

# Agency Briefing Checklist

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## What is this document?

This document asks the typical questions you should start with when formulating a brief. It will help your agency to design and deliver a better solution.

The list of questions is not intended to be exhaustive.

*Tip: Use plain English where possible. The answers below should make sense to a stranger on the high street.*

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## The Challenge

- **What problem do you want to solve?**

*Do you need more sales? Better quality of enquiries? To retain more business? Launch a new product?*

- **What does success look like?**

*How will you know you've done a good job? How are you going to measure this? What will achieving this/solving the problem enable your business to do?*

- **What's getting in the way right now?**

*Lack of know-how? Competitor moves? What evidence is there of a problem?*

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## Budget. Authority. Need. Time

- **What marketing budget do you have?**

*Do you believe your budget is adequate for the size of the challenge as you see it? Is more budget available when certain performance levels are hit?*

- **Do you have the backing of the business?**

*Do the other senior stakeholders in your business see the problem as you do? Do they believe it's a problem that needs solving?*

- **How ambitious are you?**

*Are you ready to do something radical, if needs be?*

- **What is your timeframe?**

*How quickly do you need to move on this? What's driving this? Do you feel it's realistic?*

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## **The Audience**

- **Who are you trying to reach?**

*Who are they and what do they do? What is their current or typical buying behaviour? How do they make decisions? How has this audience insight been qualified?*

- **What do you want them to think, and more importantly, do?**

*What ideas or perceptions do you need to change? How do you want them to engage with us, even before they've bought something?*

- **Why aren't they doing what you want right now?**

*Is there an awareness problem? Do they not understand the benefits of the product/service?*

- **What and who influences your audience?**

*E.g. Reviews and comparisons, facts and figures, price, performance, peers, industry, press/media.*

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## **The Product/Service/Offer**

- **What is it?**

- **What is its USP?**  
*How is this communicated? Is it really unique?*
  - **How is it priced?**  
*What price point does it have? How do people pay for it?*
  - **Where can you buy it?**  
*Is it bought in physical locations? Is it a tangible product? Is it a service?*
  - **How mature is their product?**  
*What stage of the product lifecycle is it in?*
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## Competitors

- **Who are the three competitors you need to outsmart?**  
*What kind of organisations are they? How big are they?*
  - **What do they do differently?**  
*Do they target different segments? Product differences? Pricing? Advertising?*
  - **Where is your competitive advantage?**  
*What's their USP?*
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## The Industry

- **What locations do you service or sell to?**  
*Do you have physical stores? Do you have resellers or partners or affiliates?*

- **How big is your market?**

*Is it a mature market? Is it growing or shrinking? What's causing this?*

- **Are any political or economic factors affecting your market?**

*Is there legislation that affects you? Are you linked to local tourism or industry?*

- **What technology is having an impact on your industry?**

*Are mobile or device habits changing? Are people buying in different ways? Is their service model affected?*

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## Marketing

- **What marketing activities are you running now?**

*Online and offline?*

- **What campaigns or activities have worked well before?**

*Why do you think this is?*

- **What have you tried before and discounted?**

*What went wrong? Know-how? No audience? Too expensive?*

- **What marketing resource do they have internally?**

*How many people? Specialisms? Skill gaps?*

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## Next Steps

With this information, you're ready to write your brief.