**Client: *Company Name* Date: 17 October 2017**

**Briefed by: Charlotte Phillips**

**Project Title: *Thought Leaders Presentation***

**Project Description:**

**Background:**

*Assume the agency/designer/writer has no knowledge of your activities. It is all too easy for work to fail because of incorrect assumptions. Supply the essential information they need.*

**Requirement:**

*What do you believe you require? For example, a corporate brochure, website, sales literature, sales aid, letter, form, PR, exhibition, TV, radio or print advertisement. (Sometimes, based on the information you provide, it may be that a different or additional approach is recommended.)*

**Purpose:**

*Why is this wanted? What do you want to achieve in the short-term, in the long-term? For example, to generate immediate enquiries or to explain something. How will you evaluate its effectiveness?*

**Marketing Objective:**

*Intended goals. Possible objectives include, creating awareness, imparting knowledge, projecting an image, shaping attitudes, stimulating a want or desire, and/or effecting a sale.*

**Positioning:**

*The present and, if relevant, the required positioning in the marketplace, both actual and perceived. SWOT analysis (Strengths, Weaknesses, Opportunities, Threats).*

**Target Audience:**

*Who do you most want to reach? Qualify and quantify. Describe relevant aspects, both in professional terms - nature of business, position held, etc., and in personal terms - age, sex, etc. Use socio-economic classifications if appropriate (ABC1 etc.), any, consumer insights and research). Knowing your customer is important to target them.*

**Benefits:**

*What is the single most important benefit that will appeal to your target audience? Why is this important to your customer? What are the secondary benefits? What customer pain point are you solving?*

**Proposition:**

*What is the key statement that summarises the main benefit of your product or service? Unique Selling Points (USPs). Think about this sentence, ‘If I spend £X with (Company Name) I will expect to get’ If there is more than one audience write what the key messages for each audience are if they are different.*

**Rationale:**

*Why should the audience believe what you claim? Use any research with sources to back this up.*

**Response:**

*What sort of response are you seeking? To increase brand awareness? To change attitudes? To buy? Is there an immediate action required: to email, telephone or to respond in some other way?*

**Executional guidelines:**

*Brand guidelines to be provided. The customer will inform the design/copy approach. Include the following: will the information change frequently? Is there a need to provide different information for different audiences and channels? Give details of any other elements to be included - for example, 24-page booklet rather than loose-leaf binder, colour essential. State quantities required. Include any expectations/assumptions you may have.*

**Tone of Voice:**

*What sort of language should be used: casual, formal, authoritative, friendly, humorous, serious, etc.? It may be helpful to provide examples of existing material, as well as brand and style guidelines.*

**Distribution:**

*How will this be received? By hand, in person, by email, downloaded from the website, posted, left behind after meeting, given away at an event, etc.?*

**Customer Journey:**

*Where does this project fit into the customer’s journey? How does this impact on the customer experience? How do/will they buy/respond/notice the difference?*

**Other Activity:**

*Are there, or will there be, related activities, such as advertising, exhibitions, posters or brochures? Will any subsequent activity be taking place, such as follow up mailings, telephone calls or personal visits?*

**Measurement:**

*How will you measure the success of this project?*

**Content:**

*Supply the information you wish to be communicated. In some cases, you may have draft copy, in others you may only have the germ of an idea - so describe what you want to say. Indicate key phrases/terms relevant to the business. For websites, provide any information already held on keywords for SEO. Try to prioritise. Include any images you want used.*

**Estimate/ Budget:**

*Before beginning work, a budget should be provided and/or an estimate agreed. Any estimate given is based on present assumptions of the nature of the item at this stage. These costs may be subject to revision once concepts have been developed, or if the brief changes substantially. Agree Terms and Conditions of working.*

**Timing / Schedule:**

*When do you need this delivered by? Any dependencies? If compliance and legal need to be involved this can slow down the process*.

**Briefing details:**

**Project will be signed off by: .............................. ..............................**

**Brief will be agreed by: .............................. ..............................**

**Date: 17 October 2017**

**Next Action:**

*Detail who is to do what and by when. For example, client to agree brief by a certain date and first concepts to be sent by.*