The Creative Brief Toolkit:

How to develop a clear and actionable plan that guides your next creative project to success.

WENDY WOOD DESIGN

Spot-on Creative for Your Complex, Multi-deliverable Projects
650.508.8587 :: www.wendywood.com

What's inside:

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Hi there,

Thank you for downloading this Creative Brief Toolkit. In the past twenty years, I have worked to develop and refine a strategy that makes creative projects easier and more effective. This toolkit encapsulates my thinking and culminates with an actionable document: The Creative Brief. I ask that all my clients complete a creative brief prior to our work together. **Why? Because it works.**

The creative brief can be called many things — the project brief, the scope of work, creative work plan (just to name a few) — and is the essential first step for any creative endeavor. Time and again, I have seen that the effort spent up front crafting a creative brief saves time, money and frustration and leads to a more successful outcome.

In the next several pages, I explain not only why it works for us, but I will also give examples of questions you should include **before starting your next project.**

Like so many things in life, there is no one-size-fits-all solution. This creative brief is no exception. In fact, I am constantly tweaking this one to meet the needs of each project — what works for Pottery Barn or Safeway doesn't fit the bill for Rayco Energy. There are some essential questions that I always include — then I mix and match as needed.

And that is **the true benefit** of this creative toolkit. There is a solid outline for what to include, but ultimately you pick and choose exactly what works for your specific project.

My hope for this toolkit is that it will:

1) Help you quickly get your creative brief completed
2) Define and accomplish your specific business goals
3) Serve as a resource for your future projects

There's a lot here, so if you need a little help, just reach out to get started.

To your creative success!

Wendy

Wendy Wood

What is a Creative Brief?

My definition is simple: It is a document that informs and guides any creative initiative and is the essential first step that provides the framework to keep your project on track.

In the best cases, the creative brief has been developed through meetings, interviews, readings and discussions between clients, stakeholders and designers before any work begins. It can be a formal, comprehensive document — for multi-deliverable, in-depth projects — or a simple one-page overview.

A good creative brief will answer these questions:

- What is the project?
- Who is it for?
- Why are we doing it?
- What needs to be done? By whom? By when?
- Where and how will it be used?

And it can be called many things:

- Creative Brief
- Project Brief
- The Brief
- Scope of Work
- Creative Strategy
- Creative Work Plan

A creative brief can take many forms:

- Microsoft Word document
- Online submission form
- PowerPoint presentation
- E-mailed overview

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The Benefits of a Creative Brief

I believe good design solves business problems, and the questions in this toolkit have **consistently helped** us define and clarify our client's challenges.

Initially, the brief helps us uncover key insights and objectives; it also outlines deliverables. In addition, it serves as **a vital tool** that we revisit at each stage in the creative process to gauge success against the end goals.

In the end, the creative brief serves as one central document that keeps our projects focused and moving smoothly and immediately informs us if a project is creeping off strategy or out of scope.

Overall, the creative brief:

- Inspires and guides creative efforts toward a strategically sound objective that addresses a challenge
- Sheds light on the company history and background
- Articulates audience preferences
- Provides information that ultimately produces projects that will be effective and relevant to your specific market and goals
- Serves as a benchmark for each project milestone

The Value of a Creative Brief:

For Creatives

- Provides us with the background and foundation for our design directions
- Uncovers hidden truths and obvious insights about your business
- Reveals values, personality and history of your business
- Provides justification for concepts we present to you
- Quickly informs all members of our creative team
- Helps us avoid off-target design solutions
- Clearly defines deliverables and helps avoid scope creep

For Clients

- Clarifies your goals and objectives
- Articulates facts and assumptions within your organization
- Gives opportunity to all stakeholders for input
- Builds consensus
- Provides guidelines for evaluation
- Delineates criteria for success
- Holds the creative team responsible
- Allows you to have a stake in the creative process

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Essential Questions to Ask
<u>Before Starting</u> Your Project:

The next several pages list a variety of subjects and questions I always consider when developing a creative brief. As mentioned above, I only use the sections I need and mix and match accordingly. **<u>Depending on your project</u>** and circumstance, some of these elements might not apply to your needs.

We have found that the more detailed information you can provide at the beginning of a project, the more likelihood of success. Here are the **<u>main elements</u>** I will discuss on the next several pages:

- Defining Success

- Objectives

- Messages

- Positioning

- Background

- Project Overview

- Visuals

- Schedules & Budget

- Key Contacts

- Additional Information

Essential Questions:
DEFINING SUCCESS

While this is typically not the first item I put in a creative brief, it is by far the **most important**. If there is one essential element, I firmly believe this is it. Defining what will make the project successful **guides the entire process**. The end goal is the justification of all design presentations and client changes. The main questions to ask yourself here:

What are we trying to achieve with this project?

- Is it to inform?
- Is it to direct a sale?
- Do you want to create brand/identity awareness?
- Is it corporate communication?

Is there a measurable goal that will define success?

- Will it increase sales?
- Will it have more e-mail sign-ups, App downloads or social media engagements?
- Or simply that it is delivered on time?

What is the specific action you want people to take?

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Essential Questions:
OBJECTIVES

What is your key objective?

Here is where it gets sticky. Most projects have 5 "key objectives" and often this is too much to communicate and can confuse your audience. It is important to decide on **one main objective** and have supporting goals for reference. Remember, we can't do everything and it is best to narrow down and focus in on one key message.

Why now?

- Is there a hard deadline you have to meet, like a trade show or meeting?
- Is a competitor launching a new product?
- It is important to describe the opportunity for your business.

Another way of thinking about this is asking,
"What will this project do for my business?"

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Essential Questions:
MESSAGES

I find getting the key messages down on paper is paramount. Noting what you are trying to communicate and the feeling you want to evoke is a great start. Sometimes the message is already developed and other times it needs to be developed alongside the visual treatments. Either way, when communicating the message, explain **what we want the audience to take away.**

Questions to consider here:

- Is there a main benefit **the audience** receives from your product or service?
- How should we be communicating?
- Do you have a specific tone or voice established or is this something you need to define and create?
- What adjectives describe the feel or approach?
- Tone is the marriage of design and copy — and when they work together they enhance the message and give personality to your company.
- Is your company funny? Casual? Formal? Design and text should always reflect the tone.
- Does your audience currently expect a certain tone and should it be changed?
- Can you give a few words that describe the company and its values?

Essential Questions:
POSITIONING

If you have any insight you can share about how you are positioned against other similar companies, share them here. I find these insights are **invaluable to the process**.

- How does your product or service fit into the marketplace?
- Have you conducted a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) and if so, can you share the results?

Understanding **where your business stacks up** to competitors will help differentiate you from them and will have a significant impact on your project's outcome.

- Who are your top 3 competitors?
- Can you list their websites?
- What are they telling their audience that we should also be telling them?
- Can you share a SWOT analysis on them?
- What differentiates you from them?
- Where are they better and worse than your business and why is it important?

Defining and describing your audience will also have a **direct impact** on the final creative work.

- Who are we talking to?
- What do they think of us?
- Why should they care what we are doing?
- Who should take action?

Additionally, providing **demographics** impacts the creative work.
We ask that you share the details, such as:

- Are they age 18? Or 80?
- Are they mostly women? Men?
- Are they tech-savvy?

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Essential Questions:
BACKGROUND

If this is our first engagement with a company, I always want to know a little more about their background. **A little history goes a long way** to understanding the culture, the values and the needs and allows us to provide better solutions.

Any insight to why the company is in business and what problems the business is trying to solve for customers gives context to the project and helps define a solution unique to the organization.

What is the history and context of the company or business?

- Is there a story about why the company was founded?
- Is there a mission statement you can share?
- Is there a company culture and/or brand values that drive company decisions?
- Is there a perception of the industry?

Company details are also helpful:

- Number of employees?
- Years in business?
- Where the company is located/headquartered?

What company resources can you share?

- Do you have a brand standards guide?
- Are there reports, relevant documents, recent research?

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Essential Questions:
PROJECT OVERVIEW

I find that this section is the one that changes the most through the course of a project. Often, the exact list of deliverables is unknown, or the project evolves once the creative process begins. Other times, there are other deliverables or steps in the process that we can recommend that make the project easier or more successful.

Either way, start with the **key information, deliverables and services known**. It is important to be as specific as you can — the more detail you can provide, the better understanding we all have as we go along.

It is important to describe what will be created and list any mandatory information that must be included.

Questions to ask:

- Is there a list of deliverables?
- Are there any known preconceived ideas, limitations or restrictions?
- Do you need additional services, such as a photographer or illustrator?
- Who is writing the copy?
- Do you have an internal writer or do we need a copywriter?
- How will this project be delivered? Is a printed, PDF, or interactive version needed?

Essential Questions:
VISUALS

Visual elements and styles can be very subjective. I find **capturing what works** for your brand and what resonates with your target market is essential. Additionally, I find that other stakeholders can have preconceived ideas and perceptions prior to a project kick-off. It is important to note all of this information here.

- What are the design elements that appeal to the key decision makers and do these elements appeal to your audience?
- Do they align with the message and voice of the company?
- Do you have existing imagery (high-resolution for print) available to use? Are we developing new images or picking up existing images?
- If we create new images, who, what, where are we photographing or illustrating?
- Are there colors that should be avoided and why? Color is very subjective and personal, but if we can look at it from the point of view of the audience (and not what we personally like) we can make strategic choices.
- Are there websites, companies, logos or other examples that can serve as inspiration?
- Are there examples to avoid?

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Essential Questions:
SCHEDULES & BUDGET

I find that time lines and budget are important to document early on. Identifying who is responsible for various deliverables and at what time is key to meeting final deadlines. Time lines always change, but developing an **initial schedule** at the beginning sets up realistic expectations and can be adjusted as the project moves forward.

A **budget range** allows both parties to utilize resources to create the best possible outcome. Discussions with your creative team about the costs of printing, advertising, photography and other services often reveal unique ways to stretch your budget for the best possible outcome.

Open and honest communication about available resources allows everyone involved to produce their best work. Initial understanding about budget, time commitments and schedules keeps the project on track.

- Do you have budget range or not-to-exceed figure?
- Is there a detailed list of deliverables?
- Do you have deadlines for each?
- Is there a person responsible for each?

Essential Questions:
KEY CONTACTS & ADDITIONAL INFORMATION

It is important that each side has a key point person for the project. Too many people on each side not only can create confusion, but is also time consuming. It is vital to understand **how the flow of information works**.

- Who are we reporting to?
- Who exactly is approving this work?
- Who needs to be informed of our progress? How? By e-mail, in-person meetings?
- You will need to supply details name, phone, e-mail.

Additional information

- For example, are there special printing techniques you want to explore?
- Perhaps there are other team members who will have valuable input?
- Do you have existing marketing materials that will influence the outcome of the project?

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How To Customize this Toolkit for Your Needs

I have designed this document to be a **starting point** for the creative process. The idea here is to mix, match and modify these elements to suit your needs and goals.

With each new project or design initiative, this document can be **your resource** — just pick the elements you need to reach your goals. You can copy and paste each section as needed from the provided templates.

Choosing the Elements you need:

For any large project, including branding, identity, annual report and catalog projects, I recommend a larger all-inclusive creative brief. Smaller initiatives and on-going partnerships may not need the detailed background, but benefit from success factors, key messages, budgets and time line goals.

For example, I will use a longer creative brief when:

- Engaging with a company for the first time
- Developing a new brand
- Rolling out a new marketing initiative
- Working with a new set of stakeholders

Alternatively, a short creative brief is the way to go if:

- There is a solid relationship and work history
- The workflow and company background are understood
- A similar project for the same company has already been delivered

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The Do's and Don'ts when Crafting the Creative Brief:

Do

- Include all decision makers and stakeholders
- Keep it short and sweet — identifying the most critical messages
- Talk through the main points
- Share inspiring insights
- Mix and match questions and craft a unique brief that best suits your needs

Don't

- Use buzz words and business jargon when describing your services and goals
- Use basic demographics when describing your target market — share their concerns, fears and pain points
- Focus on services and features only — emotional factors always have a say
- Use generic descriptions — colorful descriptive language leads to more compelling outcomes
- Let the brief get in the way of the time line. Craft the brief in a timely manner to get things rolling

The Creative Brief

Thank you for taking the time to fill out the following questions. My goal is to get the best result possible by delivering a creative solution based on your unique business. This short questionnaire will help us understand your needs, goals and target audience and create a strategic, well-thought-out solution.

Alternatively, if you have read over these questions and need further assistance, please give me a call. This can be our first step together.

PROJECT OVERVIEW
Provide a short description of project needs. Include all desired final deliverables, if known.

_____

_____

_____

DEFINING SUCCESS
What are we trying to achieve with this project? Is there a measurable goal that will define success?

_____

_____

_____

_____

OBJECTIVES
What is the one key objective or goal of this project?

_____

_____

_____

_____

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POSITIONING

Describe your target audience, their demographics and what appeals to them:

_____

_____

_____

What does your audience care about when considering your product/service?
What problem or need does your business solve for them?

_____

_____

_____

List your closest competitors.

_____

_____

_____

How is your product/service different from your competitors?

_____

_____

_____

What is the perception of your industry? Your company? Your product or service?

_____

_____

_____

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MESSAGES

What feeling or message do you want to convey to those who view it?

_____

_____

_____

What is the main benefit your audience receives from your product or service?

_____

_____

_____

Do you have a specific tone or voice established? Describe it here: If not, what would you like it to be?

_____

_____

_____

List a few words that describe the company and its values.

_____

_____

_____

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VISUALS

Are there design elements/colors that appeal to the key decision makers
and do these elements appeal to your audience?

_____

_____

_____

Do you have existing imagery (high-resolution for print) available to use?
Or are we developing new images?

_____

_____

_____

Please list websites, companies, logos or other examples that can serve as inspiration:

_____

_____

_____

Are there examples to avoid?

_____

_____

_____

COMPANY BACKGROUND

What is the history and context of your company or business?

_____

_____

_____

Do you have a mission statement to share?

_____

_____

_____

Describe the company culture:

_____

_____

List the company details here (number of employees, years in business, headquarter location, etc.)

_____

_____

_____

KEY CONTACTS

Who is our main contact?

_____

Are there other key influencers and decision-makers approving the work?

_____

List e-mail, phone numbers for all team members:

_____

_____

_____

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TIME LINE & SCHEDULE

Do you have a specific date targeted for completion?

_____

What is driving this date?

_____

Are there dates that you or your team are not available that might impact this schedule?

_____

BUDGET

What resources do you have for this project?

__ Less than $2,500   __ $2,500 – $5,000   __ $5,000 – $7,500   __ $7,500 – $10,000

__ $10,000 – $15,000   __ $15,000 – $20,000   __ $20,000 +   __ $_____

Does the cost above include design, printing, copy writing, photography and other services needed?

_____

_____

ADDITIONAL INFORMATION

Do you have any other information that will influence the outcome of the project?

_____

_____

_____

_____

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Conclusion

A creative brief is **the essential first step** to making your creative project run smoothly. It allows everyone involved to focus on key objectives and messages. It serves as a vital reference throughout the creative process as all parties make decisions and edits at the key milestones.

The time and effort invested in crafting the creative brief at the beginning **saves time, money and frustration** in the long-term and helps guide creative projects to success.

Download the Comprehensive Creative Brief **here**

Download the Project Brief **here**

Alternatively, if you find these questions a little daunting and you don't know where to start, let's talk. I am happy to help.

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About Wendy Wood

Recognizing the need for a more **efficient and collaborative creative process**, Wendy founded Wendy Wood Design in 2009. Her ability to craft a visual story and manage multiple projects, team members and deadlines adds immediate value for creative and marketing teams looking for real results.

Building on her extensive career with small design studios and large corporations, Wendy has experienced how different processes and approaches serve different business needs and learned how to translate this experience to best serve various creative marketing teams.

With over two decades working with Fortune 500 brands, Wendy draws from her trusted network of specialists and custom-picks **the best team for each project**, offering an impressive range of talent that includes writers, photographers, web developers, printers and other vendors. All built in to a streamlined process, making your job easier and delivering solutions tailored to your specific goals.

Wendy works in San Carlos, CA — conveniently located between San Francisco and the heart of Silicon Valley — and **collaborates with clients nationwide**.

After hours, Wendy enjoys running, hiking, skiing and kayaking. She is an avid reader and painter who loves to travel and take day trips in her Mini Cooper with her husband and two boys.