

# The Creative Brief: A framework for developing and evaluating marketing materials

The Creative Brief is a planning tool widely used by advertising agencies and marketing personnel when designing or implementing a marketing program. It can be used when creating communications directed at clients, employees, shareholders, potential investors, the media, or any other target group.

The Creative Brief is a cooperative tool by which the various people and groups involved in a project focus their thoughts and analyze the best method(s) of approaching a program. When used properly it can also reduce the time and cost associated with marketing projects, as it requires all the key participants to agree on important factors at the onset of the project.

Many organizations and agencies have a very refined, occasionally bizarre, possibly even copyrighted Creative Brief tool that is specific to how they do business. Most, though, have a few important elements in common:

- **Objective:** What is to be accomplished by this program? Is the goal to create awareness, knowledge, preference, or purchase? One traditional tool used for this purpose is the definition of **SMART** objectives: Specific, Measurable, Agreed Upon, Realistic, and Time-based.
- **Primary audience:** Who is this campaign meant to reach? The more specific and detailed the better. When possible, list details like title(s) of audience members, industry, size of company, revenue, number of employees, geographic details, affiliations, key behavior attributes (i.e., do they make the buying decision or influence it?). Demographics and psychographics go here.
- **Attitudes/Beliefs/Objections of audience:** Another way to state this element is, “Why hasn’t the audience already done/thought what you want them to?” If you were hired to argue against the purpose of this campaign, what would your points be? What is the status quo?
- **Current/Proposed behavior:** What is the audience doing now? How are they thinking/dealing with the situation about which you are addressing them? What do you want them to do differently?
- **Call-to-action:** What do you want the audience to do/think? Again, the more specific the better. One of the Ten Commandments of good advertising is: tell the audience what you want them to do. If you don’t know, don’t advertise until you do. Examples of good calls-to-action include: “Call today,” “Visit our website for more information,” “Complete and return this form.”
- **Tone:** Should this be a friendly, relaxed message, or a hard-sell with a sense of urgency? Should the audience feel like a confidant, pal, victim (in need of rescuing), partner, controller, etc? Should the ad convey a rich, textured impression or something more Spartan and utilitarian?
- **Key message:** What is the one thought that the audience should be left with? The initial level of regard given to most print advertisements has been measured at between one and two seconds. If you absolutely had to, how would you state your message in seven words or less?
- **Secondary message(s):** If the advertisement does draw in a reader, what are the other one or two points that should be conveyed? Another advertising commandment: people never remember more than three things.

# Creative Brief

Project name: \_\_\_\_\_ Version: \_\_\_\_\_ Date : \_\_\_\_\_

Participants: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Objective(s): \_\_\_\_\_  
\_\_\_\_\_

Timeframe: \_\_\_\_\_

Primary Audience Demographic: \_\_\_\_\_

Primary Audience Beliefs: \_\_\_\_\_

Current Behavior: \_\_\_\_\_

Desired Behavior: \_\_\_\_\_

Call to Action: \_\_\_\_\_

Tone: \_\_\_\_\_

Key message: \_\_\_\_\_  
\_\_\_\_\_

Secondary message(s) \_\_\_\_\_  
\_\_\_\_\_

## Approval requirements at stages:

Brief	Concept(s)	Drafts	Finals
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____



## Dissecting the Creative Brief

### Background

This **paragraph** has two key purposes: (1) to set the stage/provide context and (2) to summarize the marketing situation and challenge specifically at hand. Relevant competitive factors, marketplace variables, user issues and historical communications (for examples) belong here.

### Target Audience

Here's where you put a face on the end user/beneficiary of the product/service. While demography (age/income/etc.) are critical, psychographic and behavioral dimensions will enhance the creative team's ability to speak to/address the audience's deeper needs.

### Communications Objectives

In succinct, bulleted format, state the goals of the effort, what the communication must achieve. Is it to reassure customers? Differentiate a product? Drive customers to a web site? Tease? Drive awareness or reconsideration?

### The Insightful Creative Strategy

Also known as the proposition, promise or benefit statement, this **single sentence** is the crystallization of what the message must communicate. The most meaningful strategies capture a human/consumer insight\* and, in doing so, link the product/service to the underlying emotional drivers of behavior.

*\*Insight: the capacity to discern the true nature of a situation, the act of grasping the inward of hidden natures of things or of perceiving in an intuitive manner.*

### Support

This is the evidence that specifically proves the strategy. When you have rational, factual evidence, certainly take advantage of it. But emotional "permission to believe" can be as, if not more, compelling.

### Tonality

Relating to a brand's personality and character, this statement (or short set of words) requires a feel for what your brand stands for in consumers' minds. You also need to consider the objective of the specific message. For example, if your brand's imagery is soft and subtle, an introductory message for a line extension should probably avoid the "newsworthy" tone normally assigned.

### Executorial Guidelines

Message elements and any mandatories and/or restrictions go here.



# Creative Brief

CLIENT:

PROJECT:

**Background**

**Target Audience**

**Communications Objectives**

**Creative Strategy**

**Support**

**Tonality**

**Executional Guidelines**

**Approvals**

Prepared by: \_\_\_\_\_

Date:

Director of Strategic Planning: \_\_\_\_\_

Date:

Executive Creative Director: \_\_\_\_\_

Date:

Client: \_\_\_\_\_

Date:

# The "R.O.I." System

## DDB Needham

ROI stands for Return on Investment

At DDB/Needham, it also stands for a belief that *"Great advertising is distinguished by three fundamental qualities: Relevance, Originality and Impact."*

Their ROI Strategy System is similar in many respects to the Y&R Work Plan, but there are important exceptions - particularly in the inclusion of certain tactical elements (demonstrations) and a Media section.

### 5 Basic Questions

The System is built on five questions:

1. What is the purpose of the advertising?
2. To whom will the advertising be addressed?
3. What competitive benefit will be promised and how will that promise be supported?
4. What personality will distinguish the brand?
5. When, where and under what circumstances will the target be most receptive to the message? And what media will deliver that message to the target at the lowest possible cost?

The system is covered in great detail in "Planning for R.O.I." published by Prentice-Hall.

Here are some of the high points.

### Purpose and Target

When determining the purpose of the advertising, the ROI Planning process focuses on the specific desired behavior and source of business.

The target section should both demographic and psychographic information.

When defining the target, DDB/Needham looks for "Aiming Points" which allow you to think specifically and personally about your target.

Even though the larger target may be a good deal broader, they say, *"Think of a large target with a small center."*

An example would be "Cereal eaters who are interested in sports" for Wheaties.

### Promise and Support

*"The promise of a competitive benefit and the support of that promise are the two most important decision the strategist will have to make."*

The ROI system definition states that *"consumer benefits exist in the mind and attributes exist in the product."*

The advertiser promises a benefit for using the product.

A matrix is provided for examining alternative promises.

Support is everything that lends credibility to the advertiser's promise.

There is a heavy focus on demonstrations - both *literal* and *dramatic* (an example of a dramatic demonstration is the Bud Light "Bar Call").

When demonstrations are found or developed they are added to the strategy document.

In addition to product facts and demonstrations, this section allows for what DDB/Needham terms “*external support.*”

This includes sales promotion, PR, and direct response. When these play a major role, they must be included in the strategy and coordinated with the other media.

An example of external support would be the pictures of well-known sports figures on the Wheaties package.

## **Brand Personality**

This is a separate section.

It may be treated simply -

State Farm Insurance - straightforward, warm, a good neighbor.

Or it may demand more complexity -

Ist Nationwide Bank (parent organization)

- Visionary and “can do.”
- Passionate about banking
- Dedicated to the needs of the middle market
- Customer service oriented.

There are additional personality attributes for the bank’s “products” (Home Loans, etc.).

## **Media**

*“The ROI System ensures that the media will match the purpose of the advertising.”*

The ROI System integrates media planning in to the strategic process.

DDB/Needham has also been in a leader in promoting an integrated view of media expressed as the “*Personal Media Network.*”

A key part of this is the concept of “*aperture,*” the time that “*a customer is most likely to notice, be receptive to, and react favorably to, an advertising message...*”

## **The Process**

DDB/Needham believes that the process is most productive when agency and client work through it together. For this purpose, a Workbook is also provided.

“*Planning for R.O.I*” and the “*Planning for R.O.I Workbook*” are published by Prentice Hall (ISBN 0-13-679466-1 and ISBN 0-13-679473-4), though not generally available.

# Y&R Creative Work Plan

1. KEY FACT:

2. CONSUMER PROBLEM THE ADVERTISING WILL SOLVE:

3. ADVERTISING OBJECTIVE:

4. CREATIVE STRATEGY:

A. Prospect Definition:

Product Usage

Demographics

Psychographics

B. Principal Competition

C. Consumer Benefit (or Promise):

D. Reason Why:

5. (IF NECESSARY) MANDATORIES AND POLICY LIMITATIONS:

Product \_\_\_\_\_ Date \_\_\_\_\_ Creative Supervisor \_\_\_\_\_

# BackGrounder

Client \_\_\_\_\_ Project \_\_\_\_\_

What's the Problem?

## **I. Marketing Background:**

### 1. Current Marketplace Reality

- What's the current market situation?
- What are our problems/threats?
- What is making the competition successful?
- What's made us successful/unsuccessful to date?

### 2. Major Objectives & Measurements

- What do we want to achieve?
- What would indicate success?
- How might we measure that success?
- How might we measure the contribution of different communication elements?

### 3. Product Attributes, Features & Benefits.

- Attributes
- Features
- Benefits

### 4. Consumer Benefits & Values

- Consumer Benefits
- Values

## **II. Audience Background**

### 5. Who is the target?

- Who is the primary audience?
- What do we know about them?
- What are the primary needs we will be meeting?
- How should we talk to them/not talk to them? (TONE)
- Are there any secondary audiences (including dealers and trade)?
- What is important to the secondary audience?

### 6. Situation - Before the Message

- What does our audience think/feel about us?
- Are there any barriers/obstacles to overcome?
- What do they think/feel about the competition/category?



### 7. Desired Result - After the Message

- What will they think/feel about us after the communication?
- What do we want them to do after the communication?

### 8. Reasons Why:

- Why will they change their mind?
- What are some of the real reasons?

## **III. Tactical Background:**

### 9. How:

- How can we best reach the audience?
- What's the suggested medium?

### 10. When:

- What's the window of opportunity?
- Is there a deadline or key 'drop dead' dates?

### 11. Quantity (If materials):

- How many will we need to proceed?
- Are all the materials needed at once?

### 12. Longevity:

- How long will the program last?
- How long should the supply of materials last?

### 13. Mandatories:

## **IV Integrated Communications:**

### 14. Integration:

- How will this project work with other elements of this program?
- How will this program work with other programs?

Approvals: Who must approve the Work Plan? \_\_\_\_\_

When? \_\_\_\_\_

# WORK ORDER PRINT

**GERAGHTY & ROMAN**  
CREATIVE ASSOCIATES, INC.

NEW JOB       CONT'G CAMPAIGN       RUSH JOB  
 JOB # \_\_\_\_\_ DATE ISSUED \_\_\_\_\_  
 TITLE \_\_\_\_\_ CAMPAIGN BREAKS \_\_\_\_\_ TO \_\_\_\_\_  
 CLIENT \_\_\_\_\_ PRESENTATION TO CLIENT \_\_\_\_\_

DEPARTMENTS INVOLVED \_\_\_\_\_  
 CREATIVE       PRODUCTION       MEDIA      CC: \_\_\_\_\_

MEDIUM \_\_\_\_\_  
 NEWSPAPER       MAGAZINE

TYPES OF ADVERTISING \_\_\_\_\_  
 INSTITUTIONAL       BRAND       SALE       DIRECT RESPONSE

**CREATIVE** \_\_\_\_\_

1. Product/Service:
2. Communications Objective:  
(What Should The Message Say)
3. Positioning Statement:
4. Budget:
5. Target Audience (Demographic/Psychographic/Attitude):
6. Markets:
7. Primary Advantage/Related Benefits:
8. Supporting Research:
9. Excutional Style/Tone:
10. Corporate/Legal Considerations:
11. Competitors:
12. Information which must appear:
13. Other:

PREPARED BY: \_\_\_\_\_

**PRODUCTION/MEDIA** \_\_\_\_\_

FULL COLOR       B/W       2/C       BLEED       NON-BLEED       TO MECH. ONLY  
 BUDGET-PRODUCTION \$ \_\_\_\_\_ BUDGET-MEDIA \$ \_\_\_\_\_  
 MATERIAL QUANTITIES: CLIENT (REPRINTS) \_\_\_\_\_ AGENCY \_\_\_\_\_  
 SHIPS TO WHOM/WHERE/DATE: (REPRINTS/SAMPLES) \_\_\_\_\_

PUBLICATION	POSITION	MECH REQ/SIZE	ISSUE	CLOSE
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ESTIMATE       PLACE       PROPOSAL       NET       GROSS

CONCEPT	COPY	LAYOUT	ESTIMATE	CLIENT OK	TYPE SPEC	ILLUST/ART	PHOTO
RETOUCHING	LETTERING	MECH	MISC	CLIENT OK	REVISIONS	PROD	RELEASE

# Ogilvy & Mather

## Sample Creative Brief

(Currently no “official” form. But here is the type of piece that is used.)

Product:

Key Issue (Problem):

The Promise:

The Support:

Our Competition:

Target Consumer: Who are we talking to?  
Demographic & Psychographic

Desired Behavior: What we expect.

Target's Net Impression:

Mandatories:

Tone & Manner:

# JWT Creative Brief

## 1. What is the Opportunity and/or Problem which the advertising must address?

A brief summary of why you are advertising. Take the consumer's point of view, not "sales are down," but, rather "consumers are choosing cheaper alternatives."

## 2. What do we want people to do as a result of the advertising?

## 3. Who are we talking to?

Try to develop a rich description of the Target Group.

Indicate their beliefs and feelings about the category.

Avoid demographic information only. Add personality and lifestyle dimensions.

## 4. What is the Key Response we want from the advertising??

"State succinctly, what single thing do we want people to feel or notice or believe as a result of advertising."

## 5. What information/attributes might help produce this response?

It could be a key product attribute, a key user need which the brand fulfills, etc.

Avoid a laundry list.

## 6. What aspect of the Brand Personality should the advertising express?

## 7. Are there any media or budget considerations?

## 8. This could be helpful...

Any additional information that might affect the creative direction.

"Feel free to use a visual summary, a picture, drawing or any object which aids in understanding the  
of the brief."

# Richman Sales Promotion & Corporate Design

PENN ELECTRIC SUPPLY

COPY STRATEGY

- RESPONSE SOUGHT: \* Awareness, traffic and increased fan sales.
- COMMUNICATION OBJECTIVE: \* Selection, quality, value and price on ceiling fans from an organization that knows the product, can help you make the right choice, and will stand behind the product.
- POSITIONING: \* The light and electrical supply experts: largest and most complete contractor lighting and electrical supply house in the Delaware Valley, with 5 convenient retail locations, carrying the most extensive selection of high quality lighting fans and electrical supplies, with money back service guarantees since 1927.
- TAGLINE: "We bring knowledge to light"
- TARGET AUDIENCE: \* Non-bargain hunting consumer in close proximity to store locations.
- DELIVERY VEHICLE: \* Local newspapers  
- Supplemented by direct mail
- PRODUCT: \* Area's largest inventory and selection of ceiling fans: featuring the "Pageant"
- PRODUCT BENEFITS: \* Now the contractor's choice is available to you for the most efficient cooling system.  
  
\* The "Pageant" will deliver over 33% greater cooling capacity than any fan in its price range.
- PRODUCT FEATURES: 1. We stand behind our product with a money back guarantee  
  
2. Energy efficient - burns less than a 75 watt bulb  
  
3. Saves on heating and air conditioning bills by circulating 33% more air than any other fan under \$250  
  
4. One year in-home service warrantee  
  
5. Most versatile fan on the market  
- Extra rich brass finish  
- High gloss walnut/oak reversible blades  
- Combo canopy - allows for close-to-ceiling or regular down-rod mounting  
- Available in 60", 52" and 42" sizes  
- Available in several designer colors  
- Five/four blade option standard

**PARTNER:**  
**BRAND:**  
**PRODUCT/SERVICE:**  
**DATE:**

MASTERMINDS ADVERTISING



**ACCOUNT EXECUTIVE:**

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## **CREATIVE BRIEF**

**What is the challenge?** *(What is the biggest obstacle facing the success of your brand that only advertising can solve?)  
(Write in the form of a question.)*

**Who are we talking to?** *(Will the reader of this document feel like he or she knows this person intimately?  
Demographics, lifestyle, attitudes?)*

**What's important to them?** *(What is the critical insight into the emotional and rational factors, which help solve the  
above-stated challenge?)*

**What do we want them to do?** *(What is the desired effect we hope to have on our customer?)*

**What do they get out of it?** *(What is the single most important benefit our best customer should take away from  
the creative? What's in it for the customer?)*

**Why should they believe us?** *(What specific point or points about your brand give the customer reason to believe your  
stated benefit?)*

**Executional mandates (if absolutely necessary):** *(Only those which absolutely must be included. Do not include any  
executional "considerations".)*

## **PARTNER AUTHORIZATION**

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Signature

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**PARTNER:**

**BRAND:**

**PRODUCT/SERVICE:**

**DATE:**

**ACCOUNT EXECUTIVE:**

MASTERMINDS ADVERTISING



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## **WHERE WE'RE GOING**

*[The blueprint for changing our customer's perception. Write in the customer's own language. Would your customer actually say this?]*

### **Current belief:**

*[What does the customer currently believe about the brand?]*

### **Desired belief:**

*[What do we want him or her to believe?]*

### **Current behavior:**

*[How does the customer currently behave toward the brand?]*

### **Desired behavior:**

*[How do we wish to change that behavior?]*

### **Essential Message:**

*[What can we say to make this happen? One sentence, please]*