does the client like and why? How is it relevant?).
- **Business objectives (success criteria).** Pinpoint the client's goals in developing a particular piece or service (e.g., Is the initiative meant to increase awareness, generate sales leads, educate existing clients, improve employee morale?).
- **Creative strategies.** Existing brand guidelines—(e.g., What is relevant and what isn't?) Logo, color palette, typography, imagery, content requirements, information hierarchy, visual and editorial themes, tone, and image. This is the section to turn subjective opinions into objective strategies (e.g., If they ask for an out-of-the-box solution, how would they define this further?).
- **Functionality specifications.** (for Web projects)
- **Comparisons.** How should the audience perceive of the brand/product/service?
- **Contribution and approval process.** Which contributors and approvers get involved at what stage of the project, and what are they expected to contribute and/or approve?
- **Testing requirements.** Define how you test during the project and then, after it's completed, measure its success.
- **Timelines.** Shelf life, launch of target dates.
- **Budget.** This demonstrates the client's financial commitment to the endeavor; how much are they willing to invest?



## Make the Brief Visually Appealing and Easy to Interpret

The design of the brief may be as important as the overall content, because if it's not easy for clients—or designers—to read, then they most likely won't. Sheri L. Koetting, principal of New York-based MSLK Design (and a client of mine), is a fervent believer in an easy-to-scan chart format for creative briefs. Sheri cites a brief her firm presented to one of their new clients (see sample brief at end of article). "After meeting with the client, we realized that they really didn't understand their design goals for logo and packaging design. We needed to help them focus. They were trying to do too much, so one of the things we did in our creative brief was propose a radical design direction and a more middle-of-the-road design tweak," says Koetting. "We set up the two options in side-by-side columns so it was easy for the client to compare the benefits of the two different solutions. Because they could clearly see that we had done a thorough job researching the two options and that the more evolutionary, less radical option wasn't going far enough, they selected the more radical design, which is the one we were hoping they would choose."

MSLK has always used briefs to set design objectives and make strategy recommendations "because we believe that 99 percent of the solution is how you define the problem," Koetting adds. "That's why in our initial presentation with this client we felt it was important to include information detailing the power of defining a problem from the very beginning."

While the impact of MSLK's design is still unclear because the project is ongoing, their relationship with the client has been strengthened due to the successful collaboration. "After partnering with us on this one initiative, they trust and respect our opinion in a wide range of key decisions, not only their design needs," Koetting explains. "They see us as a key contributor, a touchstone to bounce ideas off of. For MSLK, this is the type of design firm we've always strived to be—focused on more than aesthetics and adding significant value to our clients."

## The Timelessness of Briefs—Even If Their Focus or Name Changes

During David Haskell's 25 years in advertising, he has seen creative briefs used fairly consistently. "Even dating back to the 1940s, you'll find that many agencies had something resembling a creative brief," he says. "And while the format has stayed the same for the most part, the brief's primary focus has evolved. For a number of years, the unique selling proposition was the most important element, but the key objective has become helping clients stand out in a cluttered marketplace and attract customers bombarded with messages at every turn. It's not enough to have a unique or high-quality product; it's about getting noticed—and many of today's briefs are addressing this market reality."

Haskell adds that the creative brief's ultimate usefulness ties back to how well the form is filled out and how knowledgeable the person completing it is. He believes that it may be better to go without a brief entirely, rather than use one that merely regurgitates generic language or is written with no

genuine attempt by the author to offer detailed strategic information. To illustrate the importance of descriptive naming for the document itself, Haskell relays an anecdote about Leonard/Monahan, New England Agency of the Year in 1987, to illustrate the importance of descriptive naming. “They called their brief a *Client and Agency Creative Brief*. It was widely accepted and very effective because everyone knew just by the name that it was not ‘owned’ by either party, but instead jointly produced by both teams.”

### **Sharing Ideas and Editing Content: Essential Steps in the Creative Definition Process**

Top information design strategist Sylvia Harris (also one of my clients) helps implement communication programs for large institutions in the New York area. Sylvia uses briefs in varying amounts depending on who the client is. “I usually write the brief myself and then have my client review,” she explains. “In my opinion, the greatest value of the brief is that everything is written down. I find that design teams often make assumptions at the beginning of a project; sometimes right, and often wrong. By putting thoughts on paper and sharing them with your client, everyone can agree from the beginning and nothing is left to interpretation or assumption. It’s a way to create consensus among stakeholders. All the key players can start at the same place. They may not end up at the same place, but at least they are beginning from a unified position.”

As with any written document, editing is critical in order to hone the brief’s content. “Creative briefs should be brief,” Haskell says. “A concise brief forces you to discipline yourself, to focus messaging from the get-go. Because the brief is a yardstick of the process that helps measure overall project effectiveness, the sharper the brief, the better the results you’ll see.”

Harris agrees with Haskell about the importance of making briefs succinct. “Clients don’t have time to wade through lengthy briefs, and most designers are visual and would prefer to not read long, wordy documents. I find that most people glaze over after a page or two.” She recommends including hot links in the brief for those individuals who may want a more detailed explanation for the various sections. That way, those who don’t want to read longer explanations can ignore them, but the explanations are there for those who want them. She also stresses the importance of the brief as a means to define project “mandatories” that can or cannot change without being so precise as to risk stunting the creative process.

### **A Good Brief Cuts to the Chase...**

Michael Hunter, marketing director for the Whirlpool brand, concurs that brevity is essential when writing a brief. “Economy of words is key,” he says. “You are defining the space within which the creative team should design, and then you need to let them do their job. The objective is to set goalposts for them without infringing on their territory.”

Hunter references one of Mark Twain's quotes, "I didn't have time to write a short letter, so I wrote a long one instead," to illustrate his point that it's more challenging to write a short brief because more time is needed to polish the content—and that means more time up front defining and refining objectives and strategies to make them specific and targeted.

In Hunter's experience, there's a direct correlation between design and strategy. If the creative is off, that means the initial strategy—and the creative brief—missed the mark. Hunter's marketing manager normally drafts any briefs and then shares them with him to get his input. The revised brief then gets submitted for review to the account and planning team within the agency.

### **...Yet Is Often Hard to Find**

Jennifer Miller says she rarely comes across a creative brief that is structured well. "That's because most don't have enough segmentation of information," she explains. "Also there's not enough initial communication between those requesting the work (the client) and those executing the project (the creative team). The brief really encapsulates the ability of the involved parties to effectively pass along information. That is the single biggest factor for success or failure in any creative initiative."

#### **QUICK TIPS TO KEEP IN MIND**

- The brief should be introduced into any process early on so its full value can be explained and appreciated.
- You don't need one for every project—use only for large-scale or important projects.
- The client is not your enemy, but your partner.
- If the client has given you a creative brief, rename the document—and retain the process using elements from their existing brief but expanded to incorporate your new insight and knowledge.
- Allow enough time to develop and edit the brief.
- Provide clear deadlines for approval and feedback.
- Keep the brief simple and as short as possible.
- Bulleted sound bites versus narrative copy.
- Use charts and columns.
- Provide reasonable expectations—don't aim too high or low; don't overpromise and underdeliver.
- Customize the brief—don't use templated forms or leave blanks.
- Adjust your presentation style to meet the unique personality of key decision makers.
- Conduct post-mortems/debriefs and include all key decision makers and the entire design team.

## Conclusion

Because the creative brief is intended to be a comprehensive strategic map for the entire design project, it's essential that all key team members be involved from the outset. For the designer, the brief can reinforce you as a strategic partner in the process. For the client, failing to include the creative team likely means they won't be fully immersed in the project or your objectives. By collaborating with the designer from the beginning of a project, you will ensure their buy-in and understanding, gain from their creative expertise, and have a clear, mutually agreed upon outline of goals and success criteria.

There is no rule of thumb when crafting a creative brief. "If there were just one correct format to use in creating the perfect design brief, all of our lives would be far less complicated!" writes Phillips. "It is also important to remember that there are a variety of design disciplines, and each discipline requires slightly different information in a truly useful design brief."

No matter which format you decide upon, make sure your brief is a user-friendly, visually appealing document that people will actually make time to read. Each design organization must create its own specific set of standards, processes, and guidelines when developing a brief. As the first tangible results of any collaboration between client and designer, the creative brief can be a meaningful barometer of the interest—and ability—of both groups to forge a working relationship that encourages teamwork, honest discussion, and clear, open lines of communication. In the end, I think what matters most is that creative and marketing professionals understand the potential value of this important business tool to any design initiative and to building a solid, mutually rewarding partnership.

To learn more about Emily Cohen's perspectives on developing and implementing an effective creative brief process, please e-mail her at [emily@emilycohen.com](mailto:emily@emilycohen.com) or visit her Web site at [emilycohen.com](http://emilycohen.com) for more information. To learn about Aquent's creative and marketing staffing services, please visit [aquent.com](http://aquent.com) or contact your nearest North America office at **877 227 8368**.

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## ABOUT EMILY COHEN

Emily Cohen has been a management consultant to creative professionals for more than twenty years, providing experienced and objective advice on effective staff, client, and process management strategies; conducting client surveys; and writing winning proposals, contracts, and creative briefs. Emily currently serves on the board of advisors of InSource, served as secretary for the AIGA/NY board of directors, and has taught classes and conducted seminars for many leading design schools and organizations. She is a frequent speaker on business-related issues for the creative industry and has spoken at the HOW Design and In-HOWse Designer Conferences, as well as at numerous AIGA events.