



WHO, WHAT, WHEN, WHY?

> ALWAYS WRITE A THOROUGH BRIEF



WHO, WHAT, WHEN, WHY?

A couple of years ago we received a project brief from a public sector client we hadn't worked with before.

We read what she'd written and felt that the information supplied wasn't sufficiently detailed for us to proceed. It was patchy, at best.

So, as is often the case, we listed our clarification questions and emailed them to her (email was the stipulated communication channel, which isn't always ideal).

The following day we received her answers, some of which were still too vague for us to make meaningful progress.

So we emailed her again for further clarification.

She replied (in all seriousness), "If I give you any more information, I'll be doing your job for you".

She genuinely believed that sharing this information was wholly unnecessary and, in some way, lazy on our part. She wouldn't budge, so we politely declined and stepped away from the project.

What she singularly misunderstood is that the purpose of a good design brief is to give an agency as much useful information as possible, with which to find a creative or strategic solution. It's the equivalent of laying solid foundations before you build a house. If you don't, the house will simply collapse.

If key information is not shared, you are effectively asking an agency to take a guess as to the solution. Although we'd like to think of ourselves as talented people, I'm afraid it doesn't stretch to mind reading.

The building blocks of a good brief

If you've ever seen a televised police appeal, you'll hear them say something like, "Please call us if you have any information, no matter how insignificant you may think it is".

It's exactly the same with a design brief. Detail is absolutely key. Give the agency *everything* they need at the outset. It's an old truism in design and communications that *the better the brief the better the solution*.

So, in order to help you prepare a thorough brief, I have listed below the main sections – with accompanying explanations for further clarity.

**“IF I GIVE YOU ANY
MORE INFORMATION,
I’LL BE DOING YOUR
JOB FOR YOU.”**

1. COMPANY/ORGANISATION

This is your opportunity to explain to an agency, especially one that you haven't worked with before, all about your organisation. If you write briefs often, this is something that you'll probably hold on file and can simply cut and paste into the briefing document.

It should, as a minimum, cover the following:

Company history

- Year established
- How many staff
- How many locations

Organisational structure

- How many offices
- Business divisions
- Board structure
- Shareholder/stakeholder information
- Products and services provided

Contact information

- Company website url
- Marketing contacts
- Project contacts (and respective responsibilities)

2. COMPETITORS

No organisation operates in a vacuum. In the private sector particularly, you will have competitors and you will need to explain to an agency your position in that landscape. This will include:

A list of your direct competitors

- If you don't supply this, the agency will have to do it for you, which could be a poor use of their time (and your budget). You should know your environment well enough to explain who challenges you in your marketplace – directly and indirectly.

How do you compare?

- Are you the market leader or a challenger brand (outline comparative revenues, market share etc)?
- What's your brand position and how are you perceived?
- Do you provide a like-for-like service or product offering? Is there any real differentiation? If so, spell it out.
- Who is perceived to be the best (and worst) in your space? In other words, who does what well.

3. PROJECT BACKGROUND

Current situation

Explain (in detail, if necessary) what the current landscape is and why there is a need for the activity required in your brief. For instance:

- Do you have a new product or service?
- Is a competitor biting into your market share?
- Is the company structure changing?
- Are you updating your brand?

The agency needs to know your thoughts, concerns and aspirations, so they can truly understand your position. So share everything.

Market research

If you are in possession of any market research, give it to the agency. If it's confidential, get them to sign a Non Disclosure Agreement (NDA) and then share it.

Whilst you may feel that you have already distilled your research, come to your conclusions and identified the actions, sharing it will give the agency additional context and will occasionally provide some wonderful nuggets of information that can be used for the creative execution.

For instance, Rolls Royce once supplied their then advertising agency – Ogilvy and Mather – with an engineer's report on their latest flagship model. In his notes the engineer wrote the slogan opposite:

It said everything you needed to know about the build quality of a Rolls Royce and was subsequently used as a headline for what would become a very famous press advertisement.

“AT 60 MILES AN HOUR THE LOUDEST NOISE IN THIS NEW ROLLS ROYCE COMES FROM THE TICKING OF ITS ELECTRIC CLOCK.”

4. OBJECTIVES

We often find that clients misunderstand what an objective is. They may list it as:

- to produce an annual report.

This is not an objective; it's a *deliverable*.

To identify your objective, simply ask yourself '*what do I want to achieve?*' The answer may be something like this:

- to increase market share by 3%
- to make your customers aware of a new product or service
- to sell 400 tickets for a conference
- to change a target audience's behaviour

- to raise finance for a new business venture
- to re-position your company in a particular sector.

Of course it may be that you have multiple objectives, some service- or product-based and others relating to your wider organisation. That's fine, as long as they have all been considered correctly and clearly communicated.

The advantage of setting specific objectives is that they can be tracked and measured, whether by ROI, PPC, tickets sold or whatever metric you choose.

You will then know whether your initiative has been successful.

Please note, however, that with objectives such as brand building, it's more difficult to measure success, as it takes much longer to create trusting relationships that can be quantified.



5. TARGET AUDIENCE

Who are you talking to, *exactly*?

It may seem like an obvious thing to ask, but you really do need to be as specific as you can when briefing an agency. It helps them to understand – and then ‘connect with’ – an audience; identifying what their needs and preferences are *before* they start to explore strategic or creative solutions.

For instance, a government report may be targeted at multiple audiences – Ministers, MPs, the Press, key stakeholders and the wider public. That's because all parties may be affected by the content of the report and its potential implementation.

A university, however, would target its Undergraduate Prospectus at a much narrower audience, typically sixth-form students (UK-based and international) as the primary target. Parents will almost certainly be a secondary audience, as they are key influencers. And tertiary audiences may be school careers advisers or other universities – as all potential competitors are benchmarked.

So please try to be as specific as possible, as the quality of the information you provide to an agency will directly affect what you get back.

Demographics

One way to identify your audience is to use demographics – the quantifiable statistics of a given population. You'll be familiar with these in the run up to general elections, where demographics are used to analyse voting intentions in public opinion polls. Politicians love to target specific audiences with promises of a brighter future (should you vote for them). Typical audiences may include pensioners, working families, single mothers, students, the disabled, long-term unemployed and so on.

The same general demographic techniques are used in marketing, typically focusing on gender, age, ethnicity, language, income level, employment status and location.

The purpose is to narrow down your audience, to build a mental image of the type of people you want to talk to. Once you know this, it's much easier to create your message.

For example, we were once briefed to deliver a range of targeted design collateral, to complement a behavioural change campaign in the education sector. The (single) target audience was described in the brief as “*school children between the ages of 5 to 18*”.

We politely pointed out to our client that the target audience was far too wide for one message. At one end of the spectrum the children still had their milk teeth and at the other they were drinking alcohol in pubs.

We recommended that they divide the audience into academic Key Stages, so that the bespoke collateral and messages resonated with them respectively, thus making the campaign much more effective – which is exactly what transpired.

Segmentation

Another way to further define your audience(s) is to use a technique called *segmentation*. This is a more sophisticated and detailed method of dividing a large target audience and talking to those specific subsets of customers. Broadly speaking, the main categories of segmentation are:

- Demographic (age, gender, ethnicity, religion etc)
- Geographic (neighbourhood, town, region, country, continent)
- Psychographic (activities, interests, opinions, lifestyle)
- Beneficial (benefits sought by a consumer)
- Behavioural (perception of, attitude to, usage of a product/service).

Some marketers use the above categories to model complex ‘virtual’ customers. They will hypothesise what car they drive, what newspaper they read, what restaurants they prefer, what holidays they like and so on. They will even give them names to personalise them, because once you know a person well, you know how to talk to them. And marketing is simply about identifying your audience and then engaging with them in a language they understand (and react positively to).

One final point about the target audience: IT’S RARELY YOU!

As a client, please try to detach your personal preferences from any design or marketing solutions that are submitted to you. It doesn’t matter whether you *personally* like them; ask yourself whether it’s right for the intended audience(s). That’s the only criterion.

6. MESSAGE

What do you want to say?

This is not about writing a clever headline; that’s for the agency and the copywriter to solve. It’s also not about using long words to showcase your MBA skills. It’s much simpler than that.

It’s about what you want the recipient to understand, absorb and then take away with them (and, preferably, keep).

You should be able to boil the message down to one sentence – or at least a short paragraph.

Simple examples may look something like this:

- We are the biggest food retailer in the UK
- We make beautiful watches that transcend generations
- We offer bespoke advice and support for ex-servicemen/women
- No one can beat us on price
- Everyone trusts and likes us.

The agency then knows exactly what your *core* message is and will deliver a creative solution that communicates this, whether it be visual, written, physical or subliminal – whatever works best.

7. TONE OF VOICE

If ‘message’ is all about *what* you say, then tone of voice is all about *how* you say it.

Every organisation has its own personality. If that personality is deemed a marketable asset, then all customer touch points – from above-the-line print/digital advertising, to physical collateral such as brochures and direct mail – should reflect that. So should your employees.

Whilst the tone of voice is often communicated in visual form it is, in essence, mainly about the written or spoken word.

Let me give you an example.

If you have a bank account with First Direct, you will probably have noticed how friendly and informal its printed mailers and TV commercials are. The language used is very informal and personal, even empathetic. Their mantra is clearly something along the lines of “*we know that banking can be a chore, so let us take the hassle out of it*”.

And when you call them, they prove it. *Real* people answer the phone quickly, security checks are simple and quick and everything is done with a genuine helpfulness. They clearly recruit people who fit a certain personality profile – ‘people people’, if you like. And it shows.

So, when writing your brief, you need to ask yourself what *personality* you want your marketing material to project.

Examples could include:

- Friendly and helpful
- Clever and confident
- Irreverent
- Cool and cutting edge
- With gravitas.

8. COMMUNICATION CHANNELS

Now you know what you want to say, how to say it and to whom, you then need to know how you're going to reach them. These are known as communication channels.

Traditional *outbound* marketing channels include:

- TV advertising
- Radio advertising
- Newspaper and magazine advertising
- Billboard advertising
- Direct mail
- Telesales
- PR
- Exhibitions / seminars / conferences.

Newer channels – mainly digital – can help to reach more targeted audiences and increase the ability to track interactions and, therefore, your return on investment (ROI):

- Satellite / cable TV
- Ambient media / guerrilla marketing
- Email marketing
- Online display advertising
- Google AdWords
- Pay Per Click (PPC) advertising
- Mobile marketing
- Social media marketing (Facebook, Twitter, Instagram, YouTube etc)
- Search engine optimisation (SEO)
- Webinars / podcasts
- Content marketing (White papers, Blogs, Website)
- Affiliate marketing.

The list is endless – and growing with technology advances.

You need to decide which ones suit your target audience best and then work with your agency (and media planner) to maximise the impact of your message.

9. LEVEL OF CREATIVITY

This may seem like a strange category to include in a brief but it's most important that you and your agency establish exactly what you both mean by 'creative'.

If you ask an agency to produce something 'really creative', it'll probably mean involving senior creatives whose the collective aim is to craft something unique, outstanding and, potentially, award winning.

For a client, 'really creative' may just entail a tidy layout and some nice images.

Both views are perfectly acceptable, but the problem arises when it comes to estimating the project.

'Really creative' work (from an agency's perspective) involves research, collaboration, brainstorming, producing a torrent of ideas and multiple, internal 'pruning' meetings, until the final solution is ready to present. That takes a lot of time and resource and attracts a premium price, which a client may not be expecting.

The following illustrates what I mean:

A new client contacted us and asked us to provide an estimate for a 'creative' solution to a brochure that they were to produce. They asked two other agencies to submit pitch costs, initially for an A4 cover design, and said that the *most creative* execution would win.

On reading the brief, it became apparent that they already had a comprehensive style guide that dictated where all the elements on the cover would sit. The logo was to be bottom right, the headline was to be top left – in a certain position and size (with accompanying sub heading below it) – and the main colour image was to sit in a box 180mm x180mm square.

As they were supplying the logo, text and access to their image library, it was effectively an image selection project. If the agencies correctly followed the style guide, then all submissions would look exactly the same, apart from the image. It wasn't a *creative* job at all; it was a simple production exercise.

We called the client to point this out and suggested that they would get more value for money by asking one agency to submit a generic cover design with 3 image variations.

They agreed and revised the process, but it did illustrate how important it was that all parties understood the level of creativity required.

So if you know that what you want is relatively simple, or you have samples of the kind of thing you're after, please spell it out.

Then the estimate(s) you get back will be reflective of the time and effort required.

10. BRAND GUIDELINES OR RESTRICTIONS

As illustrated in the case study above, if your organisation has brand guidelines, please share them. Generally this will involve emailing a concise pdf or, for larger organisations, allowing secure access to an online version with comprehensive digital assets.

It's crucial that an agency has time to absorb the guidelines, download fonts, collate any assets and generally get familiar with your brand – and the way that your organisation prefers to present itself.

Please don't suggest that the agency breaks your guidelines. Whilst you may not like them or be bored with the repetition, they are there for a very good reason. Without them it would be a design free-for-all.

That's not to say that your agency can't 'stretch' them, creatively interpreting them whilst still adhering to the spirit of the guidelines. It really depends on how detailed and prescriptive your guidelines are. We find that the best ones allow for creative discretion, as long as those exercising such discretion are experienced designers.

You may also need to share any other restrictions, legal or otherwise, with your designers before they start your project.

11. WRITING STYLE

Many organisations have developed a 'house writing style'. This may sit within your main style guide, particularly in large organisations, or dovetail with your Tone of Voice. Nonetheless, it's worth a separate mention.

A 'house writing style' shows how you prefer to structure the written parts of your communications. It would typically include protocols for:

- General grammar
- Spelling of Product or Service names (particularly those with embedded capital letters)
- Acronyms and abbreviations
- Bullet point styles
- Numerals
- Hyphenation
- Dashes and hyphens
- Initial Caps
- Etc, eg, ie
- Conjunctions
- Split infinitives.

The list is endless, but the point is that if you have a particular preference for how you write (in order to maintain consistency), please share it with your agencies – otherwise they may score unnecessary own goals and irritate you in the process.

12. USPs

Coined in the early 1940s by Ted Bates Advertising Agency, the Unique Selling Proposition/Point – or USP – was meant to communicate a differentiator that was so unique, literally no-one else had one. It had to be, by definition, the first and only one of its kind.

However, today, it's very rare for a product or service to have a genuine USP. Most competitors offer something similar (or will do very shortly thereafter).

Today, many organisations offer a smorgasbord of Selling Propositions (SP) – or benefits – that, collectively, give the *impression* of differentiation. But scratch the surface a little, and you'll often find that they're not.

If the products have little differentiation – such as broadband, lager, mobile phones etc – then the marketers have to work extra hard to create a *brand personality* that consumers will buy into.

13. DELIVERABLES

This is quite simply the *items* you wish to produce (whether printed, digital or otherwise – such as guerrilla marketing).

It may be a corporate identity, an annual report or a microsite. Should you be running an integrated campaign, you'll obviously be listing multiple items in your brief.

If you know exactly what you want, try to be as clear as possible, particularly if you are asking multiple agencies to provide estimates. So for instance, if it's a report, how many pages does it have; how many tables or charts will it contain (and how complex), will you need commissioned photography and so on. The more detailed you can be, the better the agencies' responses will be.

If you are unsure as to what the most effective items may be, please discuss with your colleagues or, if working with a single agency, talk to them and tap into their knowledge and experience.

14. SCHEDULE

Most projects have a specified deadline.

Sometimes it's driven by a client's personal preference or simply a desire to complete the project as soon as possible; sometimes it's driven by seasonal pressures – such as Easter, Christmas or school holidays.

Often it's driven by a fixed event, such as an Annual General Meeting, an advertising publication date, a product launch or a financial year end.

Whichever it is, please allow sufficient time for the *design* stage of any project.

We've often received briefs where the client's schedule has contained huge swathes of time for their deliberations, demarcated a generous chunk for the printer (or developer, if it's a digital deliverable) and the agencies have been allocated what's left – an unrealistically thin slice of time to complete what is arguably the most important part of the project. So when putting your schedules together, you need to fully understand how long the design process can take – and then build that in.

If in any doubt, ask an experienced colleague or talk to your agency.

Another thing you should do is always disclose the *real* deadline with your agency, so it can plan its workflow accordingly and provide you with sensible schedules. If you provide them with a false deadline, particularly if it's a short one, it could impact *you* adversely, as they may need to charge extra for weekend or evening work, in order to hit your 'deadline'.

If it's likely to be a long project and you have key milestones that need to be strictly adhered to, please stipulate this at the outset. If your milestones are flexible, however, it's typical for schedules to ebb and flow, as long as the final deadline is achieved.

We have found that, as long as we have open and clear communications with a client, what slips at their end (holidays, illness, third-party contributions, chasing a colleague's opinion etc) can generally be recovered at our end, without the need to invoke excess charges.



15. BUDGET

Always be clear and open about your budget.

Disclosing what your allowance is doesn't mean that an agency will attempt to spend it all. What it will do is give an experienced agency a good indication of what you're after – and the investment you're prepared to undertake.

If you don't tell them what your budget is, they'll have to make some sweeping judgements, which may affect the price enormously.

For instance:

Can you imagine going into a car dealership and telling them you want a new car but not indicating how much you're prepared to spend. They simply couldn't advise you.

No doubt they'd have a model at most price points, but without an indicative budget, they'd be completely in the dark.

So it is for design. There's a solution at most price points. Some require more work than others and that is reflected in the price.

However, if you are not prepared to divulge your budget, then all the agency has to go on is the quality of your brief; in particular your written clarity.

If the language used in your brief is simple and well communicated, and descriptions are clear and unequivocal, then an agency may get close to understanding your requirement.

But if your descriptions are opaque, and the language used is peppered with acronyms, jargon and MBA-style gibberish, then be prepared for a very variable selection of costed proposals.

Has it been signed off?

Has your budget been approved? One thing agencies abhor, not without good reason, is when a client asks for a written (or even creative) proposal, only to find out further down the line that the request has to be withdrawn because the budget hadn't been signed off upstairs.

To avoid tears all round, please ensure that adequate – and approved – budgets have been allocated to your project *before* you engage your agencies.

SUMMARY

So that's it. You now know all that's needed to compile a thorough brief – and why it's important to provide comprehensive information.

It doesn't have to be a long and torturous process; indeed some briefs are very short – but it is a truism that “the better the brief, the better the solution”.

TAKE AWAY TIPS

1. A thorough brief doesn't need to be War and Peace; just good, solid, useful information.
2. The process of writing a brief actually helps to clarify your own thinking.
3. Write your brief using the clearest possible language. Avoid jargon and unnecessary management-speak. It may impress your work colleagues but if it confuses your agencies – and requires repeated clarification – it's just poor communication. For guidance on writing in plain English, please go to www.plainenglish.co.uk
4. You are *not* the audience! Neither is your boss, your colleagues or your partners. Step away from personal preferences and concentrate on your intended target audience. Is it right for them?
5. If your organisation has any strong preferences, visual or otherwise, express them clearly – in advance. It's not an agency's job to guess what you like.
6. Always declare your budget (and your expectations within it). This helps agencies to quickly calculate the complexity of the project and the likely quality thresholds.
7. Make sure you nominate *one* client contact (preferably the same person) who is available to answer questions that the brief will inevitably throw up.
8. A thorough brief will subsequently help *you* to evaluate the agencies' responses.
9. If your requirements are very simple and/or you have a great working relationship with your agency, a face-to-face meeting will probably negate the need for a written brief.

Next article

In the next article (*#5 Get on board. Work closely with your designers*), we will be looking at:

- why planning workflows with your agency can save you money
- how your designers can become your brand guardians, and
- how a close relationship can remove the stress.

All this and more will be made clear in article *#5 Get on board. Work closely with your designers*.



#5

GET ON BOARD.

➤ WORK CLOSELY WITH YOUR DESIGNERS

Articles can be downloaded from bentleyholland.co.uk



About the author

Tim Purvis is a hugely experienced communicator, having worked in the design and marketing sector since 1983.

He is an award-winning chartered designer and has successfully delivered effective and measurable corporate communications for blue-chip clients such as Tate & Lyle, British Airways, Timberland and University College London.

His experience also encompasses the public sector, where he has helped to drive behavioural change programmes for many central government departments, including Education, Health, Transport, Justice and the Home Office.

He is now sole owner and Managing Director of Bentley Holland, a through-the-line communications specialist, offering strategic insights and solutions within the brand development, stakeholder engagement, client acquisition and corporate communications arenas.

All eight articles in the series can be downloaded from bentleyholland.co.uk

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