

# Write a useful project brief

A simple starting document that explains your goal, workflow, and priorities.

🕒 3 min read    Updated October 2026

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## Describe the outcome first

Write what you want to improve and how you handle it today. For example: “We want incoming enquiries to reach the right sales person without copying them between tools.” This is clearer than asking for an AI system without a defined job.

## Include the essentials

- People: the users, project owner, approver, and technical contact.
- Process: the trigger, steps, inputs, output, and exceptions.
- Tools and boundaries: systems to connect, languages, access restrictions, and actions that need approval.
- Priorities: must-haves, later improvements, target timing, budget range, and success measures.

## A brief is a starting point

It is fine to leave unknown answers open. Your brief helps us scope the work; it is not a contract, a final quote, or a delivery commitment. Keep examples anonymous until a suitable sharing process is agreed.

### Your checklist

0/3 complete

- ☐ Separate must-haves from later ideas.
- ☐ Name one measurable result.
- ☐ Remove private data from examples.

## A USEFUL NEXT STEP

Open “Prepare your project” to create and download your brief. Nothing is sent automatically.

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Your signed proposal and agreement define the final scope, fees, responsibilities, and terms.

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