

Quick Guide to a 'Real' Useful Creative Brief on Upstack

Before you skim through this guide, I feel like it's necessary to explain the reason for writing it. (Side note: I said "skim" because we both know you're not going to study this guide, in fact that wasn't the intention). When we first built Upstack, I spent a lot of time talking to experts about their design process. I was intrigued by the depth in which they would learn their clients' businesses and how that research would translate to a beautiful brand or website. It amazed me to learn about how hours of interviews and case studies would turn into one or two business strengths. That's not an exaggeration either; these are the guys that pride themselves in turning over every rock before putting pencil to paper. When they're done, the end result is a massive 100 page document that I lovingly call the "Super Brief". For us enthusiasts, this is the brief you talk about to your other design friends.

As cool as this "Super Brief" is, we quickly realized (after a few failed projects) that it doesn't produce the same results unless you're an agency willing to spend big bucks on project managers, in-house designers, and frequent meetings. The rest of us need a "real" brief. A "real" brief is one that a designer can read in less than 10 minutes and easily understand the following: exactly what you need, who you are, your likes/dislikes, and your requested deliverables.

What is a Creative Brief?

Think of your creative brief as the blueprint for your new design. This is what your designers will use to base every future decision around, especially if you do not explicitly say otherwise during your project. When you're writing your creative brief, you want to be thorough enough to tell your designers what you're looking for, but not so lengthy that it's impossible to fully read. Be straight forward, use real words, and write it as though you are talking to your designers over a cold beverage (if that's your sort of thing.) We know you're smart, but leave your big words out of this document.

The Essentials

If you decide to skip everything else in this document, at least make sure your brief can answer the following five questions:

1. *What exactly do you **need** from your designers?*
2. *What type of **style** do you want?*
3. *What are you **adamant** about (MUST HAVES and MUST NOT HAVES)?*
4. *Who are you and how must this design **represent** you?*
5. *When this project is completed, what must you have in your hands?(**Deliverables**)*

What exactly do you need from your designers?

(What others call this: Project Summary)

Tell the designers what the purpose of this project is. For example: "I need a logo for a new technology company."

Distinguish what type of design you need and include a generic description of who you are or what your company does. Including a description of the purpose of the project will give designers an indication if they can serve that purpose. Some designers might be better suited to deal with a logo dealing with a tech company than they would be designing something for boutiques, for example.

What type of style do you want?

(What others call this: Art Direction)

Give the designers some creative instructions. Some examples might be "Art deco, steampunk, or cartoon."

Finding out how to refer to a certain style of design is difficult even for some of the most seasoned designers. There are so many different classifications and it's really difficult to match the words to the visuals. If you're not sure about what style you need, the best thing to do is to find an example and broadcast it to as many people as you can who might recognize it and be able to identify it for you. People like to show off their knowledge so you'll likely be able to solve the mystery thusly. If you know how to classify the style you need, you're already ahead of the game, but it could never hurt to verify you and the designers are on the same page about what constitutes a "cartoony" style, etc. once you get into a project. For the brief, it is really helpful to isolate the style you need as accurately as possible.

What are you adamant about?

(What others call this: Parameters)

Stipulate to the designers things which absolutely must or must not be in your design. This can range anywhere from concepts to colors.

The reason this is important is it gives the designers a center to work from. You will be working with designers with vast imaginations and abilities, so it helps to place boundaries to give them a sandbox to work within. Of course, this is also helping to include or omit things that are necessary to realizing your vision or avoiding potential pitfalls only you would know about. Undoubtedly, designers can do their jobs much better when they have a client who knows what they do

and do not want. Including that information at this early stage is very conducive to getting the great design work you expect.

Who are you and how must this design represent you?

(What others call this: Background)

Custom graphic design requires that the designer understand who you are so the tone and style is an accurate reflection of the message you want to present.

The thing about custom graphic design work is that it needs to be tailored to your specific purpose. For a designer to get at the core of your message, they have to know your message. This is probably the most important part of the creative brief short of the parameters. This is what will make your design uniquely yours. The more insightful information you share, the better a designer can convey what you want.

When this project is completed, what must you have in your hands?

(What others call this: Deliverables)

In explicit terms, what content or materials do you need? (ie. Logo, business cards, tabloid posters, web banners, etc.)

This is the simplest part of your creative brief. Just itemize what materials you need made for you. Be sure to include everything you expect to receive from the designers. It's really as simple as that.

Items to be Created

(List the items that have to be created)

Example

- *Postcards (how many and what size will be determined based on concept)*
- *Letter & Envelope*
- *Three Fold Brochure Explaining New Service Plan, plus existing plans*

Project Goals

(Describe the reason the project is being undertaken and what goals are to be achieved by completing the project. Example – Old service plan is being discontinued and will be eliminated in the next few months. The goal is to convert all existing customers to new plan or to one of the other existing plans.)

Audience

(Describe who the client wants to respond? Example: Existing or prospective customers. Also, explain what they think about the brand, product or service.)

Who are you gunning for? (Competitors)

(Describe what other brands, products and services the client competes with. How does the client's brand, products and services compare in strict product terms?)

Your Message

(Describe what is the single key message the client wants to communicate to the target audience.)

Summary of Ideas

(Describe your initial ideas that you will be exploring. Doing it now and showing it to the client before you start, will save you a lot of re-work time if by chance the client does not like the direction you plan on taking.)

Example: The first customer contact will be in the form of a formal letter in an envelope, signed by the CEO and explaining that the old plan is being discontinued but a new and better plan is now available – including a side by side comparison chart of the new plan vs. the old plan. A small insert will be made to look like a coupon for \$100 off the first month and will contain a promotional code that customers are to ask for when calling. A three-fold brochure will further explain the new plan and will also briefly touch on other plan options available. The rest of the pieces will be all postcards. Each will have a more urgent tone and color scheme, each one will also include \$100 coupon and promo code.

Art Style Examples

(Show examples of the kind of artistic style you will be going after, this will ensure the client is aware of the style you are going after, so you avoid rework).

Brand Standards and Mandatory Items

(List the brand standards, logo usage rules or any other design guidelines the client has in place that must be followed. Or if they have a document or a web page where such standards are outlined, you can simply state: "See Client's Brand Standard Guidelines as available on www.clientname.com/standards")