

Project brief



One document that says why the project exists, what is in and out, who decides and when it is done. Agree it before kickoff and the arguments happen on paper, not halfway through.

Project name

Project owner

Start date

Deadline

Inside

01	Background	2	08	Budget and resources	4
02	The goal	2	09	Risks and dependencies	4
03	How we will know it worked	2	10	How we keep in touch	4
04	Scope	2	11	Approval	4
05	Deliverables	3		Worked example	5
06	Milestones	3		Before kickoff	6
07	Who is involved	3		Project brief or creative brief?	6

Type into this PDF or use the Word file. Send it to everyone on the stakeholder list and get the approval on the last form page before work starts.

01 Background

Why this project, and why now. Two or three sentences a new team member could read and understand.

02 The goal

One sentence. If you need two, you probably have two projects.

03 How we will know it worked

Numbers you can check after launch, with where they are today. A target without a starting point cannot be judged.

What we measure	Today	Target	By when

04 Scope

Out of scope matters as much as in. Writing it down is how you stop the project growing a little every week.

+ In scope

— Out of scope

05 Deliverables

Every thing that gets handed over, with its format, one owner and a date.

Deliverable	Format or spec	Owner	Due

06 Milestones

The points where work stops for a decision. Put a date under each, then work back from the deadline.

				
Kickoff	First draft	Review	Final sign-off	Launch
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date	Date	Date	Date	Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

07 Who is involved

Name the one person who approves. Everyone else either works on it, gets asked, or gets told.

Name	Role on this project	Approves, works on, asked or told	Contact

08 Budget and resources

The money, the people and the tools. Say if the budget is fixed or if there is room for a change request.

Budget

People and time

Tools and access

09 Risks and dependencies

What could stop or slow this down, and what you will do about it. Include anything you are waiting on from another team.

Risk or dependency

How likely

What we will do

10 How we keep in touch

How often the team reports progress, where, and where the files and decisions live, so nobody has to ask.

Status updates (how often, where, who)

Where files and decisions live

11 Approval

Signed before work starts. Changes to the goal, scope or deadline after this point go through a short change note.

Approved by

Role

Date

Signature

Worked example

A filled project brief for a website redesign

Illustrative. A software company rebuilding its marketing site in one quarter.

02 The goal

Launch a new marketing site by March 31 that turns more visits into demo requests.

One sentence with a deadline. Every scope question gets checked against it.

03 How we will know it worked

What we measure	Today	Target	By when
Visits that request a demo	0.8%	1.5%	60 days after launch
Pages that load in under 2.5 seconds	40%	90%	At launch

Each target has a starting point, so the result can be judged honestly.

04 Scope

In: home page, product pages, pricing, about, careers, the demo form, new templates the team can edit without a developer.

Out: the blog (moves as is), the help center, translations, a new logo.

The blog and the help center are named as out, so nobody adds them in week six.

06 Milestones

Milestone	Date	Decision
Kickoff	Jan 6	Brief signed, team confirmed
First draft	Jan 31	Page plan and design direction
Review	Feb 21	Every page built, content in
Final sign-off	Mar 14	Approved for launch
Launch	Mar 31	Live, old site redirected

Each date is a decision, not just a reminder.

07 Who is involved

Name	Role on this project	Involvement
Dana K.	Head of marketing	Approves the brief, the design and the launch
Omar S.	Web lead	Works on it: builds and launches the site
Lena B.	Sales director	Asked: reviews the pricing and demo pages

One name approves. The others know exactly how they are involved.

Before kickoff

Seven checks. If one is missing, the project usually pays for it later.

- ☐ **The goal fits in one sentence.**
And everyone on the stakeholder list would describe it the same way.
- ☐ **Every target has a starting number.**
Find it now. After launch nobody will remember what it was.
- ☐ **Out of scope is written down.**
At least three things people might reasonably expect, named as out.
- ☐ **One person approves.**
A group can give input. Only one name signs off.
- ☐ **Every deliverable has one owner and a date.**
Two owners means nobody owns it.
- ☐ **Risks have an action next to them.**
A risk with no plan is just a worry.
- ☐ **It is signed before work starts.**
Changes after that go through a short change note, not a hallway chat.

Project brief or creative brief?

They work together. The project brief runs the project; a creative brief briefs the work inside it.

	Project brief	Creative brief
Answers	Why, what, who, when and how much	What the work must say and to whom
Written by	The project owner	The marketer or account lead
Read by	Everyone involved, including finance and legal	The designers, writers and filmmakers
Covers	Scope, deliverables, milestones, budget, risks	Audience, message, tone, mandatories
Changes when	Scope, budget or deadline change	The message or audience changes