Shikatani Lacroix is a leading branding and design firm located in Toronto, Canada. The company wins commissions from all around the world, across CPG, retail and service industries, helping clients achieve success within their operating markets. SL does this by enabling its clients’ brands to better connect with consumers through a variety of core services including corporate identity, naming and communication, brand experience, packaging, retail, wayfinding and product design.

About the Author

**Ryan Talag, Account Coordinator at Shikatani Lacroix**

As an account coordinator at Shikatani Lacroix, Ryan works with retail and corporate brands such as Second Cup International and TD Bank Group. A graduate of Communications, Culture & Information Technology at the University of Toronto, Ryan conducts research and analysis for client projects and presentations.

Prior to joining SL in 2012, Ryan did a work term in the Middle East as a brand strategist for The Brand Union in Dubai, U.A.E., where he worked on the following brands: Riyad Bank and Dettol.
Writing a packaging design brief

The packaging design brief is a valuable document that provides an overview of the design request from the client to its agency and should be used by companies of all sizes.

It is absolutely worth the time and effort to create this document, as it allows for a truly collaborative process and a smooth transition to the desired finished packaging design.

1. It documents all background information and instructions to the design agency. This allows their management to review the task and properly assess how much effort and time it will take for their designers to complete the project. It also allows the chance to catch any missing information required from the client.

2. The brief provides clarity (in writing) between the company that requires packaging design and the design agency on what has to be completed.

3. From a designer’s standpoint, it acts as a guide with the requirements and specifications necessary to create the artwork. It also allows the designer to prioritize and work in a timely fashion.

Packaging design briefs create organized documentation, reducing confusion and increasing productivity, especially when multiple, ongoing projects are happening in a fast-paced environment.
The preliminary details

Project name
Identify the name of your project. Developing a naming convention can allow both parties to file and organize several of your projects.

For example: Honey Oats Package Refresh (Jumbo)

Brands
A company can have many brands. List the name of the exact brand for the project. Again, this will help organize various activities.

Date
List the date the brief will be sent to the agency.

The overview

Background
Provide details to the agency about the overall situation around the product and package design. Describe the current state of the packaging and product, and list reasons your company would like a design change.

Perhaps your firm conducted qualitative research suggesting that your brand could benefit from an updated visual identity. Maybe your marketing team has statistics to support an opportunity that your competitors have not explored.
The design brief is a blueprint for the design agency, a set of specific instructions and details to follow to achieve the ideal package design for you.

**Purpose**
Describe the general package design needs. This can be a few overall points as specific details should follow.

For example: Update the colours of the Lip Balm packaging to fit the new branding colour scheme.

**Exact requirements**

**Scope of project**
The following is a list of criteria that will detail your exact requirements needed from the design agency. This will act as a first-round blueprint for the design agency; a set of specific instructions that the agency can follow to achieve the ideal package design for you.

1. **Package design objectives**

   Similar to the “Purpose” listed above, this should describe what you want to achieve from this design. To elaborate, this can include information about imagery, ideas, brand colours, Pantone colours, visuals, shapes, logos, etc.

2. **Creative mandatories**

   While you may want the designers to have free reign to explore creative ideas, there can be certain aspects of the design that must be executed.

   For example: The medication package must follow a certain communication hierarchy (master brand, sub brand, callout, etc.) The container must say: “50% More Ice Cream.”
3. Number of options

List the number of options and concepts you are interested in seeing. You will likely have feedback for some concepts and will need the agency to adjust accordingly. As an option, you can request the amount of revisions during this process.

4. Deliverables

Describe the file type (PDF, AI), dimensions (11” x 17”), or specific form (mounted board) that is required from the agency, along with where it should be sent (person, server).

It is very helpful to inform the design agency about how the design will be used or if it will be forwarded to another vendor. This will allow the agency to prepare the files appropriately.

5. Medium/substrate details

The materials or format of the design should be noted in the package design brief. This information is vital as it can affect the design process and final product.

For example: There are limitations when designing images to be printed on flexographic or polygraphic wrap. Here, gradients will not appear clean. Providing this information to the design agency in advance allows them to create the artwork accordingly.
Strategic details

Marketing objectives
This is the business goal to be achieved from the new design. This may include increasing awareness, informing consumers about a certain aspect of your brand, introducing a new product, increasing sales, or developing a new look to gain visibility on shelf.

Target audience
Determine who the target market is for this design project. It is important the agency and designers consider this during the art process. The target can include consumers (demographics, purchase intent), other businesses, or even employees.

For example: Mothers of elementary school children who pack their kids’ lunch everyday.

Brand positioning
This is an important aspect for differentiating your brand from your competitors. This reflects the area your brand occupies in a market segment.

The brand positioning is based on consumers’ perception of your brand and is created through effective communications and consistent brand coherence (packaging, brand name, customer service, advertising).

The brand positioning can be looked at as an extension of the Unique Selling Proposition (USP). This is the single most important benefit of the brand for your target market.
To determine your brand positioning, establish what makes your product appealing from the consumer’s perspective. Does your brand communicate food products that are value for money or impressive quality? Is your company a traditional, classic establishment or an edgy and innovative startup? Is your product about convenience, reliability, cleanliness, etc.?

Specific examples:
To nourish the potential that exists within all of us (healthy food packaging).
Providing a simple solution for mainstream users (electronics packaging).
Offering delicious premium treat to eat on the go (dessert food packaging).

Research and insights
This information is fundamental for understanding the “big picture” behind your company; your brand equity, industry, tone and personality, target market, niche offerings, etc., are key aspects the design agency should consider throughout the project.

Any research your branding or marketing department has conducted (surveys, sales stats) should be forwarded to the agency. This information will allow the account and creative teams to develop a deeper understanding of your business and the reasons behind the need for change.
As the designers consider these insights during the assignment, it will ultimately result in a more effective outcome.

**Competitive set (optional)**

A competitive audit can be supplied by the agency to detail significant aspects of the main competition’s activities based on brand, communication hierarchy, packaging, retail environment, etc.

This acts as a valuable reference for the designer to achieve certain design goals (stand out from the competition, learn from others’ mistakes) based on this information.
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