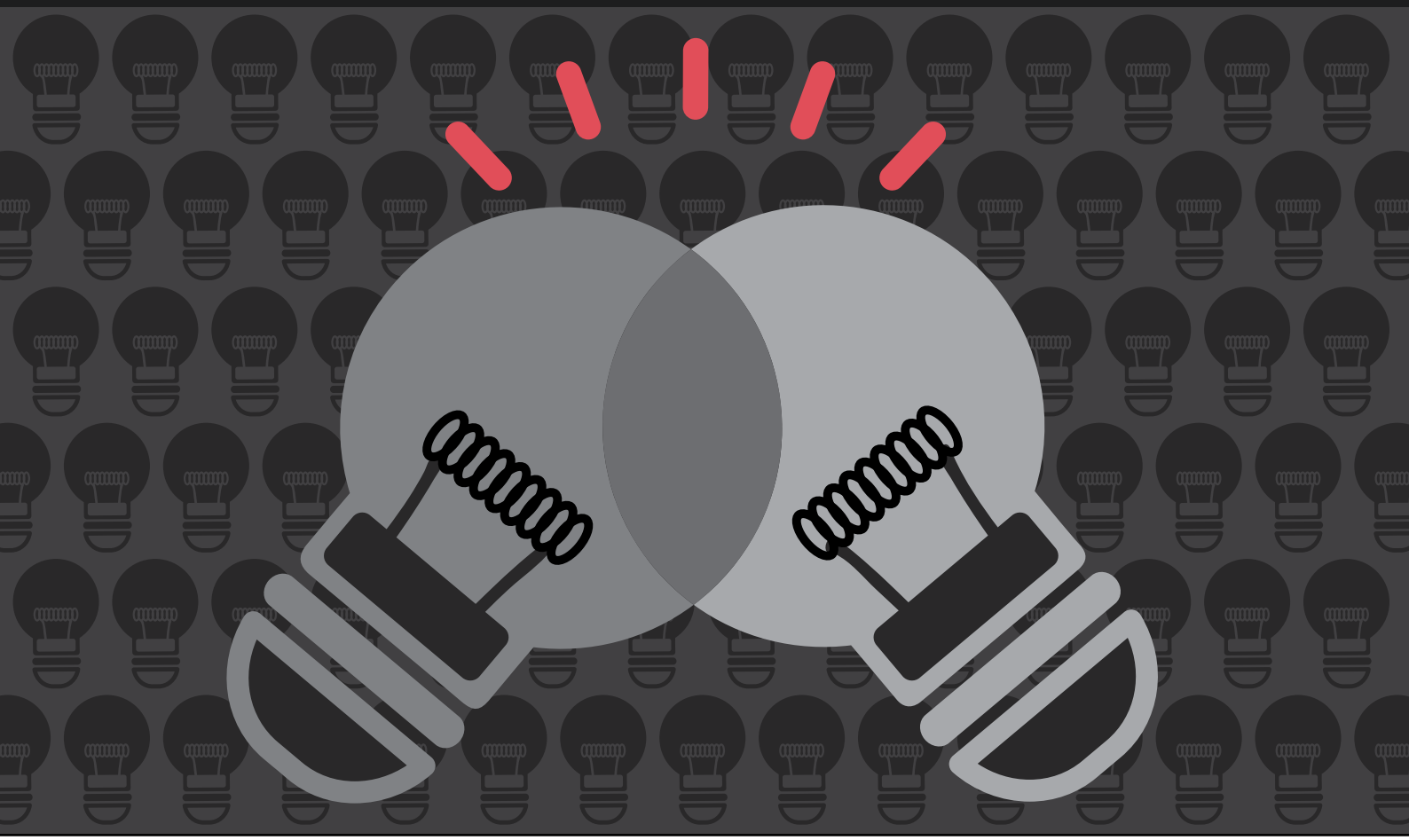
B2B Marketing™



BEGINNER'S GUIDE

Beginner's Guide to Agency Briefing

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In association with

workbrands

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Our recent *Beginner's Guide to Agency Selection* focused on selecting the right creative agency for your business. Assuming that you've chosen an agency you're happy and excited to be working with, you now need make sure you're not only working with your agency in the right way, but also making the most of what it can offer.

This process is potentially a daunting one if you're not used to outsourcing work, and you might also be nervous following past negative experiences where you have trusted your agency to take control of a project.

The following guide is designed to help you if you're not sure where to start when it comes to briefing your creative agency and making the most of the relationship. It will run through some of the most important factors to keep in mind – including setting realistic goals and maintaining open lines of communication – in order to make sure you are on the same page. In addition, you'll find a template for putting together a creative brief, a summary of the main points covered and a list of further reading material.

Getting the most out of your creative agency

JUDITH JANSEN
MARKETING MANAGER
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Your creative agency can be the difference between you and your competitors. It can help you transform brand perceptions, attract the right audience, engage investors and inspire employees, improve brand recognition and ultimately affect your bottom line. Success, however, is equally dependent on your involvement and attitude as a client. A strong relationship between client and agency is vital and will go a long way in creating – and maintaining – a sustainable brand. It will help you meet your targets, increase efficiency and avoid misunderstandings and cost overruns. Intangibles such as chemistry are critical, but there are a number of other factors to keep in mind in order to get the most out of your agency.

1. Measurable objectives

Before the start of a project, both you and your agency need to know what the end goal is, so you have the same expectations of what should be achieved. Objectives should be specific, measurable, realistic and time-related. Goals such as 'increase brand awareness' are too vague and neither of you will be able to demonstrate ROI. Instead use metrics such as website traffic, social media and newsletter open rates. Your agency can advise you on whether your objectives can be achieved within your budget and timescale. Establishing all of this at the outset means you will have the evidence to demonstrate ROI. Likewise, be sure to share your broader objectives as a business so your agency can help you to achieve these. Where do you see your brand in five years' time and what role does this project play?

2. A detailed brief

An effective design brief is the driving force behind any successful project; it will save you time, money and a whole lot of stress. A bad one will invariably result in the exact opposite. In your brief, describe your objectives and include a clear indication of your budget, the scope of work and the timescale. Ensure that you are aligned internally and all those involved in the decision-making process sign off your brief before any work is started. Any changes made once the project is underway can cause delays and incur additional fees.

The key to a successful end product is to provide the agency with as much information as possible right from the start. Leave no stone unturned. The more the agency can get inside your head and under the skin of your business, the better they are able to reflect your brand values and achieve the desired results, meaning you get more for your money. For example, let them know when your deadlines are drop-dead unmovable or when things are less urgent, to help them prioritise accordingly. Communicating such expectations upfront will pave the way for a successful relationship. A template for a creative brief is included in this Beginner's Guide.

If you are unsure about how to achieve your objectives – you may want to run a lead generation campaign, but have no idea what creative input you require – a good agency will offer to co-create the brief with you. They will use their expertise to consult you on the best way to get your message across to your audience.

3. Effective communication

Like any good relationship, communication is key. Make sure your agency itemises and explains everything from the beginning. How did it interpret the brief? How many creative concepts and rounds of amends are included in their cost estimate? Who will be undertaking the work? If you have any questions, no matter how small, ask. This may sound obvious, but it's surprising how often questions that should be asked, aren't.

Don't hold back on sharing your thoughts either. Your agency can't read your mind and, above all, it will increase their understanding of your requirements. Are you expecting to be at the forefront in terms of design? Or would you be more comfortable with a conventional tried-and-tested solution? Being honest and transparent will enable the agency to have your back when necessary. For example, if you are trying to get board buy-in or want to impress senior management, a good agency will ensure that you are supported with the right information to achieve this. Likewise, make sure you are happy with their process and understand their chain

of command. If you'd like direct contact with a designer, make sure you voice this.

Discuss upfront the most efficient ways of communicating with each other depending on location and availability. Feedback is often better shared face-to-face, while small briefs can be taken over the phone. Regular communication works well to keep the project on track, so highlight problems early and keep all parties involved.

4. A single point of contact

The relationship is facilitated by channelling all communication through one primary point of contact in your team. Agencies themselves work in the same way. Upon appointment they will assign you a project manager who you will liaise with for all matters. Having one point of contact limits conflicting messages and misunderstandings and enables you to build a closer relationship with your agency. It also ensures that someone has an overview of the entire project and can answer all questions.

5. Clear feedback

Managing communication successfully means constantly being aware of the feedback you provide. Bear in mind that we always communicate feedback, whether we speak or listen, through our tone, silences and choice of words. We simply cannot not give feedback.

Clear feedback is a vital part of a successful outcome. So, when reviewing creative work, get your thoughts in order so you can explain your points of view clearly and the agency knows where to go next. 'I don't like it but I don't know why' is not helpful to anyone. Break it down into specific elements such as colour, imagery, size and typography, and decide what you like and what you don't like and why. Also make sure that you frame your feedback relative to your objectives.

Ensure all those involved in the process are given the opportunity to provide feedback on initial concepts. Keeping them in the loop ensures everyone is on the same page and will avoid having to go back to the drawing board at a later stage.

6. Mutual understanding

Greater mutual understanding builds trust, and with trust comes greater speed to market. Effective communication is key to this, particularly at the beginning of your relationship. A good agency will take the time to get to know you and your business inside out before starting the work. An initial scoping meeting can prove invaluable in understanding each other's preferred way of working, the decision-making process, team structure, preferred communication methods and billing procedures. It also allows for the process to be discussed in more detail in terms of what is required from you at a given time to allow the agency to deliver the best possible outcome within your budget and time frame.

Ask your agency upfront about their procedures to avoid cost overruns. A good agency will understand what triggers this and will have procedures in place. They will give you regular progress updates to avoid unexpected expenses.

7. Trust their expertise

Agencies are at their best when they are in control of the creative process and are seen as experts, so take advantage of their skills. Working across many different industries, agencies can share observations and bring in ideas from other sectors to help you stand out. Working with an agency is a cost-effective way to access skills that you don't have inhouse. Having creative experts at your fingertips who specialise in all types of marcomms gives you great flexibility when it comes to seizing opportunities and using your budget to the utmost effect. Why not ask your agency for their opinion on your current design? A good agency will provide constructive criticism, a rationale and suggest improvements.

The relationship will be most successful when the agency acts as an extension of your team rather than a supplier. Working closely together and keeping communication lines open enables the agency to help you capitalise on opportunities you may have missed. Treat them as you'd like to be treated as a supplier and aim to develop the relationship.

Creative brief template

Project name:	
Date:	
Contact name and details:	
Deadline:	
Budget:	

Overview

- Project overview
- Primary objectives

About your brand

- Background
- Brand personality
- Brand positioning
- Key competitors

About the project

- Target market
- Key message and USPs
- Tone of voice
- Deliverables
- Distribution

Key learnings

1. A **strong relationship** between client and agency is vital and will go a long way in the development of successful campaigns. It will help you meet your targets, increase efficiency and avoid misunderstandings and cost overruns.

2. Set **measurable objectives** before the start of a project. Both you and your agency need to know what the end goal is, so you have the same expectations of what should be achieved and will be able to demonstrate ROI once the project is completed.

3. Ensure that you are **aligned internally** and get full agreement from all those involved in the decision-making process on your objectives and available budget, before you brief your agency.

4. A **detailed, effective design brief** is the driving force behind any successful project. It will save you time, money and a whole lot of stress.

5. Provide the agency with **as much information as possible** right from the start. The more they can get inside your head and under the skin of your business, the better they will be able to reflect your brand values and achieve the desired results.

6. **Communication is key.** If you're unsure about something, don't make assumptions, just ask.

7. Don't hold back on **sharing your thoughts.** Instead, be transparent. It will increase the agency's understanding of your requirements.

8. The relationship can be facilitated by channelling all communication through **one primary point of contact** in your team.

9. Ensure all decision-makers are given the opportunity to **provide feedback** on initial concepts, to avoid going back to the drawing board later on in the project. Clear feedback is a vital part of a successful outcome.

10. Agencies are at their best when they are in control of the creative process and are seen as experts, so **trust their expertise** and take advantage of their skills.

11. The relationship will be most successful when the **agency acts as an extension of your team** rather than a supplier.

Further reading

- *The Beginner's Guide to Agency Selection*, Workbrands and B2B Marketing
- *How to write a good brief*, Emma Craig, Workbrands
- *5 common pitfalls in client-agency relationships*, Judith Jansen, Workbrands
- *5 ways a design agency can boost your demand generation*, Judith Jansen, Workbrands
- *10 things you were too afraid to ask your design agency*, Judith Jansen, Workbrands
- *Writing a brief, a template for copywriters and designers*, The Marketing Donut

Author biography

With a marketing degree and a career spanning the professional services and creative sectors, Judith has extensive client-side and agency experience taking on a wide variety of marketing challenges. Always on the ball with the latest trends in B2B marketing, she's responsible for all marketing at Workbrands and spends her time getting businesses excited about the power of design.



About Workbrands

Workbrands provides industry-recognised creative and marketing services that go beyond outstanding design. As a multi-disciplined agency, it helps clients on their journey to brand success every step of the way, from designing brand identities to creating integrated campaigns and everything in between. Following a successful 2014, the agency was listed in the *Top 20 Fastest Growing B2B Agencies*. Clients include VMware, CDI AndersElite, Brit Insurance, Western Power, i2i Events Group, Openfield and Teleste.

For more information on Workbrands visit: workbrands.co.uk.

About B2B Marketing

B2B Marketing is the comprehensive information resource for B2B marketers. Its mission is to provide practitioners with the information they need to perform better and achieve more, whatever sector of the B2B space they are operating in.

Launched in 2004 as B2B Marketing magazine, it has since evolved into a multi-faceted resource, delivering a broad range of content in a variety of different forms and formats.

Its key products are:

Magazine: the essential monthly guide to B2B marketing, with a key focus on best practice guidance, plus monthly features looking at current trends, regular research and profiles.

Awards: the showpiece event for brands and practitioners, attracting over 800 people. Former winners include a host of top-tier B2B brands, including Amex, Barclays, Cisco, Dell, Fujitsu, IBM, KPMG, Nokia, O2, Oracle, Orange, SAP, Thomson Reuters, Vauxhall UK and many more.

Research and reports: a library housing the best in B2B practice, in-depth practical guidance and research into specific channels or industry issues.

Training: comprehensive, integrated and flexible training programmes enabling client-side and agency marketers to boost their skillsets and confidence, improve their effectiveness and increase impact on their brand.

Events: quarterly headline events providing essential learning and networking opportunities, including the B2B Summit, the annual B2B Conference and the B2B Leaders Forum.

Membership: become a member and receive all research and reports for free. You will also receive exclusive invites to members-only networking events, get discounts on training seminars, workshops and conferences and receive a subscription to the monthly magazine. There are different levels of membership available.

For more information on any of these products or services go to b2bmarketing.net or call +44 (0) 20 7014 4920

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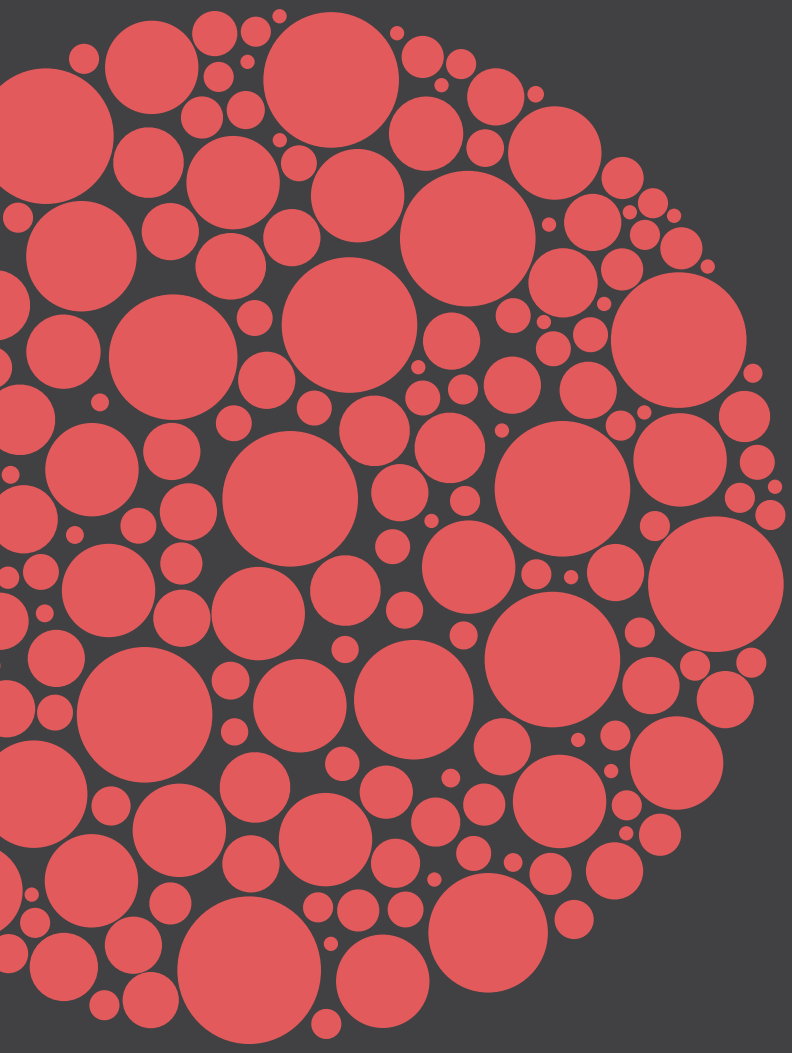
Corporate membership

B2B marketers have never had to be so multi-skilled, multi-tasked, and accountable to business objectives. Marketers need up-to-the-minute research, knowledge and insight to ensure they are not left behind.



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