Appointing a Design Consultant

Expert knowledge means success

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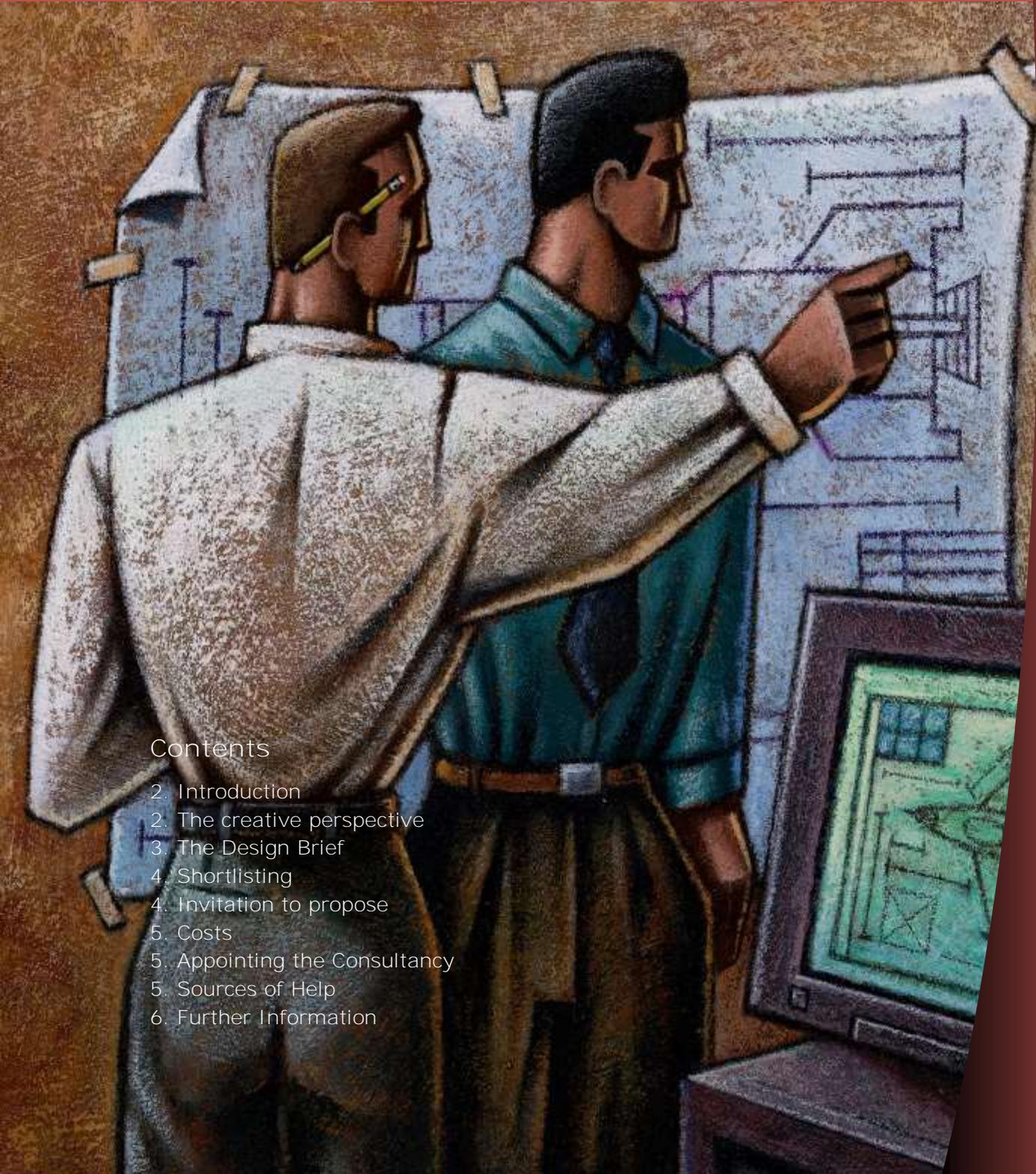
Introduction

This publication aims to help you in choosing and appointing designers. It suggests ways in which the relationship between you and the designer can be optimised to ensure the best results from the relationship.

The procedures for appointing a design consultancy vary according to the size of project and the type of consultancy you need – remember that selecting a design consultant is a very complex matter:

- You require professionalism, patience, an understanding of your personal style and philosophy.
- You expect responsiveness, direction, resources and most of all – creativity and attention to detail.

A good start in making decisions on design assignments is the Design Business Association (www.dba.org.uk). They provide useful guidance for most types of design consultancy.

4 stages of a design project

Design projects tend to break down into a series of stages, which may be purchased separately, sequentially, or all at once. These stages are:

1. Research, strategy or feasibility
2. Design concepts
3. Design development
4. Implementation

The first two stages are often rolled together, although you may need to commission a separate pre-concept stage to establish the feasibility, cost or direction of a design project.

The concept stage takes the project up to presentation of design concepts – creative proposals which visualise the design idea and allow costings to be prepared.

Design development is the preparation of detailed designs for the chosen concept, showing all elements of the design in place. Mock-ups or models may be prepared at this stage.

Implementation is the preparation of artwork or drawings and the supervision by the consultancy of the printing, manufacture, building or installation of the final design.

The creative perspective

Look at designers' portfolios: speak to their past clients; carefully assess their fees and your ability to pay. Then put together a short list of those you like.

A pitch is when you ask a number of designers to produce concepts for your campaign and then you decide which concept you prefer. Designers dislike being asked to produce a pitch without payment because they cost a lot of money to do. It should be possible to choose a designer from their work and their references. But there is a lot of free pitching about. Try to find a little money to cover out-of-pocket expenses, if you decide to use this approach.

It is easy to get caught out by materials and expenses. Find out how they define materials and expenses, and what these are likely to cost. Find out how your designer prefers to work. Some designers prefer lots of talk up front. Others want time to think and explore some options after they have received the creative brief and background materials. Designers who read the script, listen to the music and look at the paintings are to be treasured.

Professional designers work in different disciplines and you need to understand the type of designer you need, their relevant experience and how well they will work with you. In general, it is expected that designers should not have to present design solutions to the brief at the initial presentation. They will not have all the information or have been able to understand the issues outlined in the brief. An ill-informed solution at the start of the project is unlikely to result in high quality work.

Some of the key things you should look for in a designer or consultancy are:

- Relevant experience in the area of work you require.
- Relevant experience of the user group or customers you are aiming at.
- The ability to empathise with, understand and champion the user/customers point of view.

Finding a consultant

A company hoping to find a design consultant may:
- Look in professional magazines
- Study local advertisements
- Put the project to tender in publications
- Ask other businesses for a recommendation

- Professional relationship and ability to contribute to the overall perspective of the project.

And, critically:

- That they are people you feel you can work well with.

Design is an integral part of your project's objectives. Therefore, designers need to have a good understanding not only of your business but also of your expectations.

Getting the best from design for your business means co-coordinating design input and developing a formal framework within which decisions about design are taken.

It pays dividends to spend time and effort choosing the right consultancies to work with and to build long term relationships with them. This allows the consultancy to develop its understanding of your business and working practices, leading to greater efficiency and effectiveness.

It is important to evaluate the effectiveness of each project against a set of specified, quantified, performance-related objectives.

The Design Brief

Choosing the right design consultancy to work with is vital to the success of any project. The first stage in choosing a consultancy is to think through what is required and write this down in an outline brief. This needs to contain sufficient information to enable shortlisted consultancies to assess the nature and amount of work involved, what you're hoping to achieve, when the project is to be completed and how much you want to spend – so they can prepare proposals in response.

The brief is the document that describes what is required at the end of the project and the success criteria. It is created from a good understanding of the issues found by defining the problem. The brief is the starting point for design activity. A good brief directly affects the success of the outcome. It describes all relevant constraints, such as cost, materials and quality. It should define the deadlines for the deliverables and the checkpoints along the way and give a clear description of the role of each of the team participants.

Thus, the brief is fundamental to choosing the right consultancy for the job and should be clear and well considered, covering:

- Background information - include information about your organisation, the subject and context of the project, and the reasons why design consultants are being called in.

- The nature of the project - describe the scope and nature of the design project. It may be very straight forward, eg 'design of annual report', or it may more open, eg 'concept development for new product range.

- Market research - is existing market research available and do you plan to use research during the project? Will the design consultancy be responsible for commissioning research?

- Marketing background - give as much information as possible on the marketing and business background to the project. Include full details of the product or service in question: its history, positioning, market share, distribution, competitive products, etc

- Project objectives - be as specific as possible. Do not simply say 're-design product x'. Tell the designers what the project is expected to achieve: increased sales, market share gains, lower manufacturing costs, etc.

- Target audience - describe the desired target market for the product or service in question.

- Timing - when is the completed work required (actual date)? In what form will the work be expected? Eg printed copies of the brochure? Or just concepts? or artwork delivered to your printer?

- Approvals - who will approve the work at each stage? Is it the marketing manager, or will board approval be required at critical stages? To what level of finish is the work expected to be taken for presentations? Will rough sketches be sufficient, or will the board need to see the concepts 'mocked up' for different uses? These factors may affect costs.

- Budget - give the quantities of end-product required (eg 50,000 brochures, six retail sites etc) and an idea of the budget available. Be clear as to whether the figure is to include all fees, expenses and implementation costs. If you require the consultancy to estimate costs, be aware that this may not be possible until a particular design approach has been agreed

- Constraints - give details of manufacturing, technical or design constraints, including any corporate design guidelines on use of logos, colour, typefaces, etc.

- Corporate design or environmental policies - refer to corporate environmental or design policies likely to affect the design solutions proposed.

Tips on choosing a design consultant

- Prepare an outline brief for the project;
- Research a shortlist of consultancies you believe are qualified to do the job;
- Present your outline brief to the shortlisted consultancies and invite proposals from them;
- Assess the proposals and select the consultancy you wish to work with;
- Agree terms of business for the project and confirm the appointment.

Shortlisting

With the outline brief complete you can draw up a shortlist of likely consultancies. To narrow down the field, check out which consultancies offer the relevant design skills; what their portfolio is like; their history and recent track record; if they're the right size to handle your project and where they are based.

Having prepared your outline brief and thought about the nature and scope of the project, you can draw up a shortlist of suitable consultancies to carry out the project.

Shortlist the prospective consultancies according to the following criteria:

- Relevance of their design skills to your project.
- Experience as seen in recent work for other clients.
- History of the consultancy and recent track record.
- The size of the consultancy in relation to the size of the project.
- Their location.

Keep the shortlist short. Remember that in order to get properly considered proposals from the shortlisted consultancies you will need to devote significant time to briefing them and answering questions arising from the brief. If you have done your homework a shortlist of three should give you sufficient choice.

Credentials presentation

Inviting a 'credentials presentation' is a good way of finding out more about a consultancy and its work. The consultancy will usually show a selection of its work and explain its approach to projects. Look for evidence of expertise in particular markets, information about the skills available plus indication of whether you will work well together. Discuss the consultancy's approach to project management and client liaison and its methods of charging.

Invitation to propose

You are now in a position to invite proposals from the shortlisted consultancies. Proposals in response to your outline brief will normally be delivered at a face-to-face presentation when you will meet the members of the consultancy team allocated to your project. For small projects, or situations where the consultancy is already on board, a presentation may not be necessary.

Give the consultancies sufficient time to think about the project before they submit proposals. For a small project, especially where you have worked with the consultancy before, a simple letter outlining the work and confirming the terms may be all that is required. More complex projects may, warrant a document running to several pages, and this will take time to prepare. If you are not sure how long the consultancies will need, discuss this with them.

Make sure you are available to discuss and clarify points in the brief. This is in your interest since it will contribute to the quality of the final proposal. Likewise, respond positively to reasonable requests for further background information on your organisation or the project.

Proposals will not normally include design work. Assessment of design skills, and whether they are appropriate to the project, can best be made by discussing previous projects. If any design work is required it is best practice to agree a fee, bearing in mind that creative work is the currency of designers and it is unfair to expect them to utilise these skills without remuneration.

Proposals should include:

- A full response to the brief, demonstrating understanding of the issues to be tackled and showing how the project objectives will be met.
- Details of a specific programme of work to be carried out.
- Details of the team who will work on the project.
- The consultancy's terms and conditions of business.
- A clear statement of fees and expenses.

Fundamentals

Before appointing a design consultant, it is important to prepare a comprehensive project design brief. This will reflect the needs and aspirations of potential users and management and helps prospective design consultants to prepare submissions. Appointing and managing a design consultancy has some key elements:

- Determining the need for a design consultant.
- Preparation of the Consultant's Brief.
- Evaluation of submissions.
- Engagement of the selected Consultant(s).
- Managing the Consultancy.
- Project evaluation.

Fees should not be the sole factor in choosing a design consultancy. A good consultant can save money - both in capital and operating costs - in the design and delivery of a facility. As projects become more sophisticated, consequences of poor decisions can have significant ramifications.

Costs

The costs involved in a design project consist of:

- Design fees
- Expenses
- Implementation costs

The consultancy will be able to give detailed estimates only for a fully defined programme of work. If your project involves an exploratory stage which will determine the scope of future work, the consultancy can be expected to give only a broad estimate of fees and costs for later stages of the project.

Design fees are normally based on how long the consultancy thinks it will spend on the project and should be quoted in advance. Expenses are costs incurred by the consultancy on things like travel, accommodation and other expenses required in connection with the job. Implementation costs (or rechargeables / bought-ins) cover materials and services required to complete the project. These include costs from outside suppliers such as printers, photographers or shopfitters commissioned by the consultancy. A handling charge is often added to outside costs, and it's worth clarifying this point upfront. Extra work resulting from a change in the brief, or that hadn't originally been anticipated, will be charged accordingly. It's a good idea to estimate this separately and agree extra costs in writing before giving the consultancy the go-ahead.

If, in the course of the project, the brief changes, or some extra work not anticipated in the proposal is requested, considerable work may be involved and will be charged accordingly. Estimates should be requested, and it is advisable to agree extra costs in writing before instructing the consultancy to go ahead.

Appointing the Consultancy

You should confirm the appointment of the consultancy in writing. This will form the basis of the contract for the project. The Letter of Appointment should accompany a Schedule of Services and Conditions, which should clearly lay out all works to be undertaken by the designer.

Designers will advise if there is a need for additional specialist or professional services within the project outside the normal expertise of a designer – however, it's usually best to keep such appointments separately.

Lastly, remember to write to inform the unsuccessful consultancies.

Sources of Help

- **The Chartered Society of Designers**

The Chartered Society of Designers (CSD) is the UK's principal professional body for designers. In addition to its services for members it can provide information for design buyers:

The Chartered Society of Designers
1 Cedar Court, Royal Oak Yard,
Bermondsey Street, London SE1 3GA, UK
Tel: +44 (0)20 7357 8088
E-mail: csd@csd.org.uk
Web: www.csd.org.uk

- **The Design Business Association**

The DBA is the trade association for UK design consultancy sector. Members provide design services in product, interior and graphic design and design management, and include large multi-disciplinary firms operating internationally and small specialist firms employing fewer than five people.

The Design Business Association
35 - 39 Old Street
London EC1V 9HX
T +44 (0) 20 7251 9229
Web: www.dba.org.uk
E-mail: enquiries@dba.org.u k

- **The Design Council**

The Design Council works to help British industry "to understand the nature of good design and the positive effect it has on market performance".

The Council's designer selection service (DSS) offers independent advice to help design buyers prepare design briefs and identify appropriate consultancies for specific projects. For a fee of £80 + VAT, the DSS provides a shortlist of three consultancies from its register. Consultancies on the register are able to demonstrate highly professional design skills backed up by at least two years successful consultancy practice. Design services covered include product, graphics, engineering, interior, apparel and textiles, human factors, materials, and design management.

The design advisory service provides technical and management support on all aspects of design. Services are initially free, with further advice or consultancy available at nominal rates.
The Design Council
34 Bow Street
London WC2E 7DL
Tel: 020 7420 5200
Web: www.designcouncil.org.uk
E-mail: enquiries@designcouncil.org.uk

- BIS

The BIS's Enterprise Initiative offers consultancy support to companies with up to 500 employees, and other initiatives covering exports, education, and research and technology.
Telephone: +44 (0) 800 500 200 for more information.

- Patents, copyright and trade marks

The Intellectual Property Office, formerly called the Patent Office (an executive agency of BIS) can advise you on intellectual property rights which protect design work created for products, packaging, interiors, and trade or service marks.
Tel: +44 (0) 1633 813930
Web: www.patent.gov.uk
E-mail: enquiries@patent.gov.uk

- Architectural Design

For Architectural design you can contact:
Royal Institute of British Architects
www.architecture.com

- Architecture Foundation

www.architecturefoundation.org.uk

- Interior Design

For interior design search the Interior Design Directory:
www.design-directory.com/default.html

- Web Design

For Web design search the Directory of Design Consultants:
www.designdirectory.co.uk/web.htm

Further Information

This guide is for general interest - it is always essential to take advice on specific issues. We believe that the facts are correct as at the date of publication, but there may be certain errors and omissions for which we cannot be responsible.