

Contact: YOUR NAME
Phone:
Email:
Fax:

Creative Brief: ProjectName *Version XX.X*

Today's date:

Name of project:

Budget:

Overview: (Please include: project information, goals, measurable objectives)

Format: (Example: one-page 8½ X 11, double-sided letter; website landing page, email appeal, etc.)

Deadline for copy: (Back up to allow for two rounds of revision, approval, design, printing)

Launch or "live" date:

Who is my point person? Final approval contact? (Include first/last name, phone #s, e-mails)

Who are resources/background info contacts? (Same as above)

Who should be cc'd on this project?

If applicable, who is the signer? Does he/she have distinct "voice"? Examples?

What is the tone/style? (Upbeat, newsy, casual, formal/ any specific visual goals.)

Deliverables needed: (List all: letter, brochure, lift letter, buckslip, BRE etc.)

Elements in package: (Please list any other elements that will be included, whether written by me or not)



Contact: YOUR NAME
Phone:
Email:
Fax:

[Note: you only need to answer questions that apply to your project. But all projects need to answer questions re: audience.]

1. What do you want this project to accomplish? (List in order of importance. For example: donation, acquisition, donor development, repeat gifts, fund a specific project)

2. What is the medium? (Direct mail, e-mail, online, magazine, handouts at major donor presentation, etc.)

3. **REQUIRED:** Who is the audience?
 - a. Describe a member of your typical target audience: gender, age, kids/no kids, retired/working, pet owner, etc.
 - b. Are they new, existing, lapsed donors? If existing, giving at what level & for how long?
 - c. Are they familiar w/ your work? How familiar?
 - d. If this is a brochure/informational piece, how will audience use it?
 - e. Do you have any other background research – psychographic, demographic, or other – that will help me know them better? (e.g., telephone surveys,
 - f. How big is the audience? 25 ... 250 ... 300,000?
 - g. If you are using a list, what is it? (House file, swapped list, rented list, email appends, etc. If rented/swapped, from where?)

4. Is anything accompanying this project? (DVDs, video presentations, etc.) If so, I need to see it.

5. Do you have past samples of this communication? If yes, I need to see.
 - a. If yes, how did it perform?

6. What, if anything, makes it urgent? If you plan to follow up, how?

Page 2 of 3



Contact: YOUR NAME
Phone:
Email:
Fax:

7. What are the key details about the project?
 - a. What problem will it solve?
 - b. What are features? (e.g., guide dog training, new chemistry wing, etc.)
 - c. Is there a fundraising goal or ask amount associated with this project? And if so, am I allowed to use it? (Is there a matching amount associated with this goal?)
 - d. Are there any taboo words/phrases?
 - e. Do you have/want to use credibility-boosters for this project: donor testimonials, 3rd party endorsements, outside ratings (like Charity Navigator, etc.)

8. Any real-life stories associated with this project? If yes, where can I find them/who can I contact?

9. Can we personalize? If yes, how?
10. Are we testing any elements? What and how? (If this is direct response mail or email, and you aren't testing anything, why not?)

11. What is the contact info? Call to action? If clicking to a landing pg, list address please.

12. How will this project make the prospect feel they are helping save lives? Build a better world? Leave a legacy? What are the other benefits to the donor?

13. Is there anything else you want me to know about this project?

