

Building your brand

Briefing a design agency: template

Design agency briefing template

1. Details

Company name

Contact information (*your name, title, email, phone number*)

Agency's name

Date of briefing

2. Your company

What exactly does your company do? *Be specific – if your principal focus is on retirement planning, for example, mention this.*

Is there any specific meaning behind your company name?

Where are your clients primarily located?

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What is your target client type?

Write a detailed description of your target client persona(s). Aim to describe two to three target client personas. Also see [Client Personas](#).

What are the objectives for your brand? Answers could include increasing brand awareness, expanding market share or launching a new service, for example.

3. Brand identity

What are your company's core values? Perhaps you are customer-centric, sustainable or inclusive?

What is your company's mission statement and vision?

What are your company's unique selling propositions (USPs) or key differentiators? Is your client support second to none, or perhaps you have expert skills in specialised areas? What are the proof points?

What is the personality of your company? Are you formal or easy-going (or a bit of both – work hard and play hard?). Are you friendly, innovative, authentic? This message should be consistent across all marketing material.

What is your company's tone of voice? *It could be professional and formal, friendly and conversational or empathetic and supportive, for example.*

What are the key messages and value propositions you want to portray?

Do you have any specific requirements for the new brand? *This could include: visual elements, for example images or symbols; specific words or phrases, i.e. "trustworthy" or "innovative"; specific colours or tones; or design inspiration from other company's marketing that you admire.*

4. Competitor analysis

Provide an overview of your key competitors and their branding. *Include any distinctive design elements or features that set them apart. This will help to better understand your competitive landscape and design preferences.*

What is your company's market positioning, compared to your competitors?

5. Design preferences

What are your company's preferred colour schemes? *Please provide CMYK or RGB codes if known.*

Do you have any preferred typography or design elements?

Provide some examples of designs or brands you admire either inside or outside the financial services industry. *Explain why you admire these.*

Please write any style aspects you do not wish to include. *This could include colours, fonts, layouts or images; anything that you would not like to see incorporated into the final design.*

6. Scope of work

Describe in detail the project or services required from the agency, along with any specific deliverables.

What is the project timeline? *Be specific.*

What are the project milestones? *Be specific.*

7. Budget and resources

What is the budget allocation for the branding project?

Are there any company resources or assets available to the agency?

8. Measurement and success criteria

What will the Key Performance Indicators (KPIs) to measure brand success be?

What metrics will you use to evaluate the effectiveness of the branding efforts?

9. Legal and compliance requirements

Are there any legal or regulatory requirements for your brand? *Is there any specific copy that you need to ensure is included in the documentation?*

Are there any intellectual property considerations?

10. Stakeholder involvement

Please write the names and roles of internal team members involved with the project.

Name the points of contact for the agency.

11. Expectations and deliverables

List the expectations regarding what the agency will provide.

12. Review and approval process

Outline how the review and approval process will work.

What are the timelines for feedback and revisions?

13. Any additional information

Use this box to write any additional information that may be useful to the agency:

14. Attachments

Please attach with this document:

House style guide:	Yes	No
Market research:	Yes	No
Existing branding documents:	Yes	No

Please list any other attachments here:

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