

9 Golden Rules for Creative Briefing

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Getting Your Brief Right isn't Easy

It is much more difficult than it should be. We all know from experience that getting a creative brief right is a bit like alchemy.

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This is something we talk about a lot. Late last year we sat around a table to discuss briefing. We talked around experiences and ideas that might improve the process of briefing projects. What could we all do better?

Getting an idea out of your head and into someone else's is very tricky. At least, doing it in any meaningful way is hard. So, what advice can we offer to make the process easier?

Initially, our aim was to put together the best briefing form we could, but quickly we realised that advice and collaboration was a better route than form-filling and box-ticking..

To this end we came up with our '9 Golden Rules for Creative Briefing'. We thought more about how we work with our clients every day and talked through the steps we thought would make the process easier for everyone.

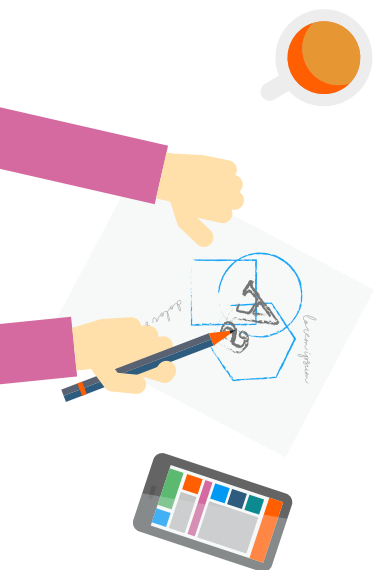
Between us, we discussed our experiences, successes and horror stories. We put ourselves in our clients' shoes, empathised and distilled the result into our nine pointers (we're aware that "Rules" is a bit melodramatic).

We are sure that using these guidelines will have a positive impact on any of the work you do with your agency.

Read on and you will still find a form though. It is really intended as a prop for a bigger conversation and it's mercifully brief. The longer we talked the more we realised that briefing forms, on their own, are never good enough and no-one likes filling them in.

Go a little further and you'll find some edited highlights and nuggets from the conversation. A full transcript of the round-table discussion is also available from [here](#) (just in case you're interested to read what we think verbatim).

Our call to action this time is just a simple request. Talk to us. We can get a lot more done together.



9 Golden Rules for Creative Briefing



1

One size does not fit all

Some people are better at expressing things with the spoken word, others when things are written down. Naming funds is a world apart from storyboarding advertising.

Every project is unique in one way or another, so it stands to reason the brief should be too.

2

Briefing forms are boring, they're restrictive, but they are a great start

The first brief should be the beginning of a process not the end. On its own a form will be inadequate. We just need enough information to start the conversation.

3

You don't need to do this on your own

Creative processes thrive on collaboration. We should work together to make sure we get the brief right from the start.

Pick up the phone and call us in. We find that a face to face meeting usually leads to some inspiration or revelation.

4

Cultivate a partnership

A relationship with an agency should be collaborative, especially in financial services. The more we understand the specifics of your offer, the more effectively (and efficiently) we can help you.

A longer-term investment of our time, on both sides, will pay off when we're able to anticipate your needs better. That's when you get the best out of us.

5

What are the project's parameters

What is key to delivering your project? Understanding of budgets and timelines is vital, but is there anything else we should know about?

Knowing about other markets/products/formats/sizes up front can help to save time and money further down the line.

6

Let's make sure we're speaking the same language

Does anyone like jargon? Design and financial services are rife with it and none of us want to baffle or patronise the other party.

It might seem obvious but checking that we're working from a common vocabulary is a useful and simple step to take. We just want to make sure we're all understood.

7

What do you want to achieve?

The best brief is the one that gives us a problem and the longer-term goal. If we can see the big picture we can identify what you really need.

We are aware that you may just need to get this job off your desk so you can get on with something more important. We can help with that too.

8

Let the creatives do the creating

We want your ideas, you will have an insight that we could never have. However, our role is to provide the creative brains and it's their job to turn your needs, ideas and inspirations into something special.

Work with us on this and our 'creative brains' can help you shine.

9

Let us know what will happen at your end

Compliance aside, what hoops will you need to jump through before this project goes live? Is there an internal sign off before you can brief us at all? Are you the end client or is there someone 'upstairs'?



It's Good Form to Talk

You won't use a form to capture the essence of a brief. They still have their uses though.

Use the questions below as prompts, get your thoughts down on paper. Write on both sides. The main thing we'd like you to do is talk to us. **Call Fin on 020 3735 4575.**

Name

.....

Position

.....

Company Name

.....

Date

.....

What do you want? / What do you want to achieve?

Who is the intended audience? / What channels would you like to use?

What is your timeline? / What's your deadline?

When can you talk to us?

A Few Edited Highlights

On the following pages you will find a few highlights from our conversation. We've included this because we want to show a little of our thinking and present our ideas 'straight from the horse's mouth', as it were. We really do think these things.

This is far from everything. A full transcript* of our conversation is available for download [here](#).



Justin Mould
Managing Director



Alan Fender
Senior Consultant



Marek Warner
Account Director



Dan Hyde
Account Manager



Alex Blondin
Head of Digital



Danielle Marchant
Designer



Tommaso Rota
Designer



Vilam Vuong
Senior Designer

*The transcript has been tidied up a little, for accuracy, clarity, scandal, and salacious detail, but the words, thoughts and sentiments are pretty-much our own.

JM

I think another question that doesn't get asked enough is, "what are the expectations of the creative, beyond just the first item? Are there other multiple usages, downstream, that one should be considering up front?"

A lot of briefing is an organic process, however, as a starting point we can make it really simple, but it's a good kick start for us to then ask more questions.

For me, what's always the holy grail is for starting the creative element, is, you know, the single proposition. You know? We want to sell more cars, but the single proposition is "we're the fastest", "That's the bit I want you to work the creative around".



MW

Clients like the fact that they can give minimal briefing and we can pick up the rest. The more that happens the more we get embedded with them, the more they feel we are an extension of their own organisation.

Some clients are better around a table than in writing. One client would send me all the stuff but then I'd read it, then phone him up and we'd discuss everything. Things would come out in the conversation that no-one had thought of yet, because that's part of it.

AF

I still think there's no such thing as the perfect brief. It's all made up of variables, depending upon the client. It's down to us to cherry pick what is relevant in the client's brief and feed it back to them. We should say, 'okay, so what you mean by this is the following'.



AB

There is also a good argument that this highlights where you're working with a quality agency. You don't have to fill in a form, plug yourself into a machine and churn out something that's very repetitious. There's a better path. The brief is created in partnership with people like us and that's where you get better value.



DH

I'm not a believer in a briefing form, it just feels like admin, rather than the beginning of a creative process.

Our way of getting briefs from clients is not formulaic, by default rather than design. It's not about filling in forms, it's not about making lives more difficult. It's a much more intelligent way of getting the essential information from them.



DM

What helps the designers with a brief is knowing what the client is looking to achieve from it...the job. What do they want to get out of it?



TR

For me the perfect brief is really just one sentence. Give us the problem, not the solution.

...Actually, just give us the problem, and then let us think of a solution for you. We can present it back.



VV

An inherent problem we have to get through is that clients have different ways of briefing and different levels of understanding when it comes to the creative process.

A good agency will guide you through the process of discovery to help you understand what you want and what you need.