



— GUIDE FOR AGENCIES

What to put in a brief so the piece comes out right first time

Five questions every brief has to answer, a checklist and five templates to copy. Works for a reel, a carousel, a post, a video or a web page, and with any tool. You don't need PortaliaFlow to apply it.

THE FIVE QUESTIONS

- 01 What is the piece, and when is it for?
- 02 What does it have to say, and to whom?
- 03 With what materials, and what references?
- 04 Who decides, and how many rounds are included?
- 05 How will we know it came out right?

01

What is the piece, and when is it for?

Half of the pieces that come back with changes didn't fail on the idea: they failed on something nobody had written down. Before thinking about content, make the job clear:

- ☐ Type of piece and channel. A reel for a social network is not the video for the website, even if they come from the same shoot.
- ☐ Exact format: length or number of screens, vertical or horizontal, with or without on-screen text, with or without subtitles.
- ☐ Publication date and, counting backwards, the date the draft is due and the deadline for approval.
- ☐ What this piece is for, in one sentence: sell, raise awareness, explain, remind. If it doesn't fit in one sentence, it's two pieces.
- ☐ If it's part of a campaign or a series, which one and which number it is.

TEMPLATE · BRIEF HEADER

Piece: [type] for [channel] · Format: [length or screens, orientation] · Campaign: [name, or “one-off”]

Goes out on [date] · Draft on [date] · Approval by [deadline]

What it's for: [one sentence].

02

What does it have to say, and to whom?

A brief that says “something cool about the new service” will come back with changes. One that says which idea the viewer has to walk away with almost never does.

- ☐ One single idea the viewer has to walk away with. If there are three, pick the first and keep the others for other pieces.
- ☐ Who it's talking to: not “everyone”, but the specific person the agency and the client have in mind.
- ☐ What we want them to do next: save, comment, open a link, write, nothing. And the exact link or call-to-action text.
- ☐ What can't be said or shown: prices, promises, competitors, words the client avoids, people who haven't given permission.
- ☐ The facts that have to be exact: names, figures, dates, addresses, terms. Written in the brief, not from memory.

TEMPLATE · THE PIECE'S MESSAGE

The idea they have to walk away with: [one sentence, the way the client would say it to a friend].

It's talking to: [specific person: what's going on for them, what they're looking for]. Afterwards we want them to: [action] → [exact link or call-to-action text].

Don't say or show: [list]. Exact facts: [list].

03

With what materials, and what references?

“I'll send you the photos” is the sentence that delays the most pieces. Whatever isn't in the brief the day the piece starts doesn't exist.

- ☐ What the client delivers and by when: photos, videos, logo, legal copy, product. With file names and where each thing is.
- ☐ What the agency provides: music, templates, stock photos, voice-over. In writing, so it's not argued about later.
- ☐ The version of the brand guidelines (or the logo) that counts today. An old logo is a guaranteed round of changes.
- ☐ Two or three "like this" references and one "not like this", with a line on why. The client's own previous pieces count.
- ☐ What happens if the material doesn't arrive on time: the date moves, or we work with what we have. Decided beforehand, not on delivery day.

TEMPLATE · MESSAGE TO REQUEST MATERIALS

Hi [name]. For [piece] (goes out on [date]) we need these materials by [date]: [list, with the format of each]. Upload them to [place] named [client-piece-date]. If we don't have them that day, publication moves to [new date].

04

Who decides, and how many rounds are included?

The brief is also an agreement. If it doesn't say who approves and how many rounds there are, whoever insists the most will decide.

- ☐ Who approves the piece, by name, and who stands in for them. One person: everyone else gives their opinion before the brief, not after.
- ☐ Who answers questions during production, and how quickly.
- ☐ How many rounds of changes are included and what counts as a round: one list of changes sent in one go.
- ☐ What counts as a change of concept: touching the idea, the audience or the message from question 2 means going back to the brief, not a correction.
- ☐ Who signs off the brief for the client and for the agency. A written "OK" on the brief saves more rounds than any template.

TEMPLATE · BRIEF AGREEMENT

Approves: [name] (stand-in: [name]) · Questions: [name], replies within [n] working hours.

Rounds included: [n]. A round is one list of changes sent in one go through [channel]. Changing the idea, the audience or the message is a new piece.

Brief signed off by [client] on [date] and by [agency] on [date].

05

How will we know it came out right?

If the only measure is “the client likes it”, every piece is a lottery. Write down beforehand what it has to meet to be approved.

- ☐ Three or four criteria that can be checked: it says the idea from question 2, respects the brand, fits the format, carries the call-to-action and the link, the facts are exact.
- ☐ Who reviews inside the agency before the client sees it, and with which checklist. Nobody reviews their own piece.
- ☐ When delivering, explain in two lines which decisions you made and why. A piece with an explanation gets approved more than a piece on its own.
- ☐ When it comes back with changes, note which question of the brief had the gap. That's what to fix in the next brief.
- ☐ Once a month, look at which clients and which types of piece come back most often. It's almost always the same unanswered question.

TEMPLATE · CHECKLIST BEFORE SENDING FOR APPROVAL

Says the idea from the brief in the first seconds or on the first screen · Correct format and length · Logo and brand from the current version · Call-to-action and link checked · Names, figures and dates checked against the brief · Nothing from the “don't say” list · Reviewed by someone who didn't make it · Delivery note with what was decided and why

What you can do this week, without changing tools

- ☐ Take the last piece that came back with changes and see which of the five questions wasn't answered.
- ☐ Use the header and the piece's message in the next brief, even if it's in an email.
- ☐ Send the materials message, with a date, to the two clients who are always "just about to send it".
- ☐ Run the checklist before sending for approval on every piece this week.

YOU MAY ALSO FIND USEFUL

How to put your client approvals in order What to agree, how to ask for an approval that can be given, and what to do with changes and with clients who don't reply.

How to tell a client is cooling off before they leave The four signals that a client is cooling off, how to measure them by hand every month and what to do about each one.

How to know what you owe each freelancer at month end Five steps so that paying freelancers doesn't depend on a spreadsheet: rate in writing, cost born with the piece, what counts as completed, expenses and month end.

How to show your client what you do for them every month Five steps so your client knows what you do for them without a twenty-page report: what to tell, let them see it, what's pending on their side, a fixed rhythm and the twenty-minute meeting.

And the twenty-five templates from the five guides, together: [**All the templates on one page \(portaliaflow.com/en/templates\)**](https://portaliaflow.com/en/templates)

portaliaflow.com/en/approvals-guide · portaliaflow.com/en/client-health-guide ·

portaliaflow.com/en/freelancer-payments-guide · portaliaflow.com/en/client-updates-guide

If you'd rather all this lived in the same place as the piece

PortaliaFlow doesn't write the brief for you and has no briefs module. What it does is keep everything the brief decides attached to the piece, in a portal with your brand:

- ✓ Each piece carries its type (reel, carousel, video, story, post), its channel and its date in the content calendar, which the client also sees.
- ✓ The client's materials and references live in their Library, per client and with temporary links, not in a chat.
- ✓ Questions are asked on the piece itself: with the client, in the approval thread; within the team, with @mentions the client doesn't see.
- ✓ The client approves or asks for changes on the piece itself; asking for changes requires a note, and every round is numbered next to its version.
- ✓ Each piece follows its client's workflow (production, review, approval, publication) with one person responsible at each step, and nobody approves their own piece.

And to see, with a sample piece and made-up data, how it goes through production, review, approval and publishing: **[Try it: this is how a piece moves through your team \(portaliaflow.com/en/what-your-team-sees#prueba\)](https://portaliaflow.com/en/what-your-team-sees#prueba)**

And what it doesn't do: it has no brief form, doesn't write content, doesn't publish to social media and doesn't replace the agreement with your client.

A PortaliaFlow guide, client portal for agencies · portaliaflow.com/en/brief-guide · Feel free to share it with your team and your clients.