

# Agency / vendor / freelancer brief template

<b>Campaign name:</b>	[Name of project]
<b>Point of contact:</b>	[Name of main internal POC]
<b>Collaborators</b>	[Anyone else involved: stakeholders, approvers]
<b>Campaign brief date:</b>	MM/DD/YYYY
<b>Campaign delivery date:</b>	MM/DD/YYYY
<b>Campaign go-live date:</b>	MM/DD/YYYY

<b>Project overview:</b>	<p>Briefly describe what this project is, why it exists, and what success looks like.</p> <p>E.g. "We need a brand video that explains our platform to new users in under 90 seconds."</p>
<b>Objectives &amp; KPIs:</b>	<p>What are you trying to achieve? And how will you know if it's worked?</p> <ul style="list-style-type: none"><li>• <b>Primary objective:</b> Increase demo requests</li><li>• <b>Secondary objectives:</b> Improve share of voice, boost engagement</li><li>• <b>Success metrics (KPIs):</b> CTR, leads generated, engagement rate</li></ul>
<b>Target audience:</b>	<p>Who is this for? Be as specific as possible.</p> <ul style="list-style-type: none"><li>• <b>Segment / Persona:</b> Job title, industry, pain point, etc.</li><li>• <b>Demographics:</b> Age, location, role, company size</li></ul>

- **Psychographics:** Attitudes, goals, behaviors, interests
- **Stage of journey:** Problem aware / Solution aware / Ready to buy

What's the single most important thing to communicate during this campaign? And what should they *think, feel, or do* after seeing it?

**Primary message:**

[What do you want the audience to take away?]

**Supporting points:**

- [Point 1]
- [Point 2]
- [Point 3]

E.g.:

- **Tone of voice:** [e.g. Bold, helpful, witty, premium]
- **Visual style:** [e.g. Minimal, vibrant, dark, editorial]
- **Do's:** [What must be included, e.g. logos, colours]
- **Don'ts:** [Any style, phrases, or visuals to avoid]
- **Approved references:** [Links to past work or inspiration]
- **Brand guidelines:** [Link to tone of voice, visual identity, assets]

**Tone, style & brand considerations**

<b>Deliverables:</b>		
<b>Deliverable type</b>	<b>Format / specs</b>	<b>Notes</b>
[e.g. Web banner]	1200x628px, JPG, <2MB	For LinkedIn ads
[e.g. Video cutdown]	15s vertical, MP4, captions	For Instagram stories
[e.g. One-pager]	A4 PDF + editable docx	For sales team

  

<b>Distribution plan / channels:</b>	Where will the final assets be used or distributed? <input type="checkbox"/> Paid social (LinkedIn, Meta, etc.) <input type="checkbox"/> Website / Landing page <input type="checkbox"/> Email marketing <input type="checkbox"/> Sales enablement <input type="checkbox"/> Internal comms <input type="checkbox"/> Print / events / out-of-home <input type="checkbox"/> Organic social
<b>Background/context:</b>	Provide any relevant details that help the vendor understand the full picture: <ul style="list-style-type: none"> <li>• Campaign history or previous work</li> <li>• Strategic context</li> <li>• Why this project matters now</li> </ul>

	<ul style="list-style-type: none"> <li>Competitor activity or landscape</li> </ul>
<b>Constraints &amp; requirements:</b>	<ul style="list-style-type: none"> <li>Legal copy, disclaimers, or mandatory messaging</li> <li>Brand or compliance checks required?</li> <li>Tools to be used (e.g. must be built in Figma)</li> <li>Platform/placement-specific requirements</li> <li>Accessibility standards</li> </ul>

<b>Workflow &amp; approval process:</b>		
<b>Stage</b>	<b>Owner</b>	<b>Deadline</b>
First draft	[Designer/agency]	MM/DD/YYYY
Internal review	[Marketing lead]	MM/DD/YYYY
Feedback round 1	[You]	MM/DD/YYYY
Final approval	[Exec/Brand/Legal]	

<b>Submission instructions:</b>	<p>How and where should final files be delivered?</p> <ul style="list-style-type: none"> <li>[e.g. Google Drive link, shared Dropbox folder, upload to CMS]</li> <li>[Who to notify when submitted?]</li> </ul>
<b>Anything else of note:</b>	Leave space for anything outside the above —

nuance, internal sensitivities, known risks, or helpful advice.