# Day 64: Taking the project brief

**SUMMARY**

**Briefs**. Defining a brief. 5 preflight checks to make pre-brief. 5 **SMART** objectives to assess post-brief.

With 35 **hot prospects** now in your sales funnel, and your first actual project wins due in the next two weeks, **Day 64** introduces the document that defines any job of work a customer wants from you: the **project brief**.

It may be called a Scope, a RFP, or a Schedule of Works. It can be a detailed specification spanning hundreds of pages (beware!) or a one-line email. But its purpose is always the same: to describe **what the customer wants**.

Taking a brief is a hands-on task: active, not passive. Don't wait for your Inbox to chime—forms and templates never give you the full story of your customer's hopes and dreams. Instead, get ahead of the game by **asking questions**—questions that get to the bottom of what the project is for and the problems it aims to solve. Without these answers at the outset, small projects drag on and big projects never end.

Today, you'll think about the overarching question—**whether the project's for you**—by mapping out your customer's objectives on a chart called SMART. You'll also learn some commonsense **preflight checks** to make before you go further. Following these rules ensures the projects you work on carry the best chance of successful completion leading to fruitful client relationships. And—even more important—prevents you accepting a project that's better turned down. (Of which you'll see many in your freelancing life.)

Over the course of **Day 64**, you'll make 3 more Connections on LinkedIn, discover 10 more prospects, and send a sales letter to 15 people on your List. You'll also follow up 5 or so responses to your recent campaign flights and contact 2 more qualified buyers.

Time to get briefed on briefs!

## 64.1 UNDERSTANDING THE PROJECT BRIEF

Think of a project brief as a **summary**. A written document that pins down what your customer wants. Ideally, it contains all information describing the project, and all criteria needed to judge whether your work answers the requirement. (And therefore whether you're entitled to ask for payment.)

The perfect brief is objective, going beyond personalities and preferences to state succinctly and concisely what the situation is, what situation is desired, and what you're expected to do to move from one to the other. That's all a project is. (More on getting from situation A to situation B on **Day 65**.)

In reality, no project brief is perfect, complete, or objective—they all exist within the context of your client relationship. So think of them as the outcome of a *conversation* between you and your customer—by the time the brief is written, expectations on both sides are already agreed and understood. That's why talking to the customer matters so much in your **Campaign** followups.

As your relationship builds towards turning the customer into a **repeat client**, you'll need shorter and shorter briefs, and a lot more can happen verbally. But there's one rule you should never relax . . .

### 64.1.1 Always ask for the brief in writing!

 . . . simply that you need a *written* brief. It can be a one-line email or a 200-page Request for Proposal—but always, *always* get it in writing.

Why? Because a brief asks you to do a job of work for money. So it's no different in principle to an employment contract. Would you take a salaried role without a contract? That's Rule 1: **Always get the brief in writing**.

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## 64.2 PREFLIGHT CHECKS: QUESTIONS TO ASK PRE-BRIEF

With that rule understood, let's go on to the questions, divided into those you need to ask *before* and *after* you get the brief. First, the pre-brief ones. Think of them as preflight checks.

### 64.2.1 Is it a competitive pitch?

Across all business sectors, many customers ask freelancers to **pitch** for every brief: reaching out to several people to make proposals, so the customer can pick and choose between them.

A competitive pitch is a reasonable approach for a commoditised task, like site clearance or wall painting. It's harder to justify when it comes to skilled labour, like restoring a classic car or writing your biography. As a rule of thumb, the more ways there are to approach a project—and in six-figure freelancing there

are *many*—the fewer reasons you have to take part in competitive pitches. Because if 10 pitches outline 10 different approaches, the customer has to compare apples with oranges—and the decision can't be objective. If every qualified buyer asks just three freelancers for an initial project, then—all else being equal—your **conversion rate** (**Day 6**) gets slashed by *two-thirds*.

So for six-figure freelancers, who earn their money by delivering an outcome with their expertise and creativity in the context of a sustainable client relationship, taking part in competitive pitches is a **bad idea**.

### 64.2.2 Is it a pitch without pay?

If there's one thing worse than a competitive pitch, it's a pitch where the customer isn't obliged to pay. It's called "working on spec", and it's rife in marketing, consulting, and other soft sectors where there are more sellers than buyers.

Think what a zero-fee pitch is really asking: you invest your time, energy, and expertise in work you'd normally charge for, and they get to decide whether they pay you or not.

There are no special cases when it comes to this question. Never, *ever* agree to do the work of a project without an agreed fee. If you do, you're valuing your services at zero, by agreeing you don't *deserve* to be paid. And a zero day rate is hard to negotiate up. (More on this in **Day 68**.)

### 64.2.3 Does the brief mandate methods?

The third question depends on your offer to the market from **Part 2**. If you're being hired for your unique mix of expertise and experience, briefs that make you follow someone else's methodology rather than apply your own proven offer are less than ideal. Six-figure freelancers earn their pay by using their own skills to reach an outcome—not slavishly following the crowd.

Of course, there are professional areas where methodologies matter. In the public, legal, and financial sectors—and others dominated by regulations and guidelines—your ability to follow the rules may be your value proposition. But unless that's part of your offer, check whether a brief expects you to achieve the desired outcome in a desired way.

If there's a mismatch between the outcome wanted and the method mandated, you may want to bow out.

### 64.2.4 Is it based on hitting a price?

The next question before accepting a brief involves price points, and how much of the decision to go ahead is based on cost. Beware of briefs that ask how low

you can go.

Why? Because that means you're a commodity—and six-figure freelancers don't do commoditised. Of course it's perfectly reasonable for a client to set a maximum, such as asking for a proposal under £5,000; all business expenditure wants a return on investment, and there are always limits to what a client can spend. But within reasonable limits, your day rate shouldn't be a big part of the conversation; talk should revolve about the outcomes you deliver, not the fee you charge.

While your invoices should always back up how cost-effective you are (ahead on **Day 82**) your offer is ultimately about value, not cost. (It's another reason, as if you needed one, to avoid competitive pitches, which usually focus on price.) Once you pitch on price, you're in a race to the bottom. And that's not where the £100,000 incomes are.

### 64.2.5 Will it lead to further work?

The last preflight check is the biggest. (And often the hardest to decide.) What chance is there that accepting the brief, and delivering the outcomes it wants, will lead to *additional* projects . . . and let you turn the customer into a **repeat client** paying you a monthly **retainer fee** (the subject of **Part 10**)?

Think critically about this. Even at your full day rate (you'll set this on **Day 68**) the real goal of an initial project isn't profit, but to set up the customer relationship for future success. The end goal of **100 Days, 100 Grand** isn't a hundred **confirmed customers** with a one-off £1,000 project, but 3-8 **repeat clients** each on a retainer fee of £500-£2,750 a month.

Even factoring in the time value of money, the customer who spends £500 a month for the next three years is better than the customer with £3,000 to spend today. So if the brief is a one-timer, **turn it down**.

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## 64.3 GETTING SMART: QUESTIONS TO ASK POST-BRIEF

Once you've done some preflight checks on a brief, there are five bits of critical thinking to do before you say yes. They answer: **what does success look like?** A tried-and-tested method for asking them is **SMART**.

### 64.3.1 SMART objectives

A brief assumes the customer is in situation A, and wants to be in situation B. That's an *objective*. (More fun getting from A to B on **Day 66**.) And a brief isn't a brief without at least one. So of course, your first sense-check is to decide if the brief *has* objectives. Once you can say yes, the task is to check those objectives are *answerable*. You do it with SMART.
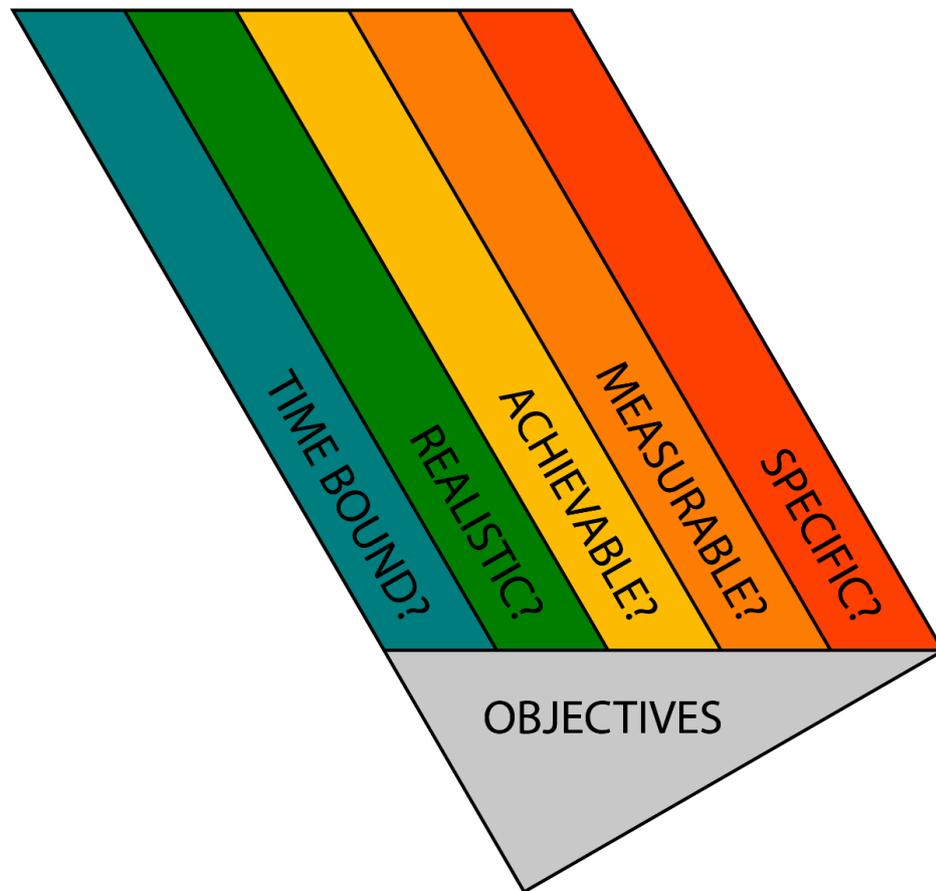
### 64.3.1.1 Are the objectives specific?

You can't answer all the world's problems in one project. So ask yourself if the brief's goals apply to a single clear area in need of improvement. If it seems fuzzy or too broad (*as much X as possible*, *more Y than ever before*, *create some Z*) ask your customer to clarify.

The easiest and fastest check is to decide whether the brief gives you a sense of knowing what to needs to be done, after you've read it once. The more times you need to read it, the more you find yourself assuming or guessing, the more likely it is that the brief fails the S of SMART.

### 64.3.1.2 Are the objectives measurable?

The freelancer's greatest friend on a brief is *measurable results*. This doesn't have to mean hard numbers—an uptick in positive perceptions or optimism can work—but make sure the brief includes some metric against which you can state your project succeeded or failed.

*Increase sales by 10% this year* is a measurable objective. So are *find 500 customers in New York* and *double profit margin per sale*. That's right:

measurable objectives tend to contain **numbers**. The softer or more touchy-feely the objectives, the more careful you need to be. Make sure both you and the customer agree not just on *what* the outcomes are, but what *size*.

### 64.3.1.3 Are the objectives achievable?

Of course the project must be within your capabilities. But if they stretch you too far to keep you in flow (too hard a task, needing more skill than you have, asking you to develop expertise with no use beyond that project) don't hesitate to turn down a project . . . or give the reason why.

Too tight a timeline or too low a budget will affect your success. (You are a resource for the project, and if there's a mismatch in what you can do or what they can afford, either the project will fail or you'll lose money. So check that what's being asked comes with an understanding of the resources needed to execute effectively.

### 64.3.1.4 Are the objectives relevant?

Even if the project's outcomes are readily achievable, you need to know whether they're really contributing to your customer's business. Vanity projects abound in larger organisations; think about what the outcomes will do for the customer, starting with their impact in cold hard cash.

This goes all the way back to the structure of the economy from **Day 1** and **Appendix A**. The goals of people differ, even within the same department. And they may not match the broader goals of the company. So if the objectives of the brief seem designed to make one individual look good at a cost to other stakeholders, or if it seems hitting the brief's outcomes won't have a positive effect on the business as a whole, talk to your customer again.

### 64.3.1.5 Are the objectives timebound?

The last sense-check is a **timeline**. Setting start and finish dates, with an estimate of resource needed between milestones, is the gold standard. If the ask seems open-ended, clarify at what point you can say the project is complete.

If the brief lacks a timeline, agree one with the customer. Proposing the dates when you'll deliver each milestone *and* the dates they owe you resources or decisions is a great way to pin down expectations. Remember, "as soon as possible" means "when you get around too it." Without dates, it's too easy to spend too much time on a project. There's an old saying that work expands to fill the time available for completion.

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## 64.4 A BRIEF CHECKLIST

So: five pre-brief questions, one at-brief, and five post-brief ones. Let's end today by summing them up, in a simple checklist.

| BRIEF QUESTIONS: A CHECKLIST |
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| **PRE-BRIEF QUESTIONS** |
| Is the project a competitive pitch? |
| Is the project paid or unpaid? |
| Does the brief specify methods? |
| Will the brief be decided on price? |
| Will the project lead to further projects? |
| **AT-BRIEF QUESTIONS** |
| What does success look like to your customer? |
| **POST-BRIEF QUESTIONS** |
| Does the brief *have* objectives? |
| Are the objectives specific? |
| Are the objectives measurable? |
| Are the objectives achievable? |
| Are the objectives relevant? |
| Are the objectives timebound? |

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Now you've got your brief checklist, let's check into today's Tasks.

### TASK 64.1: COMPLETE YOUR DAILY MANDATORIES

Add today's targets for Connections on LinkedIn and prospects to your spreadsheet. (Remember Connections can also be prospects, and the same company may be a source of both Connections and prospects.)

### TASK 64.1.1: Make 3 Connections on LinkedIn

Using the methods from Days **1** and **8**, find and invite 3 people to join your network on LinkedIn.

### TASK 64.1.2: Find 10 prospects for your List

Using the methods from Days **2** and **8**, add 10 individuals as prospects on your spreadsheet.

### TASK 64.1.3: Score prospects on your descriptor criteria

Score each of today's 10 prospects for your 27 descriptor criteria.

### TASK 64.2: SEND OUT 15 SALES LETTERS

Using the methods from **Part 7**, print, sign, seal, and stamp 15 sales letters to the cold suspects you found today, saving a PDF copy of the flight. If you're using PURLs, add them to your sales website using the methods from **Day 50**.

### TASK 64.3: FOLLOW UP RECENT RESPONSES TO SALES LETTERS

Using the methods from **Day 57**, follow up your next 5 or so responses from your Campaign. It's likely these 5 came from flight **Campaign008** on **Day 57**.

### TASK 64.4: UPDATE YOUR SALES FUNNEL

For every letter sent, response received, and conversation started, move the prospect one stage further down your sales funnel.

### TASK 64.5: TEST YOUR BRIEF CHECKLIST

On a sheet of paper or blank file, write down a job of work you've been involved in at any time in the last year. Imagine you're the project owner before the project started, and you're looking for someone to do it.

### TASK 64.5.1: Check your brief against SMART

**Does the brief have objectives**? Objectives are simply **what the brief wants**. Among your followups so far, you'll have several customer requirements or briefs. Make a list of what each customer's objectives are and consider them against these criteria:

1. Are the objectives **specific**? Look out for vague wish-lists

without targets or numbers against them. *A better business* is a wish, not an objective.

2. Are the objectives **measurable**? Make sure each objective has a metric in principle, even if that metric is *employees feeling more empowered*. If numbers could be put against it (such as feeling positive from 0 to 10) there's a metric.

3. Are the objectives **achievable**? In many lists of objectives there's at least one that'll take infinite time or resources to execute; if you see it, seek to define it more precisely.

4. Are the objectives **relevant**? Ultimately any project must deliver for the business, which means answering business goals. Check whether the brief describes a vanity project.

5. Are the objectives **timebound**? This isn't a yes-or-no answer; it's a number. Add up the days of work needed to execute the project and the gaps between milestones as parts of the project need sense-checking, approval, reworks and so on.

If one or more of these objectives are unclear, rethink your project and outcomes. If the project is one you've been talking about with a hot prospect or qualified buyer, talk to them again.

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And that's the first day of **Part 8** completed. Tomorrow you'll go deeper into SMART to **analyse customer needs**.

| CHECKLIST: DAY 64 | |
|---|---|
| **DO YOU UNDERSTAND:** | |
| The role of a **brief** | |
| The 5 **pre-brief** and 5 **post-brief** questions | |
| **SMART** objectives and how to apply them | |
| **HAVE YOU COMPLETED:** | |
| 1 hr | Applied the brief checklist to a project |
| 30 mins | Made 3 connections on LinkedIn |
| 2 hrs | Added 10 prospects to your List |
| 45 mins | Scored today's prospects for descriptor criteria |
| 30 mins | Sent 15 Letters |
| 1 hr | Followed up 5 hot prospects |
| 1 hr | Contacted 2 qualified buyers |
| 1 hr | Updated your sales funnel |
| **TAKEOUTS:** | |
| Your SMART **checklist**. List of project **objectives**. Campaign015. | |
| **TOTALS:** | |
| Connections made | **255** |
| People listed | **786** |
| Letters sent | **716** |
| **FUNNEL:** | |
| Cold suspects | **70** |
| Warm leads | **676** |
| Hot prospects | **38** |
| Qualified buyers | **2** |
| Confirmed customers | **0** |
| Repeat clients | **0** |