Clotho
DIGITAL

How to create a marketing brief:

a practical template

An editable template with a completed example and a checklist to help you prepare for a marketing conversation.



MARKETING BRIEF PACK
For UK SMEs planning marketing projects or ongoing support

Start with what your business needs

A useful marketing brief explains what you want to achieve, where things stand today and what support you are looking for. It gives a prospective partner enough context to ask better questions and propose work that fits your business.

You may already know that you need help with SEO, an advertising campaign or regular content. Equally, you may have a clear business problem and need advice on the best way to address it. Both are valid starting points.

This template works for a defined marketing project, a campaign or ongoing support. Use the sections that apply and record any important gaps. You can share the finished brief with colleagues, an agency or an independent specialist.

How to use the pack

Use the accompanying Word document to type your answers, or print the worksheet pages and make notes on the lines. Short paragraphs are usually enough. Add supporting reports or examples as links or attachments rather than reproducing them in the brief.

If an answer is unknown, say so and explain what needs to be established. Estimates are useful when they are labelled clearly. Ask the people responsible for sales, delivery and approvals to check the parts that affect them before sharing it.

The completed example shows the level of detail you might include. Its business, figures and targets are fictional and are not suggested budgets or promised results.

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The business and the reason for the brief

Business name: _____

Website: _____

Main contact and role: _____

Contact details: _____

Brief date and version: _____

Explain what you sell, who buys it and where you operate. Identify the products or services this work should support, then describe why you are seeking help now. Include any change in the business, such as a new offer, unused capacity, a shift in audience or a problem with current results.

Your notes

The objective and what success would mean

State the business outcome you want marketing to support and the period you have in mind. Give the current position and a target where you can, distinguishing confirmed figures from estimates. Explain what a suitable enquiry, customer or sale looks like for your business, including any work you do not want to attract.

For example, a requirement for more enquiries is more useful when it identifies the service, the customer and the type of opportunity you want. If you cannot set a credible target yet, ask for help establishing a baseline before agreeing one.

Your notes

The audience and the offer

Describe your priority customers, the people involved in buying and the circumstances that lead them to look for help. What do they need to understand before choosing you? Include the offer or service to promote, your main alternatives or competitors, and the evidence that supports your claims.

Your notes

Current activity and what you have learned

Summarise the marketing you currently run and any relevant results. Note the period covered, the source of the figures and any tracking gaps. Explain what you have tried before, what happened and why it ended or changed. If the reasons are uncertain, record the uncertainty rather than assuming an activity cannot work.

Useful supporting material may include campaign reports, search data, enquiry records, existing content and customer feedback. Share relevant information securely; passwords and customer records do not belong in this brief.

Your notes

The support you want

Describe whether you need a defined project, a campaign or ongoing support. List any outputs or channels you already have good reasons to request, along with the reasoning. Separate essential requirements from suggestions you want the provider to assess. Explain what is outside the scope and where you need a recommendation.

If you are unsure of the approach, you can write: We need help assessing the current activity and recommending where to focus. Please explain your proposed priorities, the work involved and how we would review progress.

Your notes

Available resources and responsibilities

Identify who will manage the relationship, provide information, approve work and follow up enquiries. Describe the time your team can realistically contribute. Include existing suppliers and useful assets such as photography, brand guidelines, case studies, email systems or reporting tools. Flag missing assets, access restrictions and dependencies.

Your notes

Budget and timing

Give an available or indicative budget range and say whether it is approved. Separate one-off setup or project costs, recurring support fees, advertising spend and any allowance for tools or external production. State whether VAT is included. If you need help setting a budget, say what decision the proposal should help you make.

Budget breakdown

Include the preferred start date, any genuine launch deadline and the reason for it. Explain your expected commitment or review period, internal approval timetable and factors that could delay delivery.

Timing and dependencies

Measurement and the response you need

Explain which results you want to review, who can provide the information and how often you expect a discussion. Where sales follow an enquiry, identify how you will share feedback on suitability and outcomes. Distinguish business outcomes from activity measures such as traffic, impressions or content published.

Measures and responsibility for reporting

Tell providers what you need in their response. This might include their recommended approach, scope, deliverables, responsibilities, timing, fee breakdown, separate costs, assumptions and relevant experience. Include the response deadline and who will make the decision. Ask providers to identify anything they need to clarify before quoting.

Proposal requirements and decision process

Your main question for the provider

Finish with the question you most need their help answering. This gives them a clear place to begin when you speak.

Example Office Interiors

Illustrative example only. The business, budgets, performance figures and targets below are fictional. They demonstrate a brief and are not a Clotho case study or price recommendation.

Business: Example Office Interiors
Main contact: Managing director
Work requested: Marketing review and ongoing implementation proposal
Brief date: 5 January 2027

1 The business and the reason for the brief

We are an established office furniture and interiors supplier with 18 employees, serving businesses in West Sussex and Hampshire. We want more furniture and installation projects worth approximately £15,000 to £60,000. Most work comes through referrals, and we have capacity for two additional projects a month. We are seeking help because marketing activity is irregular and we cannot identify which of it contributes to suitable enquiries.

2 The objective and what success would mean

Our enquiry log shows an average of four suitable new project enquiries a month over the last six months. We would like to explore whether eight a month is achievable within six months of starting the work, within the proposed budget. This is a planning target for the provider to assess. We estimate that around one in four suitable enquiries becomes a project, but need to check that figure and the time taken to convert.

A suitable enquiry is from a business in our service area considering a furniture and installation project of at least £15,000 within six months. We do not want more requests for single replacement chairs or domestic furniture.

Audience and current activity

3 The audience and the offer

Our main contacts are office managers, facilities managers and business owners planning an office move or refurbishment. They need confidence in delivery dates, installation arrangements and furniture suitability. We offer product selection and installation through one team. We have three recent projects we can describe, subject to customer approval for photographs and testimonials.

4 Current activity and what we have learned

We have a website, an irregular LinkedIn presence and a Google Ads campaign costing £800 a month. Reports show clicks and form submissions, but submissions include unsuitable requests. Our enquiry log does not consistently record source. We stopped a monthly newsletter because nobody owned the content or approval process. We have not established whether email could contribute with a clearer purpose and ownership.

Support and responsibilities

5 The support we want

We want a review of our current marketing and a proposal for six months of focused implementation. Please assess the existing advertising and enquiry journey before recommending increased spend. We are open to other channels where the recommendation is supported by our audience and budget. A full website rebuild is outside this brief; any necessary page changes should be identified and costed separately.

6 Available resources and responsibilities

The managing director will approve the plan and spending. Our sales coordinator can provide up to two hours a week for information, enquiries and feedback on lead quality. A part-time administrator can publish approved content. We have brand guidelines, product photography and access to the advertising and analytics accounts. Our website developer will handle technical changes under a separate agreement. Please flag any additional input you need from us.

Budget and timing

7 Budget and timing

We have an approved total monthly ceiling of £3,000 excluding VAT for support, advertising and any tools. Our working allocation is £1,500 for support, £1,000 for advertising and £500 for agreed additional costs. These allocations can change within the total if the proposal explains why. A separate setup allowance of up to £1,500 excluding VAT is available, subject to approval of the scope.

We would like to begin in February 2027. There is no fixed campaign launch date. Please show what could reasonably be established in the first month and propose review points across six months. We will discuss the initial proposals before agreeing a start date and contract terms.

Measurement and proposal requirements

8 Measurement and the response we need

We want a monthly review of suitable enquiries, cost where attribution is available, and progression to proposals and completed projects. Our sales coordinator will maintain the enquiry log and update outcomes. Please explain the tracking work required, the limits of attribution and how you would assess performance while projects are still moving through the sales process.

Please respond by 19 January 2027 with your recommended approach, first-month priorities, ongoing scope, responsibilities, fee breakdown and separate costs. Include relevant experience, assumptions, proposed commitment terms and any questions you need answered. The managing director will decide after discussing the proposals.

The main question for the provider

Where should we focus the available budget to generate more suitable project enquiries, and what needs fixing before we increase our advertising spend?

Check your brief

Read the brief as someone who is meeting your business for the first time. Could they understand the problem, assess whether they can help and explain what they need to know next?

- [ ] The business, priority offer and intended customers are clear.
- [ ] The objective explains what should change, with a period and starting point where known.
- [ ] A suitable enquiry, customer or sale is defined.
- [ ] Confirmed facts, estimates and open questions are distinguishable.
- [ ] Previous activity and lessons are included, along with relevant evidence.
- [ ] Required work, suggested approaches and areas needing advice are separated.
- [ ] The available budget distinguishes fees, advertising and other costs.
- [ ] Someone owns information, approvals and enquiry follow-up, with realistic time available.
- [ ] Timing, dependencies and the information required in a proposal are clear.
- [ ] You have removed passwords, personal customer data and unnecessary confidential material.

What happens next

Share the same brief with the providers you are considering and give them an opportunity to ask questions. If an answer changes the scope, update the brief so you can compare proposals on the same basis. Consider the reasoning, responsibilities and assumptions alongside the fee.

Discuss your marketing brief

Clotho Digital supports UK SMEs with marketing projects and ongoing implementation across SEO, content, paid advertising, email and measurement. We agree the work around your priorities and the resources available to deliver it.

If you would like to discuss working with us, email your completed or partly completed brief to jack@clothodigital.com. We can clarify what you need, discuss whether we are a suitable fit and establish the next step. If you are still deciding on the approach, include the main question you need help answering.



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