How to prepare the PERFECT marketing project brief

BEAKBANE
Brand Strategies & Communications

Introduction

Agencies provide the creative ideas and specialist skills required to build brands. They are specialists and can deliver better results than if the client "home cooks" and does it themselves. To get value from agencies they need to be briefed and managed properly. Here is a guide on how to brief an agency.

Different situations call for different types of briefs. Here we'll assume there is a brand that needs to be promoted that is in its early stages of development and it therefore needs defining. The brand might be anything. It could be a product, or a service, targeted at consumers or businesses. It might be part of a stable of brands but for the purposes of this document we'll assume it is synonymous with the company itself.

A lot has changed in how marketing projects should be managed. Beakbane published a document back in 2003 called "Preparing the perfect communications brief" that has been downloaded over 200,000 times. What has changed? Advertising has continued to slide from being the dominant mode of marketing communication. Now there are many more ways to communicate with online communications at the pivot. The way a company chooses to communicate varies considerably but what is always necessary is to get all the different marketing vehicles working together so there is complete integration. To see examples of how communications can be integrated go to the integrated brands showcase integratedbrands.org.

How briefing communications agencies has changed

Previously marketing management could be handled as a series of disconnected briefs for single tactics. These briefs, often called "creative briefs," spelled out details for a specific task and specified a key message along with the target audience. These types of briefs are still required when a company has a tactical project and there are many templates available online.

Traditional creative briefs are no longer adequate for the lead agency who needs to define the brand and the overall communications strategy. Their role has changed because the nature of marketing has changed. Some of the changes are:

- There are many more modes of communication to pick from that need to be integrated so they provide a satisfying experience for the audience.
- It has become easy to find and share information and so organizations benefit from being more transparent and expressing their underlying values.
- Marketing messages will be seen by different audiences so their differing wants need to be addressed.
- Communications are more interactive and dynamic.
- It is possible to track online metrics and continuously refine approaches.

Because of these changes the process of building a brand needs to be more methodical. The brand itself has to be defined clearly before individual tactics, such as corporate identity, packaging, sales presentations and the website are developed. Defining a clear brand focus is a critical first step that helps ensure all communications integrate with each other to achieve corporate goals. An effective brand focus is the starting point for making the company appear more credible and the products higher quality. It also it makes the brand more memorable.

A clear brand focus makes it easier to manage the dynamic nature of marketing. Online communications have to reflect all the different parts of the company this minute, not a historical snapshot, nor a "marketing" message that is glossy and unrealistic. Marketing needs to be integrated into every aspect of the ongoing operations of the company.

Briefing is leadership

The brand focus should communicate a lot about the company, including what the company sells, its benefits, its strategic points of difference and its personality. If it is expressed well – or badly – it will be felt by everyone within the company. The process of developing a brand focus will be easier and more satisfying if the right people are involved at each step, both at the client and the agency – it has to be a team effort and making the most of a team requires leadership.

The briefing document is key because it helps achieve alignment so key people feel some ownership and are satisfied with the final result.

If you are leading the process here are some reasons for writing a briefing document:

1. **It encourages you to organize and clarify your thoughts.**
2. **It helps you provide leadership and get alignment amongst team members, inside your company and externally.**
3. **It ensures that everyone is clear about what is important and what is not.**
4. **It enables teams to cooperate and work more efficiently.**
5. **It saves time and money and you'll get to market more quickly.**
6. **The resulting communications will be higher quality and more effective.**
7. **It helps you stay in control.**

The briefing document is key and so is the briefing session. The meeting itself is an opportunity to inspire and motivate. If you communicate with enthusiasm and confidence in the end you will get superior results.

Briefly, what is important?

The brief should make the following clear:

- What the situation is currently
- What the desired situation is (and therefore what needs to change)
- What aspects are "in play" and what aspects are settled
- The executional process (including timelines and budget)

A recurring query is, how much information should be communicated? Should the brief be short or many dozens of pages?

The answer is that the brief should include all the information the agency does not already know that they need to get the job done. Arguably it is better long than short. It can include business plans, market research and lots of background information. If the material is peripheral to their needs they can skim through it quickly.

However, the key questions outlined above need to be answered clearly. The best briefs are well thought out and logical. The objectives, the vision and the scope need to be clear and concise. A brief that is succinct is more likely to be understood, which will result in better outcomes.

The Brief:

Project Name:

Think up a descriptive or catchy name

What is the project?

Summarize the nature of the project in one or two sentences. What is the opportunity or problem that needs to be solved?

Background

The background should answer the question, What is the situation currently – and how did we get here?

The background should cover these areas:
- What is the history of the company and its products?
- What is the big picture – present and future?
- What is the corporate vision?
- What are our corporate values & ethos?
- What is the corporate culture and appetite for change?
- Who are the competitors (who is winning/losing)?
- What are the market and share trends?
- How does this project fit with the overall business plan?

The background should also cover what might happen in the future:

- What are trends in buyer and market behavior?
- What are the potential competitive threats?
- What is on the horizon? What products and technologies might change the game?

When preparing the background there is no need to be brief. In fact, it is preferable if the information is comprehensive. It is helpful to understand the totality of the company, and that includes its history, the people that comprise it, the products, the markets and the distribution channels.

Instead of writing this section just include links and documents. For instance include brand plans, market analysis, competitive reviews, brochures, advertising, magazine articles and a summary of the main competitors, with links, noting their strengths and weaknesses.

In some cases, a verbal account of the background is helpful – particularly if it is given by the founder of the company.

The Objectives:

This section defines what needs to be achieved. It should provide the criteria to answer the question, "If we achieve these objectives, will we be satisfied?"
The purpose of the objectives are to concentrate efforts where they will give the greatest results.

The objectives help everyone understand how the current situation needs to be changed to achieve a goal that is desirable for the organization. By achieving the objectives, the organization should be in a position to withstand competitive pressures and improve profitability.

When setting objectives it is necessary to be clear and concise. The fewer objectives the better. Never have more than five. Three is OK. One is best. List the objectives in order of priority.

There are different types of objectives.

1. There are **corporate objectives** (such as increase sales of _ by x% over period y). These are often subject to many influences including pricing moves and the manoeuvres of competitors, therefore metrics that are more closely related to the marketing activity might be preferable.

2. There are the **marketing objectives**. These might relate to awareness, changes in attitude or finding a certain numbers of sales leads. What are reasonable targets that are measurable? What metrics are available?

3. There are also **"unofficial" objectives**. Whilst these are often not talked about, they are nonetheless important. Who are the individuals who are most powerful and what do they want to achieve for themselves and the organization? What is their vision and what gets them excited? What will heighten their status and advance their career?

Defining objectives is a creative act that carries with it an opportunity for leadership and nuance. Inspiring visions and audacious goals can be motivating. But at the same time the goals should be attainable. Over-achieving goals is more satisfying for the organization than performing strongly but still falling short.

Brand and product overview:

You need to explain the nature of the product/company/brand and make clear what is set (for instance the name and logo) and what needs to be re-thought or improved. What might benefit from some strategic and creative thinking? What guidelines need to be adhered to?

List out the following:
- The name and nature of the products
- The number and nature of the variants (or SKUs)
- What are the product benefits?
- What differentiates the brand from the competition and in what ways is it better?
- What is the substantiation and the reasons to believe in the claims?
- What is the look, feel and personality of the brand? How might it be improved?

The audience and insights

Who is the target audience? Who is most likely to buy the product and why?

What is the "chain of satisfaction" – that is the chain of people that are part of the selling process, starting with the leadership of the organization – through the salespeople, wholesalers, distributors, buyers, servers, and final consumers? How does the target audience refer to the product? What terminology do they use?

Do you have any insights into what motivates them or might change their behavior? Remember that no matter what the product is, nor how technical it appears, it is always a human making the purchase in a human context. What are the insights in how they relate to the product in their social context?

In traditional marketing there was an emphasis on the "consumer". However there are many different stakeholders involved in building a brand. What are the different audiences and what information are they looking for? When building a website these groups are sometimes described as "personas" and they should be listed.

Go to market strategies

This defines the "how" in how the product will be sold and distributed. What are the ways the product will be communicated and sold? Questions that need answering include:

- What are the strengths and weaknesses of the sales organization?
- What sales tools are they using and how effective are they?
- What are the capabilities and strengths in the rest of the organization?
- In what geographies and channels of distribution is the product sold and where should efforts be concentrated?
- What are the expectations of the trade and how can they be motivated?
- Once an initiative is launched how will competitors respond? How can one minimize the company's strategic vulnerabilities?

The scope and process

This section needs to spell out what needs to be done, by whom and when? List out the specific deliverables that are required.

Who needs to sign off on activities? Whose responsibility is it to sell them? What checks and research will be required to validate the recommended approaches?

If you are involving several different agencies make their respective roles clear. They will cooperate better if their responsibilities are defined.

What has already been invented and can be repurposed? What needs to be created afresh?

Be clear on the timing. Deadlines motivate and help everyone make decisions and get things done and work better than saying everything is required ASAP. What is the launch date? What are meeting dates? Lay out a critical path and build in plenty of time for management sign-offs. They always take longer than expected.

What is the contact information for everyone involved in the process?

Executional considerations

What are the technical requirements needed by the agency to complete the task? These will depend on the deliverables that are specified in the scope. For instance, if a website is needed, what servers are being used and what passwords are required?

Budget

There are two approaches to managing costs. One is to define specific parameters and then ask for a quote. However, for a multidimensional project that requires strategic and creative thinking it is impossible to define all the parameters at the start.

Therefore, a better approach is to discuss a budget and work collaboratively to utilize the resources in the ways that will be most effective. If the budget has not been set, what is a reasonable minimum and maximum?

Conclusion

Writing a briefing document can be a chore – but it is a chore that will pay back with superior results. A good brief is valuable and should provide:

- Clarity about what is needed
- The information necessary to complete the task
- The inspiration and motivation for everyone to be their best.

Start every project with the mindset that it is possible to achieve breakthrough results that make history. The process will be more energizing and...you might make your mark.