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The Marketing Brief Template



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Marketing Brief for [Insert Company Name]

Business and Brand Overview

[Insert Company Name] is looking to:

- Do this
- Do that
- Do the other

[Insert Business Overview Here]

The first thing you should explain when writing your marketing brief, is about your business and the sector you work in.

As a starter for 10, here's 4 key questions that are really useful for you to have the answers to:

- What do you do and how do you make your money?
- How do customers currently buy from your business?
- What makes your business different from its competitors?
- Why do you do what you do?

The more you can offer in the first instance here, the better.

Project Objectives

Having a clear idea of your campaign objectives will show everyone involved what success looks like for you.

For example:

If you're hoping that through your marketing campaign, you'll see a surge in website sales or a specific 25% increase in service enquiries, you need to include this in your brief.

Having a set of "campaign success factors" can really help everyone know what their responsibilities are and will help to avoid any disillusionment (or reprimanding from the boss) down the line.

Perhaps your business has moved in a new direction and you need to target a whole new audience group. Maybe you're planning a product launch or even communicating a rebrand.

Remember:

Your marketing objectives should be specific, measurable and realistic.

Summarise your project objective here:

By ____ (time/date), the ____ (company name) marketing team will reach ____ (number/amount) ____ (metric).

We also suggest including 3 Success Factors (or KPIs) in your marketing brief that your agency can use to measure against. Any more than this could end up diluting your campaign efforts:

1. Success factor
2. Success factor
3. Success factor

Target Audience/Markets

[Check out this post](#) for a more detailed guide into creating customer personas.

On top of thinking about demographics and psychographics (which will come in very useful for things like LinkedIn or Facebook ads), you should be asking empathy-driven questions that will help you drill down to the true, tangible value of your product.

That tangible value is what's going to help you to create a brand that's memorable, clearly positioned and relatable to the right people.

Try answering the following questions:

- What are your customer's values/what do they care about?
- What do you want them to care about?
- Why should they care?
- Why don't they care?
- Why would they be loyal to your business?
- Why would they avoid your business?

Depending on your campaign and how specialised your objective is, your marketing brief may have multiple target audiences or maybe even just one. If there are a few different personas, you'll need to explain how the message will vary when communicating to each

one. Don't worry too much about this, though - it's likely something your brand agency will be able to help you with.

Marketing Channels

Once you've figured out who you're trying to target through your marketing campaign, you'll need to understand which channels you should be using to reach them.

Depending on your budget, you may want to focus on one rather than multiple channels. But remember, if you're pushing your audience from, let's say, a LinkedIn post to a landing page, that would constitute as 2 channels.

- Channel 1
- Channel 2
- Channel 3
- Channel 4
- Channel 5

The Problem You're Facing

While your objectives focus on where you want to be in the future, the problem(s) you're facing focuses on the here and now.

For example:

- Our target audience currently [x] but we need them to [x]. They currently won't / can't because [x].

The reasons why could be any of the following:

- Our tone of voice isn't resonating with our audience
- We haven't got our message straight
- Our campaigns don't reflect our brand values
- Our proposition is unclear
- Our competitors are doing it better than we are

- We don't have a clear understanding of who we're trying to target
- Our content isn't working
- Our social campaigns aren't generating any engagement

Insights like these will hugely help your digital marketing agency to pinpoint where to focus their efforts.

More About Your Business

Things to include here could include:

- What have you done to arrive at this point?
- Who makes up the business?
- What are you most proud of to date?
- Why did you get started?
- How do people benefit from your business?
- What is the current perception and reputation of your business?
- What is the most important part of your customer journey?
- What kind of qualities do you want people to associate with your business?

Competitor Information

A good understanding of your competitors can help your brand agency to get a grip on what they're doing well, what you're doing better, what messages they're putting out (and to who) and how you fit into the competitive landscape.

Try listing out:

- Competitor name
- Website link
- What you like about them
- What you don't like about them
- How you see yourself in relation to them
- Who they're targeting
- What they're saying in their marketing communications

Brand Strategy

If you have a fair idea of your existing brand strategy, then it's a good idea to include it in your marketing brief.

Your brand strategy is made up of:

- Audience personas
- Competitor research
- Brand positioning
- Brand story
- Brand values
- Brand mission
- Brand touchpoints
- Brand messaging
- Tone of voice
- Brand identity

Even if you have some ideas around this, get it noted down.

It's also worth noting what's working now vs what isn't (i.e. if there's a part of your brand strategy that no longer resonates with your company values or the type of audience you want to attract moving forward), so your agency can tackle any potential inconsistencies in advance.

Project Specific Information

Project specific information can be tricky to outline in a design brief.

Let's take a look at creating a new brand as an example:

- Is your business bricks and mortar, or mostly online?
- Are you in the market for awareness, customers, or something else?
- What sort of deliverables are you looking for?

Other things to consider alongside your rebranding project are:

- What does your marketing strategy look like?
- Do you need a new website? (If you're rebranding, then the answer is yes!)
- Do you have a digital marketing strategy in place?

Expected Marketing Campaign Deliverables

Depending on your campaign, you may need any of the following:

- Landing page design
- Social media assets
- Video content
- Blog content
- eBook creation
- White paper creation
- Copyediting
- Copywriting
- Keyword research
- SEO strategy
- Tone of voice creation
- Powerpoint presentation
- Branded merchandise
- Letterheads
- Brochure design

Now is the time to consider what deliverables might be required, based on the marketing channels and the ways you're hoping to reach your customers

Sample Marketing Campaigns

If you've run marketing campaigns in the past, include some links to the assets in your brief.

It's also worth mentioning some further information at this stage:

- What worked?

- What didn't work?
- What KPIs were you monitoring?
- Did you achieve them?

Previous campaigns not only give your agency an idea of how your brand will be used going forward, but it'll also help them to understand where improvements can be made - or what successes can be capitalised on.

It also helps build out the list of deliverables we talked about earlier.

Project Timescales

This question often helps agencies decide whether they can be involved with your project or not. Particularly if you have a deadline in place - for instance, an industry event or brand launch that you're trying to coordinate your marketing campaign with.

If you're looking for a rapid turnaround time and the agencies you reach out to have a lot of work on, they might decline the offer to work together.

Try to avoid reaching out to branding agencies at the last minute. The earlier you can bring them in on your plans, the better!

Use a table like the one below to outline your projects.

| | |
|--------------------------------------|--------|
| Deadline for brief submissions | [date] |
| Invited agencies to present proposal | [date] |
| Agency appointed | [date] |
| Project ready | [date] |
| Go live (if applicable) | [date] |

Project Budget

By being clear with your budget early on, you can make sure everyone is on the same page right from the get go.

Even if you can't go down to the exact penny, including a suggested budget range will help your agency to not only determine what deliverables are feasible, but also give you a more realistic idea of the results you can expect to achieve.

Include a suggested budget if possible, if not, a budget range.

We have a range of posts about design project budgets if you're not sure:

- [How Much Does Logo Design Cost?](#)
- [How Much Does Branding Cost?](#)
- [How Much Does a Website Cost?](#)

Contact Information

List out the people involved in the project here. This is what you should include:

- Name
- Phone
- Email
- Hours available
- Is it appropriate to contact them?

How the Project will Be Awarded

Typically people assign a percentage of awarding criteria to the following elements.

- Cost/Value for Money
- Quality of Work
- Previous Experience
- Alignment to the Design Brief
- Suitability of the Agency

Required Response

You need to let your agency know what you're expecting back, by when, and how to submit it.

This could be as simple as:

- A written response to the brief
- Examples of relevant work
- Testimonials from happy clients

Make sure you also include:

The email address to submit the proposal to, and the date by which you're hoping to receive your submissions.