

Sample Agency Brief

Luminary



This sample agency brief is based on a typical store finder application. In each section, we've provided a good example and a not-so-good example to illustrate the do's and don'ts of briefing an agency.

Background

The Good

Defines purpose, shapes agency thinking

XYZ Retail has grown rapidly over the past two years with our retail network expanding from 50 to more than 225 stores throughout Australia and New Zealand. To better support the needs of the 150,000 monthly visitors to our website, we need to provide them with improved tools for locating their nearest XYZ store or XYZ stockist.

Current challenges include:

- Admin overhead — our staff manually update retailers in our CRM and the website
- Competitor exposure — our competitors are able to view our full list of stockists
- Usability — users have to review a long list of all stockists, they can't search, filter or geolocate

The Not So Good

Fails to explain WHY the project matters

XYZ needs a new store finder to be designed, developed and launched by November.

Audience

The Good

Specifies a primary segment, guides decision making

Primary audience: Millennials, skew towards females. Other considerations: Tech savvy, time poor, connected consumers

The Not So Good

Fails to explain WHY the project matters

Visitors to the website.

Previous learnings

The Good

Provides context of learning

Research and feedback indicates that users only want to be presented with their five nearest locations, with a snapshot of trading hours, location, distance and product classes stocked.

Presenting a complete list of all retailers has enabled our competitors to target our extended reseller network. We need to somehow limit the data presented to any one user to avoid data mining.

The Not So Good

Lacking in context

Needs to be more user friendly. Needs to stop competitors stealing data.

Actions

The Good

Clarifies how you envision the process working

Primary — a simple user prompt by current or specified location

Secondary — a user should be able to refine results by product class

The Not So Good

Too prescriptive, fails to define a single primary action

User searches by postcode and ticks the product types they want

User Experience

👍 The Good

Enable the agency to research the right tools for the job

We currently envision that the user experience will facilitate the following:

- Users being able to locate their nearest store based on current location
- Users being able to locate a store based on a specified location
- We would like the user to be able to refine the results

It's important to us that the search process is extremely fast and that connection with our internal systems doesn't slow things down. For our internal staff, we would like a faster way for them to be able to batch load updated retailer information into the website, or we would also consider integration with our CRM.

👎 The Not So Good

Too prescriptive, limiting the agency's creative capacity

- Search by postcode or GPS location
- Filter by product type A and B with checkboxes
- Show a map for every retailer
- Click 'more' to show more results
- Batch upload of retailers

Timeline

👍 The Good

Suggests 'something' needs to support the peak season

We would like a new solution in place by early December to support the festive season.

👎 The Not So Good

Inbuilt contingency may limit best possible product outcome

Must go live by Nov 15.

User Stories

👍 The Good

Supports thinking around the experience of front end or admin users

- As a mobile user, I can view a list OR map of stores in my area AND any listing can be selected for complete details including products stocked and contact details.
- As a general user, I can only view a maximum of five relevant retailers at any one time AND that the specific stores in that list may change depending on filtering options that I apply.
- As a website administrator, I can update all retailer listings using data from the CRM in less than five minutes OR I have a method of checking that the integration is working correctly.

👎 The Not So Good

Too vague

- The website is easy to use
- Updating retailers needs to be faster

Success metrics

👍 The Good

Provides an idea of how the success will be measured

- User feedback — survey of registered users who interacted with tool
- Retailer feedback — review of enhanced toolset
- Internal feedback — user friendliness of retail updates
- Measure and monitor all interactions including filtering
- Number of contacts (track phone # reveals, number of store enquiries)

👎 The Not So Good

Meaningless or difficult to quantify

- More traffic
- More people into store

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