

## 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>

	<ul style="list-style-type: none"><li>• <b>Psychographics:</b> Attitudes, goals, behaviors, interests</li><li>• <b>Stage of journey:</b> Problem aware / Solution aware / Ready to buy</li></ul>
<b>Core message:</b>	<p>What's the single most important thing to communicate during this campaign? And what should they <i>think, feel, or do</i> after seeing it?</p> <p><b>Primary message:</b></p> <p>[What do you want the audience to take away?]</p> <p><b>Supporting points:</b></p> <ul style="list-style-type: none"><li>• [Point 1]</li><li>• [Point 2]</li><li>• [Point 3]</li></ul>
<b>Tone, style &amp; brand considerations</b>	<p>E.g.:</p> <ul style="list-style-type: none"><li>• <b>Tone of voice:</b> [e.g. Bold, helpful, witty, premium]</li><li>• <b>Visual style:</b> [e.g. Minimal, vibrant, dark, editorial]</li><li>• <b>Do's:</b> [What must be included, e.g. logos, colours]</li><li>• <b>Don'ts:</b> [Any style, phrases, or visuals to avoid]</li><li>• <b>Approved references:</b> [Links to past work or inspiration]</li><li>• <b>Brand guidelines:</b> [Link to tone of voice, visual identity, assets]</li></ul>

Deliverables:		
Deliverable type	Format / specs	Notes
[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? <ul style="list-style-type: none"><li><input type="checkbox"/> Paid social (LinkedIn, Meta, etc.)</li><li><input type="checkbox"/> Website / Landing page</li><li><input type="checkbox"/> Email marketing</li><li><input type="checkbox"/> Sales enablement</li><li><input type="checkbox"/> Internal comms</li><li><input type="checkbox"/> Print / events / out-of-home</li><li><input type="checkbox"/> Organic social</li></ul>
	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/platform-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.