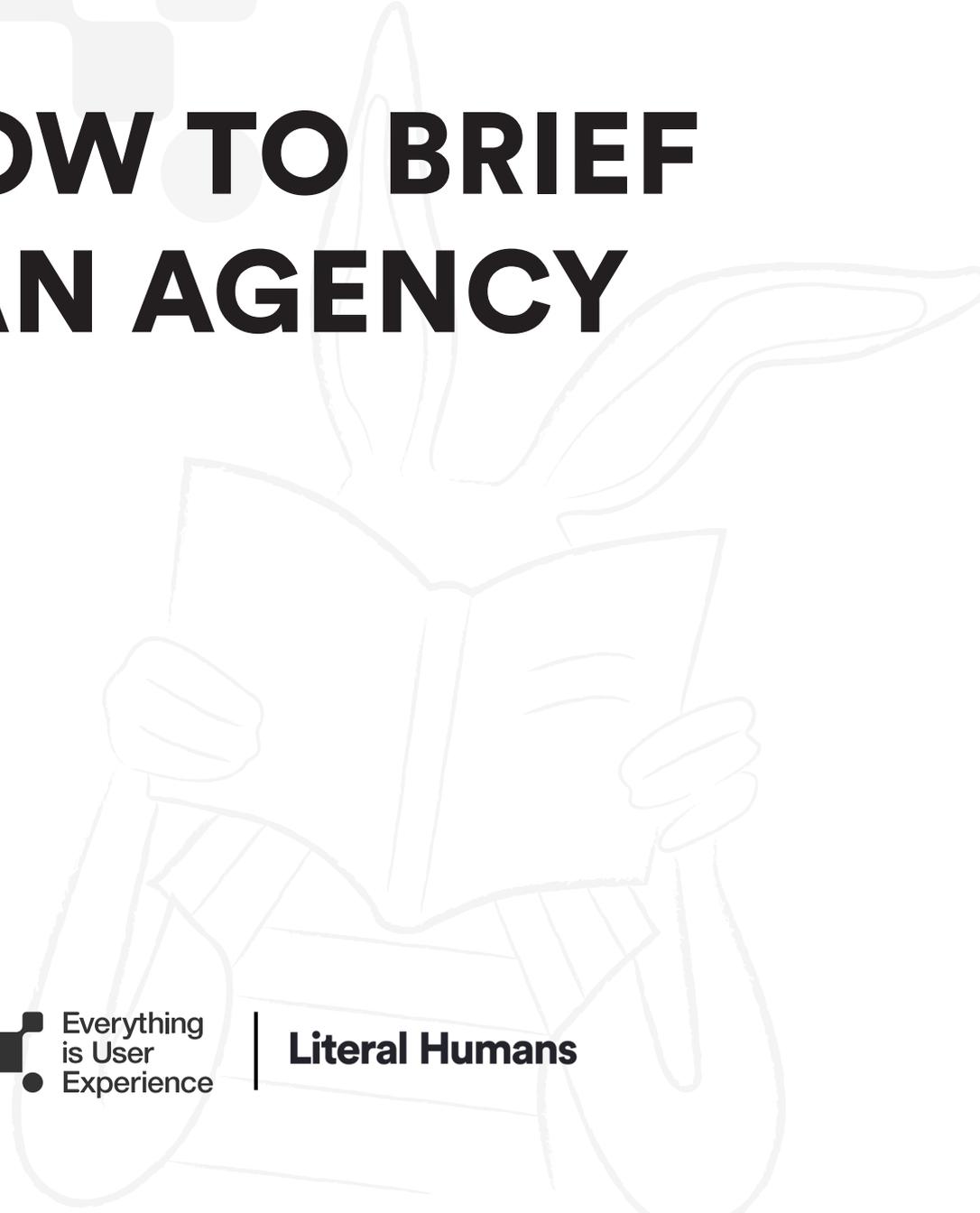




HOW TO BRIEF AN AGENCY



How to brief an agency

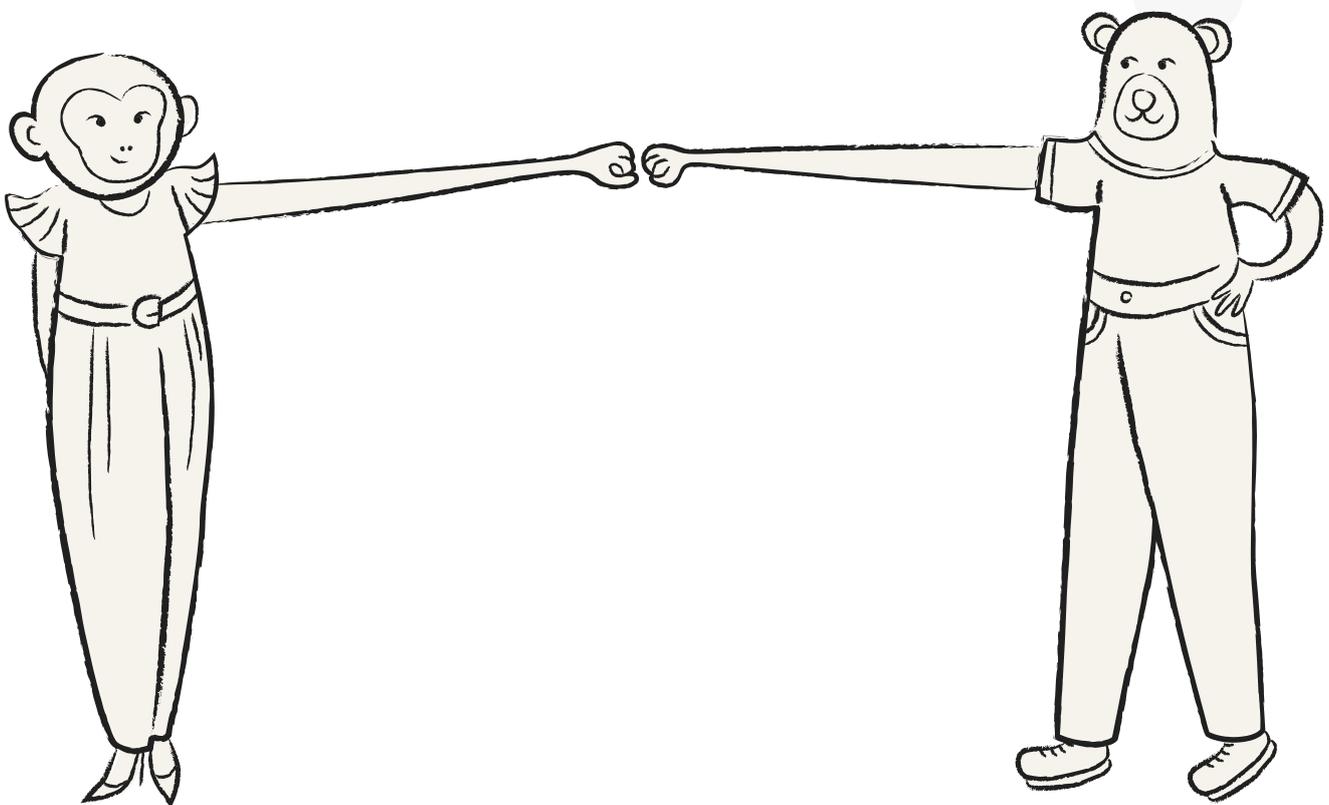
Have you ever tried to bake a cake without a recipe? If you have, we bet the results weren't great — perhaps it was soggy, too sweet, or simply *gross*.

Just like the secret to baking a delicious cake is to follow an expertly crafted recipe, the secret to a successful branding or design project is an outstanding brief.

Anyone can create and build a brand, website, logo, or app these days — which is why there are so many terrible websites and brands out there. If you're happy with a rubbish brand and an unusable website, don't bother reading any further.

Save yourself some time — you'll need it.

If, on the other hand, you want to invest in a project that gets your business results, read on to discover our secrets for writing a recipe (brief) for success.



The briefest path to success: why briefs matter

While writing an effective brief is a skill in itself, anyone can have a go, so it's easy to underestimate how difficult it is to get right. But the truth is, what goes in your brief matters — if you put garbage in, you'll get garbage out.

Lucas Bergmans, a Freelance Advisor, Blogger, and former Group Marketing Director at Cazoo, thinks the problem with startups and scaleups is that they often don't see the point of a brief — they either view it as a creative endeavor not worth spending too much time on or they perceive friction with the agile processes they're accustomed to.

His message to businesses working with a creative agency?

“Counterintuitive as it may seem, a good, detailed, collaboratively written brief can make the process smoother, faster, and more flexible down the line.”

Therefore, a mindset shift is required. You need to think of the brief creation as both a deliverable and an ongoing process — one that goes beyond the initial briefing document and requires open communication (both internally and externally) and a two-way dialogue with your agency.

Redefining the brief as the culmination of internal work that bridges the gap between you and your agency promotes better collaboration, fewer delays, and more successful deliverables. As Lucas points out, a rushed brief will lead to further time and money losses down the line.

Key takeaways:

Garbage in =
garbage out

Briefs are both a
deliverable and an
ongoing process

Brief creation =
co-creation

Trust us — we're a creative agency

They say that when you change the way you look at things, the things you look at change — and that's true of your agency, too. Despite the inherent power imbalance in the client-agency relationship, it's essential to think of them as a partner.

Give them a chance to interrogate and challenge your brief if they feel it's unfocused, lacks information, or even includes too much irrelevant information.

Maintaining an open, honest, and trusting dialogue in the brief co-creation process lets you check the chemistry of the relationship, learn about the agency's expertise, and give them a chance to improve on your ideas.

Therefore, don't try to be too specific about what the deliverables should be or how they should look — instead, focus on articulating what the desired outcomes are.

It's then the agency's job to 'wow' you with strategic recommendations on how to turn the brief into an impactful set of deliverables.

When it comes to feedback and iteration, Ruta Petersonaite, Advertising Brand Strategy Director at WeTransfer, recommends keeping a log to track what's been said and how it's reflected in the next version of the deliverable.

For Ruta, a best practice is to note down three key takeaways from each feedback meeting — this helps keep everyone on the same page and prevents the process from becoming disjointed.

And her advice for agencies? Use storytelling to show the client how you got to the final result.

Ultimately, investing time in cultivating a strong working relationship will pay off. Not only will the agency be better equipped to anticipate your needs — they'll also be able to spot possible problems and potential solutions before you even know you need them.

Recommendations for partnering with an agency

- Prioritize **open and transparent communication** throughout the project.
- Build **mutual trust and respect** between your team and the agency.
- Treat the agency as an **extension of the internal team**, fostering a collaborative environment.
- Invite **questions and challenges** — creating space to interrogate a brief might not always offer a comfortable experience, but it's a useful test.
- Provide **timely feedback** and **be responsive to queries and requests** from the agency.
- Set **clear expectations and objectives** from the beginning — this enables the agency to deliver targeted results.

Stakeholders can appear where you least expect them

Once upon a time, the Everything Is User Experience team was hired to work on a big rebrand project for a very important client. The positioning phase went well — they interviewed everyone from the frontline staff to the back-office IT people, external stakeholders, third-party vendors, long-term clients, prospects, and lost business — anyone they could find to speak with.

They translated all of this into a new name, brand positioning, and a whole new set of values that elevated the company's services and products, perfectly aligning the objectives and goals of the business with those of its clients.

The presentation went well. A route was chosen, consensus was achieved on the spot (with just a little tweaking required), and the green light was given to proceed with developing the brand's visual identity.

Perhaps it had all gone too well.

As they were packing up with a start date agreed for phase two, in passing, the CEO casually dropped in a small detail that stopped them in their tracks. "...and everything will need to go through Feng Shui Master SBS Surendran," he said.

It turned out he had met this guru while traveling around Asia and now, on the other side of a mid-life adventure, sought his counsel for every important decision in his life. A new gatekeeper had appeared entirely out of left field — he'd never been mentioned and hadn't participated in any part of the process so far — but he was now going to have a significant voice in the project.

This was a whole new kind of stakeholder.

An uncontactable, esoteric influencer who, experience told them, had the potential to slow down the process or send us through endless rounds of changes.

The team quickly jotted down some notes about the Feng Shui master's requirements and found out that he'd already supplied the business with its own set of Feng Shui guidelines — which explained the incongruous splashes of color conspicuously positioned all over the building.

With hindsight, Master Surendran's fingerprints could be seen everywhere without him ever making his presence known.

Now armed with a set of Feng Shui-compliant color palette, textures, and optimal shape combinations, the team were able to hit the bullseye first time. Every design route referenced the master's recommendations and consequently met the CEO's needs.

The project sailed through, passing the Feng Shui master test with, ahem, flying colors and appreciative notes from Bangalore.

Moral of the story? Every organization has its own **“Feng Shui master.”**

Stakeholders can come from places you will never expect, with needs that won't necessarily make sense at first, and if you don't create space for them to reveal themselves, they won't — until it's too late.

With that in mind, we want you to ask yourself...



Who are your stakeholders?

A brief usually sets out the parameters and success metrics for a project, including a range of needs, wants, and goals.

You're probably used to thinking about the audiences for your products or services — they're the end users, the people you're trying to reach.

But when crafting a brief for an agency, you need to go beyond audiences and think about all the users — both internal and external — to ensure the finished deliverable is fit for purpose.

These users are your stakeholders.

Unfortunately, briefs often neglect to consider all the potential Feng Shui masters who might be lurking in the shadows.

All stakeholders hold a different place in the process and have different needs. Day-to-day, a senior leadership team has a vastly different set of needs and goals when compared to those of frontline staff.

For instance, if you're building a website, you need to think of all of its stakeholders as users, too. A content-heavy site that needs to look active requires an evaluation of your internal team and resources.

Do you have the capacity to manage, run, and keep that site active? If not, there's a risk your team won't use it, and the website may wither or require ongoing support from the agency.

Additionally, you'll need to determine who is responsible for website management within your team and clearly define roles and responsibilities, ensuring all stakeholders (and potential gatekeepers) are involved in the project from the get-go.

For example, if the website is image-heavy, you'll have to involve the design team and make sure they're familiar with brand guidelines. Security is also a crucial issue for websites, so IT and compliance might need to be involved.

It's also essential to consider the role internal politics play in the success of a project — if there are internal power struggles or international vs. regional dynamics, they may hinder progress.

Long story short: there are always more internal stakeholders than you might first imagine, and creating a successful brief requires identifying and including them all in the process right from the start.

Questions to ask yourself before writing the brief:

1. How well do we really know our target audiences?
2. How many different kinds of user groups are there?
3. How do different user groups' needs, wants, and pain points differ?
4. What do they actually think about us and our product?
5. Do all user groups see or experience the same value?
6. Are we and the customer aligned about the value of the product, system, or service?

Don't forget: user groups exist both internally as well as externally.

Watch out for Feng Shui masters

You may be thinking, "There aren't any Feng Shui masters in my organization!" And that's probably true. But there are always unexpected stakeholders and audience types that may not be directly involved but will have their say at some point.

Therefore, capturing their views early on and including their voices in the brief will help prevent a myriad of roadblocks the unheard voices would otherwise put up once the project is well underway.

When identifying your internal stakeholders, it's important to understand why a particular team member should participate in the project (or not). This can be delicate, as internal politics often play a role.

To navigate this complex terrain, Ruta recommends categorizing stakeholders into three groups:

Working group:

The team responsible for implementing the project

Input group:

Stakeholders who will need to be consulted, such as the research or sales team

Decision-making group:

senior leadership not involved in the project but who will have a say in it.

To help you narrow it down, an additional consideration is each person's availability and the time commitment required. While this can sometimes be a balancing act, your colleagues will thank you for it.

Once you've identified all your stakeholders — including the project team members and all potential gatekeepers — you'll need to interview them.

By interviewing stakeholders, the project team can gain their buy-in and support since they'll feel the company cares about their views. Even more crucially, they'll provide insights that will help the core team come up with more impactful ideas.

Before you pour your heart and soul into your next brief, take the time to research the following three operational imperatives:

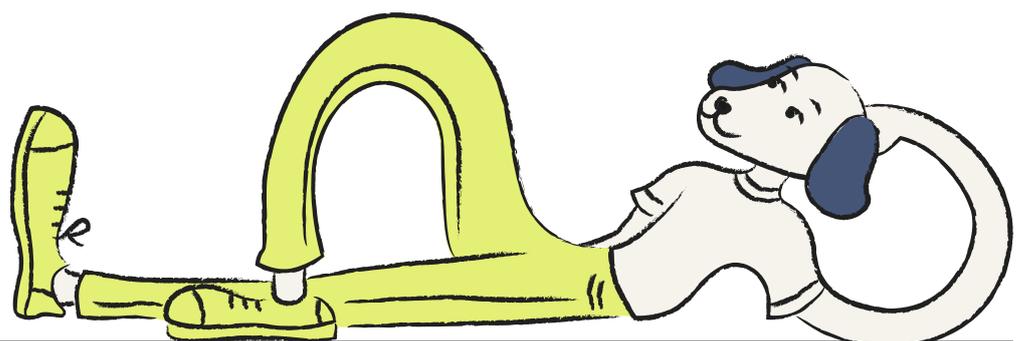
- Do we have the internal resources necessary to satisfy our audiences' needs?
- Do we have staff buy-in in order for the work to be delivered smoothly?
- What are the internal barriers to delivering the project?

Self-knowledge is the beginning of wisdom

How sure are you that all the internal stakeholders' understanding of the project goals and objectives are aligned? The reality is that even a company's mission, vision, and objectives often exist on paper but are rarely "owned" by team members or understood in the same way, so why would it be any different for the project at hand?

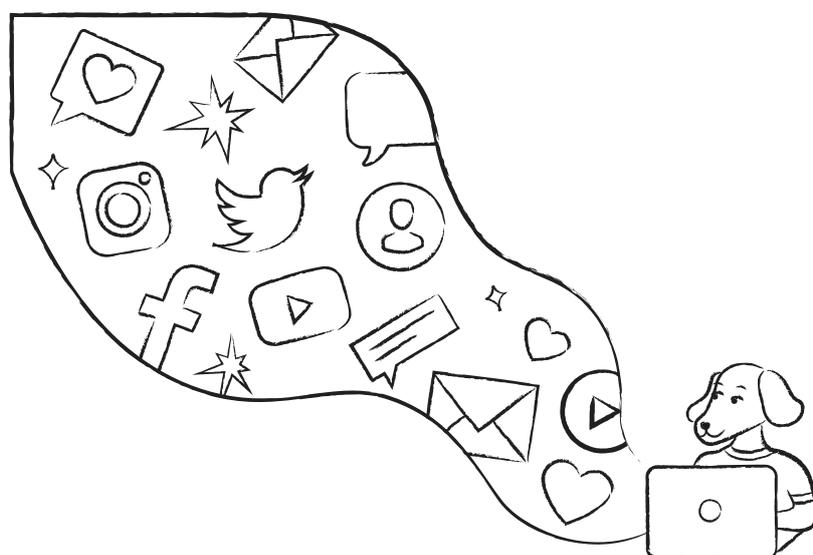
Therefore, it's essential to carry out internal research to understand how much of a gap in understanding there is between different stakeholders about the objectives of the project and the impact it will have on them.

Internal stakeholders play such a critical role in any project that being transparent with your agency about these internal dynamics is essential. It will help them better understand your needs and find creative solutions. After all, it may be the agency that will help narrow that gap over the years.



Here are some of the aspects you'll need to discuss with your internal stakeholders before communicating them to your agency:

- **Know your brand identity:** Understand your company's unique value proposition, brand personality, and target audience. This includes knowing what sets your brand apart from competitors and the key messages you want to convey.
- **Clarify your objectives:** Determine the specific goals you want to achieve with the content. Whether it's increasing brand awareness, driving website traffic, generating leads, or boosting sales, having clear objectives will guide the agency in crafting content that meets those goals.
- **Define your target audiences:** Define who your target audiences are for the project and why they're relevant. This will help the agency deliver the right scope of work for the right audiences.
- **Establish key messages:** Identify the core messages you want the content to convey. These messages should be consistent with your brand identity and resonate with your audience.
- **Brand guidelines and tone of voice:** Provide the agency with your brand guidelines, including logo usage, color schemes, fonts, and tone of voice. Consistency in brand representation is vital for brand recognition and trust.
- **Value proposition:** Clearly articulate your brand's value proposition and how it addresses your audience's unique needs. This information will help the agency communicate your brand's benefits effectively.
- **Budget and timeline:** Determine your budget and timeline for the content creation project. This information will help the agency understand the resources available and plan accordingly.
- **Be open to collaboration:** While it's essential to have a clear vision for your brand, be open to creative ideas and suggestions from the agency. Collaboration can lead to innovation!



What problem do you need to solve?

To avoid being prescriptive with your brief, Ruta suggests keeping a laser focus on the problem you need to solve — this will give your agency the freedom to use its expertise to propose solutions.

More importantly, it will help you define what success will look like. “When you root yourself into the problem rather than deliverable, it should also lead you to think how you will be measuring the success and the impact,” she explains.

You also need to think about the bigger picture and future goals. Understanding how project goals feed into your broader business objectives can spark creativity and lead to a more effective deliverable.

Takeaway: focus on the problem, not the solution.

Data + stories = target customers

Once you’ve assembled your dream team of stakeholders and aligned internally on project parameters, you’ll need to get super clear on who the project is for. In other words..

who are your end users, and what are their needs, wants, and pain points?

To answer this question, you’ll need a theory; then, you have to test it. To come up with your theory, look at your customer data and evaluate information such as demographics, assumed motivations, challenges, and preferred communication channels.

This will provide your hypothesis.

Testing your hypothesis requires interviewing the audiences you have identified or know of. These conversations reveal a wealth of information, stories, and nuance that you simply cannot get from data collection or internal theories.

External research helps you verify your hypothesis and capture a lot of the ‘whys.’ Then, you can look at the stories and data together, with the qualitative information from your customer interviews providing context to the quantitative data. These insights will enable you (or your agency) to create detailed buyer personas that represent different segments of the target audience.

It's also helpful for the agency team if you map out the buyer's journey — from initial awareness to post-purchase stages. The better they can understand the different touchpoints and interactions the user has with your company's products or services, the better the finished deliverable will be.

TL;DR: How to brief an agency in 10 easy steps

1. Identify all your stakeholders (there will be more than you think)

Be clear about who all the audiences are (and which ones are important) before starting your brief.

2. Give your agency your problem — not the solutions

You know you have a problem to solve, and writing a brief is a necessary first step in that process. Think of the initial form as the start of a conversation with your agency — help them to understand the challenge in front of you and the outcome you want, and let them think about how to resolve it.

3. Know your business objectives

Understand your vision and objectives for your business and what success looks like for the project. Include enough internal stakeholders in these discussions to ensure buy-in and support. Clarity around your objectives will help all stakeholders understand why the project is necessary.

4. Define the parameters

Specs like budget and timeline are essential. But don't stop there — fill the agency in on any other details that might be relevant to the work.

For instance, who are the internal stakeholders and potential gatekeepers? What are your competitors doing? Knowing these details will help your agency plan and execute accordingly.

5. Nurture the partnership

It's a cliché, but it's true: teamwork makes the dream work. Thinking of your agency as a trusted partner and collaborating closely with them is the secret sauce that will ensure the deliverables meet your needs and help you achieve your goals.

6. Maintain open and transparent communication

You're experts on your work, and your agency partners are experts in theirs. By maintaining open and transparent communication, you allow the agency to stay flexible and suggest alternative solutions as needs arise.

Keeping your agency in the loop can also enable them to anticipate your needs before you even know you have them!

7. Respect project timelines

You're busy, and providing feedback on project deliverables may not always be a top priority, but respecting project deadlines will ultimately help your business (as well as helping your agency get the work done on time).

8. Be open to feedback

Being open to receiving feedback is just as important as giving it. Your agency has your business's best interests at heart, so when they offer feedback, make sure you take it on board.

9. Trust your agency

The best partnerships are built on trust, and working with an agency is no exception. Trust their expertise and creative advice, and watch your business soar!

10. Don't be afraid to be negative

It helps if the agency understands where things have the potential to go wrong. Often, they have experienced similar situations and can help mitigate issues — sometimes before they even arise.



A cheat sheet for agencies

By now, you know that a good agency will ask questions — lots of them. Here are four things you can expect your agency to ask:

1. Do your needs align with those of your customers?
2. Does the brief match the needs of the end user, the customer?
3. Are you asking for the right support or solutions?
4. Have you identified all of the opportunities in front of you?

Cook up your next creative brief collaboratively

If briefs are like cake recipes, agencies are like bakers — with a detailed brief, they can create the right cake for any occasion.

The best ‘briefers’ understand the importance of collaboration, communication, and transparency.

They have a clear vision for their business, but they also trust the agency’s ‘creative brains’ and ability to craft the deliverables that are best suited to achieving their goals.

