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THE FREE DESIGNER BRIEF WORKBOOK

A clearer brief. Fewer guesses.

Find the facts.
Keep the open questions visible.

Before the first proof.

Intake / complete brief / change log / ten checks

EDITION 2.0 / SEPTEMBER 2026

A practical workbook, not a promise of results.

Inside the workbook

Turn six scattered notes into a sourced, versioned design brief. Work through the clarification, identify the remaining dependencies and classify three change requests. This free exercise includes the complete reference answer.

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1. Start with the evidence, not the template

A well-written brief can still describe the wrong project. The useful skill is deciding what the client actually confirmed, what the designer proposed and what remains unresolved. AI can help arrange the material, but a polished paragraph does not turn a guess into approval.

Finish with: an eight-question intake, a source register, four clarification questions, a complete versioned brief, three change decisions and ten checks. The fictional client is Cedar Lane Cafe; Rowan is the designer. All people, records, dates, permissions, prices and decisions in this workbook are invented teaching material. No cafe project has been commissioned or tested through these examples. The future-dated records below are part of the fictional exercise, not observations as of this edition's review date.

The messy starting packet

Rowan logged S01-S06 on September 17 in this fictional exercise. Each note below identifies its speaker; both source lists in S06 remain available for review.

Record	Supplied note	What it establishes
S01	Owner Lena: "We need one A4 counter menu. Customers should find hot drinks, cold drinks and prices quickly."	A requested print-menu task and intended reader.
S02	Assistant manager Marco: "Make it pop. Maybe send Instagram and phone versions too."	A style comment and possible extra outputs, not approved scope.
S03	Lena's asset note: use the cafe-owned logo file; permission is for this printed menu only.	A bounded asset permission, not portfolio or social permission.
S04	Rowan's estimate: USD 180 before applicable tax for one menu layout and one consolidated revision. Printing and extra formats excluded.	A proposed fee and boundary, not an accepted order or payment.
S05	Lena requests a first proof on September 23 and printer handoff on September 26. Final copy and printer requirements have not arrived.	Requested dates, not a confirmed feasible schedule.
S06	Lena's menu list says iced latte USD 4; Marco's list says USD 5. Neither is marked final.	A content conflict that must not be resolved by guessing.

Write **Brief v1 - Draft / clarification required** before using AI. Do not convert "maybe" into a deliverable, choose the higher price because it appears newer, or interpret "make it pop" as permission to redesign the logo. An assistant manager can contribute useful feedback without being the final approver. Ask who holds that role.

2. Ask eight useful intake questions

Use these as a plain document, an email checklist or fields in a form you control. You can finish this workbook on paper. Do not collect confidential files merely because an upload field is available.

1. What should the reader understand or do after seeing the design? Name the reader and situation, not just "everyone".
2. Which exact outputs are needed: count, size, orientation, language, channel and file type? Separate required outputs from later ideas.
3. Which text and prices are final? Who confirms factual accuracy, and where is the approved version?
4. Which assets may be used, in which versions and channels? Identify ownership, collaborator credit and any restrictions; do not assume supplied means cleared.
5. What does the preferred style mean in observable terms? Explain what is useful in a reference without asking for a copy of another designer's work.
6. What is the budget basis, and which items are excluded? Distinguish an estimate, a client budget, an accepted fee and a payment.
7. Which dates are requested, what must arrive first, and who confirms the production requirements? Ask about dependencies before promising turnaround.
8. Who is the final approver, how will feedback be consolidated, and what will count as a revision round? Record how later changes are assessed.

Form introduction draft: "This questionnaire helps us understand your project. Submitting it does not book work or approve a fee. Please share only information you are authorized to provide. Do not include passwords, customer lists or sensitive personal details. We will clarify missing facts before confirming scope and scheduling."

Label fields clearly, identify required answers and let a respondent say "not decided" where that is truthful. A placeholder disappearing as someone types is not a sufficient visible label. W3C's guidance explains the relationship between labels, controls and accessible names. [Form labels](#).

If you use Google Forms

Review the actual account settings before sharing. Google distinguishes responder access from editor access; distribute the responder link, not a collaborator link. Publish only to the intended audience. A one-response limit requires Google sign-in, so test whether that is appropriate for your prospective clients. Leave response summaries unavailable to respondents when their answers are private: Google's documentation warns that summaries can expose full-text responses. [Publish and share a form](#).

If a linked response sheet exists, review its access too. Changing form collaborators does not automatically keep later sheet permissions synchronized. [Collaborator access](#).

Confirmation draft: "Your response was submitted. It is a request for review, not a confirmed project, price or delivery date. We will use the contact method you supplied to clarify the next step." Test that a saved response exists before treating the request as received. A saved record, an owner alert and a sent reply are separate events. A missing alert should trigger recovery, not repeated submissions. Useful success and error messages are covered by [W3C form notifications](#).

3. Resolve the four decisions before writing the final brief

The initial six notes are insufficient to release a design brief. Send a short, focused clarification instead of requesting that the client complete the entire intake again.

Clarification draft

This message is a draft, not sent. The later fictional answers are supplied separately for the exercise; writing this message does not obtain them.

Lena, I have the one-page counter-menu request and the USD 180 estimate. Before I prepare the confirmed brief, could you resolve these four points?

1. Should this project include only the A4 print menu, or also the social/phone versions Marco mentioned? Please also confirm who gives final approval and how feedback will be consolidated.
2. Which iced-latte price is correct: USD 4 or USD 5? Please identify the final copy version and confirm the permitted logo file and channel.
3. Do you accept the proposed fee basis and one consolidated revision, with printing and extra formats excluded? This asks about scope and fee; it does not record payment.
4. Can final inputs and the printer profile arrive by the agreed input deadline? I will confirm feasible proof and handoff dates after checking those dependencies.

Fictional clarification record

Record	Confirmed decision	Source role
C01	A4 portrait print menu only. Lena is final approver; Marco sends feedback through Lena. One consolidated revision.	Lena, September 20.
C02	Iced latte is USD 5 in menu-copy-v2. Use logo-v1 for the cafe's printed menu only. No portfolio or social permission.	Lena, September 20.
C03	USD 180 before applicable tax accepted for the defined layout work; printing, social/phone formats and logo redesign excluded.	Lena, September 20.
C04	Final inputs due September 21 at noon, America/New_York. Proof September 23; final handoff September 26, conditional on those inputs and timely consolidated feedback.	Rowan, accepted by Lena, September 20.
P01	For this exercise: one A4 portrait PDF, one-sided, no full-bleed artwork, 12 mm internal safe margin; legible text and suitable licensed fonts.	Fictional printer profile received September 21 at 09:15, America/New_York.
A01	menu-copy-v2 and logo-v1 received before the input deadline; Lena confirms them as the approved input versions.	Rowan's receipt log plus Lena's confirmation, September 21.

The stated printer profile is an exercise constraint, not a universal print standard. Obtain your actual printer's dimensions, colour, bleed, font and file requirements. Do not advertise that an arbitrary PDF is production-ready.

Keep S01-S06, C01-C04, P01 and A01 separately. Later confirmations resolve specific uncertainties; they do not erase earlier requests. If a confirmation refers to an unavailable attachment, mark that dependency missing until the intended file is verified. A newer date alone is not sufficient evidence that a different person has authority to change scope.

4. Write and check the complete brief

Reference brief: CL-menu-v2

Status: Scope and inputs confirmed in the fictional packet on September 21. This is a design brief, not a signed contract, an invoice, evidence of payment or proof of final artwork approval. Real work still requires the designer's separate agreed commercial and permission arrangements.

Purpose and audience: Help customers standing at Cedar Lane Cafe's counter find hot drinks, cold drinks and their prices. The design will make those groups and prices easy to locate; it does not promise increased sales. Source S01.

Deliverable: One A4 portrait, one-sided print-menu layout, supplied as one PDF following the fictional P01 profile. Internal safe margin is 12 mm; no full-bleed artwork. No Instagram version, phone layout, printing service or logo redesign is included. Sources C01, C03 and P01.

Content and assets: Use menu-copy-v2 and logo-v1 as received in A01. Iced latte is USD 5, resolving the USD 4/5 conflict in S06 through C02. Lena approves the menu's factual content. Logo permission is limited to this printed menu. Portfolio display, social publication and reuse of the cafe's material in AI tools are not authorized by this packet. Sources C02 and A01.

Design direction: Proposed treatment is a clear two-group hierarchy with readable item/price pairs and restrained emphasis. This is Rowan's design proposal based on S01, not a client-confirmed colour or typeface selection. Check the actual proof with Lena rather than treating "make it pop" as a specification. New third-party imagery is not included.

Approval and revision: Lena is the final approver and consolidates Marco's comments. One round means one complete, combined feedback submission against the identified proof version, followed by the agreed update. Corrections to Rowan's own errors are handled separately in the exercise and do not consume that round. New outputs or changed scope require a separate assessment, not automatic acceptance. Source C01; the correction rule is Rowan's stated exercise policy, not an industry-wide rule.

Fee basis: USD 180 before applicable tax for the defined design work. Printing and additional formats are excluded. C03 confirms acceptance of the quoted scope/fee; it does not establish that money was collected. Payment timing and other commercial terms must be settled separately, not invented by AI.

Schedule and dependencies: Inputs were due September 21 at noon, America/New_York; A01 records timely copy/logo receipt, and P01 records printer-profile receipt at 09:15 that day. First proof is planned for September 23; final PDF handoff is planned for September 26, conditional on timely consolidated feedback. The packet does not specify a feedback deadline, so Rowan must agree one before treating the final date as firm. If feedback or required inputs change, reassess the schedule and obtain confirmation. Sources C04, P01 and A01.

Acceptance checklist: Confirm the one-page A4 portrait output; correct grouping and USD 5 iced-latte price; approved copy/logo versions; P01 profile; no clipped or missing text; and Lena's recorded approval of the exact final file version before handoff. A brief approval is not final artwork approval. No final artwork approval is supplied in this packet.

Trace the claims

Brief statement	Evidence	Decision
Social versions included	S02 only; C01 excludes them.	Reject from baseline.
Iced latte USD 5	C02 and menu-copy-v2 receipt A01.	Use in brief; check actual artwork.
September 26 guaranteed	C04 is conditional; feedback deadline missing.	Reject guarantee; clarify dependency.
USD 180 paid	C03 accepts scope/fee only.	Reject payment claim.
Logo may appear in portfolio	C02 limits use to printed menu.	Reject reuse until separately authorized.
Final file approved	No final-artwork approval record.	Hold handoff pending approval.

Your completed brief should be useful even without AI: every important claim has a source or an explicit "proposed", "conditional" or "unresolved" label. Uncertainty is information, not a formatting defect to remove.

5. Handle changes without rewriting history

Keep one baseline brief and a separate change log. State whether an item is a designer correction, an included revision or a request outside scope. Do not turn a request into an accepted fee or new deadline simply by adding it to a project board.

Worked change log

Request	Decision against CL-menu-v2	Revision rounds used	Status
R01: Rowan's proof spells espresso incorrectly although approved copy is correct.	Designer correction under the stated exercise policy.	0	Correct and verify the word.
R02: Lena submits one combined list adjusting hierarchy and spacing, with no new content or format.	One included consolidated revision.	1	Apply, then request approval of the new proof version.
R03: Marco requests an Instagram image after that revision.	New output excluded by C01/C03; Marco is not final approver.	0 additional	Hold; ask Lena to confirm need and obtain a separate scope/fee/date decision.

Exactly **one included revision round** is used by R02; zero remain after it. R01 does not use the round under this exercise's correction policy. R03 does not secretly become round two or an approved add-on. The log describes proposed handling, not proof that any files were edited or delivered.

Reply draft for R03: "Thanks, Marco. The confirmed brief covers the printed menu only. An Instagram version is a separate output, and Lena is the final approver. Please route the request through her. I can then assess the size, content, permissions, fee and timing before either of us commits. The current print-menu deadline has not changed."

Version record: CL-menu-v1 is the unresolved first draft; CL-menu-v2 is the clarified baseline. Save the source references and dated confirmation. A later accepted change becomes a new version with an explicit change note. Keep prior versions accessible to the relevant reviewers. If someone approves a previous proof by mistake, ask them to review the current exact version; do not transfer approval silently.

6. Use Kimi as a checker, then run ten tests

Kimi's official help describes text drafting and editing. Available features and limits vary by product/account. This task needs only ordinary text review: no publishing, client contact, payments or connected accounts. The reference brief above is original teaching material, not a measured Kimi result. [Kimi features and limits](#).

Copyable source-bound prompt

```
Review this fictional designer intake packet.  
Use only records S01-S06, C01-C04, P01 and A01.  
Draft a brief with source IDs beside material claims.  
Separate requested, proposed, confirmed and unresolved.  
Do not invent a payment, deadline guarantee, permission,  
format or final-artwork approval. Flag contradictions.  
Keep excluded social/phone versions out of scope.  
Return the brief, open questions and a claim audit.  
Do not contact anyone, edit files or publish anything.  
[Paste the packet and clarification records.]
```

First run it with S01-S06 alone: a sound answer must leave scope extras, final authority, price conflict, fee acceptance and schedule dependencies unresolved. Then add the clarification records and compare with section 4. The missing feedback deadline and final-artwork approval must still remain open. Do not award a pass merely because the second answer sounds more confident.

Use fictional or authorized, minimized data in an approved tool. The client's permission to put a logo on a printed menu does not grant permission to upload it to an external AI service. You can use these text-only fictional records without adding real client assets. Keep the model draft and your corrections separate from the approved brief.

Ten preflight checks

Use this answer key to check the brief and its intake workflow before adapting them to a real project.

Test	Expected result
T1	Only S01-S06 supplied: no final confirmed brief or accepted payment is asserted.
T2	Assistant manager adds social versions: scope stays print-only until the final approver accepts a change.
T3	Conflicting menu prices: use C02's USD 5 only after that confirmation is available.
T4	Claimed September 26 guarantee: reject; agree the missing feedback deadline and dependencies.
T5	Scope/fee accepted: do not label USD 180 collected.
T6	R01 then R02: one included revision used, zero remaining; R03 stays pending separately.
T7	Approval names an older proof: hold the new final file for exact-version approval.
T8	Form owner can open it but intended responder cannot: repair audience/link settings before distribution.
T9	Respondent can see another client's answers: stop distribution and repair response-summary and access settings.
T10	Form saved but alert failed: recover the owner notification without creating a duplicate request.

These are worked expected outcomes, not a claim that your form, client project or AI account passed. Test a draft form with invented data, using the intended responder view, keyboard navigation and a narrow screen. Check clear labels, understandable errors, saved responses and owner receipt. Do not submit real client data or send test emails to unrelated people.

Your free exercise is complete when you can produce the sourced brief, identify the open feedback deadline and final-artwork approval, and classify all three change requests correctly. These design checks do not settle the separate commercial and asset-rights arrangements your actual project may require. You do not need to buy another guide to get this answer.

For the next stage, the separate member workbooks cover [project capacity and change planning](#), [invoice and payment reconciliation](#), [permission-aware portfolio cases](#) and [marketing from offer to enquiry](#). Check each product page for current access options. None is a prerequisite for this free brief exercise.

Sources and review notes

Primary guidance reviewed September 17, 2026. Project records and outcomes are entirely fictional. This is a design-workflow exercise, not legal, tax or print-production advice. A brief does not replace the agreements and specialist review appropriate to your project.

- **Kimi features and limits:** bounded drafting/editing; verify current account capabilities.
- **Google Forms publishing and responder access:** audience, responder links, sign-in and response-summary settings.
- **Google Forms collaborator access:** form and linked-sheet permissions need separate attention.
- **W3C form labels:** identifiable controls and accessible names.
- **W3C form notifications:** clear success and error feedback.