

The Creative Brief

WHAT IS A CREATIVE BRIEF?

The creative brief is a short document (that's why they call it a brief) that typically runs anywhere from two to ten pages, depending on the scope of the project. This document outlines the pertinent information about the project so that the entire team has a clear sense of the project's background and goals.

WHY CREATE A CREATIVE BRIEF?

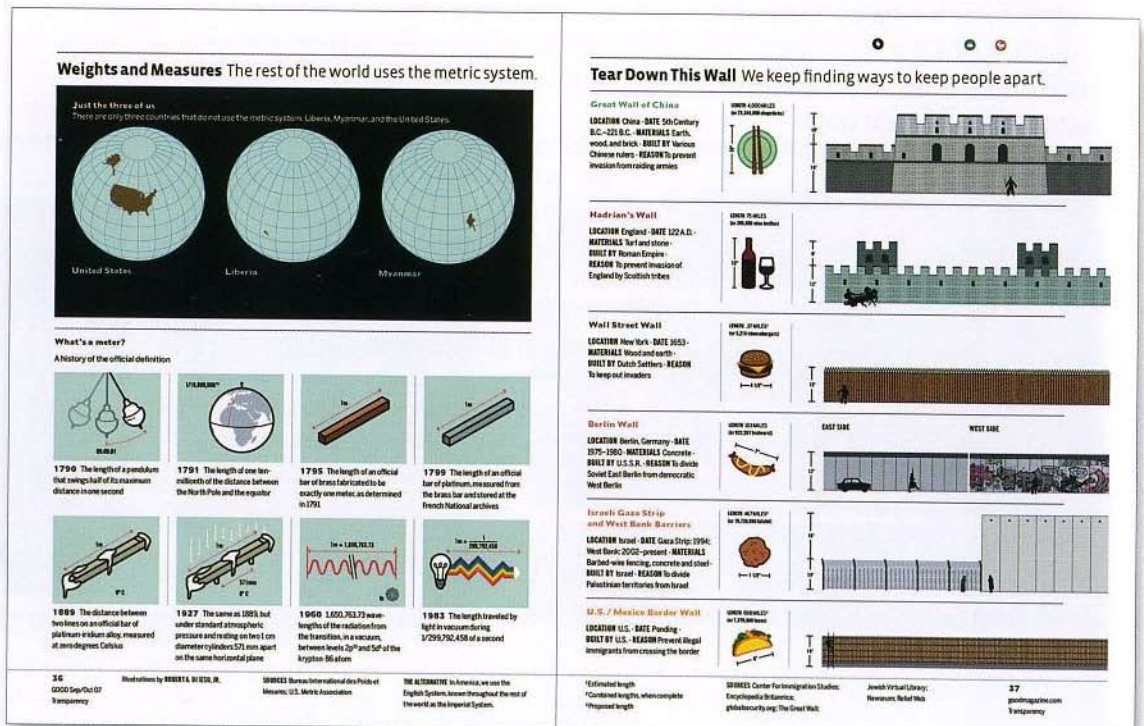
Creative briefs are nothing new to the world of communications and design. These documents have been around forever in

the ad agency world. The same reason an ad agency would create a brief for an ad campaign applies to any design project: It's important to have a good plan. Information design projects, in particular, tend toward the kind of complexity that makes having a thoughtfully crafted creative brief especially helpful.

Too many projects proceed without the benefit of a clearly defined road map for the team. Without explicitly clear directions for how to move forward, information design project teams often find themselves either floundering or going full steam ahead

→ *Good* is a magazine that provides a platform for the ideas, people, and businesses that are driving change in the world. In a recurring section called "Transparency," *Good* features a self-described "graphical exploration of the data that surrounds us." Information graphics for each issue are created by different design firms, so Open, the firm responsible for the initial publication design, developed a creative brief to document and convey the most important aspects of the magazine's mission and personality.

Open



(possibly in the wrong direction) while the clock ticks and budgets drain away.

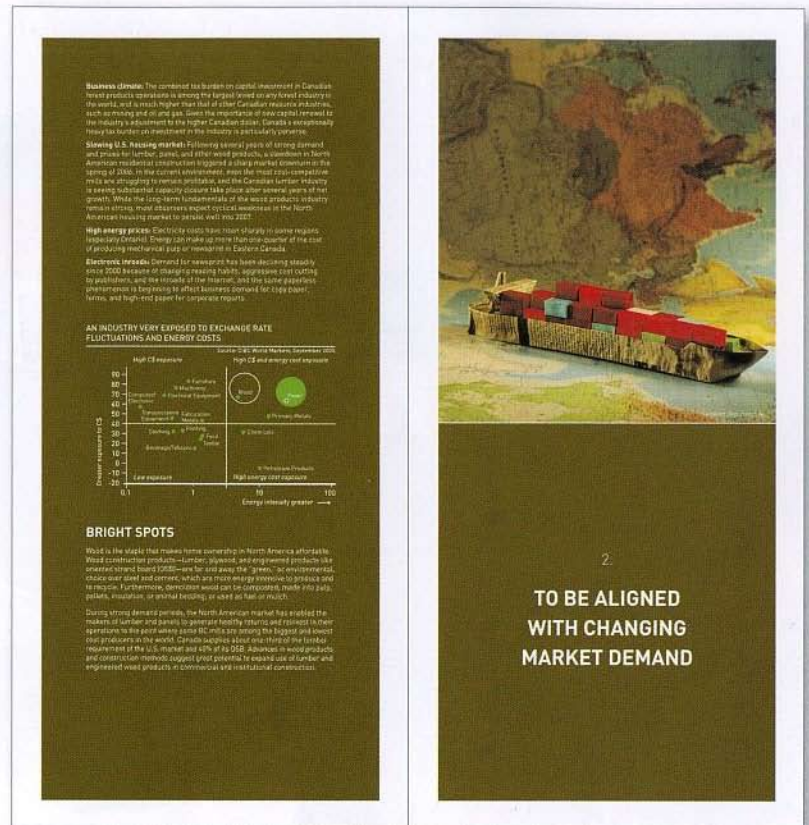
Let's say you've successfully set the stage for your project. You've spent time with the client and have a working understanding of their overall history and goals for their company and for the specific project at hand. Before you jump into the deep end and begin work on the project itself, it's time to document what you've learned so far.

CREATIVE BRIEF CONTENT: A SOURDOUGH STARTER KIT

There is apparently some debate in the design community (who knew?) over what makes for the perfect creative brief. There is debate over appropriate page count. Some people say, "It must be no longer than one page." There is debate over the brief's target audience. Some say, "The brief is the means by which you manage client expectations." Many others believe that the perfect creative brief speaks directly to the creative team and its process. Our thinking is that the perfect creative brief is tailored to the project and the team who needs to use it.

WHO NEEDS IT AND WHY?

Many times, the members of your design team haven't been in initial project meetings. They have no prior knowledge of the client or project. You could hold meetings, send emails, and verbally discuss what you know—all good. But what if you forget something or leave out critical bits of info?



↑ Informed by clearly defined project goals, the annual review for Forest Products Association of Canada makes excellent use of subheads, diagrams, and interesting custom photos that illustrate key concepts.

McMillan

↓ Because of the creative brief, Smart Design knew that one challenge in designing packaging is that retailers often take products out of the box for floor display. Smart Design created a sophisticated approach with a label affixed to the product itself, identifying the product and giving potential buyers an overview of product benefits. (See case study on page 128.)
Smart Design



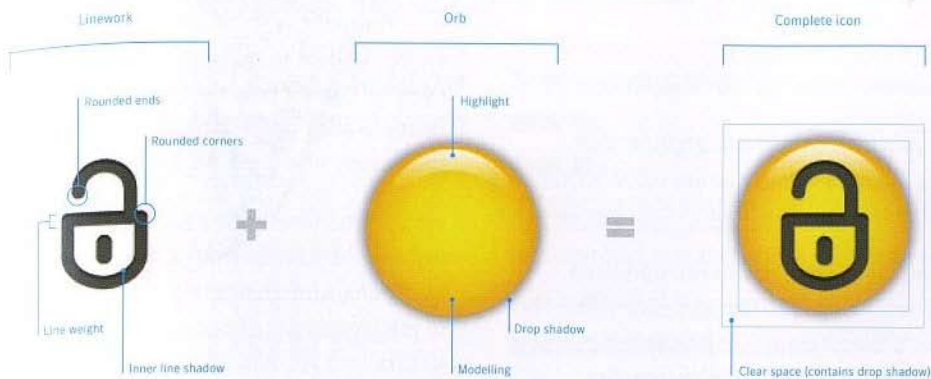
The creative brief acts as a single point of communication to ensure that everyone is on the same page as the project moves forward. In addition, the brief can spark creative juices and get them flowing.

Design Team Reference. Projects start and stop due to unforeseeable events. Team members come and go. People are often working on several projects simultaneously. Even if you wanted to memorize all key project info, who has the time or mental bandwidth? A creative brief can be a repository for the critical, practical, and inspirational information you know you'll reference repeatedly. The brief is "the source" for project requirements and should be used as a benchmark to make sure the creative work is on target.

Client Approval and Feedback. The client should give attention and final approval to the creative brief before any work begins, to guarantee that the project is off to a good start.

The brief should echo the client's key points that you heard during conversations with them. In responding to the brief, the client can help you correct the course, vet your ideas and assertions, and help you home in on what's important to them.

In addition, the client can use the brief to get critical internal buy-in or feedback, and to gather input from people who, while not directly involved with the project, are nevertheless key players behind the scenes.



- ← Comprehensive guidelines helped the in-house design team extend Symantec's new icon system.
MetaDesign

For Some Eyes Only. Some creative briefs are more detailed than others, depending on the complexity of the job, communication challenges, and the needs of the team. The document truly can be whatever you need it to be. For example, there may be times where you decide to create a “special edition” or version of the creative brief for your internal design team. There may be details that you don’t want to highlight in the official brief that can really help your team understand the finer points of the project landscape. There may be client quirks, likes, dislikes, biases, past history, or even political agendas that would be useful to know as key design decisions are mapped out. An internal version of the creative brief can give your team the “inside scoop” about the client or project.

Bottom line: There’s simply no right or wrong way to do it. What’s important is that the creative brief captures the critical information so that the people who need it are “on the same page.” Also critical: Get sign-off on the brief from your client to make sure your understanding of the project is accurate and complete.

Client Peace of Mind. Once approved, the brief can help put the client’s mind at ease while the designers cloister themselves away and get down to the task of designing. As the creative process ensues over the course of several days or weeks, the client team knows there is a plan, has participated in the creation of that plan, and has a document that serves as a concrete reminder while they eagerly await the results of your genius.

TYPICAL CREATIVE BRIEF CONTENT

A typical creative brief breaks down information into four general categories: client information, project information, project goals and requirements, and project logistics.

Client Information. Include the client’s full company name, number of years in business, noteworthy business accomplishments, whether a regional or national organization, and so on.

Client Sector. Give a bit of information about the client’s business or industry. How competitive is their marketplace? Has their industry gone through particular changes lately?

Competitor Information. List your client’s top three to five competitors and give a brief overview of each competitor’s strengths and weaknesses in relation to your client.

Intended Audiences. Who are the main audiences for this client? Is there a particular subset for the information design project?

The Business Context for the Project. A thorough creative brief will take the following into account:

- Why this project at this time for this client?
- Is there any history of the project that would be helpful to know?
- Have similar projects been undertaken for this client? Were they successful or not? Why?

Project Information

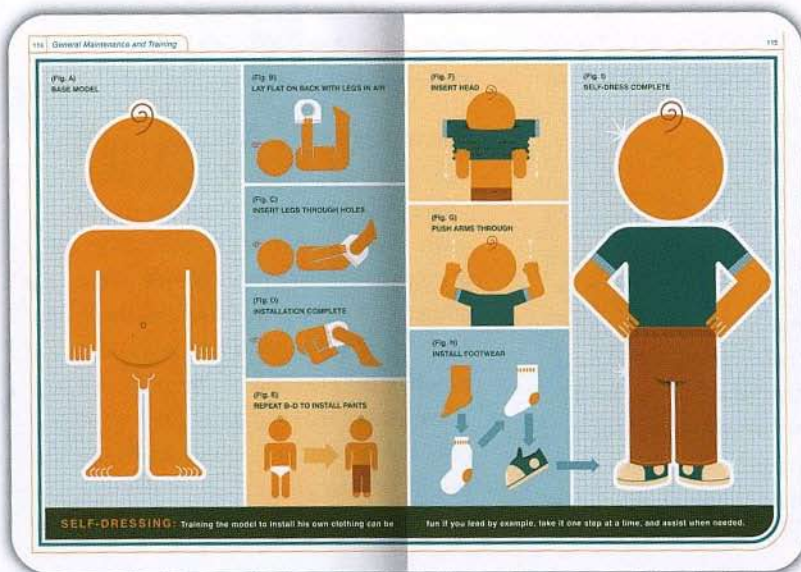
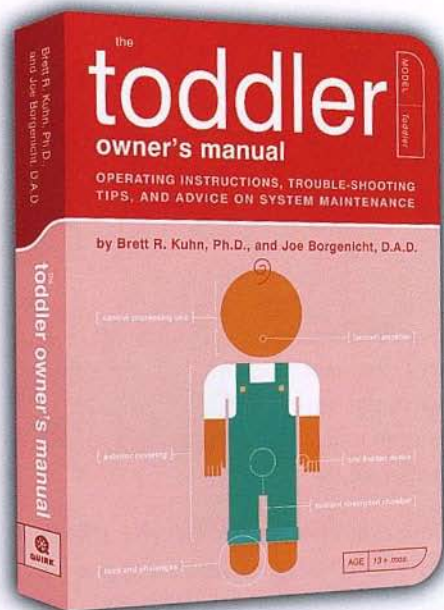
Project Overview. Ideally, this is a one- or two-sentence overview of the project.

Key Information and Hierarchy. It also helps to address these issues when writing an effective creative brief:

- What key pieces of information need to be conveyed to the audience with this project? Ideally, you and your client will have thought this through. (See “Wrangling Audience and Content” on page 36.) You can use the creative brief to distill key points about the project information and hierarchies, giving the

team a quick-reference guide to the most important elements of the project, and enabling them to make well-informed decisions about how these elements relate to each other in the context of the design.

- What is the tone for the project? For instance, when designing a brochure and hiring chart for an entirely new system of job hierarchies, the tone might need to take into account employee anxiety and resistance to change. A public transit guide addressed to children might have an entirely different tone from one designed for adults.



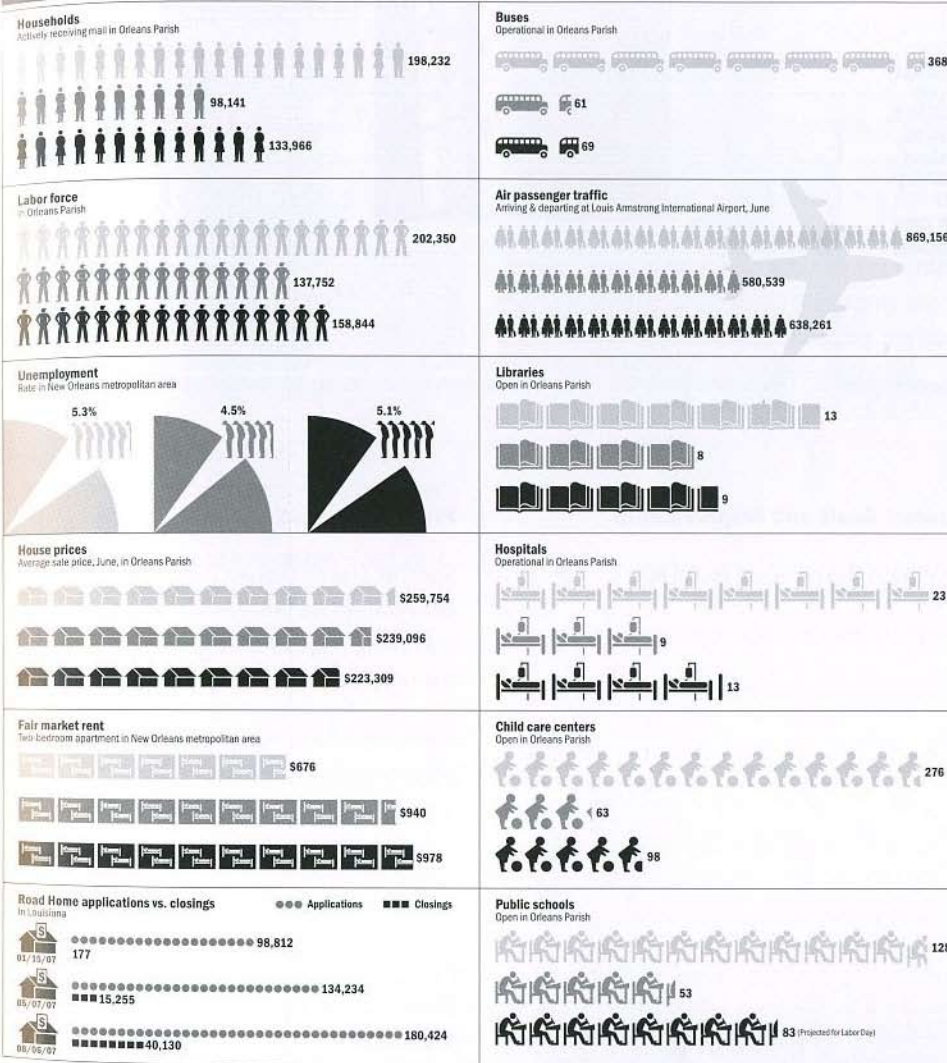
This book's publisher was looking for an alternative to the cutesy baby book. The designers implemented an owner's manual aesthetic for the project. The book's

atypical look and feel appeal to a male audience, a goal stated in the initial creative brief.

Headcase Design

REBUILDING PROGRESS IN NEW ORLEANS

● BEFORE HURRICANE KATRINA ● 1 YEAR LATER ● 2 YEARS LATER



↑ This *New York Times* infographic successfully simplifies an extremely complex story for the paper's target audience of busy readers. (Data provided by Amy Liu at the Brookings Institution.)
Nigel Holmes

SOMETIMES IT'S NOT EVEN CALLED A CREATIVE BRIEF

Funnel Incorporated takes a different approach to the creative brief. For one thing, they don't call it a creative brief at all. To them, it's a "shared understanding" document. Principal Lin Wilson explains:

"The title is very important because what we deliver is understanding—that's the common thread through all our work. Funnel has a tool that collects factual information and client goals. So the title is important, as is the series of questions. The most important are the first three.

"The first question is: What are the challenges to overcome?"

"The second question is our point of difference from a typical design firm. We're asking what people are not understanding. The client is calling us for a reason and that might be because of confusion.

"The third question is about who the audience is: 'Is it your grandmother or is it a PhD?' These are super important to creating this kind of work."



When *TIME* magazine decided to reinvent itself, the design team drafted a creative brief with the following goal: Create a newsweekly that people would want to read. Bold photography and typography create a sense of gravitas and impact. (See case study on page 136.)
Pentagram Design

“There are an infinite number of journeys to take through the design of understanding.”

—Richard Saul Wurman

Project Goals and Requirements

- What’s the problem to solve?
- Where are the opportunities?
- How will success be measured?
- Are there any known issues or obstacles in the way of reaching project goals?
- What are the technical requirements? Is there existing technology that will need to be integrated?
- What are the creative requirements?
- Are there existing brand guidelines?
- Is there any other quirky information that can be helpful (colors the client hates, sacred cows, etc.)?

Project Logistics

Specific List of Deliverables. State the deliverables, as you understand them (including page counts, document sizes, file types, and so on).

Overview of the Project Team. Include key players on the client and design team sides. Clearly define roles and responsibilities. Determine who signs off on deliverables.

Key Dates. A detailed project schedule can be provided separately, but, by all means, list out the key dates you already know about.

Budget/Hours. Include an overview of hours allocated to the project, ideally by project phase.

WHO WRITES THE BRIEF?

Typically the person who's had the most contact with the client during the project start-up phase writes the brief. This could be the project manager, the account manager, or even the creative director or designer. Ideally, whoever writes the brief should be:

- Informed about the project details. This person should have first-hand experience with the client or at the very least have access to detailed meeting notes.
- A good writer. A creative brief needs to capture a lot of information in just a few pages. Writing style should be succinct but engaging enough keep the creative team from nodding off to sleep. The writing should wake up, fire up, and inspire the creatives.

THE CREATIVE BRIEF IN ACTION

It's worth the time you spend writing a creative brief. Done right, the approved document isn't just created for posterity. It can "ground" your design decisions at every step along the way. When you're ready to present to the client, reintroduce the brief to jog everyone's memories. Explain your design decisions as they map to key points in the brief. This way, when the clients are responding to the work and making design choices, they're doing so from a strategic point of view, as opposed to just a gut, or personal, response.

- The Wonder of Reading, a non-profit organization, needed an effective fundraising brochure. The creative brief outlined the main goal for the piece: quickly convey the critical need to rebuild libraries in Los Angeles' public schools. By focusing on hard-hitting statistics and an evocative photo of a nearly empty library shelf, this spread conveyed more than paragraphs of text ever could.

KBDA



- California's children face a reading crisis.
- Literacy and education experts rank California last in the nation in the quality of its school libraries.
- California spends only three percent of what other states spend, on average, to support their school libraries.
- Our public elementary school libraries fail to meet our children's needs. Outdated design, limited opening hours, and paltry book collections severely hamper the ability of our children to acquire essential reading skills and to enjoy reading.

Personas and Scenarios

“You know you’ve been bitten by the information design bug when you begin to understand that the power of information design lies in the way it can be used to help people, to make their lives easier and better by providing serious, even life-saving communication.”

—Robert Swinehart

PERSONAS: IMAGINING USERS

If successful information design requires a thorough understanding of and commitment to the audience, creating personas (sometimes also referred to as user profiles) is an easy and fun way to walk a mile in the shoes of your users.

During the initial research phase, you and your client identified target audiences. As you move into design development, well thought-out user profiles detail the relevant information about the personalities and expectations of representative members of your audience. User profiles provide a touchstone for the project team to make sure that design choices are aligned with user needs and expectations.

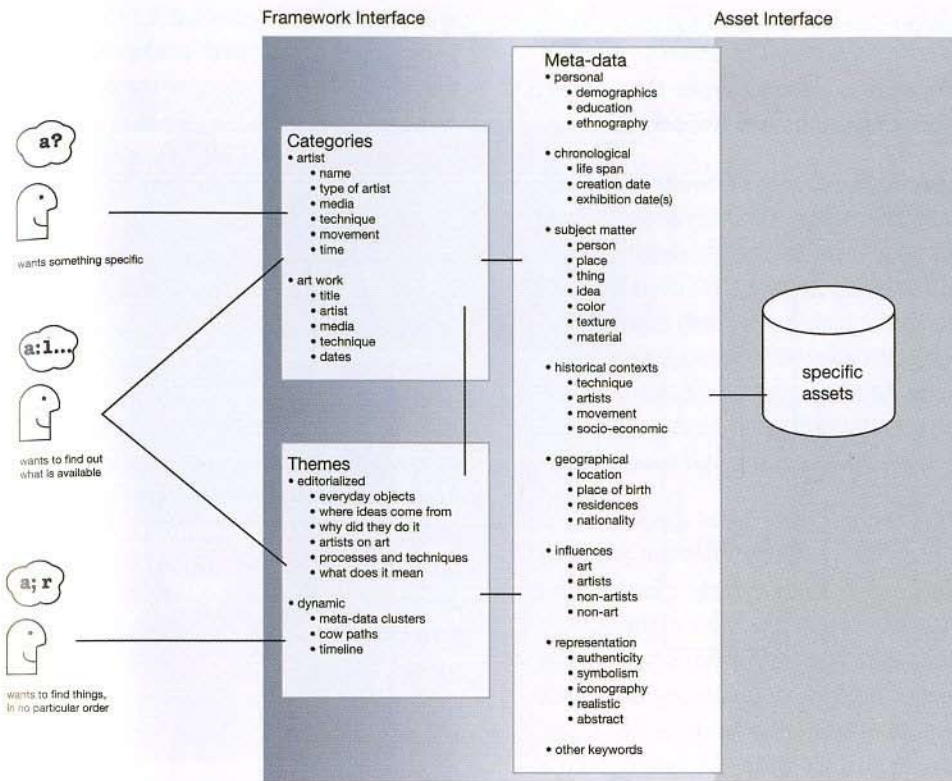
So while you may have identified your target audience as working mothers in their forties, having a persona for one particular working mother in her forties is infinitely more useful. Giving depth and details to the user’s character helps you see the target audience member type as a full person with a wide range of needs and expectations. The idea is to be able to imagine fully how a particular user will interact with your design.

Cost-conscious, Yet Surprisingly Effective. How do you learn about a user or set of users and their needs and expectations? One can spend the time and budget seeking out and interviewing real people

who fit a project’s user demographic and then distill that information into real-world user profiles. However, the simplest, most cost-effective method of generating user profiles is to formulate them yourself based on research, common sense, and overall project know-how.

In the pragmatic world of information design, it may seem odd to be prompted to invent imaginary users the way you might have invented imaginary friends when you were five. Nevertheless, invented users can be a budget-conscious, time-sensitive, and extremely valuable device to help you and your team make decisions about the project at hand. Of course, you can’t just haphazardly invent any old user. It’s a good bet that Plimmy—the imaginary, orange, 7-foot (2.1 m) dragon who protected you from the mean kids on the kindergarten playground—will not assist you at all in your project efforts. This chapter outlines a general methodology to assist you in the process of creating personas that are relevant and useful to your project.

What Is a Persona and How Many Will You Need? A persona is a brief profile of a typical user that outlines specific personality attributes, desires, needs, habits, and capabilities. Often fictional, a persona can be a composite, or representative of a typical user (rather than an actual real-world user). If your audience encompasses



← This process document for the Making Sense of Modern Art (MSOMA) kiosk at San Francisco Museum of Modern Art describes a framework that establishes relationships between content and users.

Method

→ The MSOMA kiosk's final user interface design incorporates user wants and needs that were identified during the project's planning stages. The modular interface highlights individual artists, as well as content types such as guided tours, videos, and timelines. Information is organized so that users with varied goals can explore the content in the way that best suits their browsing habits.

Method



THE DESIGNER

The Architect/Designer is primarily concerned with aesthetics in the finishes she chooses. Carpet often serves as the “foundation” for a design—other finishes are based on it, but material composition is of no concern. Inexperienced designers are often responsible for pulling and specifying finishes.



“Talk to me in my terms.”

Color and pattern, not components or construction are of primary concern. What matters is what’s cool, unique, and will make a name for the firm and the individual. All other people in the process work in service to the design – if there’s an installation problem it’s the installer’s fault; the mill is expected to accommodate change and high delivery demands.

“Help me shine.”

Success is measured in terms of her client roster and her portfolio. Recognition is very important, both in the firm and in the architecture and design community at large. High profile projects and custom products carry great caché.

“Help me see the value.”

The designer wants assurance that the finished project is true to the original vision and even true to the specification. Product knowledge comes from product representatives. Deeper understanding of product composition is welcome to the extent that it serves aesthetics.

- ↑ This persona includes a photo of the user, which lends a sense of reality to the entire piece. Particular user goals for this character are highlighted with a quote, which effectively gives the user a voice to communicate what the user type really wants.

Matter

many kinds of users, you’ll probably need to create a series of personas that reflect the range in audience types. Most projects require about three to five personas.

How Do You Create Personas? First, you need to identify your main audience types. Ask your client for specific details. Talking with the client about their users can both clarify the audience list and raise new questions about the types of users the client wants to target. Research the client’s business landscape for further ideas and information about the user base.

Next, create a short list of specific attributes for your most common audience types. Again, work with the client to hone the list of attributes. Some of these attributes will be more general, such as age, gender, profession, geography, and education. Some of the attributes will be more specific to the project, like how often the person might use the “product,” whether the person is comfortable with new technology, or whether the person likes to read.

Sometimes the demographics (age, gender, and socioeconomic status) are less important than the psychographics (personality, values, attitudes, interests, or lifestyles).

Who Creates the Personas? A single person on the team, such as the designer, the information architect, or the project manager, can create the personas. However, a group work session with the design team and the client team is one of the best ways to generate a set of personas. Not only do you gather more creative input during a collaborative process, but the act of creating personas is a great team-building exercise at the start of a project.

The client team, especially at project inception, will generally know more about their users than you will. On the other hand, you, as the designer, will often ask valuable questions, and even question certain client assumptions. For example, when discussing a Web project, the design team might inquire about the user’s computer equipment and home environment, and how that might impact browsing habits and time spent online.

So go ahead and gather the team in a room with a whiteboard, coffee, and a few snacks, and have a group work session to come up with each of the personas based on the predetermined set of user attributes and criteria.

Document Your Efforts. Once you’ve gathered all the data for your personas, create a document featuring the fruits of your labor. Each persona should include all the pertinent criteria and attributes. It also helps to have a picture of each character. Give each persona a name, too. Giving each persona a name brings the user to life, encourages empathy, and makes the discussion infinitely more personal.

The TV Lovers Snapshot

Miguel, Maria, and Pablo Martinez, Pasadena, CA



Married — 1 kid
Mid income

3 bedroom house: 1,800 sq. ft. / 165 sq. m.
Wired

Family

Miguel (32 / Regional Sales), Maria (32 / School Teacher),
Pablo (5)



Services

Digital cable + DVR + broadband
Netflix / Blockbuster
Vorrage

Living Room

32 in. LCD
Cable STB with HD DVR
DVD player

Master Bedroom

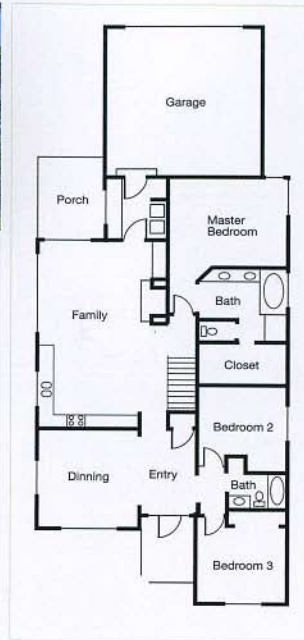
32 in. CRT TV
Shelf Stereo
DVD player
Cable, but no STB
Personal laptop

Dad's Media Room

50 in. rear projection
Cable STB with HD DVR and a Slingbox
All-in-one HTS
PS2

Travel

Work laptop with Slingbox access



← This persona by Method gives details about potential users.
Method

Even if the project isn't Web-based or technology-related, it might be interesting to know how your persona interacts with such devices. For a cookbook design, you may want to know which cooking websites, magazines, and cookbooks the user likes.

Details give your persona dimension and character. It's often helpful to include information that shows how the user relates to your project or client goals. Personas can be as specific as you need them to be. If it helps to know exactly what Joe thinks about your product, service, or information design issue, by all means, give the guy an opinion about it.

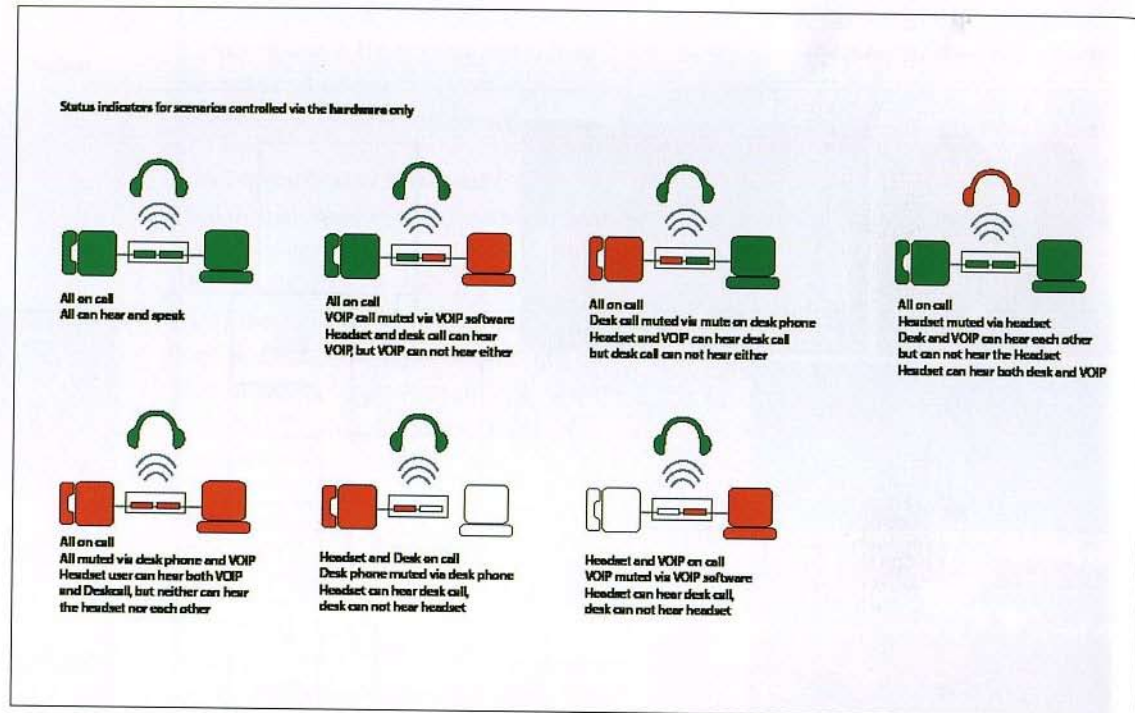
Information about personality can also help you make decisions about your information design. For example, if your key users are impatient by nature and, thus, only want the broad strokes and "big picture" information, then your information design choices will differ significantly than if your users are very patient, literate, and detail-oriented in approach.

When the personas are fully cataloged, distribute the document to the team.

How Do You Use Personas? Once you have the personas in hand, it's easier to understand the audiences and prioritize them. It helps to rank the importance of each persona in terms of project needs and goals. Not only do you have a set of representative users in hand, but you now know which users and their needs are the most critical.

Having personas as a reference while you work on the project helps to create empathy and a deeper understanding for user needs and how the particular audience types might respond to your design. Personas can be quite useful in making distinctions and choosing between design options. For

→ This early process document by Method shows the details and functionality scenario for the software and hardware for a phone system, including a visual representation of the concept. **Method**



instance, if you know your most important demographic is a hip, urban, artsy audience of 25- to 35-year-old females, you may choose a different design than if your audience is a hip, urban, artsy audience of 25- to 35-year-old females who have children. The overall demographics and personality attributes may be very similar. However, the specifics of the personas shed light on key differences that can influence user behavior in a pronounced way.

You'll be surprised at how often clients and design team members will refer back to the personas when making decisions throughout the length of the project.

SCENARIOS SHOW PERSONAS AT WORK

Personas are like actors. Now that you've got your cast in place, it's a good idea to have your imaginary users act out the process of interacting with the information design in question.

Scenarios help you identify specific patterns in how users interact with information design. Like the personas themselves, scenarios help you confirm that your design satisfies the needs of the target audience.

A scenario can be a story written in narrative form or another form such as a flowchart or diagram. Scenarios can be very specifically related to one task flow such as how a user completes a specific transaction with an online system to purchase a building permit. Or scenarios can be more general in telling the story of how a particular user interacts with the system over time and through a variety of touch points. You can decide how general or how specific your scenario needs to be depending on the complexity of your project and your need for user information about the project.