

# Intake & Brief Pack

**Templates and checklists to run an Intake Brief Review loop that reduces rework and speeds approvals.**

Intake Checklist (Use for every request)

- Requester identified and reachable (name, role, email/Slack).
- Business objective stated in one sentence (why this ask matters).
- Target audience and key insight provided.
- Deliverables listed (format, size, variants, channels).
- Must-have inputs attached (brand assets, copy points, references).
- Non-negotiables captured (legal, compliance, claims, disclaimers).
- Constraints (budget, timeline, resources) are explicit.
- Dependencies identified (data, product, vendor).
- Definition of 'done' agreed (acceptance criteria).
- Approvers named (final decision-maker + reviewer roles).
- Timeline proposed and feasibility checked.
- Intake owner assigned (Ops/PM) and ticket created.

**Pro tip: Reject or return incomplete intake. Incomplete in → incomplete out.**



## One-Page Creative Brief (Template)

Copy this into your preferred tool or fill directly. Keep it to one page wherever possible.

Field	Fill In Here
Project Name	
Business Objective (one sentence)	
Audience & Insight	
Problem to Solve	
Core Message / Promise	
Tone & Brand Voice (examples or links)	
Deliverables (format, specs, channels)	
Key Inputs & References (links/files)	
Constraints (budget, timeline, resources)	
Must-Not-Do / Compliance Notes	
Definition of Done (acceptance criteria)	
Success Metrics	
Stakeholders & Approvers	
Timeline & Milestones	

**Tip:** Attach 1–3 on-voice examples and one 'not this' example to anchor tone and style.



## Review & Approval Protocol (Keep momentum)

**Define who reviews what, by when, using what criteria. Share this at kickoff.**

### Roles

- Creator(s): produce the work.
- Reviewer(s): give structured feedback using criteria below.
- Approver: single decision-maker; breaks ties and signs off.
- Ops/PM: runs the cadence, tracks decisions, maintains source of truth.

### Cadence

- Stage 1: Concept/Direction – feedback within 2 business days.
- Stage 2: First Draft – feedback within 2 business days.
- Stage 3: Final – approval within 1 business day or written risks.

### Criteria

- Meets brief (objective, audience, message).
- On brand (tone, visual, accessibility).
- Accurate & compliant (claims, legal, privacy).
- Fit for channel (format, specs, performance basics).

### Feedback Rules

- Be specific: what works/what doesn't + why.
- Prioritize: must-change vs. nice-to-have.
- Actionable: suggest fixes or examples.
- Centralize: one thread/source of truth; no side-channel decisions.

### SLAs & Escalation

- If feedback misses the SLA, Ops/PM proceeds with last approved direction.
- Conflicts escalate to Approver within 24 hours for decision.

**Optional: Add a lightweight RACI table to your kickoff notes for clarity.**