

Agency briefing template

How to use it: Fill this in before you talk to any agency. Keep each answer short; if you can't write it in a few lines, you're not ready to brief yet. Share it, then ask the agency to play it back to you in their own words. If their version doesn't match yours, fix it now, not after the invoice.

Worked examples throughout use **"Northbound Oat Co."** — a fictional oat-milk brand. Not a real company.

1. Project name and owner

- What do we call this project?
- Who on your side owns it and makes the calls?

Fictional example: "Spring shelf push", owned by the founder.

2. Objective

- What business problem are we solving?
- What should people think, feel or do after seeing the work?
- One objective. Not five.

Fictional example: Get shoppers who already buy oat milk to try Northbound at the grocery shelf.

3. Brand

- What does the brand stand for, in one sentence?
- Tone of voice: three words.
- Must-use assets (logo, colours, pack shots) and no-go zones.

Fictional example: Oat milk that tastes like oats, not like a lab. Tone: warm, dry humour, honest.

4. Audience

- Who are we talking to? Shopper, consumer, buyer or operator? (They're not always the same person.)
- What do they do today, and why would they change?

Fictional example: Busy parents who buy plant-based milk weekly and switch brands when there's a deal.

5. Channels

- Where will the work run? Retail (in-store, flyer, retailer media), direct to consumer (your site, email, subscription), foodservice (menus, distributor), social, press?

- Which channel matters most?

Fictional example: In-store displays and retailer media first; social to support.

6. Retail and trade context

- Which retailers, banners or distributors are involved?
- What's already agreed: listings, promos, flyer dates, displays, trade spend?
- Any retailer rules for artwork or claims?

Fictional example: Listed in two regional grocery banners; one flyer slot booked in spring.

7. Seasonality and timing

- Key dates: launch, flyer weeks, seasonal peaks, trade shows?
- Final deadline, and the date you need first concepts.
- What happens if we're late?

Fictional example: Artwork to retailer six weeks before the flyer week. No slack on that one.

8. Budget

- Total budget, and what it must cover (fees, production, media)?
- Is trade spend in or out of this budget?

Fictional example: One fixed budget for fees and production; media and trade spend are separate.

9. Deliverables

- Exactly what do you need? Formats, sizes, languages, quantities.
- Who supplies photos, copy, translations?

Fictional example: Shelf talker, two retailer media banners, three social posts, English and French.

10. Success measures

- How will we know it worked? Pick measures you can actually get.
- When will we check?

Fictional example: Sales lift at participating stores during the promo versus the weeks before, checked one month after.

11. Mandatories and legal

- Nutrition, allergen or health claims to check?
- Bilingual or labelling rules?

Fictional example: Any "source of" claim gets checked against the label before it ships.

12. Approvals

- Who approves, at which stage, and how fast?
- How many rounds of changes are included?

Fictional example: Founder approves concepts and final; two rounds of changes; feedback within two business days.

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