

Communication best practices

Making the most of the briefing process

The space between

It's the getting from here to there that drives your work. *Here* is your starting point, your challenge, your opportunity. *There* is your destination. The goal you need to achieve. The vision you want to fulfill.

The briefing process helps you span the distance between here and there. It grounds you—and your agency partners—in a shared understanding of where you are and where you want to be. And it creates the map that guides your work, generating better results and saving time and money over the life of a marketing communications campaign or project.

Boiled down, the briefing process includes four steps:

1. [Develop an input brief](#)
2. [Lead an agency briefing](#)
3. [Review the agency's creative brief](#)
4. [Evaluate the work](#)

This guide walks through each step, with suggestions along the way for making the briefing process as effective and efficient as possible.

1. Develop an input brief

You own the input brief. It's yours to develop and yours to present. It's the most important tool shared between you and your agency partners. Done well, it sets up all the work that follows for greater success.

The input brief lays out the reason for action—the business need or opportunity. It presents the information that will guide the action—product information, audience profile, market conditions and so on. And it defines what is expected of the action—the goals of the marcom deliverable or campaign. All in one straightforward and concise document.

Put another way, the input brief is the foundation for the strategic and creative solution you're charging your agency to deliver. The stronger it is, the stronger their solution will be. And the more efficient, effective and successful you'll be in the long run.

How? Three reasons:

It produces better work

The input brief arms the agency with what they need to be (a) smart and (b) inspired. It focuses their thinking and engages their imagination, educates them about the product and brand, gives them insight to the audience or market, and defines the boundaries of their work.

As a result, the agency's output is more likely to be on-target, finely honed and valuable.

It saves time and money

If you send an agency off to develop a solution without providing clear direction, you're virtually guaranteed to waste time and money. They'll expend costly effort up front trying to fill in the gaps or, worse, forge ahead with partial information—inevitably producing a partial solution.

Either way, you'll be focusing your energies on repeatedly backtracking and course correcting rather than making steady progress toward your goal. And you'll probably be straining your relationship with your agency partners, too. They'll be as frustrated and disappointed by the lost time and effort as you are. It can create a debilitating loop, undermining productivity and creativity.

The input brief is your guard against confusion and inefficiency. It establishes a common understanding of the work before the work gets under way. Plus, it imposes discipline, enhances efficiency and increases the likelihood that the agency will get it right the first time, saving time and money.

A good input brief is particularly important when there are multiple agencies contributing to a project. It provides a shared blueprint, helping to ensure that each specialty—creative, media and PR, for example—is aligned with the others. That gives you a huge advantage in managing multiple moving parts as well as ensuring their collective work drives the most valuable results.

It makes it easier to measure results

Speaking of results, the input brief gives you a measuring stick to track progress and evaluate success. Since the project's goals have been clearly and concretely identified up front, you can more effectively assign accountability and quantify your success in meeting them.

Getting down to brass tacks

OK, you're sold on the importance of the input brief. What's involved in pulling one together?

There is no single template for developing an effective input brief. An input brief for a TV ad campaign will likely be quite different from one for a POS brochure. Each input brief will reflect a different level of scope and detail, and specify the needs and expectations of the agencies involved.

That said, some fundamental “musts” apply to all input briefs:

It must be written down.

A written record gives everyone the same starting point in the strategic and creative process, helping to promote more effective collaboration and alignment of work. The input brief also documents your thinking and offers your agency an important prompt to test their understanding, ask questions and engage in productive discussion.

While a verbal briefing of your agency is also essential (more on that in a bit), it should always work from the input brief for consistency and effectiveness.

An input brief can also help you present the work to others on your team or organization. This can be particularly useful when seeking their buy-in or approval, helping to avoid costly delays later on.

It must be clear and simple.

An effective input brief is just that—brief. It should include only the most relevant and essential information presented in succinct and accessible language. Strip out jargon and technical information as much as possible. Use your own language; avoid cutting and pasting information from other documents. Avoid weighing it down with too many details or requirements. You want to inspire creative problem solving, not overwhelm it. This can call for some tough decisions about what to leave in and what to leave out, but they're absolutely key to the input brief's usefulness.

It must include clear and measurable objectives.

The input brief is a contract of sorts. It specifies what the work needs to achieve and what you expect of your agency. To live up to that expectation of accountability, the agency requires objectives that are as clear and explicit as possible.

Your agency needs to know what business opportunity or challenge they're addressing. It helps deepen their understanding and focus their work. So be concrete in describing what success looks like. Use numbers to quantify what you're aiming for. Specify how results will be evaluated.

Working to this level of detail not only helps your agency, but you too. It can lend greater credibility to the program's results and more accurately measure its impact on the bottom line when all is said and done.

Elements of an input brief

As with the principles, there are some elements common to most input briefs. These aren't hard and fast requirements, but rather broad categories you'll probably want to consider as you develop yours.

Background

Set the context for the project by addressing questions about current conditions that will influence the work, such as:

- *What is the business need?*
Outline the business conditions prompting a creative response—e.g., to launch a new product, increase share, develop new markets, etc.
- *What are the market conditions?*
Describe the size of the market in value and volume, any key segments, its growth (or decline), trends contributing to these conditions, customer behaviors, etc.
- *What is the product or service to be promoted?*
Include name, a description of key features and benefits, development history, distribution channels and point-of-sale, availability and pricing, etc.
- *How is the product or service positioned?*
Describe where the product or service sits in the market relative to competitive offerings. Provide information on prior positioning, advertising and marketing campaigns. Include an overview of competitive communications.
- *What are the key issues facing the brand?*
Address how the brand is perceived in the marketplace, as well as how the product or service fulfills the brand promise.
- *What is the current brand strategy and/or advertising and marketing strategy?*
Explain how this communication is expected to complement and align with any current brand marketing or business group campaign.

You get the idea. Just be sure to include only those things that are directly relevant to the opportunity or challenge you need to address.

Objective

Another way of saying, “What does the creative solution need to achieve?” Be as specific and concrete as possible. If an ad is going to be charged with driving sales 5 percent this quarter or a print campaign is expected to increase unaided brand awareness by 20% among a targeted audience over 18 months, say so. The objective spells out the criteria by which you'll measure success, so details and clarity count.

Less is more

One last thing. While you probably have a ton of information you *could* share with the input brief, it's essential to continually ask yourself what exactly you *should* share. Resist the temptation to overload the agency with reams of documents—technical backgrounders, strategy decks, research results and the like—to sort through and make sense of. You certainly can and should forward them supplemental information along with the input brief, but be judicious in what you select. If you send your agencies everything and the kitchen sink—just in case they need it—chances are they'll get bogged down or even lost, burning through precious time and money. It's your job to separate the necessary from the nice-to-know.

To save time and avoid recreating the wheel, try applying the example input brief provided on the next two pages to your next project or program.

Tips for completing the input brief:

- All this information should fit on no more than two pages. Less is more.
- Use your own words. Do not “cut and paste” from other documents.
- Avoid jargon and use everyday language that will resonate with real people.
- Attach reference materials—technical specs, strategy, research—to supplement the input brief, but include only necessary information.

Sample input brief

Project name

Business unit

Region

Date

What is the reason for this marketing activity?

Offer background information and provide context. What are the business conditions and market conditions? Describe the product/service to be promoted and its key features. How is it positioned? What is the current brand or advertising strategy? Include only the essentials. And provide a clear objective—describe what success looks like.

What do you know about the audience?

Define the target audience. What is their need for this product/ service? How do they currently buy or use it? What is their perception of your company vs. the competition? What else do you know about how they think, feel and behave? Try to describe your target audience as they see themselves.

What do you know about the competition?

Who are the key competitors and what comparable products/services do they offer? What is their positioning? What is their marketing or advertising strategy?

What is the ONE thing you want the target audience to take away from the communication?

State the key message or idea that you want the target to believe. Be as succinct as possible.

What can you say about the product/service to support the one key message?

What makes this product/service different from competitive offerings? How is it unique to your company (in a way that is relevant and believable to the target audience)?

What action do you want the target audience to take after being exposed to the communication?

Be as specific as possible: e.g., click through, register, purchase. This action should tie back to the objective.

Other details: Are there any offers or incentives to include? What is driving the timetable?

Include any other information or details that the agency should be aware of.

Mandatories

Identify any requirements such as legal information or brand standards. Specify timing and budget.

Approvals

Who will be accountable for the work?

Client
Contact information

Agency
Contact information

2. Lead an agency briefing

Once you've got your input brief ready to go, it's time for the agency briefing. If you're tempted to send them your carefully prepared document and be done with it—after all, you've held up your end of the bargain and everything they need to know is in there—go for a brisk walk and wait for the feeling to pass. Even the best input brief can't stand in for an open conversation with your agency team where you can field questions and clarify information. Talking it out is the most efficient way to identify and resolve issues and then quickly move on.

Meeting of the minds

It's best for everyone to get together around the same table. This is particularly true if there are multiple agencies involved in the effort. You want everyone pointing in the same direction from the outset.

Depending on the project, you might decide to invite experts or key stakeholders to join you, such as a product manager or research partner. From the agency side, the account leads should be there, along with the strategy and planning people. And the creative and media folks should have a seat too. This gives them direct exposure to the business needs, the market conditions, the audience insights—all that vital information that'll soon influence their work.

Of course, it won't always be cost-effective or even possible to physically assemble all the involved parties. Phone and video conference briefings can work fine, but be sure to allow a bit more time, both before and after the briefing, for preparation, questions and building understanding.

Share the input brief with the participants ahead of time. Encourage them to bring observations and questions. Use the input brief to ground the discussion, but allow for broader inquiry and discovery.

But a word to the wise: The briefing is *not* a brainstorm. You're laying the groundwork for the creative process, not asking for concepts or solutions in this meeting. Those will come soon. Right now, focus on getting your team up to speed on the facts at hand and what's expected of them.

The agency should leave the meeting ready to dig in and develop the creative brief. More on what you should expect to receive from them—and how to evaluate it—follows.

3. Review the agency's creative brief

First off, let's be clear about what the creative brief is *not*. It's not a requirements document. Not an action plan. Not a wish list.

The creative brief is written by the agency, chiefly for the agency. It's their translation of your strategic input brief, cast in language to steer the marketing strategy, inspire the creative team or guide the media buyers. While it should give everyone on the project a common understanding of where you are and where you need to go, it's largely for the benefit of the right-brainers charged with coming up with an innovative solution.

So the creative brief shouldn't be a regurgitation of information written for a nuts-and-bolts business audience. Its job is to inspire nonlinear thinking and original ideas. And it shouldn't be a document with a long shadow, either—you want it to be quickly absorbed and intuitively applied, something the team works from, not slavishly sticks to.

Briefly speaking

Depending on whom you ask or work with—not to mention the communications specialty that's engaged—there are countless variations on the creative brief, but most include the following elements:

- The objective of the communications
- A profile of the target audience
- The proposition—the essence of what needs to be said
- Support for the proposition, including prioritized product benefits and brand benefits
- The desired response of the target audience
- Recommended voice, tone and brand personality
- Executional details, such as seasonal or geographical considerations or the recommended media mix
- Tactical details, such as budget, timing and legal requirements

Every agency has its own approach to creative briefs, so grant your team some latitude in what it comes back with. But regardless of its format, it should address how the solution will influence your audience and fulfill the goals you laid out in the input brief. In other words, at minimum it has to reflect a genuine understanding of how the ad or brochure or the media plan you're developing will shift the thinking or behavior of the people you're trying to reach. This is a bit different than just playing back the information you supplied in the input brief; you're looking for innovative thinking and intelligent problem solving.

Share your feedback on the creative brief with your agency in writing. Be as specific as possible. If you don't want them to pursue a particular direction (“No slice-of-life campaigns,” for example) or if there's something missing (“You should prioritize trade publications”), tell them in no uncertain terms.

This is also a good time to challenge your agency. Let them know you want big ideas. If the creative brief is lacking in depth or ambition, push them. You've come this far; don't treat its approval as a formality. You don't want to be backtracking later to fill in holes.

Consider the brief as a shared vision between you and your agency. Both sides should understand and buy into it before signing off.

And once the ink is dry, the real fun begins.

4. Evaluate the work

After the agency team has been set loose and begins developing concepts, rely on the creative brief in your review and critique process. It'll focus your feedback and help the agency respond more quickly and effectively. The creative brief gives you and your agency common ground to weed out weak ideas, discuss refinements and home in on the winning concept.

Some questions to consider:

- Is the creative concept aligned with the marketing strategy?
- Does the concept clearly support the proposition?
- Will it resonate with your target audience?
- Does it emphasize benefits and identify competitive advantages rather than just calling out product features?
- Does it convey an authentic and consistent brand voice?
- Will the recommended media mix most effectively reach your target audience?
- How will the concept be adapted for specific media channels?

Remember, the creative brief is your map to make sure you and your agency don't get distracted or lost while working your way from here to there. By working through the process, you should see better results, faster. Which means you'll be free to focus your attention and resources on addressing other challenges, exploring new opportunities and meeting your goals.
