A marketing brief template that gets useful work back

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A useful marketing brief template describes a decision, not a task. Keep it to one page with one owner: the person who decides. Cover the situation, what exists, the constraint you suspect, deliverables, scope and exclusions, budget, timing and how success will be judged. Where you cannot answer a field, write "unknown".

Why weak work usually starts with the brief

In my experience, both in-house and as an independent consultant, a good deal of disappointing marketing was delivered to the brief it was given. The brief asked for a brochure, a campaign or a website refresh. Nobody wrote down which decision the work was meant to help, so the supplier did the task well and the business still did not move.

A task can be finished. A decision has to be made by someone, and a brief that leaves that out leaves the supplier guessing.

The template

Each row is a field. The right-hand column is what good looks like in it.

Field	What good looks like
Business situation	Two or three sentences on where the business is now and why this work is being asked for now. Facts, not ambition.
What the customer is doing today	How buyers currently find, compare and choose you. Mark what you know from data or conversations and what you are assuming.
The decision or outcome	One sentence: what will be decided, or what will change, because this work exists.
What exists and is worth keeping	Existing content, data, messaging and relationships the supplier should build on, so they do not start from a blank page.
The constraint you suspect	Your best guess at what is getting in the way. It may be wrong, and saying so is fine.
Audience and approvers	Who the work is for, and the named people consulted on it, in the order they see it. Approvers give input. They do not decide.
Deliverables and format	What will exist at the end, in what form, and how many rounds of feedback are included.
Scope and exclusions	What is in, and what is explicitly out. The exclusions save the most arguments.
Budget range and timing	A range rather than a single number, and the dates that are fixed versus preferred.
How success will be judged	The measure, who reads it, and when. If a measure would never change a decision, drop it.
The one owner	The person who decides: yes, no or not yet. One name, not a committee.
What you cannot say or claim	Regulatory limits, unverifiable claims, competitors you will not name, topics that are off the table.

Then apply the rule I use most: one page, one owner. The owner decides. Approvers are consulted, named in order, and the owner settles any disagreement between them. If the brief runs longer than a page, the background is probably hiding the decision. If it has three owners, you do not yet have one brief.

Briefing a consultant differently from an agency

The template is the same. The emphasis is not.

- **A consultant needs the problem and the evidence.** Give them your suspicions, your data and the things you have already tried. They will help decide what the work should be, so a pre-written deliverable narrows the thinking you are paying for.
- **An agency needs the deliverable and the boundaries.** Give them the format, the channels, the approvals, the budget range and the exclusions. They will produce something defined, so vagueness about the output costs you revision rounds.

If you are unsure which you need, fractional CMO or agency covers the difference. Once the brief is agreed, what a marketing statement of work should include turns it into scope and ownership, and the client onboarding checklist covers access and the first week.

When you cannot fill in a field

Write "unknown", and add how you would find out. "Unknown: which enquiries become customers. We could check the last twenty in the CRM."

That is a finding, and often the most useful line on the page. It tells the supplier where to start and stops a guess being built into the plan as fact. If half the fields say "unknown", the first piece of work is probably diagnosis rather than production.

One boundary: a brief cannot rescue an unresolved disagreement inside the business. If the directors do not agree what the work is for, or who decides, a clearer document will only record the disagreement. Settle that first, or make it the first job.

What the supplier should send back

Within a couple of days, a good supplier returns four things:

- Their understanding of the situation, in their own words.
- Their questions, including the ones your brief did not answer.
- The assumptions they are making, so you can correct them cheaply.
- What they would not do, and why.

If what comes back simply repeats your brief with a price attached, nobody has yet tested the thinking.

Free downloads, no sign-up: the brief template (PDF), an editable version (Word) and this guide as a PDF.

Where to start

Take the last piece of marketing work that disappointed you and fill in the table retrospectively. The empty or vague rows usually show where it went wrong. If you would like a second pair of eyes on a draft before you send it, get in touch and tell me what you are commissioning. I'll say plainly whether the brief is ready.

Frequently asked questions

What should a marketing brief include?

Twelve fields: situation, current customer behaviour, the decision the work supports, what exists and is worth keeping, the suspected constraint, audience and approvers, deliverables, scope and exclusions, budget and timing, how success is judged, one owner, and what you cannot claim.

How is briefing a consultant different from briefing an agency?

A consultant needs the problem and the evidence you have, because they will help decide what to do. An agency needs the deliverable and its boundaries, because it will produce something defined. Giving each the other's brief is a common cause of disappointment.

What if I cannot answer every field in the brief?

Write 'unknown' and say how you would find out. An honest gap is a finding, and it shapes the first piece of work. A guessed answer usually gets built into the plan and costs more to unpick later.

How long should a marketing brief be?

One page, with one named owner. Longer briefs tend to hide the decision under background. If it will not fit on a page, the disagreement about what the work is for probably has not been settled yet.

This is a copy of the guide at chapmansconsulting.co.uk/insights/marketing-brief-template/. The web version is kept up to date; this copy is as at 29 September 2026. Free to share; please credit Chapman's Consulting.