

Client Briefing Checklist

Before ending the client briefing session, make sure we have all the answers to the following questions:

QUESTION	ANSWERED?	REMARKS
THE OBJECTIVE		
Is marketing objective to grow market share OR to grow the size of total market?	<input type="checkbox"/>	
Is the source of business users OR non-users?	<input type="checkbox"/>	
Has there been any activities in the past trying to achieve the same objective and source of business?	<input type="checkbox"/>	
THE PATH TO PURCHASE		
Are the buyers same with OR different than the end-users?	<input type="checkbox"/>	
When and where do people usually start realizing they need the category?	<input type="checkbox"/>	
What are the steps do people usually take to get the product/service?	<input type="checkbox"/>	
Who can influence people about the way they make choices?	<input type="checkbox"/>	
What final steps do people take to actually acquire the product/category?	<input type="checkbox"/>	
Are the others who share in the act of consumption?	<input type="checkbox"/>	
THE BRAND		
What is the “for...” part of the brand positioning?	<input type="checkbox"/>	
What is the “only...” part of the brand positioning?	<input type="checkbox"/>	
What the “because...” part of the brand positioning?	<input type="checkbox"/>	
Are the current brand associations different than the intended?	<input type="checkbox"/>	
THE PRODUCT/SERVICE		
What does the product do better than its competitors?	<input type="checkbox"/>	
How different is the product’s price from competitors?	<input type="checkbox"/>	
THE PREVIOUS COMMUNICATION		
Has there been a consistent unifying theme or platform?	<input type="checkbox"/>	
Are there non-negotiable mandatory elements?	<input type="checkbox"/>	
THE LOGISTIC		
What is the budget and how is it split up?	<input type="checkbox"/>	
Are the dates for important milestones agreed?	<input type="checkbox"/>	
Are the ones who wrote the brief different that the one who’ll approve the proposal?	<input type="checkbox"/>	
Who influences the approver of the proposal?	<input type="checkbox"/>	

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This checklist is not intended to be a teaching tool or an algorithm.

Additions and modifications to fit local practice are encouraged.

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