

ISBA

ingenuity

workingtogether

How to brief your agency

A best practice guide

Updated March 2023

How to brief your agency: a best practice guide

Agency briefing is crucial. A good brief (and process) saves time, money and headaches. But a great brief can lead to undiscovered revenue, increased brand affinity and long-term growth.

In partnership with ISBA - we've spoken to experts from across the industry to help brand marketers brief their agencies in a way that not only informs but inspires.

First things first, what is the objective of briefing your agency?

Simple. A great brief has one overriding objective: to inspire and motivate an agency to respond in an effective way, ultimately solving your brand's challenge(s). An effective and engaging brief enables all stakeholders to buy into one vision and determine the direction of a project. Moreover, it's a structured template that's designed to facilitate high quality conversations around a business challenge between humans. It should be brutally honest, not shying away from the uncomfortable truths. But most of all, it should be an objective source of inspiration for any agency to read.

Before we get started, something to keep in mind when preparing your briefing: good agencies are in high demand. This means that they are assessing you as much as you them. They are figuring out if you will be a good client.

Beyond the commercial calculation of 'will we make money', they are contemplating if winning your business is likely to open new doors for them? Will the work you create together inspire their team? Will working with you be a positive experience?

They will be looking to answer these questions throughout. So, no pressure, but if you want the right agencies in the mix, it's best to get it right first time.

TOP TIP:

Pitcherator is an online tool created by design agency dn&co that agencies use to decide if they are going to pitch. Put yourself in their shoes and try to answer these simple questions honestly.
www.pitcherator.com

What are the stages of briefing your agency?

While every brief is different and there is no one-size-fits-all approach, broadly speaking, the process can be split into three stages: **clarifying**, **writing**, and **meeting collaboratively**.

The following aims to take you through each stage of the process, pin-pointing elements that make a great brief and highlighting some of the common pitfalls to avoid.

Our thanks to all the industry experts who contributed to our research, both from the client world, Britvic, Direct Line Group and HSBC and to the agency teams at Initials, M&C Saatchi, 20something, The Brooklyn Brothers and Impero for their assistance in producing this best practice guide.

Clarifying

Often the most overlooked stage in the process, but perhaps the most crucial, clarification is essential to forming a clear, rational and well-thought-out brief. Whether the communications objective is creative, digital, social, PR, media, the same briefing principles, and the importance of clarifying objectives, remain.

Firstly, why are you reviewing? The reason tells the agency a lot. It helps them understand the type of agency you need. Tracey Barber, Global Head of Brand at The Brooklyn Brothers explains that *“the context of the brief explains where you’ve been, where you are now and where you want to get to. For example: if a business is frustrated by the speed at which their current partner delivers content, it might indicate that they value agility, over strategy”*.



What is it that you are trying to accomplish? What is your message? What are the areas of difficulty or pain points that you are seeking to alleviate?

James Willoughby, Client Services Director at Initials, highlights:

“The brief is a reductive document designed to articulate and understand a problem. It’s a document with instructions and direction, but it’s also a contract of work between two businesses. You wouldn’t ask an architect to come in and just give you a “new house...”. Before the design and build, they’d want to know how you intend to use the space, any issues with the old layout, what new features you want, and the things that should be excluded, your tastes etc. Only when they really understand what their client needs will they start work.”

Setting out the problems with the old, what is required from the new, and including the sense of a journey from A to B are essential elements of a sound brief.

Christi Tonetti – Marketing Director at M&C Saatchi agrees. She suggests that stating a *“very clear problem”* is one of the tell-tale signs of a good brief. Conversely, briefs that look to ‘update’ or ‘disrupt’ – without clear thinking as to why – often signal a lack of clarity.

Clarification is the step that defines your objectives, expectations and the goalposts of the project. By stating the expectations of your team and stakeholders, you set your agency up for success. It is your chance to express the scope and extent of your challenge and be explicit about what you want to be delivered.

This is not a time to be vague. Be unapologetically clear on what you want! You won't regret it. Agencies require this clarity-of-thought to help them home in on your exact requirements. A good way to test this is by removing your brand name from the document and sending the objectives section of the brief to colleagues outside of marketing. It should be obvious as to which company the brief pertains to.

Tracey Barber, at The Brooklyn Brothers states that a solid brief should include elements of the overall business strategy. She explains:

“There should be a clear link between overall objectives of the business, the long-term marketing strategy and the brief in question. Rather than a segmented list of deliverables, it should contain some narrative of the brand’s journey – where has it been, where is it now and where you like to take it.” Barber continues “a brief isn’t a shopping list of ingredients, it a vision of the final meal.”

A possible approach:

Before diving straight into the construction of your brief, take some time to consider your brand's story, its role, its raison d'être. Why is it important? Why does it matter? What makes it special? If you can't answer these questions, why should your agency – or indeed your target audience – care?

Next, outline a clear, definable goal. What is the primary objective of the brief? Think elevator pitch in a cabana.

Then, define other key objectives. Charlotte Wilcocks, Strategy Director at Impero, stresses that brands shouldn't shy away from sharing their brand fundamentals, business, marketing and communications aims.

For instance:

- Brand Fundamentals: target consumers / positioning / values / mission
- Business Goals: profit / market share objectives
- Marketing Goals: sales / brand recognition / brand health
- Communications Objectives: household penetration

Without clarifying these objectives, without clear goal setting, how does an agency know what the end point is? How does the agency know what they are striving towards?

Clarify clearly and you set yourself up for success.

Finally, ensure you are certain about the *type* of brief that you are issuing. What is required from the agency in question? Thinking? Solving? Activation? How big or different do you want the output to be?

Marketers need to be single-minded and zero in on the one thing that the activity has to address. Mark Evans, Managing Director, Marketing & Digital at Direct Line Group reflects on the lessons he has learned while briefing creative agencies:

“we were frustrated that we felt the agencies were telling us what we wanted to hear until we had a really frank conversation with them. At which point, one of the agencies responded with one of the most important and useful questions we’d been asked throughout the process – what kind of advertising do you want?”

The open-ended nature and simplicity of the question made the client, in this case Mark and his team, describe the kind of work they wanted. Be it strategic, disruptive, scalable, humorous, emotive etc. So, make sure you are aligned on the kind of brief you’re delivering.



Writing

It's the stage that fills marketers with dread, but it doesn't have to! However complex your challenge, the written brief must be simple, clear and, err, brief.

Brevity is key and helps brands to focus in on their objectives, as Charlotte Wilcocks highlights: *“I think shorter briefs definitely help a client to focus on their own thinking... I always prefer a very clear and pointed brief.”*

Brevity and a singularity of focus were recurring responses when asking agency stakeholders about effective briefing documents. Christi Tonetti, M&C Saatchi, stresses that condensing the written brief into a one or two-page document *“forces marketers to edit and get to the heart of the communication.”*

Mark Evans, Former Managing Director, Marketing & Digital at Direct Line Group agrees - *“long ago it was common for a creative director to take a pair of scissors to a client's brief and cut out only 2 or 3 words and sticking them on the wall for inspiration”.*

While this may seem extreme, it illustrates an important point; briefs should be concise and simple. Mark finishes by quoting Sir Winston Churchill:

“If I had more time, I'd have written you a shorter letter”.

So, in that spirit, let's not overlabour the point.

Can the brief be verbal?

Yes, in part, but it must also be written! Even if objectives, goals and insights are shared verbally, a written document has two crucial benefits:

- a) It ensures and demonstrates that ample time and consideration has gone into the briefing process (remember, you are being assessed too!)
- b) It acts as a contract between the brand and agency. The objectives and KPIs are written down and stated for all to see – there can be no misunderstanding, no ambiguity



Top Brief Writing Tips:

- 1) Include market analysis and motivational insights into your target audience alongside numbers and figures. Think about the characteristics that make them humans. Ultimately, we communicate with people, not data .
- 2) Make bold decisions about what is needed and what is not. Feel free to add in supporting documents and materials into appendices, but the main document should be short and sweet.
- 3) Focus on the problems that an agency has been employed to solve. Without detail and depth pertaining to these issues, how can an agency find the solution?
- 4) Ensure enough experienced eyes have read the brief. While fresh ideas are important, alignment across the business in terms of what you're looking for is imperative. This will save you time and money.

Example components:

Timeline: what are the different stages in the process?

When must they be completed by? Be open and honest about these. Setting false deadlines can dilute output unnecessarily. While providing ample time is encouraged, don't make timelines too long.

“There’s a momentum to pitches so it’s important to keep the ball rolling with timeframes that are not too short, but not too long” explains Tracey Barber.

Deliverables & Scope: what are the key, overarching deliverables for this campaign?

Typically, this part is straight forward... the client needs a new TV campaign, website, CRM strategy (etcetera, etcetera), but what about when the client does not know what the deliverable is? What happens when the client understands the challenge or the opportunity but doesn't understand how get there? *“This is where a co-created brief is really important”* explains Jawal Safdar, Integrated Marcomms Lead at HSBC. *“Sometimes we know there’s an opportunity from the data or a new piece of insight, but we don’t know how to best capitalise.”* This is not an excuse to give loose briefs – quite the opposite. *“It’s important to still give strict guardrails and a ball-park budget”* adds Safdar.

Key Stakeholders: who are the most important decision-makers?

Get them involved, or at least copied into emails as early as possible. The way the agency approaches your brief from a process POV will tell you a lot. You don't want senior decision makers to miss out on this. Time with senior people is always scarce, so if you need to ration their time, get them involved in the early stages, rather than the latter. By the time you have whittled your shortlist down to a 2-3 agencies, all the agencies should (if the process has been run correctly) be able to hit your KPIs. So, get them involved in the brief-writing and early chemistry sessions.

Challenges: how would you summarise your brand challenges in short, succinct points?

Be honest open and unapologetic. Think of agency like a well-seasoned urologist – they have seen it all. The more open you can be in sharing data, failings, and problems, the closer you will get to finding a solution.

Example components:

Target Audience: who are you trying to reach?

Do not just use stats – illustrate their characteristics, goals, ambitions, constraints and fears. If you identify as a ‘customer-centric’ business, you will want to go heavy on this. Tracey Barber reflects on a pitch where the client delivered the whole briefing through the lens of their customer, not the business.

“It was a creative and refreshing way to get the point across that the primary focus for their business is the customer – everything else comes second” explains Barber.

KPIs: what signifies success?

Andrew ‘Barney’ Barnard, Co-founder, 20something explains that:

“On the whole, the biggest signifier that a brief has been properly prepared, and has internal alignment, is when there are KPIs stipulated. It’s flabbergasting how many are absent of any actual targets.”

Barnard continues, *“It’s easy to write the background bit and it takes agencies no time at all to make up for that if it isn’t great or missing. The business objective is critical. We can help plug or develop the comms objective if it’s missing but we can’t tell a business what it needs to achieve.”*

Budget: how much will it all cost?

Is this set-in stone or is there room for manoeuvre? Even if you do not have a final number – ballparks are very useful. In fact, if you do not have a ballpark, it’s often a red herring for the agency. It means you have not done the necessary rigour required to create a solid brief.

Background: how is the brand / business currently positioned? What are the pain points and how can an agency alleviate these? Include previous learnings here. What has or hasn’t worked in the past and for what reasons? Don’t be afraid to discuss (under NDA) what you think your USP is over your competitors. Tracey Barber explains that by letting the agency into the business like this *“allows the agency to better understand your culture so that the fit is right for both parties”*.

Moving forward, where does the brand or business want to be and what steps need to be achieved in order to get there? Most importantly, how will everyone know that the goals have been accomplished?

A word of warning: wherever possible, keep the language of the brief simple. Internal buzzwords, jargon and marketing-speak will only serve to confuse external parties. Use unambiguous, clear, concise language. It will be easier to read as a result.

As Charlotte from Impero emphasises:

“Remember that someone from outside of your organisation or business is reading the brief, so using lots of internal acronyms is not helpful. The clearer and more concise the ambition and action of a brief, the clearer the agency response will be.”

One suggestion from Jawal Safdar, Integrated Marcomms Lead at HSBC, was to ***“write and deliver the brief from your customer’s perspective. This simplicity will ensure the agency focuses their effort on the important bits and emphasises customer-centricity to the agency”*** explains Safdar.

Get feedback from other stakeholders and ensure that every decision maker is aligned on the objectives you are trying to convey to the agencies. Davnet Doran, Head of Brand PR at Britvic says

“it’s vital to ensure that the brief has been seen by enough eyes across the business, particularly by those who head up the organisation – the brand guardians. They have more visibility over the strategic direction of the brand – they understand the history, what’s worked in the past, and what hasn’t.”

She adds that ***“sponsorship from the wider team at this level will also ensure the agencies that you mean business.”***

Meeting Collaboratively

The briefing meeting itself, its delivery, is another chance for a brand or business to inspire and motivate its agency. A written brief is useful, but it is **not** the end!

How, when and where a business chooses to deliver the brief is of equal importance.

Understanding your agency audience and their motivations is crucial. You have a chance to cajole and influence them into creating brilliant work – take that chance!

Meeting gives the brand a unique opportunity to engage and enthuse its agency partner. Does the setting - whether it be virtual or physical - promote interest and intrigue? Is the delivery engaging and motivational? Essentially, will this make the agency stakeholders want to produce their very best work?

Agencies can clearly recall instances where the 'meeting collaboratively' stage has been conducted brilliantly, as James at Initials recalls:

“A toothpaste brand sent the team some product to trial and this enabled them to film a diary in the week before the briefing. The actual briefing was held at the factory where we watched how the toothpaste is manufactured, watched each other’s videos and talked about our experience of the product. We’d become fully immersed in the brand and product before we’d even seen a piece of paper with an objective written on it.”



Brand immersion and piquing agency interest through meeting other members of a business (not just those in marketing) is also effective as Christi Tonetti suggests:

“Whether it’s innovation, product design or technology, meeting people that are really passionate about the brand gets us excited about an opportunity. When we met the founder of a jewellery business and heard her talk so passionately about why she started the business, the materials used, the way they are crafted, it had a huge impact on our enthusiasm for the work.”

This is also an essential opportunity for agencies to ask questions and clarify on any areas of uncertainty. A collaborative approach here fosters joint ownership of the problem which leads to better, shared results. Use the session to expand on and dive deeper into the problems and challenges that are currently faced. Do this and you will already be closer to a solution.

One technique pioneered by P&G in the 50s is the ‘all-agency briefing’. They can be an effective and time-sensitive way to showcase your brief to each of your chosen agency candidates in one sitting. Instead of multiple individual sessions, you can deliver a richer, in-depth explanation from all the key stakeholders – not only a brand manager. One thing to note is that this should be complimented by a private Q&A session.

Davnet Doran, Britvic explains that

“all-agency briefings are great as long as they are accompanied by plenty of opportunity to ask confidential questions, as much of the agencies USP and strategy could be revealed by the questions they ask.”

While out-of-the-box thinking is encouraged when deciding on how to inspire your agencies, the ultimate inspiration according to Doran is when the agencies feel that the process is collaborative.

She explains that:

“it’s the client’s job to create an environment in which collaboration is encouraged. An environment of trust between the agency and client. When the two parties can have candid conversation about the problem – you increase the likelihood of producing good work. The brief should expose some of the business’ most guarded challenges , so they need to trust the agencies they give the brief to. They’re the briefs I like answering.”

What about when these meetings are virtual?

Impero suggest using collaborative tools like Mural to recreate the brainstorm environment. Charlotte highlights that – one of the downsides of virtual meetings is that every call has become a “mini presentation” which can take away from the process and evolution of ideas, as things can feel overly final when in a deck.

James recommends using the Zoom Rooms functionality within the video conferencing platform:

“In these rooms, we are able to have small group conversations to process some of the things that we have been talking about or generate ideas in smaller groups before discussing as a whole. With so many people talking at once – video conferencing can feel overwhelming and this simplifies it.”

Additionally, M&C Saatchi recognise the value of arranging two meetings instead of one when video conferencing. Two shorter, sharper sessions help all parties to focus more and reduces “Zoom fatigue”.

Tracey Barber, The Brooklyn Brothers agrees that several, shorter meetings are preferable over longer sessions, suggesting that they are much more productive.

“It’s useful to think of these as sprint workshops that can even be hosted and run by the agency”

suggest Barber. Presumably, this will also give you a front-row seat to their problem-solving process



Top Tips

- 1) Don't brief agencies until you are 100% sure you have internal buy in
- 2) Define a clear problem. What is it that you want to change? 1-2 sentences
- 3) Be honest as a brand and with your agency. How are you going to make this change?
- 4) Ensure that ambition and budgets are agreed by all
- 5) Be clear on brand fundamentals before briefing out tactical campaigns
- 6) Let go of a 'ta dah' moment – make time for informal conversations and catch ups throughout the briefing process
- 7) Be as single-minded and ruthless as you can be
- 8) Get your colleagues to pick holes in your brief because you don't want the agencies wasting time doing that
- 9) After the brief is distilled into a couple of pages, leave it alone for at least 48 hours. Come back to it and ask yourself: are you are inspired?
- 10) Maintain transparency over deadlines

With thanks to Ingenuity for producing this guide.

For further support:

W: ingenuitylondon.com

T: +44 (0)207 042 2900

Ingenuity,
2nd floor, 1 Maple Place,
London,
W1T 4BB

For more information please contact:

ISBA

12 Henrietta St
London
WC2E 8LH

T: 020 7291 9020