Creative Services Brief Template

We all get caught up in the excitement that comes after you decide to have a new marketing piece designed for your company, product or service, or campaign. It’s so easy to get swept away envisioning the impact it will have on the intended audience. However, the jubilation often deflates when we jump into the process of finding, hiring, and managing a designer or design team.

Let’s face it—corralling their creativity into a concept that meets your needs is difficult and can be overwhelming. On the one hand, you want to give them free reign to be able to turn those creative juices into something powerful. On the other hand, you’re not creating an art piece to win awards, but turning a marketing concept into something that speaks to your audience and increases sales.

So what is the best way to take on this process without losing your mind, wasting your money, and driving your designer away? Consider these three tips to help you stay on track:

**Take your time to find the RIGHT designer.** Just like there are a lot of fish in the sea, there are a lot of really talented and not so talented designers out there. You want to make sure you take the time to really evaluate whether this is the right designer for you, and not just make your selection because you like what they’ve done. Some important questions   
to ask:

* Have they worked on projects similar to your current needs?
* Do they have good references? While reviewing past work is a very important consideration, be sure you also spend some time talking to their clients to find out about their design process, working styles, and the results of the project.
* Have you liked the people you’ve met so far? It seems obvious, but you’re getting ready to embark on a pretty intense process and you want to make sure you can get along and communicate effectively with this person/team.

**Write a Creative Brief.** A creative brief is the most effective way to get everyone (both your organization and the design team) started with a common understanding of what needs to be accomplished. An effective creative brief gives the designer direction and provides your team with established benchmarks to measure concepts against. Spending the time to complete a well-outlined creative brief will save you a lot of time up front. We recommend that each brief:

* Identify a clear statement of objectives with priorities
* Tie these objectives to your company positioning
* Indicate how you will measure the achievement of goals
* Define, characterize and prioritize your audiences
* Outline budgets and time frames with specific details on scope and schedule
* Explain the internal review and approval process
* Set forth any procedural requirements that might hold up the process down the road

**Don’t be afraid to lead.** It can be a bit overwhelming to say you’re going to “lead designers”. As we’ve said, it’s a double-edged sword of setting them free while keeping them focused. However, you’ll both benefit if you lead the project while the designer designs and manages the design process. With that, it’s important that you’re available when the design team needs you—for feedback, clarification, or to make decisions in a timely manner. You’ll be happiest with the design process AND the end product if you:

* Identify and articulate your objectives
* Establish your process early
* Ensure the design team has access to what it needs from you
* Define a detailed budget and schedule to measure progress
* Lead the process from beginning to end

By making sure you’re following the steps above, you’ll ensure that you AND the design team work together to create a piece that makes an impact. After all, this is supposed to be a fun process!**Creative Brief and Services Request TEMPLATE**

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| --- | --- | --- | --- | --- |
| **Date Submitted:** | | **Due Date:** | | |
| **Priority** | **❑ Low ❑ Medium ❑ High ❑ Immediate** | | | **Approval:** |
| **Project Manager** | [Enter the name of project lead] | | | |
| **Project Description** | [Enter your project description] | | | |
| **Project Goals** | [Enter the 3 top goals this creative project must achieve] | | | |
| **Target Audience** | [Enter a description of who you are trying to attract and their top three common personality traits] | | | |
| **Key Messages** | [Enter a description of the top 3 (and 3 only) messages that must be present] | | | |
| **Tone** | [What tone do you want the creative (both visually and in copy) to take? Casual? Formal? Technical? Humorous? First Person, Third Person?] | | | |
| **Quantity** | **Media Output** | **Size** | | **Colors** |
|  |  |  | |  |
| **Existing graphics  to be used  (file names and locations)** | [List any existing graphics you require be used in this project] | | | |
| **Project Timeline** | [Detail your project schedule, including all reviews and approvals] | | | |
| **Project Budget** | [Enter your project budget, including design, production (i.e. print fees), etc.] | | | |
| **Project Sign-Off** | **REVIEW TEAM** | | **APPROVAL TEAM** | |
|  | [Enter the names of everyone who must REVIEW the piece] | | [Enter the names of everyone who must APPROVE the piece] | |
| **Other** | [Add any other key information relevant to this project] | | | |

**Creative Brief and Services Request SAMPLE**

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| **Date Submitted:** | | **Due Date:** | |
| **Priority** | **❑ Low ❑ Medium ⌧ High ❑ Immediate** | | **Approval:** |
| **Project Manager** | Jennifer Brock | | |
| **Project Description** | Develop a company overview brochure that will be used as sales tools and ties to the web site as far as incorporating elements of design and color scheme. The project will include design and review of two distinct concepts. Copy will be provided to the design team prior to concept development. | | |
| **Project Goals** | 1. Support the sales process with a piece that effectively communicates who we are, what we do, who we do it for, and why. 2. Can be distributed via print and electronic means (PDF) 3. Format conducive to inserts (case studies, articles, etc.) | | |
| **Target Audience** | * Industries: Manufacturers, Distributors, and Retailers (Annual Revenue of $200 Million - $500 Million | Small to medium companies with 200-400 employees) * Buyer: VPs, Directors, and Managers of IT * Influencers: Operations Managers, Shipping Coordinators, Quality Control Engineers | | |
| **Key Messages** | Pragmatyxs sells, integrates, and supports mobile and wireless equipment and software to increase the productivity and accuracy of inventory data management—saving manufacturers, distributors, and retailers money. Our holistic approach leverages the latest technologies and the expertise of our application developers to customize a system that successfully meets your unique business needs.  Our brand promise is our STEADFAST COMMITMENT TO ACHIEVING SUCCESS (through our clients success, we succeed.)   * We fully commit our resources and energy towards your success. * Every business decision we make is tested to determine whether it will contribute to our client’s success, and only moved on if it does. * Our investment in tools and systems that allow us to deliver high-quality solutions and to better manage our day-to-day customer support activities. * We develop close, loyal relationships with our key partners allowing us to maximize the value we bring to our customers | | |
| **Tone** | Need a combination of professional, but conversational, copy tone and edgy artwork that indicates movement in technology. Given the audience is technical in nature, need to minimize marketing fluff and highlight the “facts.”  Imagery needs to reflect manufacturing environment in a non-traditional (shop floor, forklift, etc.) way, showing wireless technology as an exciting new addition to the same-o, same-o. | | |

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| --- | --- | --- | --- | --- |
| **Quantity** | **Media Output** | **Size** | | **Colors** |
| 1,000 | InDesign File  Adobe PDF (for print and email) | 11x17 Fold-over, Finished 8-1/2x11 | | Pantone 569  Pantone 640 |
| **Existing graphics  to be used  (file names and locations)** | Include company logo, technical certification logos, and partner logos | | | |
| **Project Timeline** | The schedule for this project will flow as follows:   1. 2 comps presented to Jennifer by 3:00 p.m. Thursday, February 17th 2. Review team will review and provide feedback by Tuesday, February 22nd 3. Feedback incorporated and revised comp presented by Thursday, Feb 24th 4. Review Team will review and provide feedback by Monday, February 28th 5. Feedback incorporated and final comp presented to Approval Team by Wednesday, March 2nd   Final art files for Brochure delivered to Printer by Thursday, March 3rd | | | |
| **Project Budget** | $2,000.00 | | | |
| **Project Sign-Off** | **REVIEW TEAM** | | **APPROVAL TEAM** | |
|  | Paul, Phil, Shirley, Shannon, Jennifer | | Paul, Shannon | |
| **Other** | N/A | | | |