

BDI Design Advisory Service

Appointment Scenario Guide

This guide was developed to demonstrate seven scenarios a client may identify with when considering utilising the skills and services of a design firm. Each scenario provides guidance on how to approach an agency and what to expect from them in accordance with your project status and its value.

All text, terminology and imagery is copyright © British Design Innovation

Professional Practice: Appointment Scenario Guide

Organisations and entrepreneurs have many and varied reasons to engage the skills of a design agency. This guide has been created to enable you to follow Professional Practice and to decide upon the route to appointment commensurate with the status and value of your project/contract.

BDI is able to support you in the appointment process and the recommendation of agencies best suited to your particular need. Using our Design Advisory Service & Professional Practice documentation we are also able to provide you with Design Brief, Templates, Evaluation Forms and Non-Disclosure Agreements.

BDI Design Advisory Service and professional practice documentation has been created to protect the interests of both client and agency. Professional Practice procedures ensure best use of both parties time throughout the appointment process.

The most successful appointment of consultants is relationship based.

This Guide presents typical scenarios where client organizations find themselves requiring contact with designers. Each scenario offers guidance on how designers should be engaged and how BDI can offer support to that process.

Scenario 1 Early stage research/benchmarking/capability assessment > **Chemistry Meeting**

Scenario 2 Reviewing or creating a roster > **Roster**

Scenario 3 Seriously reviewing/imminent project > **Credentials Presentation**

Scenario 4 Live project, with allocated budget and board approval > **Think Piece**

Scenario 5 Product design evaluation/blue sky > **Evaluation Project**

Scenario 6 Pre-board approval/early stage funding or budget allocation required > **Visual Business Case**

Scenario 7 Tender/contract > **Tender**

Appointment Scenario Guide

scenario 1: early research / benchmarking / capability assessment

project value: **unknown / non-disclosed**

appointment procedure: **chemistry meeting**



Chemistry Meeting

A Chemistry Meeting provides both parties with the opportunity to assess personality fit by comparing whether visions meet or collide in terms of attitude, knowledge, openness and skill set.

A Chemistry Meeting can be used to short-list agencies to invite back for a Credentials Presentation. It ensures that time is not wasted by agencies preparing detailed material or by clients sitting through inappropriate Credentials Presentations.

BDI support:

Use the BDI recommendation service to assist you in the identification of agencies best suited to your needs, your team, your Company type & its industry sector.

scenario 2 reviewing or creating a roster

project value: **on-going**

appointment procedure: **pre-qualification > chemistry meeting > credentials presentation > confirm place on roster**



Roster

Setting up a Roster is a useful way for larger organizations with a variety of design requirements to identify and appoint a range of design agencies to be called upon as appropriate to the size and type of project in hand.

Some organizations find it useful to appoint a lead agency as Brand Guardian who ensure brand guidelines are in place and available & adhered to by other rostered design agencies. The lead agency is often appointed on a retainer basis. The rostered agencies are engaged on a project-by-project basis.

Rosters also enable clients to build closer working relationships with their agencies and to benefit from benchmarking to ensure best possible service is achieved.

Rosters should be reviewed and, if appropriate, refreshed every two years.

Appointment Scenario Guide

To create a Roster select teams that are best suited to your requirement based on design discipline, sector experience, size, location and strategic & creative prowess. Provide agencies with a pre-qualification questionnaire and set up Chemistry Meetings. Select a short list and invite agencies back for a Credentials Presentation.

Once agencies have been approved to the roster and are issued with a brief the client should then follow the Think Piece or Visual Business Case procedures *see scenarios 4 & 6*

BDI support:

If required, BDI can assist with the production of a pre-qualification questionnaire and distribute to selected agencies. We can also provide your procurement team with Professional Practice documentation to include Design Brief template, Response to Brief template, Evaluation Forms and Non-Disclosure Agreements.

scenario 3: seriously reviewing / imminent project

contract value: **under £25,000**

appointment procedure: **chemistry meeting and/or credentials presentation > written proposal with outline costs > appointment > service contract**

contract value: **over £25,000**

appointment procedure: **chemistry meeting and/or credentials presentation > shortlist > written proposal with outline costs or think piece > appointment > service contract**



Credentials Presentation

A Credentials Presentation should, in most instances, follow a Chemistry Meeting. This should place you and the agencies in a position of already knowing something about each other.

Prior to the Credentials Presentation it is beneficial to provide agencies with an overview of your company and the issues that are important to you in a working relationship. This will enable you to determine which agency has the best cultural fit.

You may wish to issue an actual design brief prior to the Credentials Presentation, however, other than questions raised from reading your brief, it would not be appropriate to expect any design concepts pre-appointment. Ideally a brief should be issued to agencies who remain on your short-list after the Credentials Presentation.

stage one

Meet and review the work of up to three agencies if the contract value is less than £25,000 or up to four agencies if the project is worth more than £25,000.

Limiting the number of agencies you ask to present saves time and money for both client and agencies.

stage two

Short-list agencies following the Credentials Presentation. If a project is live the client may issue a brief and request a written proposal with outline costs.

Appointment Scenario Guide

Clients and agencies would be best advised to sign a mutually protective non-disclosure agreement.

Agencies should be given the opportunity to present their written proposal with outline costs and discuss them at a face-to-face meeting.

The Client should notify agencies of their decision in writing, by email or verbally within four weeks following the submission of proposals ideally accompanied by a written Evaluation Form. All materials and proposals submitted to the client must be returned to the agency.

BDI support:

BDI recommendation service can help you to identify agencies best suited to your business needs. Professional Practice documentation includes a Design Brief template, Response to Brief, Evaluation Forms, Non-Disclosure Agreements and Heads of Agreements/Contracts.

scenario 4: live project, with allocated budget and board approval

project value: [projects over £25,000](#)

appointment procedure: [chemistry meeting](#) > [credentials presentation](#) > [short-list](#) > [think piece](#) > [appointment](#) > [service contract](#)



Think Piece

Following a Credentials presentation the client may wish to commission a Think Piece to evaluate an agency's approach to problem solving. It is not a design solution. Think Pieces enable an agency to demonstrate their understanding of an organization's business sector, its customers and how to communicate with them.

It is most ideal to set a fixed fee for short-listed consultants.

Agencies selected to respond to a Think Piece should be those short-listed following a Credentials Presentation. Ideally one or two agencies but no more than three agencies should be on the short-list.

The client and agency are advised to sign a mutual non-disclosure agreement that protects the interests of both parties.

BDI support:

BDI Recommendation Service can help you to identify agencies best suited to your business needs. Professional Practice documentation includes a Design Brief template, Response to Brief, Evaluation Forms, Non-Disclosure Agreements and Heads of Agreements/Contracts.

scenario 5: product design evaluation / blue sky

project value: commensurate with commissioned work

appointment procedure: chemistry meeting > credentials presentation > short-list > paid evaluation project > end OR > appointment > service contract



Evaluation Project

It is fairly common practice for one or more product design agency to be commissioned by an organisation to undertake a conceptual project that enables strategy, approach, market and consumer understanding, and visual sensitivity – amongst other criteria – to be evaluated.

The Evaluation Project may be commissioned on a purely conceptual basis for internal use and or customer research or may be the forerunner to a final brief. Due to the often significant financial commitment to the development of new products this is a very good way of evaluating both your own thoughts/strategy/marketing ideas with an experienced and objective outside third party and/or a means of ensuring that your product design development partner is the right one to entrust a substantial 'live' project to.

BDI support:

BDI recommendation service can help you to identify agencies best suited to your business needs. Professional Practice documentation includes a Design Brief template, Response to Brief, Evaluation Forms, Non-Disclosure Agreements and Heads of Agreements/Contracts.

scenario 6: pre-board approval / early stage funding or budget allocation required

project value: fixed fee

appointment procedure: chemistry meeting > credentials presentation > appointment > service contract

service contract outputs: visual interpretation; storyboards or other preferred presentation material



Visual Business Case

There are many situations when a marketing or innovation team or entrepreneur need to present ideas to gain the buy-in of their board, funding organizations or other internal and external audiences.

These needs are best approached by setting a fixed budget to engage a design team to assist you with the translation of your ideas/plans into a Visual Business Case and produce visual material that enables you to

Appointment Scenario Guide

better communicate your plans or ideas. These will invariably be directional ideas that communicate the intended brand, service and/or product experience.

This approach can assist you to gain feedback from critical audiences, adapt the brief accordingly and finalize the necessary budget to place you in a position of proceeding with confidence or opting not to proceed further.

There are certain types of strategically led design teams that are best suited to this type of early stage advisory role. BDI will be happy to recommend two agencies whose business & creative skills, sector knowledge and personality best meet your requirement. Dependent on your budget/their fee you could engage more than one agency to create a Visual Business Case. If buy-in is achieved you would engage the consultancy whose work was most well received.

The work of the non-successful agency should be returned together with an Evaluation Form.

BDI support:

BDI recommendation service can help you to identify two agencies best suited to your business needs. Professional Practice documentation includes a Design Brief template, Response to Brief, Evaluation Forms, Non-Disclosure Agreements and Heads of Agreements/Contracts.

scenario 7: tender/contract

project value: **below £25,000**

appointment procedure: **pre-qualification > credentials > short-list > written proposal with outline costs > appointment > service contract**

project value: **over £25,000**

appointment procedure: **pre-qualification > credentials > short-list > written proposal with outline costs OR think piece or visual business case > appointment > service contract**



Tender/contract

Public sector organisations tasked with European Contract rules often find the procurement process for creative services quite difficult.

Most private sector procurement departments that follow the plus £25,000 value/3 quotation rule separate the procurement of creative services from procurement of equipment and general supplies. They recognize that the process of awarding creative service contracts is entirely different from awarding supplies and equipment contracts.

Larger tenders over a value that demands an open invitation to be published in the European Journal and or trade press can benefit from following the Professional Practice Appointment Scenario Guide.

Tenders that demand a fixed cost when the project components involve sub-contract elements such as photography and print production are the most problematic. However, following best practice appointment procedures help to overcome these problems by breaking down the stages of a tender.

Appointment Scenario Guide

Public sector tenders that request blind and unpaid creative concepts to be submitted at any stage of the process are not compliant with industry Best Practice procedures and are most often fraught with copyright problems.

Under European Copyright law visual origination remains the ownership of the originator. Copyright can be assigned by license or other form of agreement on payment of an IPR buy-out or license fee.

Public sector organizations that need visual material to present to other stakeholders should consider using the Visual Business Case option. This option also saves the organization time and money. Further it safeguards the organization from incurring project cancellation fees issued by agencies that have committed resources to a tender that is cancelled post submission.

BDI support:

BDI is able to assist public sector organizations to follow Best Practice and engage the most appropriate design agency whilst keeping within the European procurement rules. We are able to assist you with the production of a pre-qualification questionnaire according to the design disciplines you employ as well as by size, type, location, discipline, sector experience and business and creative prowess. As required we provide briefing and Evaluation Forms and guidance on copyright issues.

About British Design Innovation (BDI)

BDI was set up in 1993 to bring together a fragmented design industry and create a focal point resource that would make design agencies more visible and accessible to those that needed to engage with them.

BDI design agency database is arguably the largest and most accurate resource available. Professional Practice was launched in early 2004, developed with the assistance of ISBA and the IPA and other qualified stakeholders. BDI was the first organisation to provide appointment tools that serve to mutually benefit clients and agencies.

Many client organisations, entrepreneurs, innovation departments and agencies have benefited from using BDI Design Advisory Service and Professional Practice documentation.

BDI also undertake an annual design industry wide valuation survey which tracks the health and wealth of the design sector.

BDI is committed to improving professional relationships between design firms and all those who seek to engage with them. We aim to ensure that the relationship between design agencies and their clients is a mutually beneficial one.

BDI Design Advisory Service

British Design Innovation is able to assist all type and size of organization, be they private or public sector, to identify agencies best suited to their particular requirement. BDI has over 15 years experience of working with the commercial design sector and assisting clients to make the right choices.

Arguably, BDI maintains the largest and most accurate resource of UK commercial design agencies. It operates nationwide as well as maintaining a virtual office in every UK region including Scotland, Wales and Northern Ireland. The majority of regional hubs are supported by a regional board of Directors. BDI design resources cover all type and size of agency from the following disciplines: branding and

Appointment Scenario Guide

graphics, product design, service design, commercial interiors, packaging design, exhibitions and live events and multi-media. It is able to select accurately by location, size, design disciplines, sector experience, personality fit and business and creative prowess.

BDI is able to offer in-depth guidance on appointment procedures. Professional Practice documentation includes a Design Brief template, Response to Brief, Evaluation Forms, Non-Disclosure Agreements and Heads of Agreements/Contracts.

For further information or assistance please telephone 01273 621378 or email

info@britishdesigninnovation.org

www.britishdesigninnovation.org

www.designdirectory.org

BDI Professional Practice

© British Design Innovation

All Rights reserved. No part of this document may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, computerised or otherwise, without prior agreement.

Please note that any approved use of this documentation, either in part or in full, by members and clients must include this BDI Copyright statement.



9 Pavillion Parade
Brighton BN2 1RA
tel: 01273 621378
fax: 01273 622144
www.britishdesigninnovation.org