

BUSINESS

11 STEPS TO A GREAT CLIENT BRIEF

Translating marketing-speak into a strategic tool will help you and your team create better work. Use these 11 points to develop your own brief, and learn what questions to ask when the information you're given falls short.

At some point during my career, I realized that I lost creative battles because I was ignorant of the larger business or marketing considerations that trumped aesthetics. The courses in my undergraduate and graduate design programs thoroughly prepared me to think visually. My work experience and ability to solve problems in digital or print formats allowed me to achieve positions of responsibility. I could write the design proposal, build the team, design or direct the executions and pitch the ideas—yet I can remember times when none of this served me.

Then, one day, I stumbled into a strategy meeting. From that moment, I decided to become the creative who understood business. The result of that pursuit was clarity on how much the business and marketing context we create for influences the creative process and product. This is why a sound brief is so important in the first place. Improve the elements in the creative process to improve the quality of the creative product.

How many times have you felt like you had no idea what to design because the brief was either full of worthless information, or so vague that you were better off before you read it? I've been there myself. Each organization is unique in the briefing process. Every project scope and objective will require unique considerations that will tailor a brief to a specific communications problem. A brand built from scratch will need a more comprehensive brief than an initiative from an existing campaign. A digital brief will have different language than an outdoor campaign brief. Design briefs may be different than advertising campaign briefs. You've probably experienced that much.

I'll be talking you through the framework of the transferable portions of a brief and the information needed to solve any problem. When sitting down to write a brief, you'll need a clearly defined goal(s), a narrowly defined target and some insight into what that target wants. Let's get started.

1. DESCRIBE THE PRODUCT

Adman Peter Nivio Zarlenga said it best when he stated, "In our factory, we make lipstick. In our advertising, we sell hope." This section must answer the question, "What are we selling," both literally and figuratively. So on the surface, it may be a hair-growth formula for men, and underneath the surface it may be liquid confidence.

I'll paint a picture of the underlying motivations using a bit of psychology. Marketing and business programs mention Maslow's Hierarchy of Needs when delving into consumer behavior. Abraham Maslow identified what he saw as five stages of human needs. Visualize five horizontal lines across a pyramid. At the most basic level, or the bottom, are the needs that sustain life itself. These items include food and shelter and are labeled biological and physiological needs. Once those needs are taken care of, someone typically would seek the need for safety. After that comes the relational needs of belonging and love. Status or esteem needs follow, and last, at the top, is the abstract need for self-actualization. Using this hierarchy to describe the underlying motivation for buying the product will frame this in an interesting way for those reading the brief.

2. DESCRIBE THE ASSIGNMENT

This can be answered in tactical executions, strategic approach or exactly as the client articulated from the request for proposal (RFP). Decide what is best according to the situation, but what the client has set out to accomplish must be crystal clear in this section. Articulate any primary and secondary objectives here. It's a good idea to look back at the signed proposal and scope of work while doing this to make sure that scope creep hasn't hijacked the project. If this ends up sounding like way too tall of an order, or something is out of balance, it's best to clarify now. Detail any phases, additions or subtractions in the client wish list as well. Be brief yet specific enough not to be vague. A thorough job in this section will help you tackle step 11.

3. WHAT'S THE BACKGROUND?

After reading this section, you should have an overview of the context that the product or brand is experiencing. If you're working on a design or a campaign for a food company that has just had a product recall because someone was sickened, you may need to know that. It will shape the mindset of those you'll have to pitch your creative to. It's my experience that when you find out you weren't even in the ballpark at the presentation or encounter insurmountable baggage as a response to some visual approach, this section wasn't properly discussed. Find out how the client defined success in previous initiatives. Uncover why the product is being relaunched and what areas fell flat when they were tried in the past. Save yourself big headaches and delve into the marketing or business history of the brand or product here.

This is also the spot to include a written analysis of the top three competitors. This will help frame the product or service within the context of the client's competitive set. Is this a challenger brand or a leader in the category? Answer this with prose. Bullet points won't work at all in this brief. A random list of things about each competitor won't give you a real understanding of what aspect of your business a particular rival competes with. (Example: If your product is better but their service outshines that fact, then that should be communicated.) Links or samples of their existing creative should be included for reference.

4. WHO ARE WE SELLING TO?

With the product in mind, choose a character from a TV show, movie or your family that would best embody the ideal target, and create a persona. This is where all that time spent watching TV and movies comes in handy. Imagine if Phil Dunphy from ABC's "Modern Family" embodied your target. If you're familiar with the show, you know that he's a middle-aged, married real estate agent with three children. Knowing about his quirky personality and his house in the suburbs would make it easier when formulating a concept, visual execution and media channel approach to selling him a car.

Bring the target to life through demographics, psychographics or firmographics (B2B). We should see

a person emerge from cold census data, secondary marketing research and other quantifiable information in this section. It helps when you know that you are selling red cardigan sweaters to a person named Phil. Bottom line: The target should be crystal clear after reading this section, and that should be based on facts, not opinions. Seek clarity from the appropriate people when this isn't clear. Doing this will save you and the creative team countless hours of execution time. Do it right or do it twice.

5. WHAT'S THE ONE MAIN BENEFIT OF THIS PRODUCT?

This is where you articulate the selling proposition unique to this product or service. Put yourself in the customers' shoes and determine what's in it for them. For creatives, the relevant part to take away from this is that the client, account, marketing and business departments are looking for visual and verbal messaging that differentiates the product from its competitors. It's obvious that we comparison shop to find the best value for the money; to help you articulate that, you'll need features and benefits. A feature is what a brand or product is. A corresponding benefit is what that product or brand does for its target audience. To break this down further, the features of a product or service are similar to the physical features of a person.

When looking at your phone, its touch screen, front-facing camera, storage capacity and network are all features. These features enable specific benefits such as speed, ease of use, a visual and verbal conversation, the freedom to take photos while listening to music or the ability to make a video and upload it. It's important to exhaust all these features and identify the corresponding benefits to the target that those features make possible. From this exercise, your team will uncover how the product or service is unique from its competitors. Determine which single benefit is most important or relevant to the target. Sometimes this will be obvious based on the objective the client is trying to achieve. When the main benefit is presented clearly, it becomes easier for a potential customer to determine how one digital camera may be better than another.

6. WHAT ARE THE REASONS TO BELIEVE?

You should find focused selling points in this section. These should be tangible product or service features that will justify why someone should listen. Thanks to people like you and me, we all are bombarded with thousands of marketing messages daily. When the design of an ad or the concept gets your target's attention, you better have something true to say. Format will dictate how much more you can communicate past your one main benefit (think 30-second spots vs. brochure vs. website). Delve into blogs, reviews and the social media conversations people are having beyond the company website and press releases. These are great places to look for truth. Truth often presents itself in the form of a disconnect between what the brand wants to say and what people are saying about it. It's our job to resolve this tension with a creative business solution.

Rooting your creativity in strategy makes for creative business solutions.

7. WHAT BARRIERS TO PURCHASE DO WE NEED TO OVERCOME?

Actual or perceived, these are things that get in the way of someone choosing the product or service your client is offering. A recent example is Toyota's automatic acceleration recalls. This was clearly a blow to the brand heritage and trust Toyota built over the years. Doubts about reliability and trust in the technology were a substantial disincentive to purchase. In this case, the barrier was from within, but barriers can also result from larger shifts or the economic climate. List these barriers briefly, but be specific. Identify them so that you can overcome them.

8. WHAT'S THE NET TAKEAWAY?

When a customer interacts with a brand's marketing message or uses the product, a moment of truth occurs. The brand or product either lives up to the hype or it doesn't. After the target consumer has come in contact with your design, advertising or in-store marketing, what should they take away from that interaction? In the car example from above, the key takeaway could be to re-establish trust through the value, innovation and overall quality Toyota is known for. A simple and focused message presented within a well-designed experience over time will more than likely be remembered.

9. WHAT'S THE BRAND POSITION?

If your brand has a positioning statement, be sure to keep it handy. If you know this doesn't exist internally for the client or internally at your firm, test it out as a guide when developing your recommendations.

Once you as a designer, art director, copywriter or creative services manager have a sense of the specifics of a project from a client meeting, strategic planner or your own research, it may be helpful to take a stab at developing the brand positioning statement. This tool is a succinct articulation of the target, brand, business category, point of difference and reason to believe.

I use the following template for crafting a positioning statement: "For (target), (brand or product) is the (category) that delivers (benefit/point of difference) because only (brand name) is (reason to believe based on a tangible attribute or feature)."

Remember that the tool is only as good as the information you populate it with so be sure to plug a specific feature into the "reason to believe" blank and a corresponding benefit into the "point of difference" blank. This will take a few drafts to get right, but once you do, place it at the top of the white board or in the communications that you give to your team (after getting any needed buy-in).

It may take some time to become comfortable with the process of articulating strategy in this way before executing, but rooting your creativity in strategy makes for creative business solutions. Samples of existing creative should be included for reference in this section. The graphic standards or brand guidelines should also be easily referenced for tone and brand personality so as not to deviate from what's on brand.

10. WHAT'S THE DESIRED RESPONSE?

The customer will move on if you aren't clear how to take advantage of what you offer in your creative executions. Each brand is posturing for a share of your wallet. All brands that want to retain their current customers or convert prospects into customers should make it easy for people to respond. Should your prospects call, click, visit or all three? This will depend largely on channel, creative format and product. Be specific in the wording of your call to action and be sure to allow prospects the ability to respond in multiple channels. Whatever it is in your situation, be sure it's compelling and clear.

11. WHAT'S THE TIMING?

Be clear on how much time you have to come up with everything listed in section 2. List any phases, and pad a day or two here or there.

Keep in mind that there's no one way to approach a creative brief or strategy document. You may or may not include every section listed here. When determining the content of each brief, ask yourself, "Does it make strategic sense to omit or change the order of any sections?" If so, make the case for why and take a chance. Strive for clarity rather than uniformity. Though I've personally found value in this framework from my former partner and NYU faculty colleague Professor Neil Feinstein, there is no template. If it's worth its salt, it's a custom-designed strategy coupled with tactics and execution every time. You'll need to look at your specific project or organization to determine the exact course of action.

As our field evolves, I see the opportunity for smart creatives to become partners with business and marketing practitioners. That partnership benefits designers when we engage in whole-brain problem-solving—part strategy and part execution. It doesn't have to be us against the business and marketing folks, and creativity doesn't have to be relegated to execution. The late design icon Tibor Kalman said, "We are here to inject art into commerce." In order to do this properly, my skills had to evolve to include learning the language of commerce.

As you become acquainted with what the business and marketers in your client's organization are thinking, you, too, will be able to maximize your potential to participate in strategy and minimize the time executing in a vacuum. This isn't rocket science; it's just a different language. Think of the new approach as a translation from marketing-speak (or the language of the suits) into strategic tools that will help you or your team create more relevant creative work. **HOW**

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