Strategic Overview

This Strategic Overview is a living document that informs the creative theme/concept and subsequent campaigns, projects, and deliverables. This document should be kept current and travel with every Project Brief.

Document Information

Last Revised On	
Revised By	
Client	

Background

What's the client's mission? Their vision for success?

What product/service are we selling?
Provide details, including external resources and links to helpful websites. If this is something we've sold previously, has anything changed?

What are our qualitative objectives/goals?
Describe how we want the audience to perceive the client and what they're selling. How do we want to shift their beliefs, values, or attitudes?

What are our quantitative objectives/goals?
Provide any known information about our marketing strategy and tactics, including the media channels and response mechanisms that will be used. If possible, include KPIs, goals for leads, cost per lead, call conversion rate, lead rate, etc.

Strategic Insights

Please come to the creative theme/concept kickoff prepared to determine or discuss the client's key advantages. After the meeting, delete the red text box below and enter the agreed-upon key advantages.

Remember: Key advantages aren't features or benefits, they're the intersection of what the client does best, what their competitors do worst, and what their audience wants most.

Please come to the kickoff ready to talk about:

- The **client's current marketing goals**, including samples of previous years' creative and a recap of past performance
  - What did we learn from the data (trends, audience insights, best practices, etc.)?
- Potential **marketplace challenges** and/or opportunity areas, including strategic analysis of the competitive landscape (share competitive examples if possible)
- The **target audience**, including possible pain points and/or expectations
  - Beyond their age and location, do we know more about them (for example: profile information or Deft Research)?

List key advantages:

What proof points support the key advantages?

Please list all proof points (e.g., benefits, plan ratings, testimonials, etc.) as well as the order of importance (if determined). Please indicate where the Creative Team can find relevant approved language (e.g., include a link to a Creative Versioning Guide, a job number of a previous release, etc., and note any changes).

What could prevent the audience from acting?

Consider marketplace challenges like offers from competitors, upcoming holidays or elections, confusion about changes to health insurance regulations, etc. Also consider interpersonal challenges like past experiences, people's thoughts or feelings, opinions about changes to plan benefits, etc.

Strategic Insights

What helpful brand elements and style preferences — including imagery, brand colors, typography, and helpful do's and don'ts — can you share?

Please include/list any additional resources that you think others may find helpful.

Additional notes:

Client Signature (if required): _____

Date: _____

Project Brief

This Project Brief is a one-time use document that informs a campaign, project, or deliverable. It should be accompanied by a current **Strategic Overview** document, which contains additional information.

Document Information

Prepared by	
Creation date	
Client	
Job Number	
Job Name	

Team Information

Account Team	
Creative Team	
Digital Team	
Media Buyer	
Production Team	
Stakeholders	

Project At-a-glance

Primary Deliverable	
First Target Date	
Estimated/Approved Budget	
Available Hours	

Functional Details

Why are we doing this project?
Describe the motivation for this project. Explain why DMW recommended it or the client requested it.

What needs to be created?
List all deliverables, including needed versions. If existing creative is being updated, indicate scope of updates and/or the location of markups (if applicable).

Direct mail print specs	
Postage type and class	
Print ad types and count	
Print ad specs	
DRTV spot lengths	
Digital ad types and count	

Are there any special requests for the project or deliverable?

What product/service are we selling?
Only describe if it differs from what's in the Strategic Overview.

What's the objective/goal?
Be as specific as possible. How does this project fit into the overall marketing plan?

What action should the audience take?
List one action per row.

Method of response (call, go online, scan QR code, visit, etc.)	Contact information (phone number, URL, address, etc.)	Offer/incentive (get an Enrollment Kit, talk to a rep, etc.)	Details (deadline to respond, value of offer/incentive, etc.)

Strategic Insights

Which key advantage(s) do we need to communicate for this project?

Which proof points support the above key advantages?

Who is the target audience?
Only describe if it differs from what's in the Strategic Overview.

What could prevent the audience from acting?
Only describe if it differs from what's in the Strategic Overview.

Additional Details

Are there specific tag lines, offers, images, logo lockups that need to be included (or avoided) in the deliverable?

Is there content that needs to be included for a USPS® promotion?

Highlight the needed legal disclosure/footer below OR include the location where it can be found.

Additional notes:

Schedule

Kickoff	
IR #1	
IR #2	
Ziflow	
Client Presentation	

Budget Details

Quantity	
Production Budget	

Client Signature (if needed): _____

Date: _____