IDI Resources: Client Guidelines

Documents in this section provide inspiration and serve as "checklists" when developing brief documents, planning and calculating projects, and preparing for communication between clients and suppliers of design services. The documents are designed to be equally useful for both parties, and are available to everyone.

Commissioning Design

Starting up a design project

This document is based on DBA's Getting Started guidelines and is made available to the IDI via our membership of BEDA. This document is featured by IDI as an inspiration. IDI takes no responsibility for the contents of the following guidelines.

Creative agencies come in all shapes, sizes and types, so how do you pick the best for your project? Design is practised in a number of ways. A designer may be self-employed, part of a group of designers working together in a loose collaborative way or they may be part of a design agency where there are a number of different specialists under the same roof. This guide uses the term 'designer' to refer to any person regardless of employment status.

We believe that design is best utilised at the earliest possible stage of the project and that a designer can help with the project at the strategic level as well as the tactical implementation level. Depending on where you are in the project will require different skills from the selected designer and it may be worth taking time to think about where you are in the project before you embark on looking for your design resource.

Identifying the Challenge

A good place to start when thinking about what sort of designer you need is to look at the size and the nature of the challenge facing you and the business – whether at this stage the output is an open question; a concept, a product idea or a series of products, or for communication design a brochure, a website or a new service.

Developing the Brief

The next step in beginning to help clarify your requirements is drafting a brief. If more than one designer is approached, it is obvious that all designers should start from a similar point for you to compare the feedback you get from them. They will need some information on the background to your business and to the nature of the project as well as what you need from them. The brief represents a starting point for communication and discussion as well as a tool for you to use when searching for and selecting designers.

Types of Designers

The term 'designer' is generally used to cover a range of services and activities and for the most part a well trained and experienced designer will be able to add value to most design

issues and processes. However, as in all sectors, most designers specialise in certain areas and many agencies may offer more than one specialism.

When making an initial approach to selecting and commissioning a designer, the recommended route is to look for designers that specialise in the type of challenge you have identified and need to resolve. So, if you think that you need to resolve issues with your packaging, then you might want to look for designers who specialise in packaging initially rather than graphic designers who are able to design packs.

The easy way to do this is to look at their portfolio online. If the work examples are mainly packaging projects then it is safe to assume that they specialise rather than seeing a selection of graphic design projects with some packaging examples. You may need different types of designers at different points of the project but it will help your selection process if you focus on core specialist skills initially.

Designers use a range of terms to describe who they are or what they do. A simple and perhaps basic starting point for what each is about is as follows.

Graphic Design
Graphic design deals mainly with two-dimensional design or what is sometimes referred to as design for print or screen viewing. This could include stationery, brochures, catalogues and internal communication materials as well as technical information and forms, posters and banners, design for digital reproduction, signage etc. Designers in graphic design may specialise in areas like Wayfinding, Information Design or Internal Communications or in visual communications for specific fields of application.

Brand or Identity Design
Designers who specialise in this area tend to deal with the way an organisation communicates who it is and what it does and, more importantly, try to define a differentiated proposition in the marketplace. They will often develop an identity system that will include a logo, typeface, colour palette and any photography or imagery required. As part of the project they will also produce stationery options, a brochure cover or may be a webpage that demonstrates how the identity should be applied. Ideally they will produce a guide to all the identity elements for use when commissioning design in the future.

Product or Industrial Design
Product designers will deal with anything that is three dimensional and typically manufactured. This may include components of larger designs, complete products, consumer goods and even 3D structural packaging. These designers can also specialise in sub categories, for example medical devices, consumer goods or sports equipment. They may have engineering support in house and will be able to deliver a set of CAD drawings ready for tooling and production.

Web or Digital Design
Website design deals with the way a business is expressed on line as well as handling any extranet or intranet applications required. Increasingly digital designers will also be able to develop phone applications and other access media applications. This sector will also

help develop everything from powerful presentations to CD ROMs and digital media for customer use.

Packaging Design
Packaging designers work in three dimensions but use the print process to express the final design. Packaging design includes labelling and protective covers as well as the actual box, carton or pack the product arrives in. Some packaging designers also deal with point-of-sale materials such as the retail unit that may display the packaged goods in store.

Exhibition Design
Exhibition design covers that range of design outputs required to promote a product or service in a designated space. This could either be a stand at a trade show or a small booth at a local networking event. In some cases it may also include the development and construction of the final design.

Retail Design
Retail design covers shop interiors and fittings as well as the way products are sold within the retail space. Some agencies will also have project managers who will be able to manage the fit-out of the shop or retail space as per the design solutions developed.

Interior Design
Interior design in some agencies may well include retail but usually covers everything from office space and workspace to large public spaces and design for domestic spaces. Some interior designers will get involved with the entire fit out process, while others work on a more conceptual level or on specialised areas, from designated work or client relations stations to environments for specific types of care or treatment.

Service Design
This is a relatively new specialism for agencies; traditionally it was included as part of a brand agency offer when establishing the way a brand operated. It deals with the development and delivery of a service offered both online and offline. It will cover all aspects of the service from the customer experience to the internal resources required to support the service on a day to day basis.

Innovation Consultancy
Innovation consultants help organisations to identify and develop new product or service propositions. Typically they will work with the business at a more strategic level using creative tools and processes to help the business uncover and identify then exploit unrecognised opportunities within specific markets. Innovations consultants will also work internally to help identify and build appropriate internal skills and capabilities. Creativity and innovation is part of what all the agencies can offer but only as part of the core specialism. These agencies are typically used when no specialism has been identified or required but will work with the client to develop a brief for the most suitable agency to help implement the opportunity identified.

The Process

Finding a designer is easier than you think, once you have thought about the challenge you face, have tried drafting a design brief and identified the type of designer you think you need to help. In many countries, you will find online directories which allow you to search by different criteria, each criterion added will narrow down the possibilities available to you from the membership.

Besides such directories – where available – there are a host of different ways to identify potential designers. Asking colleagues or other business contacts for a referral is one, using the wide range of available magazines and journals that cover each sector of design is another. Moreover, professional designers' associations and design centres will be able and more than willing to guide you in your search for a partner. Using the internet is also a possible route but possibly the longest and most time consuming.

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Pitch brief

This document is based on DBA's Pitch Brief guidelines and is made available to the IDI via our membership of BEDA. This document is featured by IDI as an inspiration. IDI takes no responsibility for the contents of the following guidelines.

Your Details
Client Name / Project

Introduction
This is an introduction to your company, who it is, what it does, where it operates from and how long it has been trading. It should cover the specific part of the business the project is being commissioned from if there is more than one operating division or site. A reference to the website with any particular pages to note can be included here.

Background
This section should give an overview of the project, where it was conceived, what it has set out to achieve, where it has got to and what is needed next. It could include why designers are being brought in at this stage as well as any reference to any other designers that have been or are working on it currently. This will indicate how the new agency will fit into the overall mix.

The Presentation
This should cover a bit about the presentation the agency is being invited to. It will cover details such as time allocated, what is required by the panel such as case studies, a demonstration of previous experience, something about how the agency operates, any thoughts they might have about the project as well as the time for questions.

Who will be attending
Sometimes it is useful to let the invited agencies know who is on the panel. If known the names and titles of the panel can be listed and if the role on the project is unclear then a comment as to how they connect to it.

The Process
Depending on how much you want to reveal, this section can cover a little about the selection process itself, how the agency came to be invited, how many are being invited, a confirmation of the pitch date, when the agency will know the outcome of the pitch and how feedback and questions will be handled.

Contact Details
This should cover any details such as the site address for the pitch, any travel or parking details, where the pitch is to be held internally, contact details for switchboard or a colleague (just in case your mobile is off during a pitch), the pitch organisers contact details and the suggested route for any questions.

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The design brief

Your Details
Client Name / Project Name

Introduction
Provide an introduction to your business, who you are, what you do, where you do it and how long you have been doing it for. Add a link to your website and any relevant information with regards to the project. Add any further information that would help the designers get a feel for your business and how it operates.

Project Background
Describe the project in as much detail as you can or need to. How has the project been raised, what is it designed to do, where does it fit with other initiatives within the business, does it have to work with any of them? Detail the project objectives if available particularly with respect to business impact and what the project needs to do for the business or organisation.

Market Background
Describe the market you are in, the current prevailing conditions, what you need to do in the market. Have you any market research data to support the project, was the project based on changes within the market itself or are you looking to enter new markets? Who is the target audience/s (customers/users) within the market you have just described? What is the competition in your market, what does it look like, can you list websites that the designers can go to get a better feel of the overall landscape of the market you are describing?

Work to Date
Detail any work (if you can) that you have carried out or completed to date that has an impact on the project. What is available to the designer, describe the point that they are entering in to the project (if relevant). Is there anyone else that they might be working with? Is there anywhere else that they might be able to get further information on what you have done so far?

Services Required
This is where you detail what you need. It may be that you just want a brochure or alternatively it may be where you attach a specification for something much more technical. You can be specific about what you need or leave the brief deliberately open for the designers to challenge at a meeting. If you are unclear about exactly what form the services will take – seek advice; make sure you have the right type of designer for the job.

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Pitch Guide

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Setting Out

Before setting out to run a pitch you should ensure that you have

1. Developed a brief for the project you would like the designers to be considered for (see section 2)
2. Selected the designers you intend to invite (see section 3)
3. Confirmed the selection criteria for the designers you require
4. Agreed some dates that any colleagues that will be judging can attend
5. Agreed what sort of pitch you require Selection Criteria

When selecting designers, it is best to think about what you actually need before you start to look. This way you will not just be swayed by a piece of work you like or are familiar with in their portfolio. Think about the skills or experience you might need, the sort of projects that you would expect to see in their portfolio as well as the sort of approach you think you might need. Think also about how they demonstrate how effective they are, have they won awards, do they enter competitions or do they need to able to explain what their creativity has done for their previous clients? Finally, you should also be sure what sort of pitch you want to run. There are two main type of pitch that are generally understood by creative agencies, a creative pitch or a credentials pitch.

Creative versus Credential pitch

A creative pitch is where you ask a designer to present some ideas at the meeting (i.e. they have to do some creative work prior to seeing you) against a designer who will be very happy to meet with you to show you their portfolio, which is referred to as a credentials pitch. If you need run a creative pitch then you should expect to pay for it, after all they are working on your behalf. This can be done by setting a minimum fee that you are willing to pay, and asking the designers to work to it.

If you are setting a creative pitch you will need to be very clear what it is that you are asking them to do. Different approaches and different ideas presented will make the final selection harder as there are likely to be bits in all the presentations you like.

Credentials pitches on the other hand still require the designer to think before the meeting but this thinking should be about you and your business needs not how the challenge can be resolved at the first meeting. Designers will have a portfolio of projects, which they will regularly present to potential clients to get work. The key here is that they will have selected projects or case studies that will be similar to the challenge facing your business to demonstrate their suitability for the task ahead.

The creative pitch is mostly used where you have both the budget and a clear idea of what you need. The credentials pitch is used mostly where you are looking for a designer to

work with but where the brief is more open and you feel you would like to explore with one designer ideas going forward. By reviewing portfolios and meeting the designer you are selecting the designer you feel you would be most comfortable working with in this way.

How Long and How Many?
Most pitches usually take place over the period of one day. At a push up to six agencies can be accommodated with an early start and a late finish. Each pitch should last from about an hour to an hour and a half with questions. Each pitch ideally should have time between the leaving of one agency and the arrival of the next. This time will be required for you and the pitch panel to discuss or make notes whilst the pitch is fresh in your minds. It will also be required if the incoming agency needs to set up their presentation, make sure the laptop connection works with the projector etc. If at all possible the pitch panel should retire to a separate room for discussion whilst the agency is setting up and getting used to the room.

The pitch day can be tiring for all but it is essential that you collect all the completed feedback sheets at the end of the day. It is very difficult to try and complete these at a later date.

Who should attend?
Balancing the judging panel is always an issue. Ideally, anyone with an interest or stake holding in the project being pitched for should be there, but too many on the panel will inevitably lead to problems and conflicts with the final section process. It may also affect the timings of the pitches if too many people want to ask questions that relate to them directly and not the project itself.

Regardless of the number attending, there will always need to be a Chairperson for the sessions, someone who can start the process, welcome the agency, keep time as well as being responsible for managing the question and answer session at the end. They may not necessarily be the person responsible for the scoring sheets and feedback, usually that would fall to the project manager or director.

Preparing for the Pitch Day
Having identified the agencies you want to see (see section 3), you will need to invite them to the day set aside for the pitch. The earlier you can let an agency know what day you have in mind the more likely the planning will run smoothly. Ideally, you are trying to avoid changing the arrangements at all, although changes are inevitable with such a large group of people need to attend the day. Once you have alerted the agencies, you can then follow up with the running order and pitch brief.

There are no 'rules' around the allocation of a running order. Usually, done on a first come first served basis, each agency should have kept the day free and would pick whatever time slot is available (except for the last slot of course). Confirmation of each agency slot should be sent in writing to remove any confusion. This should be accompanied by a brief for the presentation itself.

The pitch brief is used to ensure that each agency attending is clear what they are expected to present. This will also help the judging panel in their approach to scoring,

where they will be able to judge pitches that are closer in content. A sample pitch brief is in section 4. The brief can be as short or as long as required. All you are doing is to help the agency prepare for the meeting in a more focussed way and that they have all the information they need to prepare something relevant to show.

Ideally on the day of the pitches, or perhaps the afternoon before, you will want to gather the judging panel together and brief them to ensure that they are thinking about and scoring the same issues. You could take them through the background to the project, the pitch brief or what it is that you have asked the agencies to come prepared for. You may be using the pitch record sheets (see section 5) and you should discuss the process for this as well as the time scale for the decision process and feedback. It may be that you have arranged a further meeting to discuss the overall pitch and the agencies involved on a separate day. You will therefore need to reiterate how important their scoring is and how useful their completed sheets will be for the follow up meeting.

Other things to consider before the pitch day are
• Refreshments, for the panel and the agencies
• Do you/ reception know who is coming and when?
• Have you organised the timetable to allow for breaks for the panel?
• Does all the equipment you need work/ do you know how to work it? Do you have access to someone who does?
• Does everyone know where to go? Visitors parking facilities/ maps?
• How will you provide the feedback?

Successful and Unsuccessful
You need to select someone to work with you to deliver your project and this means that there will be agencies that have attended the pitch and have put time and effort in that will want to know why they were unsuccessful.

Plan time after the decision has been made to either complete a feedback form (see section 7) or to schedule a telephone call (or if you wish a face to face meeting) with the unsuccessful agencies to give them a debrief and feedback to help them understand what you and the pitch team were looking for and why they were not selected.

Completing the scoring sheets will help in this process and will ensure that you have something useful to say. Be prepared to answer a question regarding who attended the pitch. Most agencies will want to know who they were up against and who won eventually. There are no 'rules' here either but the agencies will be interested to see which company they keep and where they were placed. Realistically, it is not wise to be telling everyone that they came 'a close second' when in fact they didn't! It is difficult to give feedback if a performance was under par but then the agency might already know this!

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Agency Selection Guide

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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 an agreed number of ideas from which one will be selected to develop in the next stage.

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.

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