

# Briefing a design consultancy

Preparing the brief - Read this before you choose a consultancy

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## PREPARING THE BRIEF

N.B. Read this *before* you choose a design consultancy!

The comments made in this guide are generally applicable to the briefing of any design-related consultancy, such as a product, graphics, or website designer.

Time dedicated to this "foundation process" is time well spent. Getting it right at the outset can save many problems further down the line.

This guide is written assuming that it's a company project, but it's equally applicable when the design work is being commissioned by (or from) an individual.

## BACKGROUND INFORMATION

There are a number of points to be considered before proceeding, particularly where the brief is being prepared by a company:

- Who owns the business?
- Is the Chief Executive committed to the project?
- When was the business established?
- Where does the current project fit within the existing business plan and finances?
- How does it compare with competitors?
- What was the impetus for the project?
- What are the expected ramifications for: sales, markets, profits, workforce, training needs, production distribution, etc?

This *must* be a TEAM effort, with a project manager and all aspects of the company involved: management, design, sales, marketing, manufacturing, accounts, suppliers, distribution, etc.

If you're an individual, then you must think carefully about all aspects of these functions you carry out yourself.

So you need to wear your sales, marketing, manufacturing and distribution hats as well as your design hat.

## STRATEGIC MATTERS

Think about the project as a whole:

- Where does the current project fit within the long-term objectives of the company, e.g. is the new project: resolving existing problems, broadening the product range, fighting competition, etc?
- Is there an agreed budget for the project? If so, is it adequate and is everyone aware of the amount and

where the costs are likely to be incurred or committed?

- Who is the "Project Leader"?
- Is the Chief Executive committed?
- If the project is a new product, does it have a finite life? If so, what is it?

## TIME SCALES

- Identify the roles of those involved in the project team and ensure that all personnel are aware of their relative tasks and milestones.
- Have a plan with clearly identified stages and review points.
- The expected programme of work should be clear to all. Do not worry if the programme has to be adjusted if circumstances dictate, but if this does occur, keep the project team informed.
- Identify those skills which the consultant(s) must have in order to fulfil the task.
- Choose three appropriate design consultancies, and ask around for recommendations, if you can.

## DESIGN BRIEF

Before meeting potential designers, it is important to have a well prepared brief. This promotes fair competition and objective comparison.

The project team should be involved in the preparation of this written brief and be comfortable with the outcome.

Without infringing the designer's rights, include as much quantifiable information as possible.

If the documents are to be provided as part of the tendering process, ensure that all consultants receive the same set of papers.

## SELECTING FROM A SHORTLIST

Try to introduce as much uniformity into the interview process as possible. Each designer will then get a fair chance and you can compare "like with like".

You should interview each candidate, ideally at your premises, allowing about 1½ hours for the meeting.

Divide the allotted time between reviewing the designer's portfolio and discussion of the project under consideration.

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You should provide the consultant with sufficient information to permit them to write a statement of the work to be done, the length of time to be taken and the likely costs which would be involved.

This document is usually referred to as the "*Terms of Reference*" (TOR). Before the interview is over you should agree a date by when the TOR must be submitted.

## SELECTION

Evaluate each TOR carefully. The document should include the following in a clear and unambiguous manner:

- The overall market and project objectives.
- The specification, i.e. performance, cost and time-scale requirements of the project.
- Exactly which tasks will be carried out by the designer / consultant.
- Which "**deliverables**" will be provided by the consultant at the end of the project?

Before the final selection is made it is worth visiting the consultant(s) at his or her premises if this is possible.

Another vital part of the selection process is the "chemistry" between the designer and the project manager. Remember that personality, dependability and communication skills are a vital part of this stage of the design process.

## PROJECT MANAGEMENT

Moving on to the implementation stage of the design process needs careful preparation. Once the consultant has been selected, provide as much additional written and verbal instruction as necessary.

Agree the following points:

- costs
- milestones
- stage payments
- interim meeting dates

It is important to ensure that you own all resultant Intellectual Property Rights (IPR). Be aware that this might not happen automatically, even though you are paying the design consultancy - get the correct legal advice.

The "Project Leader" within your business should act as the principle contact for the consultant(s). This avoids confusion and maintains "the overall view".

Where the project is complex, then the above stages will need to be further sub-divided as follows:

- Preliminary concepts and/or investigations.
- Product development along agreed lines.
- Final stages of approval.

Meetings should be held at the end of each stage of work. At these meetings progress should be reviewed and decisions made about the next steps in the process.

Written records should be made and circulated, with action points indicated for each person involved. If necessary, make mid-course corrections, but keep everyone informed.

In the early stages try not to place too many restrictions on the designer - it is their creativity that you are paying for. He or she should, of course, be made aware of any fixed constraints.

## CONCLUSION

Dependant upon the nature of a given project, the designer's efforts will produce all, or a selection from, the following list of "deliverables". These items should be agreed in advance and confirmed in writing:

- Concept sketches
- Detailed drawings
- A feasibility report
- A model (working or otherwise)
- Camera ready artwork or CAD renditions
- A prototype (working or demonstration)
- Finished website (within this area are registration fees, URL searches etc.).

Satisfactory products are usually the result of teamwork and involve the following:

- Well prepared brief
- Clear terms of reference
- Attention to detail
- Adequate finances
- Careful monitoring of the project
- Clear and regular communication throughout
- Retention by you of the ownership of all resultant IPR

At ip21 we can help with all the above and would be happy to give you a written quotation for your project.