

## Choosing a Design Firm

Before you choose a design firm for your project, indeed, before you even contact design firms, consider the following points:

### Step 1—The Big Picture

Step back from your project for a moment and address these fundamental questions:

- What is your company's mission (in twenty-five words or fewer)?
- What do you want to become? What is your company's vision?
- What ties your organization together? What are your values?
- Who are your competitors?
- What truly differentiates you from your competitors?
- What do you want this project to do for your organization?

If you can't answer these questions, you need marketing expertise. The most successful design is grounded in a marketing plan that in turn is built on your mission, vision, and values. Design, no matter how well organized and beautiful, is not a substitute for marketing, but a good design firm often knows something about marketing and its importance. Design can work seamlessly with marketing considerations, and a design firm should offer guidance in finding marketing professionals if you need them.

### Step 2—Target Audience

Name your audience. If there is more than one, list them in order of importance. Define each audience group by answering the following questions:

- What is the single most important piece of information your audience wants?

- What general information are they after?
- What is the impression you want to make to this group?
- How will your audience use what you are producing?

### Step 3—Content

Create an outline of the content you want to convey and consider whether you want the project to be presented in a specific number of pages. Does the content support your mission, vision, and values? Ask the design firm if they can provide a writer and editor if needed. Keep the content clear and concise, so that people will read, listen to, or look at what you are offering. Trying to include too much content is the biggest and most consistent mistake we see. The justification is always the same: some morsel of information may be appealing to some person. Organizations don't want to lose any potential client, student, or user. But they disregard the truth that everyone is overwhelmed with information. No one wades through meandering content. Focused brevity is the key to success. If you need to supply details, do so through secondary Web pages, pdfs, white papers, and contact information.

### Step 4—Visuals

Surf the Web, look at trade publications, and research what other organizations akin to yours have done. Inspiration need not even come from within your field. Make a collection of logos, packaging, printed pieces, and Web addresses of things you like. Then analyze why you like them. (For example, is it the color, the feel, etc.?) Decide how these general preferences might be applied to your project.

Also consider:

- What have you done in the past? Is it still working? Should it be emulated?
- Do you have any existing visual, identity, or editorial guidelines? What has worked for you visually, and what has not?

Consistency is important—you want all your communications to have a similar look. This may be hard for an organization that no longer likes its look, or has a look that’s changed considerably over time. If you dislike your look, but are not prepared to examine it in detail, it may be best to continue with the old look. A designer can improve your look while maintaining consistency. If your problem is lack of consistency, perhaps you can emulate your most successful project to date (the design firm can help evaluate this), so that you are at least beginning a trend. In the end, though, using the same guidelines for all communications is most successful.

#### **Step 5—Schedule and Resources**

Logos require a couple of months to develop, as do publications such as annual reports, magazines, and catalogs. Web sites take three to four months. Printing and final proofing generally require at least three weeks. Interviewing and meeting design firms and getting estimates can take a month. Decide your final due date, the components of the project, and work backward to calculate a start date.

What can you do in-house? Do you need a marketing person? A writer and editor? Do you have a good library of photography? Do you have an in-house data-management person? Figuring out exactly what you need ensures that you receive accurate estimates.

#### **Step 6—Budget**

We strongly encourage you to put together a budget. This will help determine what you can afford, and helps the design firm provide accurate estimates.

#### **Step 7—Measuring Success**

It is always best to decide at the beginning of a project how you will evaluate its success. This

may entail research to establish how successful past projects have been, and to help determine present goals. If you have done a similar project in the past, take a look at what made it successful or unsuccessful. Get opinions and look at any data (such as the number of attributable sales, applications, or hits derived from this project). If you don’t have any past data, use this project to start gathering some. Consider the following information-gathering methods, and hire a researcher if you need one:

- Focus groups
- Interviews of key stakeholders within and outside of the organization
- Surveys (online and on paper)
- Quantitative
- Qualitative
- Usability testing

#### **Step 8—Write a Request for Proposal (RFP)**

A well-prepared RFP will establish common expectations between you and the designer. For more information about this, see our white paper titled “Writing an RFP.”