

HOW TO WRITE AN EFFECTIVE BRIEF



DAVE BIRSS

BRIEF

Job title What is this project called? Keep it short and make it easily identifiable.			
Job summary A very short description of what the job involves. No more than a couple of sentences.			
First review Date	Second review Date	Delivery date Date	Budget £ Budget
State A In simple, clear language, describe the current situation.		State B In simple, clear language, describe the ideal situation after the solution has been implemented.	
Transformational statement A SIMPLE SENTENCE THAT DESCRIBES HOW YOU'LL GET FROM STATE A TO STATE B.			
Supporting information What other information is important for the team to know? Only add relevant information here. If it doesn't add to the argument, take it out.			
How we'll judge the ideas <ol style="list-style-type: none">1. List the2. criteria3. you'll use to4. judge the5. final ideas6. (5 or 6 at most)			
Inspiration Share links to things that will inspire the team and demonstrate the standard of idea you're after.			
Links and docs Only add links to information that is absolutely necessary for the team to have access to.			
Job owner What's your name?		Approved by A decision-maker adds their name for approval	

Find more free resources at davebirss.com

Find instructions on filling in the brief here.

CLICK HERE TO DOWNLOAD THE BRIEFING TEMPLATE

or copy and paste this address: davebirss.com/documents/brief.docx

Hi there,

I'm Dave Birss, an author and educator who specialises in helping companies get to ideas that impact their business. These ideas can be for innovation, marketing, problem-solving or anything else.

And the starting place for effective ideas is a great brief.

Over the last few years, I developed a briefing format that has been working fantastically well for my clients (as well as for my own projects). It's pretty simple. And it's entirely focused on transforming a situation.

I run training sessions on how to use this brief - as well as how to generate ideas. But I'm happy to give this brief away to anyone who thinks they could benefit from it.

This document gives you some basic instructions on how you might be able to use it.

I hope you find it helpful. And if you do, please send me an email to let me know.

Top regards,

A handwritten signature in black ink that reads "Dave". The signature is written in a cursive style with a large, looped initial "D".

hello@davebirss.com

BEFORE YOU START WRITING THE BRIEF

A brief is there to crystallise your thinking, make sure you've considered everything and inspire your team to come up with great ideas.

Before you start writing it, you should have done some research (beyond a simple Google search) to find out as much as you can about the problem and the audience (if it involves people). Ideally, you'll discover something that other people haven't noticed. And you'll have done some further research to unearth the reason behind that observation. This is your insight. And it forms the core of your brief.

The attitude you have while writing a brief is essential.

A brief is not about covering your arse. It's not an inconvenient hoop to jump through before you're allowed to ask the team for ideas. Instead, you should think about building a solid foundation for the ideas to be built upon.

The quality of thinking that goes into the brief dictates the quality of the thought that comes afterward. A high-quality brief is far more likely to generate high-quality ideas.

And - of course - it should be brief. You need to make decisions here to select the essential information. If you fail to refine the information and just throw everything in the document, your teams will spend time debating what's important rather than generating ideas. And that's a waste of time for everyone.

You shouldn't need to expand any of the text boxes in the template or drop the font size to fit in tons of information. If you've applied sufficient thought to the information, you should be able to fit it into this simple format.

All the work you do at this stage sets the standard for all the work that comes afterward. So don't skimp on it.

Now let's go through the boxes on the brief.

THE EASIEST PART OF THE BRIEF

Let's get the admin stuff out of the way first. This is the stuff that doesn't require much brainpower.

Job Title

This is what you're going to call the project. Make it descriptive. But keep it short. Try to choose a title that won't be muddled up with something else.

Job Summary

Again, this is simply so that people can understand the job at a glance. In no more than a couple of sentences, describe what the job entails.

First Review, Second Review, Delivery Date

Put in all the dates that matter.

The First Review is for the project leader to go through the best ideas and give direction.

The Second Review is for the project leader to give final direction on the chosen work.

The Delivery Date is just what it sounds like. That's when the work needs to be handed over.

That was easy, wasn't it? Now it's time to use your brain.

LET'S TRANSFORM THE SITUATION

The purpose of your project is to change a situation from what it currently is to something much better. If you don't transform the situation for the better, you've failed.

It may be that you're aiming to transform the state of a machine from broken to working. Or transform a process from expensive to cheap. Or transform a team from demotivated to engaged.

Or if you're in marketing, you're probably aiming to transform what an audience thinks, feels or does.

So this is the core of the brief.

I think it's important to understand what the current situation is and what the ideal situation is. I call these ***State A*** and ***State B***.

Write each of these states in a simple, easy to understand sentence.

I would advise you to think about this carefully. And challenge your assumptions. Look from different perspectives to find something other people haven't spotted.

For example, defining the problem as 'the elevators are causing people to wait too long' will give different (and far more expensive) results to defining the situation as 'people are complaining about waiting for an elevator'.

The first option will lead people towards an engineering perspective.

The second will lead people to think about a human perspective.

This was an actual problem for an apartment block in New York. The solution was putting mirrors on the elevator doors. People spent their time checking their hair and straightening their clothing instead of getting annoyed waiting.

And the complaints dried up.

STATE A

Describe the current situation in a sentence. This should describe what is undesirable. It may be the way a process or machine isn't delivering the desired results. Or it may be what a group of people currently thinks, feels or does.

Remember that you need to write this simply.

If you find yourself choosing words for nuance or constructing a sentence like a lawyer, you're doing it wrong. Write it so a ten-year-old could understand it.

Here are five examples that we'll use over the next couple of sections:

- Our customers are defecting to the competition because of their new feature
- The widget stamper is breaking down every week
- The audience is unaware of how our product can help them
- Our customers are complaining that we're taking too long to deliver
- We need to make more profit from our product

Take a look at these.

See how simply they're phrased. And how they're describing the problem you want to address without pushing you towards the assumed solution.

This is how you keep your brief open enough to explore fresh perspectives yet clear enough to keep the team focused on the problem they need to address.

STATE B

This time you need to describe the ideal situation in a simple sentence.

Again, you need to be careful not to lead people towards your assumed solution. Instead, describe the end state in an open way.

You'll be able to see what I mean in these examples:

- We don't just retain our existing customers but we attract new ones
- The widget stamper doesn't break down any more
- The audience knows about our product and how it can benefit them
- We stop getting complaints about our delivery times
- Our products help us generate more profits

If you do this well, it will probably seem a bit obvious and simple.

That's good! That means you've stripped away the complications and assumptions that can make it harder for the team to understand the task.

Clarity is critical.

THE TRANSFORMATIONAL STATEMENT

The transformation statement is a description of how we get from State A to State B.

It's the most crucial part of the brief, so it probably deserves the most thought and effort. And it should be written clearly and without any hifalutin language.

Here are some examples:

- We need to give our customers a reason to stick with us rather than switch to the competition.
- We need to find the root cause of the widget stamper problem and eliminate it.
- We need to make our audience aware of our product's benefits in such a compelling way that they'll want to switch.
- We need to find an effective way to reduce our customer's frustration of waiting for our product to be delivered.
- We need to find ways that our product can generate more money for the business, directly or indirectly.

I've started all of these with the words "we need to" because I think it's important that people know this isn't just a nice-to-have. It's of great importance to the business and deserves their attention.

If you look at the first example, you'll see that it doesn't hem us into an assumed approach. It's not asking for a new feature - although that may be a good option. It also allows us to consider cutting the price, locking customers into longer contracts, bundling products and other options.

This openness is vital to encouraging exploration.

If we were to simply say that we needed a feature to make us more desirable than them, we'd be discounting all the other options and potentially missing out on a much more powerful solution.

SUPPORTING INFORMATION

This is where you'll be tempted to throw everything into the brief.

Don't.

You should only add the most essential items here.

Things like mandatory inclusions, limitations and the resources you have to work with.

You may want to expand on the insight that led to your State A, State B and transformation statement.

There may be a little bit of background information that's necessary for people to tackle the problem.

Your job is to apply judgement here.

To work out what's important to know and what to leave out.

If you find yourself just copying and pasting from another document, you're probably not putting in the right amount of effort.

You need to find the right balance of information for the brief.

Too little information will prevent people from coming up with good ideas.

Too much information will cause them to spend their time debating what information is important rather than generating ideas.

Once you've written this section, go back over it and use your delete key liberally.

HOW WE'LL JUDGE THE IDEAS

There's a step I recommend before you start writing the brief.

It's getting all the stakeholders together in a room (or a Zoom) to agree on the five key criteria they'll use to judge the ideas. This helps to align their thinking, set their expectations and - most importantly - helps to prepare them to evaluate the ideas effectively at the end of the process.

I like to put these agreed criteria on the brief because they help to keep everything on track and increase the chances of delivering suitable ideas at the end.

Firstly, they do that by making it clear what the team is expected to deliver. Some of these criteria may even help them come up with ideas.

Next, it helps the team select the ideas that best meet the criteria.

When you have some potential ideas, it helps you improve them. If some of the ideas aren't ticking off all the criteria, you can spend some time trying to develop them so that they cover everything.

I also recommend going through the criteria to see if your ideas can better address them. This will make your ideas even more effective at solving the problem.

Finally, you should remind the decision-makers of the criteria before you present your ideas so that they have a framework to judge with. This reduces the chances of them rejecting ideas on a whim or because of spurious reasons.

Like the rest of the brief, these criteria shouldn't limit people's thinking and direct them towards assumed solutions. This needs to be addressed in the stakeholder session before you start writing the brief.

If you haven't done this pre-brief session, you can develop your own criteria based on your understanding of the decision-makers. This isn't nearly as effective, but it's better than nothing.

INSPIRATION

One of the purposes of your brief is to ignite the imaginations of your team. And to show them the standard of idea you're after.

You can do that by showing them some things you think are brilliant.

It's a good idea to choose things from outside your industry so that people aren't tempted to simply plagiarise.

You can find good stuff by looking at awards shows in various industries. (Try not to choose things too close to your industry or you may end up with a second-class version of something your competitors are doing.)

It's a good idea to keep an eye on sites like Digg, Reddit, It's Nice That and booooooom.com for some regular inspiration.

I set up Google alerts and Flipboard boards to stay up to date on certain things I'm interested in (like neuroscience, creative psychology and guitars).

It's a good idea to get into the habit of collecting interesting stuff just for this purpose.

If you're looking for smart and lateral ideas, show examples of that kind of thinking.

If you're looking for something high profile and attention-grabbing, add examples here.

Try to add things that will make people go "Sh*t! I wish I'd thought of that!"

You want to leave them excited to work on the brief and start spitting out ideas.

LINKS AND DOCS

If you're working on something quite technical, you may have difficulty adding everything you need into the brief.

So you can attach and link to relevant documents, websites, films and other things.

But apply your judgement here.

This isn't an opportunity to pass on the responsibility to other people to do the work on your behalf. Ideally, you should have gone through this information yourself and summarised the essential parts in the rest of the brief.

Remember that the more time people spend looking through links and documents, the less time they spend thinking and coming up with ideas.

And the more information you expect people to put into their heads, the harder you make it to focus on the vital information that could lead to great ideas.

So, again, once you've added things in here, go back and hit the delete key as much as possible to only leave what is vital.

PREPARING TO DELIVER THE BRIEF

You want to make sure your brief is a good one before you deliver it to the team. But you'll only truly know you've hit the mark when you see the results.

As the person who's written the brief, you're probably too close to judge it objectively.

To increase the chances of getting the brief right, you need to show it to other people to get their take.

Ask them if they're clear on what the brief is asking for.

And if they feel that their brain is chomping at the bit to come up with ideas.

If the answer to both of those questions is "yes," you're probably ready to go.

Now you need to think about how you're going to brief the team. Because the way you do this shows how committed you are to the project, how excited you are about getting great ideas and how much you value the people you've picked to work on it.

Merely sending the brief in an email shows that your heart isn't in it.

Calling a meeting and then reading it out word for word is utterly uninspiring.

How about taking them to where the problem is and briefing them there? Or taking them to where your audience hangs out and briefing them there? Or sending the brief to them in a fancy box along with a bottle of champagne?

Make it an experience.

Try to communicate something about the brief in the way you deliver it.

Make your team feel special, excited and inspired.

Then you just need to manage the team as they come up with ideas. But I'm not covering that here. If you want help with that, drop me a line.

ABOUT DAVE BIRSS



Dave Birss is an author, educator and consultant who helps organisations get to effective ideas. Before he did that, he was creative director for a number of the UK's biggest and best ad agencies.

He helps with innovation, marketing campaigns and helping organisations get better ideas out of their teams. He looks at company culture, processes, leadership styles, creative skills and every other part of the puzzle.

He has a few courses available on LinkedIn Learning.

He's written and co-written several books, including "How to Get to Great Ideas," "Iconic Advantage" and "A User Guide to the Creative Mind."

And he has a handful of films (including a 6-part TV series) available on YouTube.

You can find out more about him on his website.

davebirss.com



**IF YOU FIND THIS HELPFUL,
PLEASE LET ME KNOW:**

hello@davebirss.com