

# THE CLIENT BRIEF

A best practice guide to briefing communications agencies



Joint industry guidelines for young marketing professionals in working effectively with agencies



**“FORGET, JUST FOR A MINUTE,  
THAT YOU ARE BRIEFING AN AGENCY.  
INSTEAD, PRETEND YOU ARE  
STANDING ON THE BANK OF A RIVER  
ABOUT TO BUILD A BRIDGE.”**

Around you are architects, builders, all sorts of different experts that you have hired to help you. They might all come from different specialist companies, they might all come from a single one-stop-bridge-shop. It really doesn't matter. All that matters is that you build the best and most effective bridge you can.

So what brief should you give them in order to get that perfect bridge?

How about **where it should start from?**

Where are you standing right now?

Where is 'point A'? They need to know that.

That's not up for debate.

And what about **where it should finish?**

Where's 'point B'? The destination. If I were the architect, that's the bit of information I'd want made pretty clear.

Finally, what about **how to build the bridge itself?**

Probably not.

Maybe you'd give them some ideas on what the bridge might look like, what vehicles will need to cross it, what size boats will need to go underneath it, how high the hand-rails should be, etc, etc. But you're not going to tell them how to build the bridge. That's their job. You're going to sit back and wait to see the drawings.

It's the same with briefing agencies. They need to know where you are now. And they need to know where you want to get to. What will success look like? And how will it be measured?



CHRIS HERD

IPA Value of Advertising Committee

If every agency involved in your campaign shares that same information, aren't they likely to work better together to achieve the desired result?

So when you're writing an agency brief, think **“Where am I now?”** and **“Where do I need to get to?”** Make it crystal clear. And you'll find that most agencies will be pretty good at getting you there.

I think that's the single biggest thing we've learned from all of our research in preparing this guide.

So I hope it sings out loud and clear as our single biggest recommendation.

Now, back to bridges.

The Millennium footbridge. Wouldn't you just love to see the original client brief?

# “THE BETTER THE BRIEF, THE BETTER AND MORE ACCURATE THE RESULTS.”

The aim of this new joint industry initiative is to provide you with best practice guidelines on how to brief communications agencies and make the most of their expertise.

There are universal pressures on all clients to work faster, cheaper, better, and increasingly your personal success will be connected to your marketing activity being more effective. Adopting these guidelines will positively impact upon this success.

In addition there's a growing requirement for clients to demonstrate that robust processes exist within their own operations. Formally adopting best practice in agency briefing will go a long way to satisfy this requirement.

The brief is the most important bit of information issued by a client to an agency. It's from the brief that everything else flows. Indeed written briefs are a point of reference that can be agreed at the outset and therefore, to some extent, form a contract between client and agency.

The better the brief, the better and more accurate the results. The more time, effort and information you input at the start, the greater the time savings throughout the process.

This document is designed for use with all types of communications agencies. We have included a simple list of the main headings in a good brief for easy reference and a short summary of what each section should contain. There is also a longer web-based document, which goes into more detail.

We have conducted research with over 100 clients and more than 100 agencies to quantify these views (you will see verbatim comments and figures from the research illustrated throughout the text). We have also considered many briefing templates developed by clients and agencies alike to distil the 'common ground' and we have discussed briefing techniques with many independent expert consultants to ensure that our guidance document is as reflective of current best practice as possible.

We want you to use this template to help your marketing teams become the best briefing practitioners possible. We want agencies to disseminate the guide far and wide amongst their client base. We want you to consider joint training with your agency. Together we can make a difference and truly improve effectiveness whilst limiting the wastage of time and money for all concerned.

I welcome your comments, suggestions and questions on this important topic and assure you that ISBA will continue to work with the Communications Agencies Federation (CAF) representing the IPA, MCCA and the PRCA to deliver first class information, training and services to enable advertisers to manage their agency relationships more and more effectively.

DEBBIE MORRISON  
ISBA Director  
of Membership Services



# WHY WRITE A BRIEF?

THERE ARE THREE COMPELLING REASONS WHY IT IS WORTH WRITING A BRIEF FOR EVERY PIECE OF WORK THAT YOU COMMISSION AN AGENCY TO DO:

- 1 It leads to better, more effective and measurable work
- 2 It saves time and money
- 3 It makes remuneration fairer

## 1 BETTER WORK

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A brief is the most important piece of information issued by a client to an agency. It's from the brief that everything else flows. Therefore it's essential that every effort be taken to prepare the best possible documentation of what is required.

It's in the nature of creative thinkers that giving them the tightest of parameters will often stimulate the most inventive of responses – and 79% of clients and agencies agreed that: **“It is difficult to produce good creative work without a good brief”**.

The client brief can be considered the platform for a communications campaign. The better a company's corporate or brand position is defined and the more

thoughtfully its key business issues are described, the more likely it is that strategic and creative thinkers in agencies will be able to apply their specialist skills to produce great solutions.

**“The whole idea is to stimulate the creative imagination, not to restrict it. Ultimately you are buying creative ideas. Procurement people can sometimes write briefs as though they were buying copper piping or paperclips. But selling is an art. It's more like briefing an architect. We need agencies to feel inspired so they can do their best work.”**

(‘BRIEFING’ RESEARCH 2002: AGENCY SAMPLE)

## 2 SAVING TIME AND MONEY

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The biggest waste of agency resources is to put them through the process of developing a solution repeatedly without concrete direction. It wears on relationships and is costly in wasted staff time (on both sides).

**“We need agencies to get more work right first time. That saves time and money. A proper written brief makes the process more efficient – that's good for clients and good for agencies.”**

(‘BRIEFING’ RESEARCH 2002: CLIENT SAMPLE)

In our research 99% of agencies and 98% of clients agreed that: **“Sloppy briefing and moving goal posts wastes both time and money”**. A clear written brief can minimise this wastefulness and maximise the chances of a ‘right first time’ agency response to the client.

**“The written brief instils a discipline on my team and the agency to be very clear about what the objectives and expected outcomes are.”**

(‘BRIEFING’ RESEARCH 2002: CLIENT SAMPLE)

Both clients and agencies say that ‘time pressures’ are the main reason for inadequate client briefs. But in fact not writing a brief to save time is a false economy, as more often than not it leads to re-working. Worryingly, 75% of agencies and 55% of clients agreed that: **“The briefs that we work on are often changed once the project has started”**. Worse, 79% of agencies reported that: **“Clients often use the creative process to clarify their strategy”**, and even 35% of clients agreed with this. It's like using your first set of curtains merely to define how big your windows are!

# “A PROPER WRITTEN BRIEF MAKES THE PROCESS MORE EFFICIENT— THAT’S GOOD FOR CLIENTS AND GOOD FOR AGENCIES.”

## 3 FAIRER REMUNERATION

One of the criticisms that marketing people face from their colleagues in finance and in the boardroom in general is that they lack accountability for the very significant sums of money they spend.

The caricature of the flash and superficial marketing executive will only be dispelled by a more professional approach. Ensuring that briefs are written for every project from every agency is an essential place to start.

Over 90% of agencies and 84% of clients agree that: **“Payment by results is impossible without fully agreed business objectives”**. Given the increasing prevalence of a PBR component in so many remuneration agreements, this is another compelling reason for a proper written brief.

Clearly the scale of the project will dictate the depth and complexity of your brief – one for a major new brand launch will obviously be much more detailed than one for a small tactical advertisement within an existing campaign.

But, whatever the task, a written brief that includes ‘objectives’ and ‘success criteria’ is the foundation stone for accountability and demonstration of the effectiveness of advertising, media, PR, direct marketing, sales promotion and indeed all forms of commercial communications. And without the ability to demonstrate our effectiveness, none of us will receive the remuneration that we deserve.

## IN REAL LIFE WITH ANDREW NEBEL

*Clients generally get the agencies they deserve! The best work flows from client/agency partnerships that are built on mutual respect, integrity and a joint humility of approach which allows the professional perspective of both parties to be recognised and respected.*

*In working together successfully, clients and agencies need to achieve the commercial equivalent of a ‘Vulcan mind meld’, which can only flow from clear, open and non-precious communications in both directions.*

*Establishing a clarity of purpose through the definition of objectives which are outcome focused and measurable is clearly at the heart of the briefing process. Clear briefs are not the only critical success factor in arriving at good advertising and marketing, but without this sound starting point you have little chance of success.*



ANDREW NEBEL

Barnardo's – UK Director of  
Marketing & Communications

# THE PRINCIPLES BEHIND A GOOD BRIEF

THERE IS REMARKABLE CONSENSUS AMONGST CLIENTS AND AGENCIES ABOUT WHAT MAKES A GOOD BRIEF. THERE ARE THREE KEY AREAS:

- 1 Written briefs
- 2 Clarity of thinking
- 3 Clearly defined objectives

## 1 WRITTEN BRIEFS

Our research shows that 94% of clients and 98% of agencies believe: “A combination of written and verbal briefing is the ideal”. Both parties see enormous benefits in starting with a written document produced by the client, which is then analysed by the agency and debated between the two teams.

**“We prefer a written brief because this forces the client to consider their request. The discipline of writing a brief ensures some rigour on their part. The opportunity to discuss this at a subsequent verbal briefing usually allows us to cover any inconsistencies and, if necessary, develop focus through mutual agreement.”**

(‘BRIEFING’ RESEARCH 2002: AGENCY SAMPLE)

The process of developing, discussing and agreeing the brief in this manner in itself adds value. And if more than one agency is involved in developing the campaign (as is often the case with media and creative agencies) it is advisable to brief all parties together – with one written brief and one subsequent briefing meeting.

**“By writing a brief we have focussed on what it is we are expecting from our activity and what we expect our agencies to contribute/come back with.**

By discussing this written brief, each party has the opportunity to build on the written brief, challenge it and buy into it. It assists clarity and helps build an effective team.”

(‘BRIEFING’ RESEARCH 2002: CLIENT SAMPLE)

A written brief is also vital in ensuring the ‘buy-in’ of other key people in your company. This buy-in is essential in order to avoid the significant waste of time and resources that can happen when senior executives – often outside the marketing department – challenge key assumptions in the brief, leading to belated changes in direction. Written briefs should have the buy-in of all interested parties before they are delivered to your agency.

Nowadays, when you may retain three, four or more agencies to work on different aspects of your organisation’s corporate or brand communications, the premium on convening a key meeting to enable all parties to debate and contribute to the brief has never been greater. Having people with advertising, media, direct marketing, public relations, sales promotion and other communications skills together in one room at the beginning of the project will add enormous value and set the shared agenda for the work ahead.

# IN REAL LIFE WITH ALAN DOYLE

*In the words of Bill Bernbach, “Our job is to simplify”.*

*The key to effective briefing is to provide a simple insight that can be dramatised memorably. Ensure that you know exactly what you want. Then tell the agency as clearly as possible.*

*(It also helps to have a seamless relationship with them stretching back over four decades, mutual understanding and respect, a fine brand and peerless products.)*

ALAN DOYLE

Volkswagen UK – Communications Manager



## 2 CLARITY OF THINKING

A good brief is not the longest or most detailed, it's the one whose clarity and focus creates the platform for a great strategic leap, a blinding customer insight and an effective solution.

Briefs are called 'briefs' because they are meant to be brief. They are a summation of your thinking. Try to attach all relevant supporting information as appendices.

As Blaise Pascal put it in his *Lettres Provinciales* of 1657; "I have only made this letter longer because I have not had the time to make it shorter". Too much information can fog the process. Relevance and context are more important than reams of data.

**"The main difference between good briefs and bad briefs is that good briefs leave you with a clear understanding of what you are trying to do. Bad briefs drown you in contradictory information and objectives."**  
(**'BRIEFING' RESEARCH 2002: AGENCY SAMPLE**)

The client brief should therefore be a concentration of your current thinking, it should contain key nuggets

of information and it should focus on setting out the objectives of your product or service that commercial communications can play a key role in achieving.

This appeal for clarity and objectivity, however, is not an attempt to reduce your creativity. For instance, often your dramatisation of the brand's situation and the key issues it faces can spark off great creative thinking. The tried and trusted 'factory visit' should not be forgotten and there may be other more innovative ways that you could light the creative fuse.

**"Clients should not underestimate how much a good brief, written with real flair and delivered with belief, can help enthuse and inspire the agency."**  
(**'BRIEFING' RESEARCH 2002: AGENCY SAMPLE**)

Remember that briefing your agency is a joint and dynamic process. Whilst this booklet encourages a formalised approach to briefing in order to create clarity, this should never be at the expense of additional, more dynamic and inspirational briefing methods.

## 3 CLEARLY DEFINED OBJECTIVES

**"Ultimately the point of communications is to get people to do things. Which people? What things? You've got the basis of the brief right there. Everything else is detail."**  
(**'BRIEFING' RESEARCH 2002: AGENCY SAMPLE**)

Start by making sure that your objectives are crystal clear. Use concrete business objectives rather than vague terms such as 'to improve brand image'. (And remember, every objective starts with the word 'to'...)

If your objective is indeed to improve your brand image, then go further. Explain the desired improvement that you want to achieve. From what to what? What will it do for your business? (eg so IFAs will recommend your brand, etc). What's your business rationale for spending £xm to achieve this? Concrete business objectives rather than woolly intermediate objectives are essential.

**"The clarity of the objectives is the most fundamental part of a good written brief. The single greatest frustration is when there isn't a clear and credible problem to solve."**  
(**'BRIEFING' RESEARCH 2002: AGENCY SAMPLE**)

Almost all agencies and 82% of clients believe that: **"Client briefs should focus on making sure the business problem is properly defined"**. Furthermore, 72% of agencies and 84% of clients say: **"All briefs should have effectiveness criteria and evaluation methodology written into them"**.

Since no remuneration agreement that contains a performance related element can be made to work without appropriate measures of performance, quantifiable objectives should always be set.

So, clearly defining the objectives to establish the project's 'success criteria' (what will success look like and how will it be measured?) is the number one principle of writing a good brief.

## WHAT A GOOD BRIEF SHOULD CONTAIN

THE KEY SECTION HEADINGS OF A BEST PRACTICE CLIENT BRIEF ARE AS FOLLOWS:

- 1 Project management
- 2 Where are we now?
- 3 Where do we want to be?
- 4 What are we doing to get there?
- 5 Who do we need to talk to?
- 6 How will we know we've arrived?
- 7 Practicalities
- 8 Approvals

These headings and sections should be completed for every brief you give to an agency. Clearly the depth of detail within each section will vary according to circumstances: this week's tactical retail price offer will be heavy on the practicalities; the next major campaign for a brand intended to last for five years will be stronger on the strategic issues.

Generally your brief should focus on defining the 'two ends of the bridge': "Where are we now?" and "Where do we want to be?" Creating communications to build the 'bridge' for the brand to travel between these two points is the key

role for any agency, and their response should be required in the context of the client marketing and campaign strategy set out clearly under "What are we doing to get there?" and "Who do we need to talk to?"

A crucial point is to be explicit as to the measures of the effectiveness of the exercise, ie "How will we know we've arrived?"

At either end of the brief there are the operational requirements of "Project management", "Practicalities" and "Approvals".

### 1 PROJECT MANAGEMENT

You should ensure that the basic facts of the project are provided. These will vary according to your internal systems, but the following are common bits of information that are required:

DATE; PROJECT NAME; PROJECT TYPE; PURCHASE ORDER; JOB NUMBER

COMPANY: PLC/GROUP COMPANY; OPERATING COMPANY/BRAND OWNER

BRAND: NAME/VARIANT

CLIENT TEAM: NAMES/TITLES AND CONTACT DETAILS

AGENCY/S: NAMES/TITLES AND CONTACT DETAILS

## IN REAL LIFE

### WITH ALAN BISHOP

*Arriving at the COI after a long history on the agency side at Saatchi & Saatchi, I've been forcibly reminded of how important a disciplined briefing process is, especially in the complex communications environment in which our clients in Government departments operate. Both in my private sector days and now at the COI, I find that working to a clearly written brief gets the right results: be clear on where you are now, where you want to be, and then employ the best agency people to get you there.*



ALAN BISHOP  
COI – Chief Executive

# YOUR BRIEF SHOULD FOCUS ON DEFINING THE ‘TWO ENDS OF THE BRIDGE’: “WHERE ARE WE NOW?” AND “WHERE DO WE WANT TO BE?”

## 2 WHERE ARE WE NOW?

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Describing the current position of the brand, its background and the key issues it faces defines the start point for the journey on which communications will take the brand.

The brief should try to contain the following information: product or service description (including key attributes and benefits); manufacturing or service delivery; distribution channels; market size (volume and value); customer usage data; the brand's positioning; its history of brand communications, competitive brands/products and their communications activity, etc.

## 3 WHERE DO WE WANT TO BE?

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This section defines the desired destination of the journey on which successful communications will have taken you. The goal should be set in the context of the overall corporate business and marketing plan, as well as what will be achievable by this specific project on the proposed expenditure.

A single-minded and measurable objective is usually a pre-requisite for success. Typical objectives are to effect improvements in sales, usage, awareness, image, reputation, profitability, customer profile, shareholder value, and/or response levels – although there are many other possible objectives of communications. A quick glance at any selection of award winning papers from the IPA Effectiveness Awards, the MCCA Best Awards or the PRCA FrontLine Awards will reveal that there are nearly as many valid objectives for communications campaigns as there are campaigns themselves!

## 4 WHAT ARE WE DOING TO GET THERE?

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### MARKETING STRATEGY:

It's unlikely that advertising or other communications will achieve the defined objective alone, so it's essential for the agencies involved in developing these communications to have a full understanding of the total marketing and communications strategy – and of the programmes that you have already put in place. It is also essential that this strategy is demonstrated to be in line with and in support of your overall corporate business plan.

### CAMPAIGN STRATEGY:

The campaign that you are briefing will probably involve more than one medium or communications discipline – and hence more than one agency – all of whom will need to know your overall campaign strategy. This section should describe and define the campaign plan, as well as the specific advertising/media/PR/DM/SP/etc briefs within it. Think about what direction you can give to your agencies' creative briefs. And what inspiration you can give them. What is the role of each medium or discipline within the total campaign? And for each one, what is the key message? What brand/tonal values are required?

## 5 WHO DO WE NEED TO TALK TO?

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All communications are designed to elicit some form of response from a particular group of people. These target groups should be defined and prioritised as accurately as possible via demographics, lifestyle, product usage, attitudes, etc.

Equally important are the insights that you and your agencies already hold about these target groups that can be leveraged to create the desired reaction. Often your agency will conduct further research to generate even greater understanding – and your existing insights will provide them with a useful and welcome platform to build on.

## 6 HOW WILL WE KNOW WE'VE ARRIVED?

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You and your agencies need to know what success (or failure) will look like. Measures should be put in place to establish whether or not the campaign delivers against its desired objective. How will the campaign be measured? When will it be measured? Who will measure it? This is vital to the operation of PBR remuneration agreements.

Remember that most communications campaigns are steps along the path of a bigger journey. Progress towards the bigger and longer-term brand and corporate goals should also be measured.

## 7 PRACTICALITIES

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Your agencies' responses to your brief will have many implementational consequences, so it's important that all the key practicalities for them to bear in mind are included in your brief. These fall into three main areas:

### BUDGETS:

An upfront tackling of budget issues (and the anticipated results from different budget levels) will dramatically reduce the reworking of solutions – reducing total costs and improving integration across the campaign. Your approach to setting the budgets may vary from brief to brief. Ideally, you will know the budget from the outset, in which case it should be clearly stated and broken down into its component parts. Sometimes, however, 'scenario budgeting' will be required in order to give clear direction to the agency. For instance one or more hypothetical budgets might be supplied (ie what would your recommendation be on budgets of £x, £y and £z?). Alternatively, you might request the agency's recommended budget to achieve a set of given and measurable objectives.

### TIMINGS:

What are the key delivery dates? What are the key payment dates? When should the key project milestones be set? What are the booking dates or deadlines for media? Should it consider the timings of other campaigns? Is there a sales conference whose deadline precedes the media copy date? How do you want the creative timings to run (eg tissue meetings)? What phases of pre-testing research are planned? What are the logistics of production?

### OTHER CONSIDERATIONS:

Each communications discipline will have different practicalities that should be thought through before the agencies are put to work.

For creative briefs, are there any agreed media strategies? For media briefs, are there any agreed creative ideas to work with? (Ideally, of course, media and creative agencies would be briefed together so that the campaign can be developed jointly as one synergistic programme.) What legal constraints are there in this market? Does the brand or corporate identity have guidelines or other mandates? Are there 'softer' but nevertheless important constraints or considerations which might affect the agency's work? Do you have any other complementary activity planned, eg trade promotions?

## 8 APPROVALS

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The final piece of detail needed in the brief is who has the authority to sign off the work that the agency produces. This person (or people) should also be the one(s) to sign off the brief before it is given to the agency.

## THE MAIN SECTIONS OF THE CLIENT BRIEF

**START HERE**

**1**

PROJECT MANAGEMENT

**2**

WHERE ARE WE NOW?

**3**

WHERE DO WE WANT TO BE?

**4**

WHAT ARE WE DOING TO GET THERE?

**5**

WHO DO WE NEED TO TALK TO?

**6**

HOW WILL WE KNOW WE'VE ARRIVED?

**7**

PRACTICALITIES

**8**

APPROVALS

**BRIEF NOW**

# NEED TO KNOW MORE?

If you would like more detailed guidance on briefing we have created an online version of this guide, with each section and its sub-sections described more fully, and with examples by way of illustration. This will provide in-depth guidance and could be a helpful tool for any company wishing to incorporate the principles of briefing into in-house training modules.

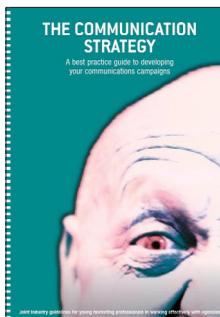
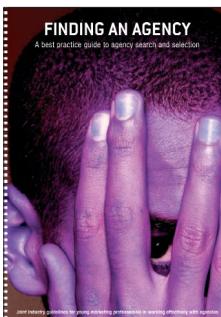
The full online Briefing Guide is available as a downloadable PDF from the following websites:

[www.CAFonline.org.uk](http://www.CAFonline.org.uk)   [www.IPA.co.uk](http://www.IPA.co.uk)   [www.ISBA.org.uk](http://www.ISBA.org.uk)   [www.MCCA.org.uk](http://www.MCCA.org.uk)   [www.PRCA.org.uk](http://www.PRCA.org.uk)

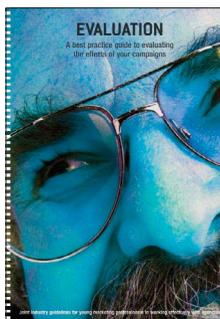
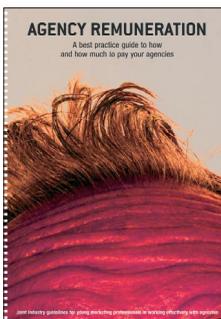
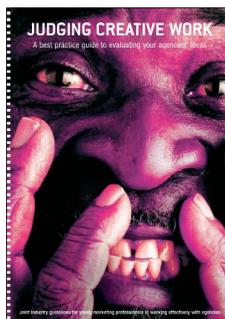
## GUIDES IN DEVELOPMENT

There are five more joint industry guides 'under construction', all designed to help you get more from your communications agencies.

Please contact CAF, the IPA, ISBA, MCCA or PRCA if you want to get more details.



(This will be a revised version of 'The Guide' summary published in July 2002, which is still available online.)



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