DESIGN BRIEFS: IS THERE A STANDARD?

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ABSTRACT
The brief is an essential part of the design process and marks the beginning of any design project, both within the realms of education and practice. It is used to help the designer to understand the problem by defining the objectives and parameters of the project toward generating the most appropriate solution. It also has reflective, administrative and legal purposes within a design project, making it a critical document to the design throughout the task. A brief can be as little as a single line of text to a series of pages with detailed information and specific constraints. It can be generated by the designer, by the client or as a shared and agreed document between both parties. At the end of a project, the client will refer to the brief to measure the success of the project and consequently the ability of the designer to produce an appropriate solution. This will, in turn, equate to a return-on-investment consideration and the value of the designer for future projects. Although the brief is so central to a project and its resulting actions, initial research shows that there is little common guidance on how to write and structure such a vital document.

This paper reports on the initial stage of a study that investigates the formality and authorship of design briefs, specifically in the discipline of industrial design. Through a review of existing scholarship on the topic and examples of design projects it considers the role of the design brief. It also discusses the possibility of a common structure and its implications as a generic template to be used as a standard project document.

Keywords: Design brief, design education, client relationships

1 INTRODUCTION

The design brief is commonly seen as the launching of a design project. Whether it is a project in product design, industrial design, graphic design, architecture or any other design discipline, the brief will establish the requirements of the creative service to be undertaken by the designer or design team. These requirements, which can be used as a means for assessing the success of a project, are usually established by a client to define a business opportunity that exists. The project's success, or failure, will be attributed to the abilities of the design team to respond to these requirements and the brief—or the ability to respond to a brief—can, in consequence, determine the possibility of future work. Subsequently, the design brief is a very powerful document that will frame the specific design process, guide assessment and evaluation of process and final product, and influence design opportunities beyond the projects life.

From this, it is clear that the design brief is a vital element in the process and development of a project, and the continuity of employment for the designer. The client and designer must acknowledge its existence, understand its content and its effects in generating and comprehending the project. Prior to this, the task of creating design briefs must be a prominent part of design instruction and learning, although current research shows that this is often not the case.

In this paper, we will explore the term 'design brief' and discuss its definition, purpose and form with a focus upon the discipline of product design. The paper considers whether there is a level of commonality between design briefs and - if a degree of homogeneity exists - whether it is possible to create a standard template for design briefs. The paper will also reflect upon the implications of the existence or non-existence of a standard template. The paper reports on the initial stage of a study that investigates the formality and authorship of design briefs in industrial design. It is based on a review of existing scholarship and forwards a reflection upon experience from practice.

2 WHAT IS A DESIGN BRIEF?

2.1 Definition
A review of existing scholarship reveals that there is a lack of research in this area and that there is limited discussion about the potential implications - positive and negative - of developing a unified definition of design brief. The conceptual ambiguity surrounding the term 'design brief' reflects the multiple and various ways in which the word 'design' in itself is commonly used. The word 'design' is used in several ways and, in English, it takes the form as both a verb and a noun [1: 88; 2: 14]; it refers to the act of creating something and to the result of such actions. Moreover, whilst common conceptions of design is often associated with creativity and innovation, the word design does not necessarily imply the production of something new; it may simply refer to the act that follows routine procedures, re-creation of existing patterns, traditional motifs, conventional models or customary acts [2: 14]. This conceptual ambiguity translates into the definition of a 'design brief': does, for example, a design brief refer to a document describing a course of action (process) or a desired product? Is it a document outlining the procedures and steps leading to an original and novel outcome, or is it simply an outline of routine steps for production? Is a design brief meant a static or dynamic document? Does a design brief reflect a conversation or instruction?

In lieu of the global popularity of design as a discipline, many related terms have evolved that can often confuse the meaning of what a design brief is. Even in the relatively narrow field of product design, the three words in the term 'Product Design Brief', taken in isolation, will conjure up a combination of connotations toward what is essentially the same meaning.

Table 1. Examples of words related to Product Design Brief

Product	Industry, market, engineering
Design	Creative, innovative
Brief	Statement, problem, definition, specification

The numerous combinations of these words may potentially disadvantage the intended purpose of a design brief, which is, essentially, to inform the designer of the client's requirements toward producing an appropriate solution to their business problem or opportunity. It is not at all uncommon to see the term 'design brief' being replaced by concepts such as Creative Marketing Brief or Product Innovation Statement. Such variation in terminology may create issues in cross-cultural situations and in interdisciplinary scenarios where knowledge is sought from various fields and sectors.

Scholarly literature on design and design processes do not provide—to the authors' knowledge—a simple, coherent definition of the term 'design brief'. Anecdotal definitions of product design and briefing have, however, been identified through alternative design resources, such as websites of design firms and design organisations. These definitions reflect informed and refined statements of a design brief. The website of the International Council of Societies of Industrial Design (ICSID) [3] describes the discipline of design as follows:

> [d]esign concerns products, services and systems conceived with tools, organisations and logic introduced by industrialisation - not just when produced by serial processes. The adjective 'industrial' put to design must be related to the term industry or in its meaning of sector of production.

The UK's Design Council [4] states that product design briefing is:

> [a] knowledge sharing activity, usually prescribed in a briefing document, describing what is required. The brief can be complex and backed up by research or, equally commonly, not really created until all influencing factors are better understood. It is quite rare to find a really comprehensive brief. Invariably, clients work with the design team to help put the brief together. Bringing designers in early adds greater breadth to the client's vision, unpacking what they could have, alongside what they think they should have.

The wording in the last citation suggests a freedom and a flexible nature to the structure of the design brief with no set structure in relation to what is should contain and no fixed process as to who should be the author and its completeness. This observation is also made by Phillips [5] who in anecdotal terms suggests that, from the view of industry, there is no single or correct format for a design brief. According to Phillips, this is largely due to the number of organisations, industries and disciplines that take the interpretation of the design brief's structure, content and format into their own hands.

2.2 Role and Use

A client's attitudes toward design can define the role of the design brief within the design process of a project. The initial negotiation between a client, known as 'briefing' [6], can display the client's attitudes toward design and the designer's role within the project. In a study of the briefing process, Paton and Dorst [6] conclude that the designer's role may attain five different identities, namely those of a 'Technician', a 'Facilitator', an 'Expert', an 'Artist' or a 'Collaborator'. The different identities will attain different roles within a design process:

- a *technician* will be brought in at the end of a project's formulation and given a solidly defined brief to carry out what is expected by the client, only questioned to clarify particular aspects;
- a *facilitator* will advise on specialist aspects but the parameters of the brief will be pre-defined;
- an *expert* will be required to bring a partially formed idea and will negotiate the formulation of the brief with the client;
- an *artist* will, similarly to the expert, be expected to engage with a client who holds the nucleus of a concept but will be requested to apply a style to the design output; and,
- a *collaborator* will be expected to collaborate and work alongside the client towards mutually agreed parameters and detail [6: 577-579].

According to Paton and Dorst, the most favoured type of designer in the briefing phase is the collaborator. This role suggest a highly iterative and transparent process of exchange between the client and designer, which leads to a high level of productivity and ensures that a process of evaluation and development takes place already at the initial stages of the design process. Such processes, they argue, are conducive of successful design projects [6].

In line with Paton and Dorst [6], Phillips [5] endorses the collaborative nature of the design brief, describing the designer as 'a strategic business partner' in an organisation's structure. Evidence of successful relationships between design and business can be seen in the products and profits of companies such as Apple, Fiskars, Braun, Alessi and Herman Miller, which place design at the centre of the business' core activities. If the client views design in this sense, then there is an equal accountability for praise and blame on a project whereby the designer's reputation is at stake as much as the investment provided by the client. This type of collaborative relationships suggests a shared sense of responsibility which enhances a sense of ownership and engagement. The ICSID [3] defines the industrial designer as being 'an individual who practices an intellectual profession, and not simply a trade or a service for enterprises.' This again is in support of the designer being of much more value than a mere technician and that collaboration is of advantage to all parties. A more equal relationship in a project and collaboration on writing the brief will improve the output of the design work and the morale of the designer in their preferred role with the client, and it will clarify the communication of actions throughout the project.

A written design brief will clearly articulate the product requirements to all parties involved in a project. This written nature, rather than verbal, is more definite and misinterpretation may be minimised by the (agreed) wording that has been chosen to direct design proceedings. The design brief, which is essentially a question or definition of a problem, should be used as a validation tool periodically throughout the project when making key decisions. Failure to consult the requirements of the design brief at these decision points can take the direction of the project off-course. At a project's end, the client can use the design brief as a means of evaluating the performance of the designer in the project. The design brief would be part of the quote and a contract, which highlights its importance in project articulation, direction and reflection and, administratively, in relation to payments and possible litigious circumstances.

3 CREATING A DESIGN BRIEF

3.1 Authoring

In most cases, a client will be identifying the business opportunity and initiating the birth of a project. This implied project ownership automatically divides the roles of customer and service provider between, respectively, the client and the designer. Traditionally, the client will set the brief with its requirements and see the designer as the 'technician' or 'facilitator', as described by Paton and Dorst [6]. This is a widely accepted practice across most design disciplines.

In a product design scenario, if a client is generating the design brief then it is likely that the client organisation's marketing department will be in control of authoring the brief. An individual or a group within the department will have identified the business opportunity and the narrative wording chosen to articulate to the designer their aims and expectations. It is at this point the brief will become rigid, both in the sense of its purpose and its parameters, thus restricting the ability of the designer to influence the clients intentions.

However, including the designer in the 'briefing' process may improve all aspects of a project, including timeline, budget, communication and budget. This refers to the implication of collaboration discussed above through which dual accountability for the success or failure of a project will exist as the client will look at the sales results and the designer will use the project as a portfolio piece to gain future work. The mutual appreciation for the knowledge and expertise of both client and designer will create a strategic and effective dialogue in the briefing process [5].

According to Blyth and Worthington [7], it may, in circumstances where the briefing does not adopt a collaborative nature, be beneficial to apply a 3-stage process, although in retrospect it could also be used in that mode. Blyth and Worthington [7] state that, with the aim of clarifying and validating the intentions and roles of all parties involved in a design process, a briefing should address three distinct phases, *pre-project*, *project* and *post-project*, of which different stakeholders hold authoring responsibility:

- A *pre-project brief* is the responsibility of the client. In narrative form this part of the brief will define the need of the project, the aims and expectations of the client, and expressions of their resources both in staffing and budget that will be applied to the project.
- A *project brief* is developed by the design team on the basis of the pre-project brief, with the aim to propose alternatives to constraints and costs, to create a bulleted list of design activities and in general validate the project. This process could be seen as impersonal and the approval process has an implied evidential documentation for legal circumstances should they arise.
- A *post-project brief* is generally authored by the designer and represents a reflection on the design process with the aim of providing some lessons for future projects.

3.2 Structure

Scholarly literature on writing product design briefs is limited with subjective suggestions of a structure and content available from a few sources [e.g. 5; 8]. One of the few scholarly books that exist on the question of how to create a design brief is Philip's book *Creating the Perfect Design Brief*, published in 2004. Drawing on anecdotal evidence collected through decades of experience with industry, Phillips specifies what he believes is a selection of headings (below) that is 'always found in great design briefs' [5: 29]. It is envisaged that in this case the briefing is done mutually by client and designer. According to Phillips [5: 28-51] there are seven key elements that should be included in a brief:

1. ***Project Overview and Background*** – This initial section will be an executive summary of the project stemming from the narrative description conceived by the client. The desired business objectives and project ownership would be defined together with short description of the intended project phases.
2. ***Category Review*** -- Defining the category of the product, not its associated industry, will provide a wider vision of the company's current positioning. This will detail the client's and its competitors' information of pricing, sales, profits, longevity and promotional techniques together with past, current and forecasted future industry trends. The business strategy of the client including a mission statement should also be included in the category review to gain a deep and holistic sense of its vision.

3. ***Target Audience Review*** – Analysis of the target customer will provide the designer with a deep understanding of how they experience current or influential scenarios. National, cultural and gender differences should be considered in the analysis, whilst also bearing in mind that there could be multiple audiences who will purchase and use the designed solution.

4. ***Company Portfolio*** – A company portfolio will provide the designer with a complete knowledge of the company and its activities, including brand philosophy, positioning in the market and reputation with its customers. Information on the company's product ranges will specify where the new product will fit.

5. ***Business Objectives and Design Strategy*** – Articulating the business objectives of the perceived solution can assist in creating design strategies to address them effectively. This clarity of alignment in objective and strategy can lead to the client approving experimentation with more creative concepts.

6. ***Project Scope, Time Line, and Budget*** – Phases of the project should be planned in detail with the client and include a description of activities, available resources and approval process for the end of each phase. Through collaboration when writing the brief, the client will better understand the process and may, subsequently, provide better support for the timelines and budget that is required for the project.

7. ***Research Data & Appendix*** – Any relevant data on performance, sales and market-trends should be included as references for the designer to evaluate upon through the design development process. This section would also be reserved for other documentation that the client and designer feels are vital to the project.

Philip's seven elements can be seen as a template for design briefs. It is, however, not supported by rigorous research but by anecdotal evidence from Philip's experience from practice. Similarly, Stone [8] presents a structure of a *creative brief* on the basis of personal experience that depicts ten components: background summary, overview, driver, audience, competitors, tone, message, visuals, details and people as its headings for the structure and content. The variety of structures may be successful within a given project, but they are not quantified if one is more effective than the other.

3.3 Using the Brief

Traditional creative processes such as brainstorming, affinity diagrams and user-experience mapping can be used to further expand upon the brief and provide stimuli to the design team. The link between the content of the brief and a creative process can be unclear, this is due to the design profession tendency to keep its processes a carefully guarded secret [5]. A reluctance to disclose the nature of the thought processes toward a successful design may be a means for keeping a competitive advantage, but it does not aid design education and those curious to the initiation of a concept.

4   CONCLUSIONS

The many anecdotes toward what should and should not be in a design brief will encourage new unsupported opinions. Although successful on a singular project, there is no evidence that structures such as those suggested by Phillips [5] and Stone [8] could be applied to a variety of product design industries with equal conclusions. It is on this basis, that the project of which this paper forms part aspires to investigate the effects of a set structure on a project and its implications on the design process and product success.

Based on personal experiences, authors such as Phillips and Stone would argue that there cannot be a standard structure to form an accepted template for project documentation [5; 8]. Some structure is, however, perceived to be of benefit to design processes [2]. This argument draws on studies of creativity and it is based on the assumption that design processes will, ultimately, resemble that of creative processes. Whilst it is acknowledged that design does not necessarily equal creativity, the question of structure and pre-set parameters is of particular relevance in relation to creative design processes—whilst a routine design solution is based on a linear model [9] that can easily be structured in a brief, non-routine design requires innovative and creative solutions that results from integrative processes which may not be easy to identify at the outset of the process. That is, if a brief is aimed to result in unpredictable results that expand existing design variables, then it is likely that at least one function, structure or mapping will be unknown at the outset of a design project. This ill-defined nature of design suggests that monotonicity and stability is problematic and that, through the design process, new elements, operators, requirements, structures and potential solutions will be introduced

[2; 9]. In these circumstances, a brief has to be open and flexible enough to allow for play and exploration. However, at the same time, the brief has to provide some framework and rules within which the play and exploration can take place.

The study of design briefs, of which this paper forms part, will delve further into the role of the early phase of the design process and the question of strategic approaches for better design outcomes. With the aim of addressing the gap in the literature, a scoping study will be undertaken to supplement a traditional literature review to provide information on an area that 'is complex or has not been reviewed comprehensively before' [10]. Through a scoping study, the broader dimensions of the complexities of the early phase of a design process and the problems associated with variance of design briefs can be identified as a pre-project preliminary exercise, and greater understanding of industry terminology and views can be sought. Information will be sought from design professionals and educational experts to understand their perceptions and experiences of the ways in which the design brief informs the design process and specific projects.

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