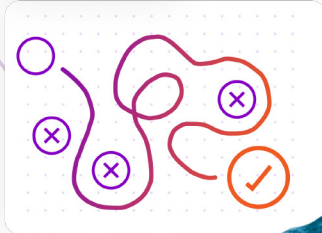


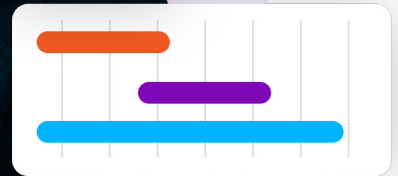


**Kentico**

**Objective**



**Timeline**



 **Audience**

 **Budget**

 **Technical**

**Ebook**

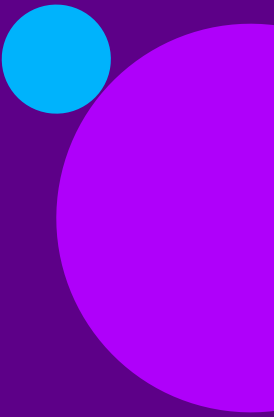
# How to brief your agency.

**10 steps to building the  
perfect brief for your project**

[kentico.com](https://kentico.com)

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Every successful project starts with a clear roadmap. For digital experience projects, that roadmap is your agency brief—a tool that aligns creative vision with business goals, empowering your agency to deliver exceptional results. Yet, crafting a comprehensive brief is often overlooked or rushed, leading to miscommunication, wasted resources, and underwhelming outcomes.

This ebook is here to change that.

Whether you're launching a website, designing a mobile app, or revamping your digital strategy, this guide will equip you with the actionable steps to create a brief that drives clarity, inspires innovation, and keeps your project on track.

We'll begin by exploring why a well-structured brief is essential to your project's success and outline the critical elements every brief should include. Along the way, you'll gain expert insights and actionable tips to transform your brief into a collaborative tool—one that lays the foundation for a successful partnership with your agency and sets your project up for lasting impact.

By the time you finish, you'll have a step-by-step blueprint to create a brief that not only saves time and energy but also empowers your agency to craft a digital solution that exceeds expectations.

Get ready to take control of your next project.

Let's build a brief that delivers.



# Why a clear brief sets your project up for success.

A well-crafted brief is essential for the success of any project involving a new CMS (Content Management System), DXP (Digital Experience Platform), or website. Here's why:

- **Clarity and alignment:** A good brief clearly defines the project's goals, ensuring all parties understand the desired outcomes, deliverables, timelines, and quality standards.
- **Efficient resource management:** It helps identify required resources, preventing scope creep and controlling costs. Agencies can allocate the right expertise, ensuring better budgeting and scheduling.
- **Improved communication:** The brief captures your vision, requirements, and constraints, reducing misunderstandings and fostering collaboration with the agency.
- **Prioritization of needs:** It helps differentiate between essential and optional features, ensuring core functionality remains the focus.
- **Risk mitigation:** By identifying potential risks early, the brief allows for contingency planning and manages realistic expectations across stakeholders.
- **Quality and consistency:** It sets benchmarks for quality, ensuring a cohesive user experience and alignment with your brand identity.
- **Effective platform selection:** A detailed brief helps evaluate vendors based on clear criteria, allowing agencies to submit tailored proposals.

In short, a strong brief is the foundation for a successful project, guiding everything from planning to final delivery.

*“A well-prepared brief acts as a roadmap, guiding creative teams toward innovative solutions that drive real business results. By investing time upfront in a thorough brief, clients can ultimately save time, money, and frustration throughout the project lifecycle.”*



[Ivan Adriel](#), Growth & Strategy Director, at [Granite](#)





# 10 steps to building the perfect agency brief.

Here's a structured approach to guide  
organizations in preparing an effective brief:

# 1 Introduce your company and background.

- Provide a brief history and current position of the company.
- Highlight key products, services, and market position.
- Share your company's vision and mission.
- Share data about your audience, competitors, and industry trends.
- Define the purpose of the project (e.g., replacing an outdated system, improving customer engagement, scaling operations).
- Mention any relevant previous projects or current systems being replaced.
- If your organisation has succeeded or failed with similar projects in the past, provide as much detail as possible around this.

*“Incomplete briefs can lead to misaligned expectations, wasted resources, and subpar outcomes. Common challenges include vague success metrics, inconsistent brand guidelines, and insufficient background on previous campaigns. To avoid these pitfalls, clients should involve key stakeholders early, allocate ample time for brief development, and be open to agency input.”*



[Ivan Adriel](#), Growth & Strategy Director, at [Granite](#)



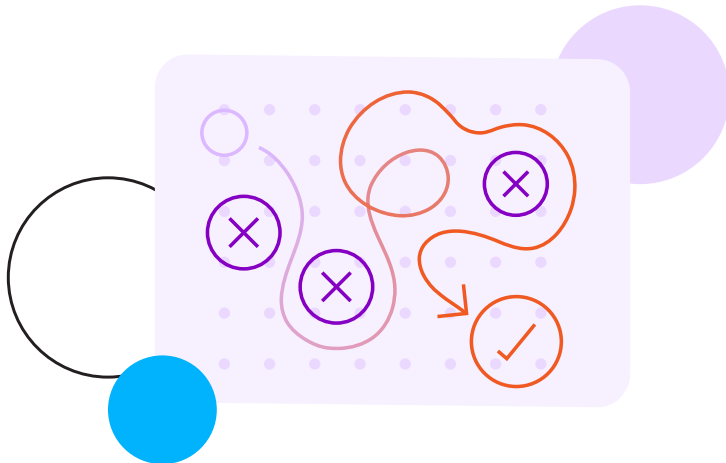
# 2 Objectives and goals.

- Clearly state the main objectives (e.g., enhance user experience, improve SEO, integrate with existing systems). Be specific.
- Include any secondary aims (e.g., future-proofing the site, supporting multilingual content, mobile optimization).
- Outline how success will be measured (e.g., increased site traffic, higher conversion rates, improved customer satisfaction).

*“Crafting an effective brief is crucial for successful client-agency collaboration. The most critical aspect? Clarity of objectives. Clients often underestimate the importance of defining specific, measurable goals and providing comprehensive context about their target audience, competitive landscape, and brand positioning.”*



[Ivan Adriel](#), Growth & Strategy Director, at [Granite](#)



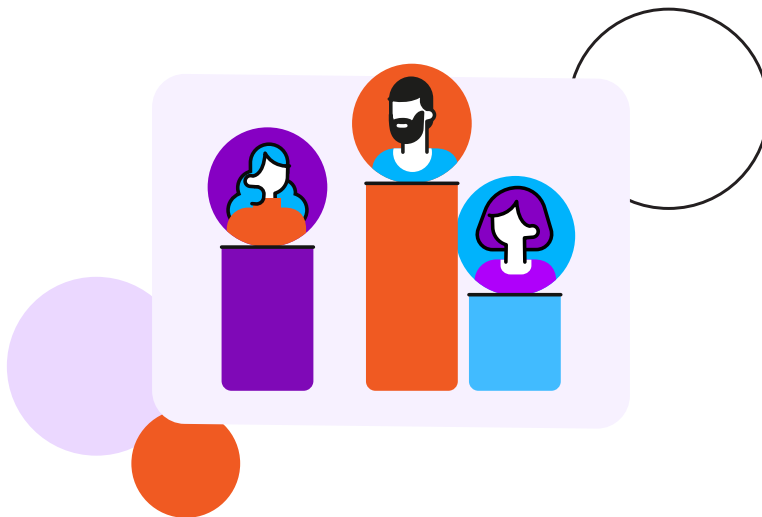
# 3 Target audience and user profiles.

- Define the primary and secondary target audiences (including demographic details, user behavior, and preferences).
- Describe typical user paths and key interactions expected on the platform.

*“It’s helpful to outline typical user paths expected on the platform—such as how users discover content, make decisions, or complete actions. This insight allows agencies to design intuitive, user-centric experiences that meet both business goals and user expectations.”*



[Marek Malík](#), Senior UX Designer at [Kentico](#)



# 4

## Technical and functional requirements.

- List essential features (e.g., content management, e-commerce, personalization).
- Mention desired functionalities (e.g., multilingual support, role-based access).
- Specify required integrations with other systems (e.g., CRM, ERP, third-party APIs).
- Address expected traffic loads and performance expectations.
- Include future scalability needs.
- Highlight necessary security measures and compliance standards (e.g., GDPR, HIPAA).

*“A common issue is when customers list the requirements as if they already know what they need without letting us know what problems they want us to solve with a new project. A long list of features is not always a good starting place. Sure, the tool can have all that you think you need, but will these work well with your current and future challenges? More background information about the challenges that you are facing should be number one on the list of every good brief.”*



[Lukasz Skowronski](#), Solutions Architect at [Konabos](#)



# 5 Design and user experience.

- Provide brand assets and guidelines.
- Include design principles and any established user interface requirements.
- Share insights into the desired user experience.
- Mention any existing user feedback or pain points.
- Define accessibility standards that need to be met (e.g., WCAG compliance).

# 6 Content strategy and management.

- Conduct a content audit of existing content. What will be migrated, created, updated, or archived? Highlight gaps or opportunities for new content.
- Detail the types of content to be managed (e.g., blogs, videos, product descriptions).
- Estimate the volume of content.
- Explain the content creation, approval, and publishing processes.
- Mention any required content migration from existing systems.

*“Clearly defining the types of content to be managed ensures the agency can create the right tools and structures to support your content strategy. Without this clarity, you risk ending up with a system that doesn’t align with your content goals, leading to inefficiencies and missed opportunities to engage your audience.”*



[Jonathan Henault](#), Head of Brand and Content at [Kentico](#)



# 7 Project management and collaboration.

- Provide a desired project timeline and key milestones.
- Indicate any critical deadlines (e.g., product launches, marketing campaigns).
- List key stakeholders and their roles.
- Define decision-making processes.
- Establish preferred communication channels and frequency of updates.
- Specify the format and frequency of reporting.

*“One important aspect of preparing a brief for a new website project that is often overlooked is to define clear roles and responsibilities for each party. Too often we see briefs that talk about objectives and goals at a very high level, but don’t define what the expectations are for what the internal team is tasked with vs. what the external agency is tasked with. Make it clear what your vision is for who is doing what.”*



[Brian McKeiver](#) Co-Owner of [Bizstream](#)

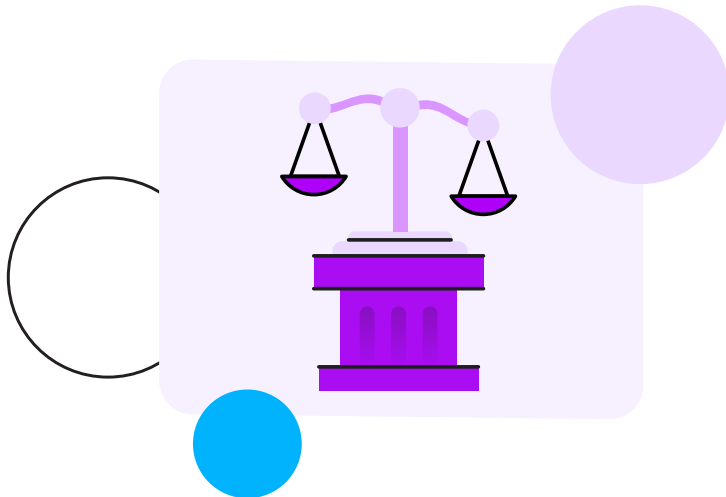


## 8 Budget and resources.

- Provide a clear budget range for the project.
- Detail any financial constraints or considerations.
- Mention the internal resources available (e.g., IT support, content creators).
- Identify any expected contributions from the agency (e.g., design, development).

## 9 Legal and contractual considerations.

- Outline any legal or contractual requirements (e.g., IP rights, confidentiality agreements).
- Specify expectations for post-launch support and maintenance.
- Include any required warranties or service level agreements (SLAs).



# 10 Additional information and future plans.

- Share any planned future phases or enhancements.
- Include any other relevant information or constraints (e.g., legacy system dependencies, preferred technologies).

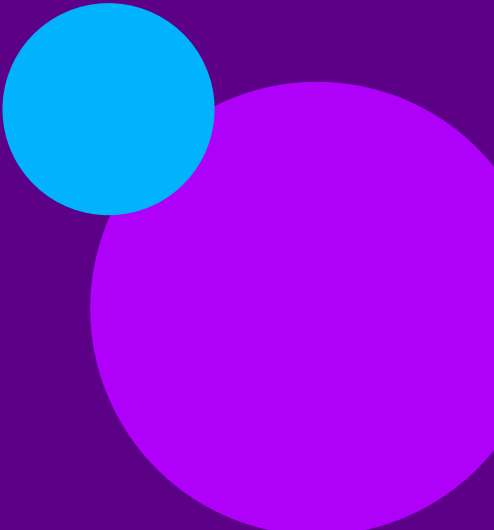
An effective brief ensures that the digital agency understands your organization's needs and expectations clearly. It forms the foundation for a successful partnership and the successful delivery of a CMS, DXP, or website that meets your business objectives.





# Tips for crafting an effective agency brief.

Here are some practical tips and tricks  
to ensure your agency brief is not only clear  
but also strategically powerful:





**1. Define a focused scope:** Be precise about what the project entails. Define deliverables, key milestones, and timelines clearly to avoid misunderstandings. Ensure that the agency has a clear understanding of what is in scope and out of scope for the project.



**2. Prioritize objectives:** Clearly distinguish between “must-haves” and “nice-to-haves.” This helps the agency allocate resources effectively. Make your KPIs measurable to guide the agency’s direction and evaluate their performance later.

*“The most important value of a client brief is to ensure the agency truly understands the customer’s goals, the purpose of the site, their target audience, and often the pain points that are driving their investment. An incomplete or incorrect brief can cause the most important goals to be overlooked in the day-to-day project decisions. The brief is essential for helping us navigate the customer through important project decisions. Without it, we could make the wrong tradeoffs when balancing features, cost, and complexity.”*



[Mike Wills](#), Kentico MVP and VP of Technology at [BlueModus](#)



**3. Ensure clarity:** Use straightforward language that ensures everyone—from the agency to stakeholders—understands the objectives and requirements. If you must include technical or niche terms, provide a glossary or definitions to avoid misinterpretation. Avoid overloading the brief with excessive technical details and prioritize key requirements to guide the project effectively.



**4. Align internal stakeholders early:** Ensure that all internal stakeholders (e.g., marketing, IT, legal) are aligned on the project’s goals, budget, and scope before submitting the brief. Gather input from team members who understand the project’s objectives, technical requirements, and end users. This ensures consistency and avoids conflicting instructions during the project.





**5. Set realistic expectations:** Establish a realistic budget and timeline that align with your goals. Factor in time for revisions, testing, and unforeseen challenges. Break the timeline into clear phases with associated deliverables to track progress. Setting achievable expectations will ensure that both you and the agency are on the same page. Similarly, provide a clear budget range for the project so that the agency can propose solutions that align with your financial constraints. Being upfront about your budget helps the agency recommend the best approach within your means.



**6. Focus on business needs, not features:** Emphasize the business problems or goals that need to be solved, rather than simply listing features. This allows the agency to recommend solutions that are both practical and effective in addressing your core challenges.

*“It’s rare to get a brief from a company that really understands their needs, challenges and possible solutions. It’s more common to get a brief asking for specific tech or vendors because they have heard or read about it. Unfortunately, during our discovery it often happens that the tech they want doesn’t turn out to be the best solution for them. And that can be a hard pill to swallow.”*



[Roel Kuik](#), Martech Practice Lead at [Aviva Solutions](#)



**7. Understand your digital maturity:** Assess your current digital capabilities. Understanding your organization’s level of digital maturity helps determine realistic expectations for the project and highlights the tools, processes, and skills required to achieve your goals. Whether you are just starting out or looking to optimize a well-established system, clearly communicating your digital maturity helps the agency tailor their approach, ensuring that the proposed solution fits your needs and is achievable within your current resources.





- 8. Leave space for agency expertise and creativity:** Agencies bring valuable insights and creative solutions that can enhance the project and lead to better outcomes. Don't overprescribe. Leave space for the agency's expertise and innovation. Encourage the agency to question assumptions and propose bold ideas.

*“It’s surprising how most businesses overestimate their digital maturity and have based their feature wishlist on that assumption. Getting down to the details of what they actually need and can handle—now and in the near future—is something most businesses don’t do all that precisely... with the risk of briefing an agency for tech that’s not the best fit for where they are or growing towards.”*



[Roel Kuik](#), Martech Practice Lead at [Aviva Solutions](#)



- 9. Foster collaboration and communication:** Maintain open communication, set clear expectations, and stay flexible to ensure that both your team and the agency are aligned and working toward the same goal. Define communication channels, timelines for updates, and decision-making processes. Regular feedback and transparent communication ensure that the project stays on track and meets expectations. Designate one person on your side to consolidate feedback and minimize confusion.



- 10. Be visual where possible:** Provide reference materials, such as design mockups, competitive examples, mood boards, or inspiration from other industries. Include user journey maps if possible and diagrams or sketches of the intended user flow for added clarity.



*“The most important aspect of preparing a brief is **comprehensiveness**. With the information you have at the onset of the engagement, think out as many of the business needs, contingencies, people, processes, and platform considerations as is possible. Try not to give this process short shift, because if you do you will be bemoaning the limitations of this charter document throughout the project. That said, also allow for some flexibility. Very few projects end up exactly as they were conceived, and it is often in those pockets of flexibility where great innovation and better ways of doing something can surface.”*



Matthew McQueeney,  
Head of Relationships at Konabos

**Now that we've covered the key elements of a comprehensive agency brief, it's time to put these insights into action for an imaginary firm, Ecothrive Energy.**

# Sample agency brief for Ecothrive Energy.

1. Introduction and background	Why it works
<p><b>Company overview:</b></p> <p>Founded in 2005, Ecothrive Energy provides sustainable energy solutions, including solar panel installation, energy-efficient HVAC systems, and eco-friendly consultations. Headquartered in Portland, Oregon, we serve the West Coast with a mission to make renewable energy accessible for all.</p> <p><b>Why this project:</b></p> <p>Our outdated website hampers customer engagement and limits our ability to meet growing demand for online consultations and educational resources. We need a modern, user-friendly platform to scale operations, enhance engagement, and integrate seamlessly with our CRM system.</p> <p><b>Previous learnings:</b></p> <p>Previous redesign efforts in 2021 failed due to unclear objectives and misaligned stakeholders. Users find navigation confusing and are frustrated by the lack of mobile responsiveness.</p>	<p><i>Provides a clear snapshot of the company, laying the foundation for informed project decisions.</i></p> <p><i>Strategic vision enables the agency to align its recommendations and deliverables with broader strategic objectives.</i></p> <p><i>Clearly defines the problem, helping the agency determine project priorities and propose relevant solutions.</i></p> <p><i>User feedback provides actionable insights for the agency to address.</i></p>



2. Objectives and goals	Why it works
<p><b>Primary objectives:</b></p> <ul style="list-style-type: none"> <li>• Enhance UX with intuitive navigation and modern interface.</li> <li>• Improve SEO to increase organic traffic.</li> <li>• Integrate with our CRM for better lead management and tracking.</li> <li>• Position the website as the go-to resource for renewable energy education by 2026.</li> </ul> <p><b>Secondary goals:</b></p> <ul style="list-style-type: none"> <li>• Enable mobile responsiveness.</li> <li>• Future-proof the site for multi-language support.</li> </ul> <p><b>Success metrics:</b></p> <ul style="list-style-type: none"> <li>• Increase site traffic.</li> <li>• Improve conversion rates for consultation bookings.</li> </ul>	<p><i>Objectives focus on tangible, specific outcomes and guide the agency toward the project's core purpose.</i></p> <p><i>Separating secondary goals helps the agency prioritize resources effectively.</i></p> <p><i>Measurable metrics</i></p> <p><i>tie the objectives to quantifiable outcomes, giving the agency a clear understanding of what constitutes success.</i></p>
3. Target audience and user profiles	Why it works
<p>Primary audience: Homeowners (ages 30–55), typically female, interested in renewable energy solutions, with moderate to high disposable income.</p> <p><b>Secondary audience:</b></p> <p>Commercial property managers seeking energy-efficient solutions to reduce operational costs.</p> <p><b>User behavior:</b></p> <p>Homeowners start with research articles before exploring product options. Commercial clients prioritize ROI calculators and detailed service offerings.</p> <p><b>User journeys:</b></p> <p>Example path = “Learn about solar benefits” → “Explore solutions” → “Schedule a consultation.”</p>	<p><i>Splitting the audience helps the agency focus on the most critical audience first.</i></p> <p><i>Outlining specific user behaviors gives insights into what features and content will drive engagement.</i></p> <p><i>Identifying distinct needs for each audience sets the stage for delivering personalized experiences.</i></p> <p><i>The user journey allows the agency to ensure experiences align with expectations.</i></p>



4. Technical and functional requirements	Why it works
<p><b>Essential features:</b></p> <ul style="list-style-type: none"> <li>• Content management system (CMS) with easy-to-use templates for blogs, FAQs, and case studies.</li> <li>• E-commerce functionality for purchasing smaller products like energy monitors.</li> <li>• Integration with CRM for lead tracking and email marketing.</li> </ul> <p><b>Desired functionalities:</b></p> <ul style="list-style-type: none"> <li>• Multilingual support for future expansion.</li> <li>• Role-based access for internal content teams.</li> <li>• Meet GDPR compliance standards.</li> </ul>	<p><i>Defines essential features clearly, giving the agency a concrete set of must-haves to focus on.</i></p> <p><i>Balancing current needs with future aspirations helps the agency design a scalable, adaptable platform while managing resource allocation effectively.</i></p> <p><i>By not overprescribing, the agency has the space to add value with expertise and creativity.</i></p>
5. Design and user experience	Why it works
<p><b>Brand guidelines:</b></p> <p>Use our established color palette: green (#3AB54A) and blue (#0D8BF2), symbolizing sustainability and trust. Maintain a clean, minimalistic design to reflect our eco-friendly ethos.</p> <p><b>User feedback:</b></p> <p>Users find the current site cluttered and challenging to navigate. They seek quicker access to essential tools like cost calculators and booking forms.</p> <p><b>Accessibility standards:</b></p> <p>Comply with WCAG 2.1 AA standards.</p>	<p><i>The brand guidelines give direction while giving space for innovative design.</i></p> <p><i>User pain points ensure the redesign directly addresses known issues.</i></p> <p><i>The section is concise yet comprehensive, focusing on actionable insights rather than overwhelming the agency with unnecessary detail.</i></p>



<h2>6. Content strategy and management</h2>	<h3>Why it works</h3>
<p><b>Content scope:</b></p> <ul style="list-style-type: none"> <li>• Approximately 200 articles, blogs, and whitepapers to be migrated from the current system.</li> <li>• New content types include video testimonials, ROI calculators, and customer success stories.</li> </ul>	<p><i>Gives the agency a tangible understanding of the workload.</i></p> <p><i>Knowing content types helps them recommend technologies, tools, templates, or features.</i></p>
<h2>7. Project management and collaboration</h2>	<h3>Why it works</h3>
<p><b>Timeline:</b></p> <ul style="list-style-type: none"> <li>• Project kickoff: Early 2024</li> <li>• Launch: Late summer 2024</li> </ul> <p><b>Key stakeholders:</b></p> <ul style="list-style-type: none"> <li>• Marketing Director (Project Owner): Oversees content and branding.</li> <li>• IT Manager: Manages integrations and technical specifications.</li> </ul> <p><b>Communication plan:</b></p> <ul style="list-style-type: none"> <li>• Weekly progress updates and bi-weekly calls. Major milestones will involve comprehensive stakeholder reviews.</li> </ul>	<p><i>Timeline gives the agency a clear project duration while not being too specific, which can limit project outcomes.</i></p> <p><i>Listing stakeholders clarifies who is responsible for which aspects of the project.</i></p> <p><i>The communication plan ensures the agency understands expectations and processes.</i></p>
<h2>8. Budget and resources</h2>	<h3>Why it works</h3>
<p><b>Budget range:</b></p> <p>\$100,000–\$150,000, inclusive of design, development, and post-launch support.</p> <p><b>Internal resources:</b></p> <p>Our IT and marketing teams will assist with content creation and testing phases.</p>	<p><i>Clear budget parameters allow the agency to propose appropriate solutions and manage expectations.</i></p> <p><i>Clarifying internal assistance ensures effective resource allocation, avoiding overlap.</i></p>



9. Legal and contractual considerations	Why it works
<p><b>Requirements:</b></p> <ul style="list-style-type: none"> <li>• Full intellectual property rights for the final deliverables.</li> <li>• Confidentiality agreements to protect proprietary information.</li> <li>• One year of post-launch maintenance included.</li> </ul>	<p><i>Outlining key legal and contractual terms reduces the potential for disputes later on.</i></p> <p><i>Clarifying post-launch support ensures bugs or issues will be addressed in the critical early stages post-launch.</i></p>
10. Additional information and future plans	Why it works
<ul style="list-style-type: none"> <li>• <b>Phase 2 (2025):</b> Implement personalization for user recommendations.</li> <li>• <b>Preferred technologies:</b> Open to recommendations but leaning towards Xperience by Kentico for its scalability, flexibility, and powerful content management capabilities.</li> </ul>	<p><i>Including details of a Phase 2 helps the agency plan for scalability and future integration.</i></p> <p><i>Technology preference helps the agency tailor their proposals while inviting their expertise.</i></p>



# Set yourself up for success.

A well-structured agency brief isn't just a document—it's the foundation of a successful project and a powerful tool for collaboration. By clearly defining your objectives, understanding your audience, and providing detailed, actionable insights, you set the stage for a partnership that delivers real results.

Remember, the effort you put into creating a thorough and thoughtful brief will pay dividends in the form of smoother project execution, innovative solutions, and a final product that truly meets your goals.

So take the time to build your brief carefully—and watch as your vision takes shape, stronger and more impactful than ever before.

Ready to brief your agency? What about starting by finding the ideal implementation partner for your project?

[Get in touch](#)

# About Kentico.

Reduce the complexity of your marketing technologies and take control of your content across your websites, microsites, emails, and other digital channels through a single solution. Empower your team to create personalized, engaging customer experiences while eliminating time-consuming tasks with a comprehensive content management system that is easy to learn and use.

Tailor content and delivery to individual preferences and develop consistent interactions across multiple digital touchpoints and reach your customers on their favorite channels—any time, anywhere. No need to worry about surprise expenses thanks to transparent, predictable pricing and low ownership costs. Kentico's platform consolidates all the tools you need for successful multichannel content management and digital marketing in a single solution. It offers a rich set of built-in capabilities to help your team achieve more with fewer processes and less technology. With transparent pricing and flexible licensing, you will improve productivity while accelerating business outcomes.

## Eager to learn more?

Talk to our experts! Schedule a free live online 1-on-1 demo of Kentico and let one of our experts walk you through the features and capabilities that will help you create amazing digital experiences.

**MEET OUR EXPERTS**

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