

Selecting the right agency or design partner

*This document is based on **DBA's Agency Selection Guide** featured in the **DBA Directory** and is featured by **BEDA** as an inspiration.*

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What are you actually looking for?

Having decided on the source of the designers, how do you actually know who is right or who is more suitable than others? The initial step will be to use the designers own website to have a look at what projects they have worked on, who they have worked for and what they can offer you. Things to look for or think about are;

- Have they worked on similar sized projects to yours?
- Do they have similar types of client to you?
- Have they worked on any of your competitors?
- Do they have a range of outputs or are they all somehow similar?
- What sort of experience do they have (just because they may be a new company does not mean that the owners and senior designers do not have vast experience)
- Do you like what they do?
- What information is available? Can you get a feel for who they are?
- Can you get more information if you need to?
- Do they measure what they do? How effective is their work? Do they tell you?
- Have they won any awards? (especially design or effectiveness awards)

At this point you are only really looking to identify three to four designers or agencies who you feel would be able to help you and that you would like to take to the next step. There are no 'rules' about how many designers you can see. However, bear in mind the more you see the longer the process, the more work may be involved in communications with them.

Next Steps

Ideally the next step is to meet each designer or agency. You can do this informally or formally and this will depend on how fast you need to make a decision. Visiting them if you have the time will tell you a lot about them however you will need to make time for this. Asking them to meet with you again informally to present their portfolio and talk through the project or more formally in a credentials pitch will depend on your needs and preference at the time. You could just ask them to write a proposal and send it in.

In meeting the designers you are learning more about them, how they approach you as a client, how they communicate and how they go about understanding who you are and what your business does. The pitch process is designed to formalise this and to allow a decision to be made as to who may be more suitable to undertake the project.

Chemistry

At the end of the day, you will need to work together as a team and this invariably comes down to 'chemistry'. Getting the best from your designers will be easy if you all get along and can work together well and there is little point selecting the highest scoring designers from the pitch process if you don't think you will get along! The process is only a guide to getting a designer who has the right

credentials, who can demonstrate capacity to handle the project and who understands what it is you are after to the point where you start to work together.

If you don't find a designer straight away go back to your lists and try another selection, don't feel you have to select from your first pass. Too many projects have veered off plan because of the speed in the decision process that has ended up having to pick someone unsuitable due to time constraints. If speed is an issue, then seek someone who has experience to guide or advise you. If you do not know of anyone ask your national or regional designers' association to help you find a selection of relevant potential partners.

Asking for a Proposal Document

Depending on how confident you are with your selection of designer, you may just approach the selected designer to develop a formal proposal response to your brief. You can in fact ask all the designers you have seen to respond if you have not selected one but this will mean more work. The proposal document can be used as a way of engaging in a conversation, a negotiation or as a way of selecting the final designer.

The issue of how much will always be at the forefront of any negotiation. The designer will use the brief against which they will work out what they need to do, how long it is likely to take and how much they need to charge for it.

At this point you have two options, either tell the designer how much money you have in the budget and get them to provide a response that indicates what they would be able to deliver or let the designer come back to you with a figure for the project without any guidance. There are no rules here. It is more likely to depend on the budget available. If the budget is on the tight side then it may be better to let the designer know. This is likely to save time (and perhaps embarrassment) later! Bear in mind that where you have indicated what the budget is, you are reviewing what the designers can deliver for the money whereas where no budget has been given you are evaluating what you are getting for the price quoted.

Reading a proposal

The proposal document should indicate how the designer will carry out the project, the process or methodology they will use, how long they expect it to take, how much it will cost and what the client will actually get for their money. Where possible the proposal should also suggest who will be involved at each stage, how much time they will spend and at which rate. The process will differ from designer to designer but is likely to include the following stages;

- **Research, user studies, strategy or feasibility**

The research here is carried out by the designers, either to better understand the issues faced by the project or to experience first hand the product, service or website. This may include a look at what else is happening in the market as part of the context for the project – either through a market analysis approach or through more or less elaborated user studies.

This research is not to be confused with more formal qualitative or quantitative research that is usually commissioned separately from a specialist in the research area. This should be indicated as such.

Costs can be saved by providing the designers with as much information as is available or asking the designers what else is required and suggesting that it may be more cost efficient for a member of staff to collect the information required on their behalf.

The expected output of this stage will be a confirmed brief and a project plan. (It is sometimes difficult to confirm this upfront prior to the project formally starting) If added research is being

carried out by the designer, then a report of the activity and findings should also be made available.

- **Design concepts**

During this stage the designers will explore possible solutions to the brief. The expectation here is that they will present any agreed number of ideas from which one (maybe two depending on money available) will be selected to concentrate on in the next stage.

Typically designers will expect to present up to three ideas or routes to choose from. Asking for more may increase the price for this stage. However, there is no reason why the client cannot ask to see the working drawings, sketches or development models to see how the solutions were arrived at.

The output from this stage is to agree on one idea to take to the next stage. To avoid any unnecessary extra costs, the client should ensure that all the decision makers involved in the project are present at the meeting as any change in direction may incur extra fees.

- **Design Development**

This stage will take the idea selected and work it up to a final solution. It might take from weeks to several years, depending on the complexity of the task in question, the degree of autonomy given to the designers and dependency on other in-house or external experts. The actual deliverable will have been agreed as part of the proposal document. This will allow the client to agree a final sign off of the design before it is implemented.

Any final issues or uncertainty about the design needs to be dealt with by this point. Any changes after this will be expensive. If in doubt (and if possible) live with the design for a period of time and consult others. Do not rely on the design solution 'growing on you' over time as if it does not feel right now then it is not likely to be right after implementation.

- **Implementation**

This is where the final design is delivered either with it going live, to print, to production or communicated to target audiences.

Depending on the requirements of the brief, a designer will have some sort of involvement at this stage. It may be called 'supervision of production' or similar phrase. At some point in the proposal it should indicate where a designer stops designing and starts to oversee the implementation process. It maybe that on larger projects a project manager will have been involved and they might be seeing the project through to delivery, but always ask for justification as to how much time is really needed to see it through.

If in doubt about any part of a proposal document either because of the language used or because of the concept being unfamiliar or just unclear, ask the designer to clarify to the point that it is understood exactly what is meant so as to avoid any confusion or disappointment at a later date.

Things to watch for

Proposals will come in a variety of different formats and layouts and will cover most issues. However, there are areas that can be left out or not touched upon until incurred. If they are missing from a proposal ask the designer how they would like to deal with the issues should they arise. Some of these are:

- **Changes to the brief**

The proposal is based on the brief given and any changes, depending on the nature of the change, may render the proposal invalid. It is wise to ask the designer to indicate the likely impact of the change BEFORE making the decision to change. This could be a timescale problem as well as a financial issue.

- **Design changes**

The same hold true for design changes where a solution is settled upon, but perhaps due to other project members input it needs to be changed. If a change needs to be made, again discuss the cost and impact of the change BEFORE requesting it. The earlier in the project the changes are made the less impact it will have on the project overall.

- **Record keeping**

Meetings and decisions should always be recorded either in the traditional set of minutes or in the form of a contact report from the designer. If there is a project manager this will be their responsibility, if not it will fall to the designer to write. However, think about the possibility of an internal team member drafting the minutes to reduce the cost.

- **Unscheduled meetings**

The designers will have allowed for a series of client meetings per stage of the project. If this is not clear, ask. If unscheduled meetings are called be aware that the designers are incurring time each time they leave their office to visit the client's premises. Costs can creep up if the client is requesting meetings that were not planned for.

- **Travel time**

This issue should be partly covered in the agency selection process and applied to the distance and therefore the time taken for the designer to get to and from the client. If the distance means that the designer will spend more time travelling than in the meeting, ask how they will be charging for this. Some may have a travel rate but others will expect the client to pay the standard day rate. Splitting the meeting venues between the designers and the client's sites can reduce cost.

- **Mark up and bought in items**

The proposal should indicate where needed how the designers will deal with buy in items. These include services that they may not have in house such as copywriting, photography or website programmers, prototypes or mock-ups. It may also include specialist researchers or consultants depending on the type of project being undertaken. The designers may mark up the service either under a 'handling fee' and a percentage will be applied or they will allocate extra 'project management' time to look after the bought in resource. If this is not clear ask and perhaps negotiate.

- **Expenses**

Different types of expenses will be incurred as part of the project. These are likely to include materials and travel as well as items such colour reproduction and couriers. Expenses are variable and difficult to estimate up front. Ask for an estimate but it will always depend on how the project is running and the demands the client puts on the agency. Extra presentation boards or more colour run outs will be charged and thought should be given to the option of post against courier especially if the distance or urgency does not warrant it. Always ask for a breakdown of expenses in the invoice from the designer and that the designer clears any large or unusual expense first as it may be more practical for the client to buy direct in some cases.

Final Decision

Once you have arrived at your final choice for the designer you wish to work with and regardless of the process used to get to the decision, make sure you have allowed enough time to give feedback to the unsuccessful designers. The feedback is important to the designers as they will have spent time and effort working up their proposals as well as any time spent meeting with you. They will want to know why they were not awarded the job so that they can use the information to improve their performance next time.

Feedback is also important as you never know but you may decide to ask some of the designers to pitch again for another project and they will learn from their experience with you and decide if you are a client that they would like to work with and go through the process again in the hope that they are successful the second time around. This is as much about your brand as it is theirs!

If in doubt about any part of the process or you have questions that are specific to what you are trying to, find someone to ask or contact your national or regional professional designers' association or design centre who will almost certainly know someone who will be able to answer your questions or help in the process.