Creative Brief Template

A client-friendly creative brief template that gets the inputs you actually need - goals, audience, constraints, references, and approvals.

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What's inside

- A 28-question creative brief grouped into context, objective, audience, deliverables, brand, examples, logistics, and approvals.
- An optional form-friendly version (for Google Forms / Typeform).
- Two filled examples (landing page + brand refresh) you can copy as reference.
- A short checklist to run the brief without endless revisions.

Last updated: 2026-01-09

How to use this template

Send the brief before the kickoff call. Ask the client to fill it out, then use the call to clarify answers, confirm constraints, and lock approvals.

> **Quick guidance**
>
> If you only do one thing: define the 'success metric' and the 'final approver' up front. Those two fields prevent most rework.

Creative brief questions

Use these questions as-is in a Doc, or copy the form-friendly version on the last page.

1) Context

A fast snapshot of what you're making and why now.

Project summary (1-2 sentences)

Background: what happened that triggered this request?

What already exists? (links to current site/pages/assets)

2) Objective

What does success look like - and how will you measure it?

Primary goal (choose one)

Success metric / KPI (how you'll know it worked)

Secondary goals (optional)

Must-avoid outcomes (what would make this a failure?)

3) Audience

Who is this for, and what do they care about?

Primary audience (role/title + context)

Top 3 pain points / objections

Stage of awareness (new, comparing, ready to buy, existing customer)

Accessibility or compliance needs (if any)

4) Deliverables

Define what you are delivering and what you are not.

Deliverables list (pages/screens/assets) + quantity

Platforms / placements (web, mobile, email, ads, etc.)

Content owner: who provides copy/images and when?

Technical constraints (CMS, components, file formats)

5) Brand

Reduce guesswork by linking the source of truth.

Brand guidelines / design system link (if any)

Tone / voice adjectives (3-5 words)

Mandatory elements (logos, legal text, CTAs, disclaimers)

6) Examples and references

Show what 'good' looks like to the client.

Examples to emulate (links + what you like about them)

Examples to avoid (links + what you dislike)

Competitors or alternatives the audience compares you to

7) Logistics

Constraints are part of the brief. Capture them now.

Target timeline / launch date (and why that date)

Stakeholders (name + role) and who attends reviews

Budget range (optional) or budget guardrails

Review cadence + tools (weekly call, async comments, etc.)

8) Approval process

Avoid surprise stakeholders at the end.

Final approver(s) (name + title)

Acceptance criteria (how work is approved)

Sign-off steps (what happens after approval)

Prevent endless revisions

- Confirm **one primary goal** (everything else is secondary).
- Write down **one success metric** you will optimize for.
- Name the **final approver** (one person) and the decision deadline.
- Agree on **review cadence** + expected response time (e.g., 48 hours).
- Define what counts as **approved** (acceptance criteria).
- If scope changes, use a **change request** (keep it calm and explicit).

Filled example: Landing page redesign

A quick reference example for a typical B2B landing page request. Keep it short and specific - the goal is clarity, not perfection.

Field	Example answer
Project summary	Redesign the pricing landing page to increase qualified demo requests from paid traffic.
Background	Traffic is up 35% but conversion rate dropped after the last pricing update.
Primary goal	Increase demo request conversion from 1.6% to 2.2% within 60 days.
Audience	Ops managers at 50-200 person companies comparing 2-3 tools.
Deliverables	1 landing page (desktop + mobile), 3 hero variants for an A/B test, handoff specs.
Brand	Use existing design system; tone: confident, direct, minimal hype.
Examples to emulate	Linear pricing page (layout clarity), Webflow pricing toggles (simple comparisons).
Timeline	First draft in 10 business days; launch by Feb 14 for campaign start.
Final approver	Head of Marketing (Sara). Sales lead provides feedback but is not final sign-off.

Tip

When the goal is conversion, ask for one measurable metric. If the client gives you five goals, pick one and label the rest 'secondary'.

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Filled example: Brand refresh

Example for a light brand refresh (not a full rebrand). This works well for agencies who need alignment across stakeholders.

Field	Example answer
Project summary	Refresh visual identity for a consulting firm - modernize the look while keeping brand recognition.
Background	Brand feels dated. New competitors look more modern. Website redesign planned next quarter.
Primary goal	Create a consistent, modern system usable across web + decks within 4 weeks.
Audience	Decision makers at mid-market companies; referrals are common.
Deliverables	Logo refinement, color palette, typography, 6 core components, slide template, social kit.
Brand	Keep current blue as anchor; avoid playful styles; tone: premium, calm, practical.
Examples to emulate	Stripe editorial (spacing), Notion simplicity (components), McKinsey clean layouts.
Constraints	No name change. Logo must work in monochrome. Accessible contrast ratios.
Approval process	Round 1: internal team. Round 2: founders. Final sign-off: CEO (Nadia).

Tip

Write down what will NOT change. 'Light refresh' fails when stakeholders expect a full rebrand.

Form-friendly version

Copy/paste these prompts into Google Forms or Typeform. Keep answer types simple (short text, paragraph, multiple choice).

- **Context**: Project summary; Background / why now; Existing assets links
- **Objective**: Primary goal (single choice); Success metric (short text); Secondary goals (optional); Must-avoid outcomes
- **Audience**: Primary audience; Objections/pain points; Stage of awareness (multiple choice); Accessibility needs
- **Deliverables**: Deliverables list; Platforms/placements; Content owner + deadlines; Technical constraints
- **Brand**: Brand guideline links; Tone/voice adjectives; Mandatory elements
- **Examples**: Emulate links + why; Avoid links + why; Competitors/alternatives
- **Logistics**: Timeline/launch date; Stakeholders + roles; Budget range (optional); Review cadence + tools
- **Approvals**: Final approver(s); Acceptance criteria; Sign-off steps

Related templates

- Project Kickoff Checklist
- Scope of Work Template
- Client Portal Requirements Checklist
- Change Request Form Template
- Design Rate Card Template

Primary keyword: creative brief template