

Agency / vendor / freelancer brief template

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

Project overview:	Briefly describe what this project is, why it exists, and what success looks like. E.g. "We need a brand video that explains our platform to new users in under 90 seconds."
Objectives & KPIs:	What are you trying to achieve? And how will you know if it's worked? • Primary objective: Increase demo requests • Secondary objectives: Improve share of voice, boost engagement • Success metrics (KPIs): CTR, leads generated, engagement rate
Target audience:	Who is this for? Be as specific as possible. • Segment / Persona: Job title, industry, pain point, etc. • Demographics: Age, location, role, company size

	• Psychographics: Attitudes, goals, behaviors, interests • Stage of journey: Problem aware / Solution aware / Ready to buy
Core message:	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? Primary message: [What do you want the audience to take away?] Supporting points: • [Point 1] • [Point 2] • [Point 3]
Tone, style & brand considerations	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]

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

Distribution plan / channels:	Where will the final assets be used or distributed? ☐ Paid social (LinkedIn, Meta, etc.) ☐ Website / Landing page ☐ Email marketing ☐ Sales enablement ☐ Internal comms ☐ Print / events / out-of-home ☐ Organic social
	Provide any relevant details that help the vendor understand the full picture: • Campaign history or previous work • Strategic context • Why this project matters now

	• Competitor activity or landscape
Constraints & requirements:	• Legal copy, disclaimers, or mandatory messaging • Brand or compliance checks required? • Tools to be used (e.g. must be built in Figma) • Platform/platform-specific requirements • Accessibility standards

Workflow & approval process:		
Stage	Owner	Deadline
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]	

Submission instructions:	How and where should final files be delivered? • [e.g. Google Drive link, shared Dropbox folder, upload to CMS] • [Who to notify when submitted?]
Anything else of note:	Leave space for anything outside the above —

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