

The Creative Brief Worksheet

This creative brief worksheet uses information gathered in the discovery process (client survey, research, and interviews) and builds a skeleton for the strategic planning process.

Project Summary

This paragraph is a statement overview of the project as a whole; include brief project overview, goals, and relevant background information.

- What is the basic overview of the project? Briefly include background information if relevant.
- What is the single purpose of the new strategy?
- What are the secondary goals of the strategy?
- What are the long-term goals?

Audience Profile

Profile the target audience. Provide enough detail to enhance understanding of who the audience is. Include some user demographic information. Your goal with this section is to answer the following:

- Who is your target audience? Profile stakeholders: clients, champions, partners, and allies whose interest in the project helps meet their respective goals or eliminate a common challenge. Include as much detail as possible, sectors of interest, age, educational background, and any other relevant information.
- What do they care about?
- What is a typical reason your clients and stakeholders engage your organization?
- What they do online on a daily basis?

Perception/Tone/Guidelines

How do you want your stakeholders to respond to your new marketing/communications strategy and your organization?

- What do stakeholders currently think and feel about the current profile of your organization?
- What do you want them to think and how do you want them feel?
- How will this new strategy help to achieve this goal?
- What adjectives would you use to describe the way you would like others to perceive your organization and its activities?
- What are some specific visual goals to convey at public, industry, and government events/opportunities for outreach?

The Communication Strategy

How will we convince them?

- What is the overall message you are trying to convey to your stakeholders?
- How will you convey your organization's overall message?
- Identify stages of development (if appropriate) used to execute goals.

Competitive Positioning

Identify your organization's differentiator; the factors which will make your strategy a success?

- How is your organization different from other activities within the jurisdiction?
- What specifically sets you apart from other worthwhile organizations?
- What areas of your current strategy/image are successful and why?

Targeted Message

State a single-minded word or phrase appropriately describes the organization.

Tracking Activity

How will you measure the success of the strategy and of each goal? Tracking activity spotlights necessary revisions to the strategy and identifies when the goal is reached; triggering assessment and target of the new goal.

Budget Planning

Whether a budget amount is pre-assigned or not, the recommended approach is to determine the marketing and communications strategy and then work out the budget. This way, if cutting activities from the plan, the decision is based on its value to the strategy as opposed to its cost; making an informed cost reduction or cost deferral