

# The Creative Brief — Why It Matters And How To Write A Great One...

How to communicate to your copywriter  
and designer about what you want

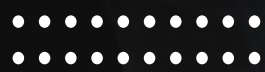
A dark tabby cat is standing on the left, leaning forward with its front paws extended towards a ginger cat lying on its back on the right. The ginger cat is looking up at the tabby cat. The background is a dark, textured surface, possibly a couch or carpet. The lighting is warm and focused on the cats.

OR: HOW TO GET FROM THIS...



TO THIS!  
WITH YOUR CREATIVE PARTNERS





# We All Want Our Campaigns To Run Smoothly

Good creative comes from good ideas

*Great* creative starts with a **great creative brief + open communication**

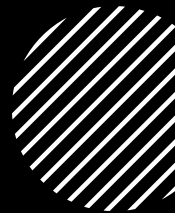


A CREATIVE BRIEF IS  
a Guide... a Roadmap...  
the Direction...

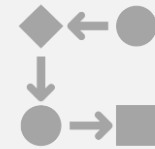
The place you present your **vision** for the project and give **clear direction** on what is expected while *also* providing ample opportunity for **discovery and collaboration** with the writer or designer



# An **Effective** Creative Brief



Helps keep everyone on the same page



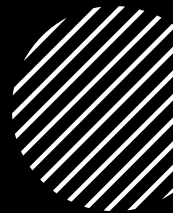
Helps you identify and avoid roadblocks early



Speeds up the design and development process



# What Makes a **Great** One?



Is well organized and easy to follow



Includes all the necessary information to create a content that meets your needs and expectations

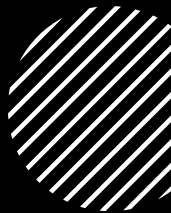


**Is developed in collaboration:**  
Account, Copy and Design (and maybe the client) have all met ahead of time to brainstorm ideas



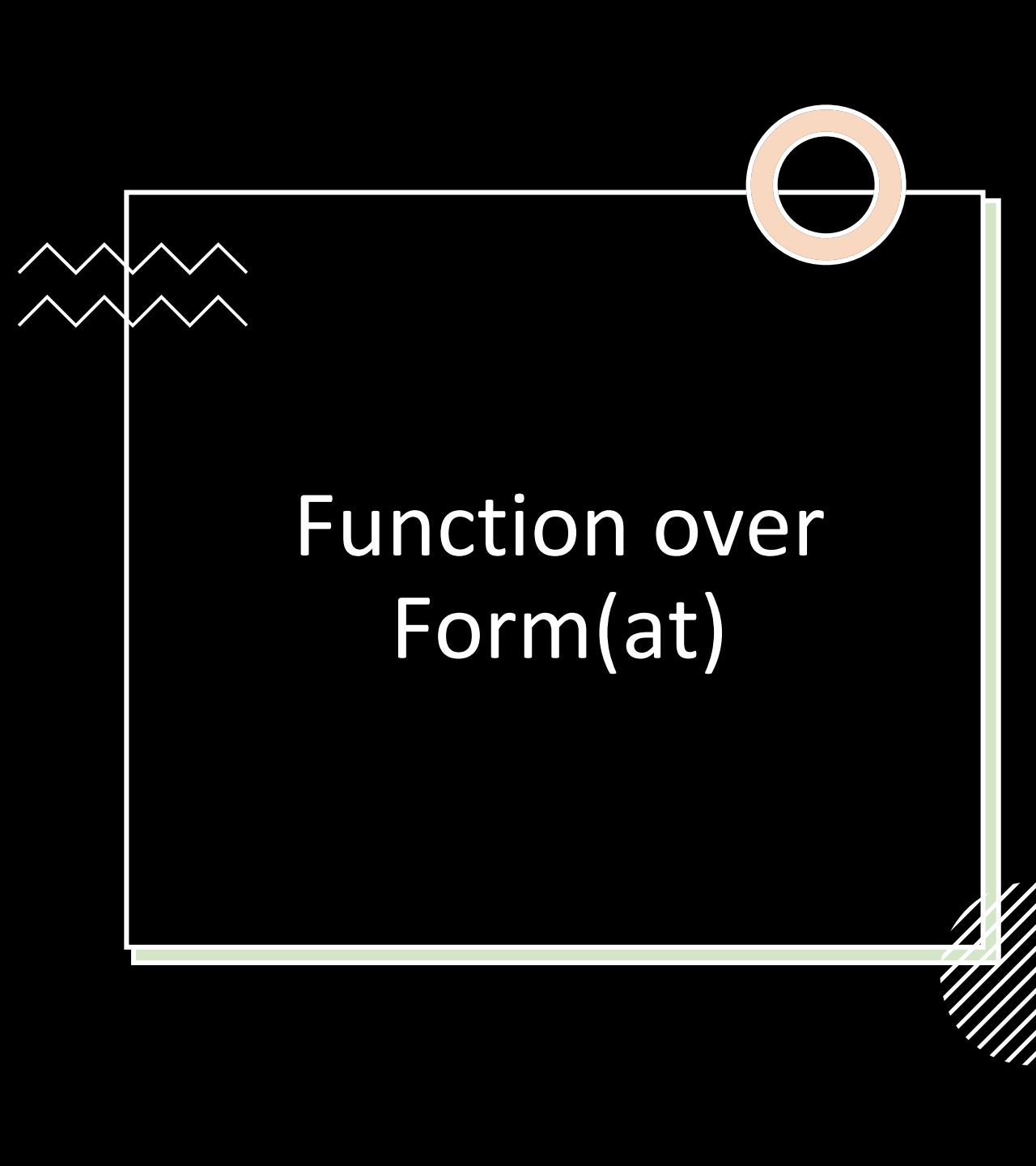
## What *Is* a **CREATIVE BRIEF?**

(also known as  
*creative strategies,*  
*strategy memos, copy*  
*briefs or design*  
*briefs*)



- It's a document generated when you want to start a new project with a designer or creative team
- It's written by the person on the receiving end of the art or copy (to a writer or designer, YOU are the "client")
- Preferably, AFTER collaboration





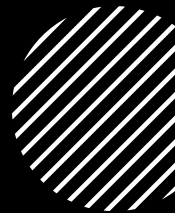
Function over  
Form(at)

What it *looks like* is not important

What's important is **what's in it**



## What to **Avoid**



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A creative brief that contains nonessential information and gaping holes that causes even the best creative folks to struggle to do great work

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Even worse, running a project without a design brief which results in chaos with countless phone calls, ping-pong email threads and lack of clarity on design direction and project milestones

# THE COPY BRIEF





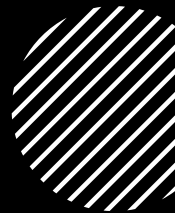
## The Perfect Copy Brief Doesn't Exiii...

**“If a brief is perfect, a writer doesn't have to ask any follow-up questions, or seek out any additional resources. Everything is right there in the brief.”**

- *Esteemed Copywriting Professional*



# Key Components for **Writers**



## **Centering Ourselves**

Set the stage –  
who, what, when, where, how

## **Project Specifics**

Components, schedule, fees

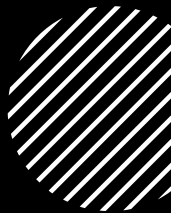
Case for support, call to action,  
offer details

## **Resources**

Additional information on  
content, samples



# CENTERING OURSELVES

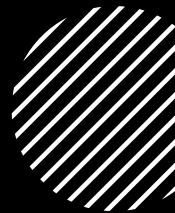


## **Start with the 30,000 foot view:**

- Who is the client?
- What is the core assignment?
- What is the format?
- When is it due?
- When does it drop?
- What is the fee?



# NARROW IN ON THE PROJECT AT-HAND



- What is the style?
- What is the format?
- What are the specifications and copy needs for each piece?\*
- Who is the signatory?
- Who is/are the audience(s)?

*\*Never see "insert standard X here" again!*



# CLARIFY THE MESSAGE



- What is our goal for sending this piece/campaign?
- What is the Case for Support?
  - What is the problem we are trying to solve?
  - Why is it urgent?
  - How will the reader's action solve the problem?
- What background information does the writer need?





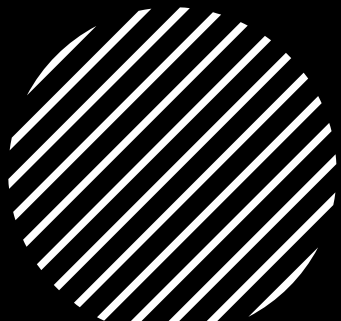
# ADDITIONAL KEY DETAILS



- Is there a front- or back-end premium?
- Are there images or graphics to reference or caption?
- How many versions?
  - Full version?
  - Or spot-text variation?
- What is the ask string?



# Want a Writer to **Love** Working With You?



## **Provide Resources!**

Anything additional information you can give them on content, samples, links to program information, etc...

## **Pick up that phone!**

Talk to your writing partner early and often - a call before you start, and a walk-through of the final, approved brief goes such a long way



# The **Bridge** from Copy to Art

A designer should never be in the position of “filling in the blanks” on components

The Brief should be clear enough that the writer can provide **complete copy**

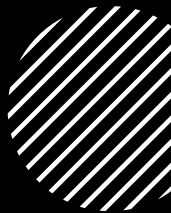
*(That's why we're giving you a checklist!)*



**THE DESIGN  
BRIEF**



For a Start...  
List **ALL** the  
**Deliverables**



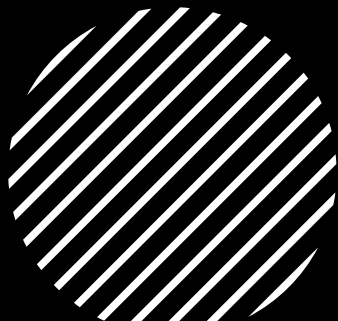
**Print Components** — OE, Letterhead,  
Reply device, Return envelopes,  
Inserts, Tests, Versions ...

**Digital Assets** — email headers, call out  
boxes, buttons, lightboxes, landing  
pages, social posts, ads ...



# Just Like the Copy Brief **Also** Include

- Name of the Campaign
- Names of Key Stakeholders
- Goals and objectives of the campaign
- Who is target audience
- Information about deadlines & budget

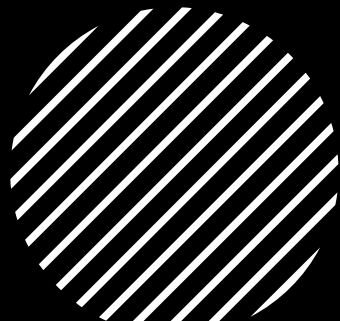




# Make Sure the Designer Has Information About/Access To

**Branding guidelines** such as colors, style guide, fonts, logos, signatures, etc.

Anything you want in your final design should be discussed up front





For **Print**  
Campaigns  
Include  
Information  
About:



The Basics:

- Component Sizes
- Formats/folds
- Ink colors
- Paper specs
- Print and Mail Codes





If You Don't  
Want **Blank**  
**Pages** Back...



A little **direction on content** \*  
is always nice....

- Envelope Teaser Copy
- Letter signer name
- Donation Form Header
- Information about the ask  
(Is it a match? Symbolic asks?)
- Return Envelope Address
- Links to Photos

*\*If you don't have all the copy from the writer yet, be prepared to AT LEAST provide the designer Headers and Teasers*



## A Note on Photo Assets

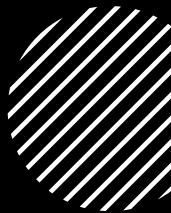
If you are not supplying photos, include in the Brief:

- ❑ Links to client photo database and direction on what to source
- ❑ Information on stock image sites if you have an account they should use

*Be sure all imagery used in your design is licensed and legal to use!*



# For **Print** Campaigns Don't Forget



## The Important Stuff:

- What will “fly” the package?
- What content needs to be variable/personalized?
- Are there caging guidelines for scanlines?



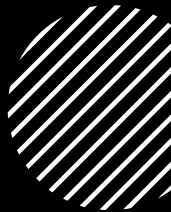
For **Online**  
Campaigns  
Include  
Information  
About:

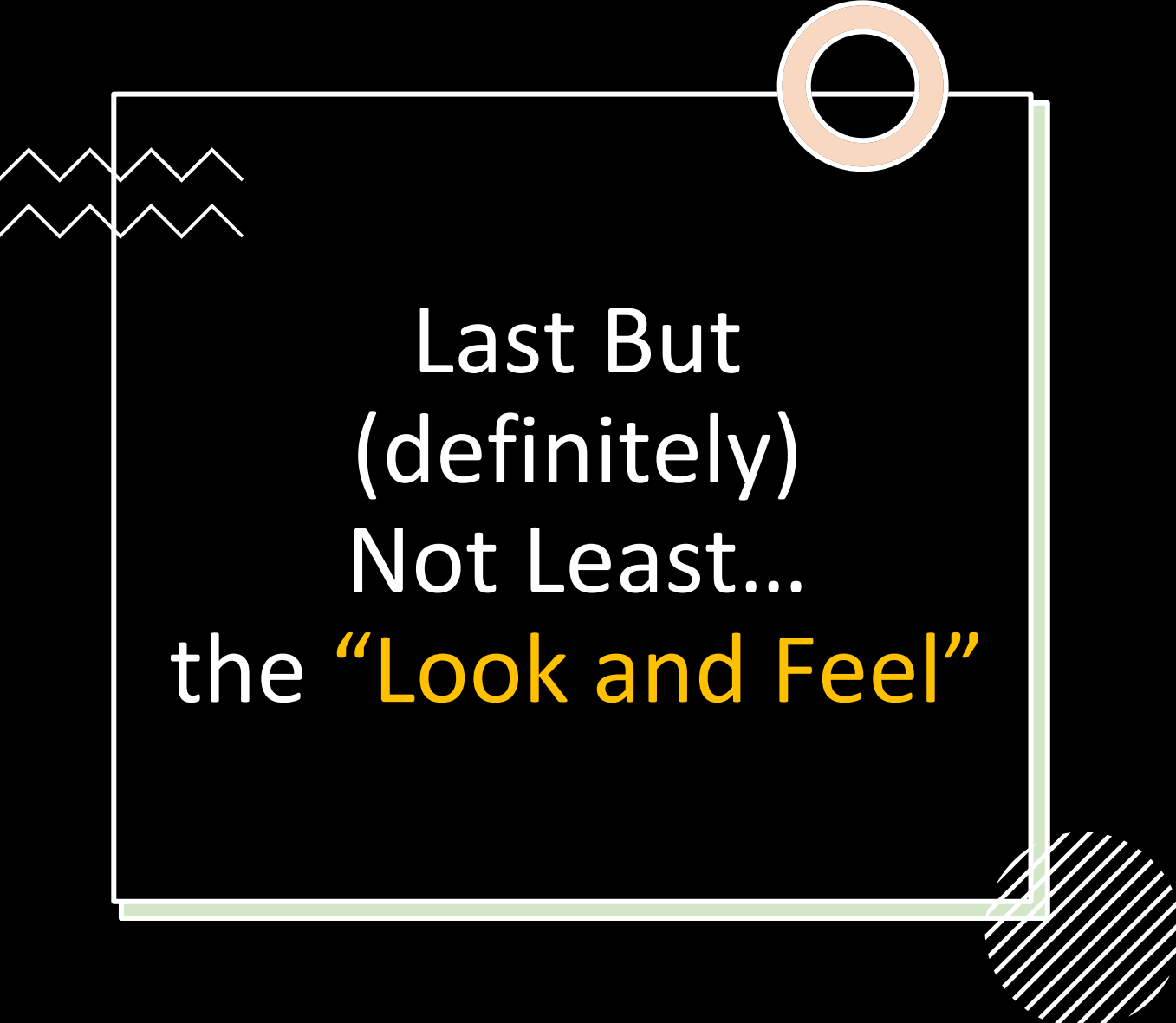


- File formats
- Whether you need layered files
- What platform(s) will the files be displayed on
- File size limitations
- Any personalization needed
- Animated or static
- Transparency needed

If its for online ads...

Provide specs for all versions needed





Last But  
(definitely)  
Not Least...  
the “Look and Feel”

Provide **direction on TONE**—do you want it to be:

Urgent?

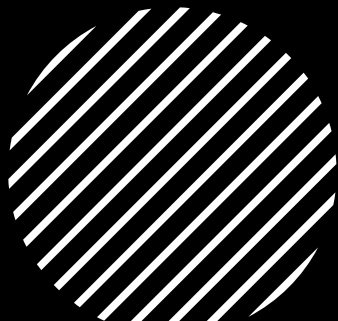
Hi-touch?

Friendly?

Institutional?



# Believe It Or Not...Designers Can't Read Your Mind\*



- ❑ Discuss your **vision** ...
- ❑ **Show examples** of things you have seen...
- ❑ Talk about what you like—*and why*...
- ❑ And what you don't like—*and why*...

Providing information on what you envision will dramatically affect how **quickly** the graphic designer can hit the mark.

\* Saying, "You're the expert here" really means *we defer to your judgment to read our minds!*

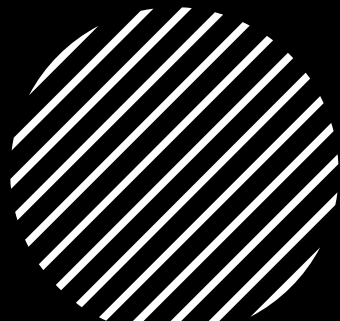


# Want a Designer to **Love** Working With You?

Create one design brief per project or campaign

If it's a big campaign that needs lots of different visual assets, separate the brief into detailed sections

**Schedule a one-on-one with the designer**—a meeting, be it virtual or physical, to go over the brief in person will go a long way toward getting all parties on the same page about design



Any Questions So Far?





WHEN IT'S TIME FOR

feedback

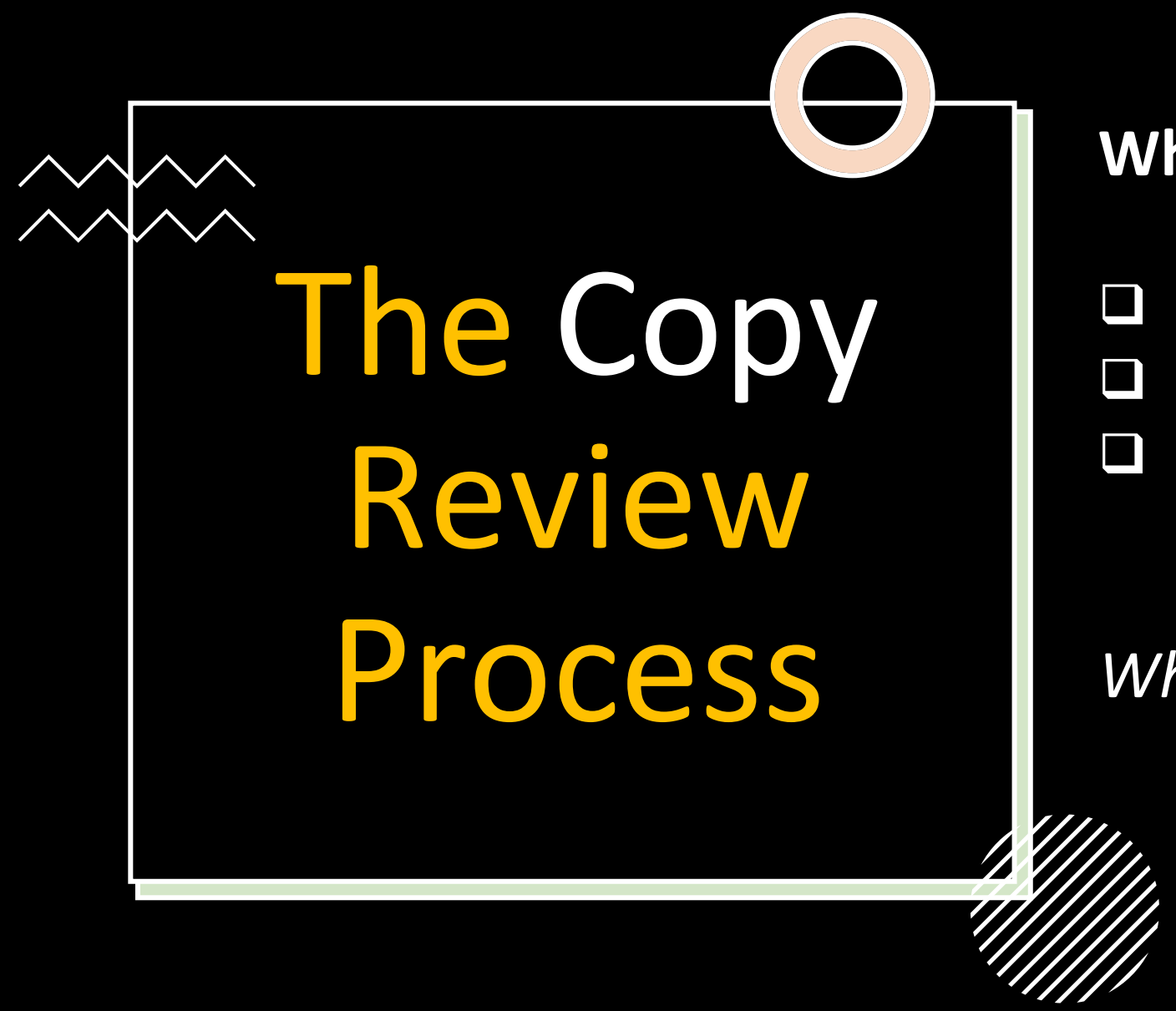
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# The Way You Give Feedback Matters

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In the back-and-forth process, remember, not only are you giving to your writer or designer direction about changes, you're also **developing a relationship** with them...

*Make it a good one!*



# The Copy Review Process

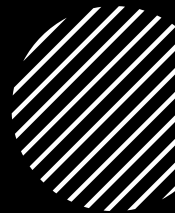
**What is your part in the process?**

- Is it complete?
- Is it accurate?
- Are there errors in institutional standards?

*What isn't your part?*



# INTERNAL REVIEW

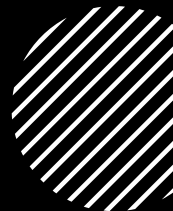


## Questions to consider

- When should you alter copy prior to client review?
- Who should make those changes?
- How to convey those changes if needed



# CLIENT REVIEW

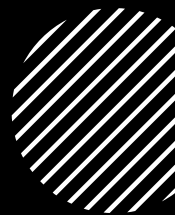


## Questions to consider

- In what format should you provide the content to client?
- Establish a single point of feedback
- How to clarify their issues — questions to ask
- How to navigate client preference which bucks best practice



# DELIVERING FEEDBACK

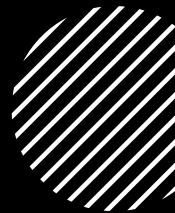


## First...

Before you get back to the writer, sure you've asked the client specific questions about *their* issues

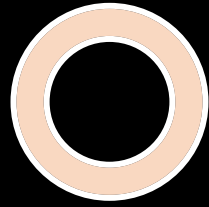


# DELIVERING FEEDBACK



Give clear direction on where the issues are:

- Tone?
- Style?
- Voice?
- Word choice?
- Content / Facts?



# Quick Note About

“VOICE”

VS

“TONE”



**Voice** — Refers to the language habits of the signatory of the piece and has to do with word choice and sentence structure (think Yoda!)

**Tone** — Is the vibe, the feel, the undercurrent of energy the whole thing gives off

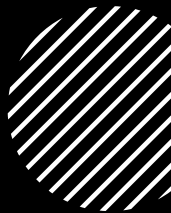
*A person can have one voice and a multitude of tones*



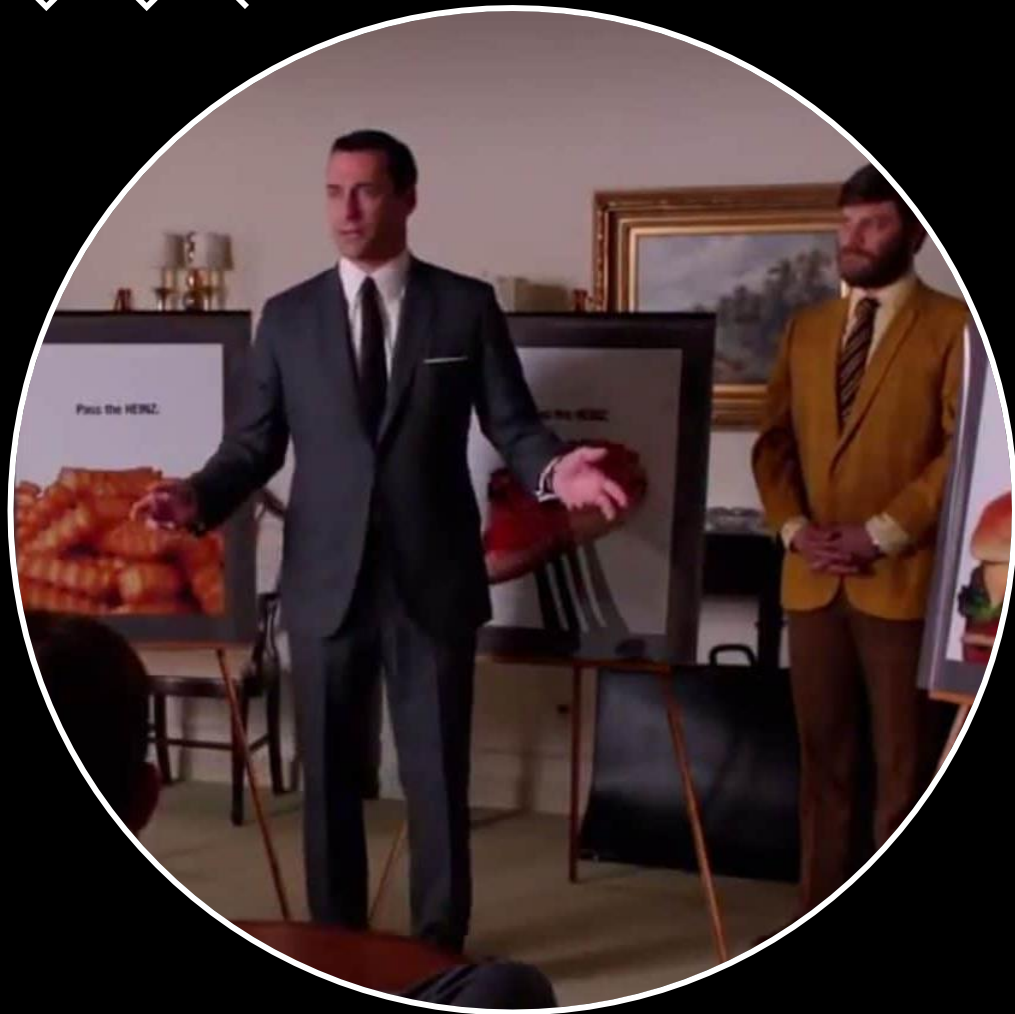




**FINALLY...**



Once you've annotated the document - call the writer to talk through if possible



## Time Is Tight...

Fundraising creatives don't often get to make elaborate "dog and pony" shows where they can **present and explain their choices** to you (their client)...

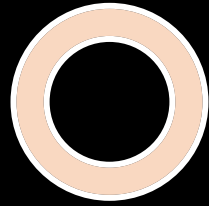




So...  
First Things  
First

If you are unsure why they chose a certain direction, pick up the phone/jump on teams/bang out an email and **ASK**—creatives are more than willing to explain their rationale and discuss the choices they made!

Their answers can even **help you make the case** to *your client*



# Ready To Review The First Draft of Art?



Look at the project **in context**

Especially lightboxes

Ask the designer for a mockup if you need help seeing the big picture

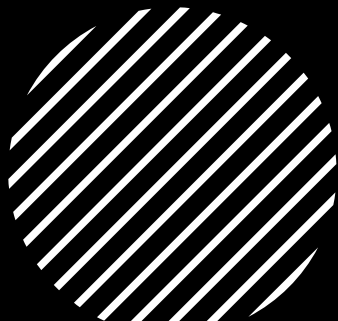
Look at all the campaign elements as a whole

And **consider the donor experience**





# Not Liking What You See? Discuss the Problem



Give honest feedback, and try to avoid giving design direction — leave it to the designer to come up with solutions

It's better to say:

“It missed the mark” or “It’s not the right tone, can you make it more [insert adjective here]” or

“I’d like more emphasis on the [insert item here]”

As opposed to:

“Change the font to Times Roman and move the photo to the top right.”



## *Why?*

Giving designers feedback about what's working (or what's not) gives them the **information they need** to **rework** the design to **meet the goal**.

When you give specific design direction, it can often create other issues causing additional rounds to fix new problems you didn't foresee.





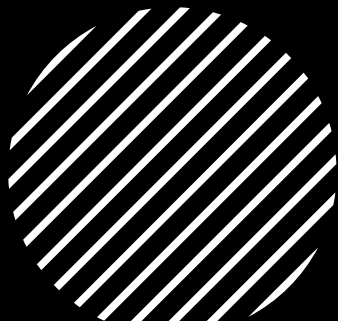
# Try to Use Meaningful And Descriptive Phrases

“All the elements are too close together and it makes it feel confusing or cluttered”

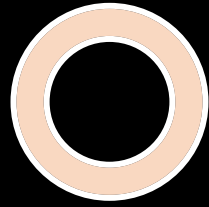
“The colors need to be more vibrant”

“Nothing is standing out, there’s a lack of hierarchy”

Don’t hold back on the **description** of why you think something works or doesn’t work — the more info the better.



*We’ve got a handout for that!*



# Words Watch Out for “B O L D”



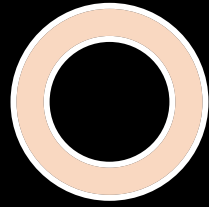
**Bold** can mean so many different things. It could refer to a heavy typeface, a high contrast in color, making an element HUGE on the page.

Or it could take on a conceptual, personified meaning, making the design feel fearless or unapologetic.

*See handout for alternatives!*







# Words Watch Out for “CLEAN”



As in, “It’s too clean.” Things can never be too clean!

People often say this when they feel there is too much negative space (*previously known as “white” space*), but as designers we know there’s a reason to have ample negative space.

What is really bothering you when you say it’s “too clean”?

*See handout for alternatives!*





# If It Ain't Broke...

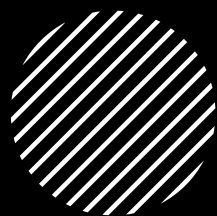
Remember...It's not about personal preferences. Keep it objective. Did the design meet (or miss) the goals?

Remember, you are probably *not* the target audience...it's not a question of whether YOU like it...

**Pro Tip:** Let the client see it before you go too many rounds editing for *your* personal preferences

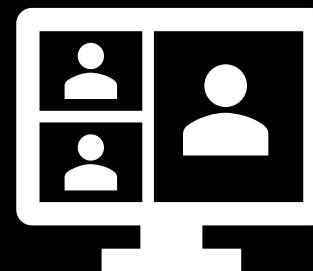


# Last But Not Least...



Verify all edits are **clear** and any questions have been answered before passing on client edits/comments to your designer

**When in doubt...TALK IT OUT!**





# Q&A

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