Form Examples and When to Use Them

Request forms play a crucial role in facilitating effective communication and collaboration between stakeholders and creative teams. Proper creative briefing leads to better collaboration, increased alignment, and higher stakeholder satisfaction. When you invest in a great request form, you'll see the results later in your workflow with metrics like reduced time to first proof, reduced number of proof versions, and faster turnaround on projects.

In this article, we will explore different types of creative request forms, empowering you to choose the right form for your unique requirements.

Request Form Creation Checklist

Before you begin, answer these:

- What type of content is this for?
- What do I want this form to achieve?
- Are there any bottlenecks or known process gaps I want to solve?
- What information does my team need to complete the request and operate efficiently?

While you are building, check these:

- **Identify who is responsible for accepting requests.** Include the Acceptors field and add the person(s) responsible for accepting requests. Without an Acceptor, no notifications will be sent when the form is submitted!

- **Include questions that will give your team enough direction to do their work.** This can't be achieved with a single field, but it's important to consider throughout the building process. Be sure to ask for any details that should be included, and provide ample opportunity for your requesters to share their ideas to reduce feedback cycles once the work is ready for review.

- **Identify the questions that are essential to completing the request.** Each field has the option to be required for form submission, indicated with an asterisk to the requester. When editing a field, select the checkbox next to Required.

- **Include instructions that will help requesters understand how to complete the form.** Using the Static Text field gives you the ability to provide instructions or headers for clear communication. Utilize Helper Text in Text, Longform Text, and Number fields to provide examples of the information you need or further instruction.

- **Identify any resources requesters should reference, such as previously created content or company brand guidelines.** Provide these with the Link field.

- **Consider how long your team needs to complete the request and if there are any constraints on lead times or service level agreements (SLA's).** Enforce this in your Due Date and Date fields by limiting the dates available for selection.

- **Determine if there is a project template that should be mapped to the associated work.** Define this in the Project Template field to select the template by default. Acceptors will still be able to select from other available templates for flexibility.

- **Identify any tags that should be mapped to the associated work for categorization and reporting.** Define these with the Tags fields.

- **Determine data points that are important for your team to map to projects for visibility and reporting needs.** Use your Custom Fields* to track these important data points directly from the request form.

  Available only to Business and Enterprise customers.

> ⓘ Download the interactive checklist HERE 📎
> (https://dyzz9obi78pm5.cloudfront.net/app/image/id/649369c0d3412f2c9029ba65/n/lyt-2021-formbuilderchecklist-final01.pdf).

General Request Form

A general creative request form serves as a comprehensive tool to capture various types of creative requests. It typically includes fields for the project name, description, objectives, target audience, desired format, and any specific branding guidelines or assets.

This type of form can be used when strategic advice from the creative team is needed, and the requester might not know which type of deliverable they are requesting.

General Request

Please do your best to fill out each of the fields below. After submitting your request, the team will review it and you will be notified of next steps. If you have any questions, please leave them in the comment section after submitting your request.

Due Date *

📅 Set Due Date ⌄

Requesting Department

⌄

Brand

⌄

How can we help you?

Describe your request: What is needed? What are your goals anticipated outcomes?

Who are you targeting?

Which personas are you hoping to reach? What is the audience size? What are their primary needs?

What is your key messaging?

What should people do, think, or feel when they see or interact with our creative?

What deliverables do you need from us?

Give us details about the file types and specs you need, and we'll follow up with any questions.

Do you have any additional information that you would like to share?

No detail is too small! Please provide any additional dates, formats, or other relevant information.

If you have any resources that might help inspire or assist, add them here.

Add Files ⌄

Drag and drop to attach files.

💡 Guide your requesters to provide the information you need by providing Helper Text.

Request Forms for Specific Deliverables

Individual request forms can be created for each type of deliverable. These forms do not contain conditional logic and can be built using the form template builder.

It is assumed that the requester knows what type of deliverable they need for their project.

HTML Email Example Form

HTML Email

Due Date *

Due Date

⮊ Set Due Date ⌄

Requesting Department

[⌄]

Brand

[⌄]

Who is your target audience?

Which personas are you hoping to reach and what insights do we have about them? What is the audience size? What beliefs or attitudes are we trying to influence?

What is the ONE thing to communicate?

If the audience has only one takeaway, what should that be?

What are the general communication objectives?

Are there other points or messages to communicate in addition to the ONE thing? What emotional and/or rational appeals are being made?

What are the desired responses/outcomes?

What are people supposed to do when they see this? How will the success of this asset be measured?

Email Send Date

📅 Set Date ⌄

Email Sender

[🔳]

Reply-to Address

[   ]

Sending Address

[   ]

Description

What is the purpose of the email, what feeling are you trying to evoke, what is the tone, etc.

Intended Audience (check all that apply)

☐ Existing Customers   ☐ Prospects   ☐ Employees

Pre-header Copy

[   ]

Copy

Provide the exact text needed

Call to Action

What is the primary message for this email? What action should the recipient take after reading it?

Special Instructions

Please provide any additional information the creative team needs to know

Required Approvals

☐ Brand Manager   ☐ Legal   ☐ Marketing Communications

Attachments

Add Files ⌄

Drag and drop to attach files.

Social Media Example Form

Social Media

Due Date *

⊟ Set Due Date ∨

Requesting Department

⌄

Brand

⌄

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What are the desired responses/outcomes?

What are people supposed to do when they see this? How will the success of this asset be measured?

☐ Facebook

Copy for Facebook

Media Type for Facebook

○ Static ○ Animated GIF ○ Video

☐ Instagram

Copy for Instagram

Media Type for Instagram

○ Static ○ Animated GIF ○ Video

☐ Twitter

Copy for Twitter

Media Type for Twitter

○ Static ○ Animated GIF ○ Video

Please list the product(s) you plan to promote:

Design Direction

If you have ideas for the design or layout of the media assets that you would like us to consider incorporating, please describe them here.

Campaign Start Date

📅 Set Date ⌄

Campaign End Date

📅 Set Date ⌄

Required Approvals

☐ Brand Manager ☐ Legal ☐ Marketing Communications

Attachments

[Add Files ⌄]

Drag and drop to attach files.

Video Example Form

Video

Due Date *

🗓 Set Due Date ⌄

Requesting Department

⌄

Brand

⌄

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What are the general communication objectives?

Are there other points or messages to communicate in addition to the ONE thing? What emotional and/or rational appeals are being made?

What are the desired responses/outcomes?

What are people supposed to do when they see this? How will the success of this asset be measured?

New Footage Needed?

◯ Yes ◯ No

Launch Date

📅 Set Date ⌄

Project Description

Distribution Channels

○ Broadcast ○ Digital Billboard ○ In Stores ○ Social Media ○ YouTube

Length

○ :15 ○ :30 ○ :60 ○ Other

Orientation

○ Portrait ○ Landscape ○ Both

Video Length: Other

Title Card Copy (if needed)

End Card Copy (if needed)

Final File Delivery Type

○ .mp4 (most common) ○ .avi ○ .mov ○ I'm not sure

Required Approvals

☐ Brand Manager ☐ Legal ☐ Marketing Communications

Attachments

Add Files ⌄

Drag and drop to attach files.

Web Banner Example Form

Web Banner

Due Date *

🗐 Set Due Date ⌄

Requesting Department

Brand

Who is your target audience?

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What is the ONE thing to communicate?

If the audience has only one takeaway, what should that be?

What are the general communication objectives?

Are there other points or messages to communicate in addition to the ONE thing? What emotional and/or rational appeals are being made?

What are the desired responses/outcomes?

What are people supposed to do when they see this? How will the success of this asset be measured?

Call to Action

What is the call to action for the ad?

Copy

Landing Page

Where would you like the audience to land when the ad is clicked? Please provide any relevant URL(s).

Design Direction

If you have ideas for the design or layout of the ad that you would like us to consider incorporating, please describe them here.

Attach any images you'd like us to use in the ad (such as product shots or headshots)

Add Files ⌄

Drag and drop to attach files.

Note: You may also attach any work samples you'd like us to use for reference (such as previous ads or competitors' ads).

Additional Images

Describe any additional images you'd like included in the banner

Live Date   **Take Down Date**

📅 Set Date ⌄   📅 Set Date ⌄

☐ Full Banner: 468 x 60   ☐ Skyscraper: 160 x 600

☐ Leaderboard: 728 x 90   ☐ Small Skyscraper: 120 x 600

☐ Square: 250 x 250   ☐ Wide Skyscraper: 240 x 400

☐ Button   ☐ Other

                                            Describe "Other"

Maximum File Size

Additional File Requirements

Required Approvals

Brand Manager ☐ Legal ☐ Marketing Communications

Postcard Example Form

Postcard

Due Date *

🗓 Set Due Date ⌄

Requesting Department

⌄

Brand

⌄

Who is your target audience?

Which personas are you hoping to reach and what insights do we have about them? What is the audience size? What beliefs or attitudes are we trying to influence?

What is the ONE thing to communicate?

If the audience has only one takeaway, what should that be?

What are the general communication objectives?

Are there other points or messages to communicate in addition to the ONE thing? What emotional and/or rational appeals are being made?

What are the desired responses/outcomes?

What are people supposed to do when they see this? How will the success of this asset be measured?

Print Quantity

Budget

What is your total budget for the project?

Mailing Date *

📅 Set Date ⌄

Mailing Class

⌄

Postcard Size

○ 4 x 6 ○ 5.5 x 8.5 ○ 6 x 9

Will you need an electronic file?

○ Yes ○ No

Project Description

Required Approvals

☐ Brand Manager ☐ Legal ☐ Marketing Communications

Attachments

Add Files ⌄

Drag and drop to attach files.

Concierge Form with Conditional Logic*

Available only to Business and Enterprise Customers

Conditional Logic allows you to hide or show fields or sections of the form based on a value selected. For example: if a checkbox field "Postcard" is checked, then the "Postcard" section of the form, containing relative fields, is displayed.

This means that one form can be used to give users the ability to choose which deliverable they would like to request.

> Forms built with the Form Template Builder and forms built by our Support Team both provide powerful functionality. Find a comparison here (https://guide.lytho.com/help/form-builder-comparison).

Forms with conditional logic need to be updated by our Support Team. Request changes to the forms here (https://guide.lytho.com/help/contact-feedback).

Print

What type of collateral do you need? *

☐ Postcard   ☐ Brochure   ☐ Sheet   ☐ Poster   ☐ Other

Design Direction

If you have ideas for the design or layout of the project that you would like us to consider incorporating, please describe them here. Be sure to attach any examples you would like us to reference.

Direction/Ideas

Copy

Please provide any relevant copy for the collateral *

○ A copy document is attached to the request   ○ Copy is pasted below

Request Form *

| Social Media | ⌄ |

Due Date *

| 🗓 Set Due Date ⌄ |

Call to Action

What is the call to action for the post? Please provide any relevant URL(s). *

| |

Social Media Channel

| ☐ Twitter |

| ☐ Facebook |

| ☐ Instagram |

| ☐ LinkedIn |

| ☐ Pinterest |

| ☐ Other |

Campaign Dates

Campaign Start Date *

| 🗓 Set Date ⌄ |

Campaign End Date *

| 🗓 Set Date ⌄ |

Design Direction

Product Lines:

| |

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