Find Your Angle

CHECKLIST

The Creative Review Checklist for Financial and Professional Services

Give feedback that gets better work, faster.

01 Before the review

- [ ] Is there a clear brief, audience and proposition we've agreed with the agency?
- [ ] Have our internal stakeholders signed off the brief, not just the marketing team?
- [ ] Have we agreed how many rounds of feedback, who has final sign-off and when we'll respond?
- [ ] Has compliance seen the brief and flagged any boundaries?
- [ ] Do we know what level of finish to expect, from rough thinking to worked-up concepts?

02 In the room

- [ ] Am I taking notes on my first reactions as the work is presented?
- [ ] Have we asked the agency which idea they'd back and why?
- [ ] Am I judging this as the client would, not as myself?

03 Evaluating the idea

- [ ] Does it answer the brief and bring the proposition to life?
- [ ] What's working and what should be protected in the next round?
- [ ] Am I judging the idea, not the execution?
- [ ] Is it a campaign platform that can flex across channels, from brand to demand?
- [ ] Does it build our distinctive brand assets, or borrow someone else's?

04 The financial and professional services tests

- [ ] **The swap test:** could a competitor put their logo on this and run it unchanged?
- [ ] **Safe vs right:** if it feels risky, is that a genuine compliance risk or just unfamiliar?
- [ ] **The jargon check:** would a client, not a colleague, understand it?
- [ ] **The audience check:** is it for end clients, intermediaries, or both, and are we judging it through the right lens?
- [ ] **The memory test:** will prospects remember us when they're ready to buy, even if they're not in market today?

05 Gathering stakeholder views

- [ ] Have I asked every reviewer the same specific questions, not just 'thoughts?'
- [ ] Have I separated problems several people spotted from individual preferences?
- [ ] Have we resolved internal disagreements before responding to the agency?
- [ ] Am I championing what's great, not just filtering out problems?

06 Giving the feedback

- [ ] Have I started with what's working, and been specific about why?
- [ ] Have I explained what isn't working before suggesting solutions?
- [ ] Have I stripped out emotive language and framed points as questions where possible?
- [ ] Have I marked must-haves and nice-to-haves clearly?
- [ ] Is any feedback actually a re-brief and have I said so?
- [ ] Will I deliver it on a call, then follow up in writing?
- [ ] Have I shared the positive reactions from stakeholders too?

Find Your Angle helps financial and professional services firms build brands that are unforgettable.

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