



*Choosing a
Communications Designer*

A Practical Guide

Brought to you by:



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INTRODUCTION

Sooner or Later, You're Gonna Have to Choose

At some point, every business — regardless of size — requires the services of a communications designer. After all, if your project is important enough to warrant a marketing, promotions or public relations campaign, it's important enough to make sure it's done right.

But it's not enough simply to hire a professional. These kinds of projects represent a large investment of time, energy and money, so it's critical to hire the right designer for your particular needs. Choosing the right one can mean the difference between a stunning piece that looks great and gets fantastic results, and one that falls visually flat and generates disappointing returns.

"But I don't know the first thing about professional design!"

You say your MBA program didn't include training to work with creative professionals? Perhaps your degree is from the Seat-of-the-Pants School, and didn't include experience in outsourcing creative work. Don't know what a designer actually does? Don't even know where to find one?

Relax. You're not alone. Few executives are trained to make these kinds of decisions or to work effectively with creative professionals. This puts them at a distinct disadvantage when hiring creative consultants.

We've run into this situation with many of our clients. That's why we're offering this white paper to fill in this critical information gap. What you learn from this paper will give you the power to approach marketing projects with confidence. It will help you understand:

- The benefits of hiring a professional designer
- Where to look for the pro you need
- How to choose the right one for each particular project
- How to work effectively by taking a sensible approach to project management:
 - Establishing clear project parameters and expectations
 - Maximizing the talents of your chosen designer
 - Setting an optimal amount of your own involvement in the project
 - Designating appropriate liaisons to your designer and other creative talent

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We even give you a list of other resources to use in broadening your knowledge of this important aspect of growing your business. As a special bonus, this paper also provides an Evaluation Checklist you can use over and over. It will help you prepare to work successfully with a professional designer in any kind of communications project.

THE DESIGNER DILEMMA

When do I need a designer?

Unfortunately, many business owners know little to nothing about what a designer actually does. This results in them making the mistake of not knowing when they need one. Design professionals are still sometimes referred to as “graphic designers,” based on the old definition of their duty: to attract attention to the message. However, with the advent of digital technology, they have become so much more than creators of a pretty layout.

Today’s successful graphic designers are actually information managers, using visual techniques to corral similar ideas together, then lead the reader’s eye through the material in the most efficient and effective way. After all, they not only need to make sometimes dry information interesting enough to read, but also fight the time deficit that every busy, modern person deals with. If your designer doesn’t know how to hold the interest of the reader and move the eye along at a reasonable pace, the reader may just give up. Then your message never reaches its intended audience, and your entire investment becomes just another expense...and a wasted one, at that.

Those professionals able to not just attract a reader’s eye, but also to hold it until the end of the message, are true communications designers. Their skills make sure the communication — that elusive connection between words and visuals and the reader’s mind — actually happens.

So, the answer is: You need to hire a professional communications designer when you want to produce some kind of material, whether traditional print or new media, that must communicate to today’s preoccupied, harried audiences.

What should I look for?

Communications designers bring all the talents, knowledge and understanding of the graphic designer to the table:

- effective information layout
- readability through sound typography

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- color theory and psychology
- effective use of illustration and photography

But then they add the expertise of someone who understands the purpose, potential and the limitations of digital media:

- the Internet, intranets and extranets
- email
- CD-ROMs & DVDs
- Touchscreen technology & kiosk displays

Communications designers are familiar with the many different programming languages and “applets” that allow such media to work. You may be familiar with some of their names:

- Java
- CGI/Perl
- Shockwave
- Flash
- Cold Fusion

This knowledge doesn't necessarily equate to the ability to perform such coding themselves, but some really advanced communications designers are also proficient programmers in these languages. When you hire these well-rounded individuals, you get a lot of bang for your buck.

But do I really NEED to hire a professional?

Some business owners and managers, even when they need top-flight communications materials, opt not to hire a professional designer. They mistakenly believe they are “saving money” by using a staffer who may have some creative ability, or by trying to do the work themselves. Usually, the results make them regret such a decision.

The fact is, really good communications design is an alchemy of art, science, training, experience and creativity. Simply having access to the tools of the designer's trade—a computer and some page layout software—doesn't make someone a designer, any more than owning a toolbox makes one a mechanic, or having a piano makes one the next Beethoven. We've all seen the sorry results of “garage design,” and the proliferation of low-end desktop publishing software has only exacerbated the problem.

Really good communications design is an alchemy of art, science, training, experience and creativity. Simply having access of the tools of the designer's trade ... doesn't make someone a designer.

The argument that professionals cost too much money is one that doesn't hold much water. The fact is, you get what you pay for. So if you're tempted to go "on the cheap," ask yourself if it's worth saving a few bucks to negate the impact of the rest of the budget. Remember: No matter how much time, effort and money is spent crafting the message, if no one reads it everything is wasted.

Every professional designer with a few years under his or her belt has at least one horror story about having to clean up after someone who claimed to be a designer because s/he had mastered a low-end publishing package on a home computer. Often, only after the dismal failure of such untrained, overwhelmed substitutes, project managers finally realize the need to bring in a proven professional.

When a real designer is brought in at this point, much time has frequently been lost, tempers are frayed, and everyone is beginning to feel under the gun. Now-looming deadlines frequently require lots of budget-busting overtime on everyone's part. The designer must be brought up to speed, and then come up with the creative concepts that should have happened at the beginning. And face it: no one produces their best work under unrealistic pressure.

The final result is often less-than-stellar work for a lot more money than would have been spent, had the professional been on board from the beginning. So do yourself a favor: if the boss mentions that his high school kid is a real whiz on the computer, find a polite but firm way to insist on hiring a pro. Along with real communication design abilities, a pro will also bring to the table basic business experience and etiquette, a realistic view of what can be achieved in a given time frame, and a healthy respect for the importance of deadlines.

Okay, we want a pro. But how do we find one?

There are many places you could start your search. There are trade associations whose members include professional designers, and membership in such organizations usually signals a certain seriousness about the members' careers. Many of these associations have websites, several of which even feature search criteria for member specializations.

One such organization is the American Institute of Graphic Arts (AIGA). You'll find an interesting treatise on information design, and other useful topics on their Clients page at <http://www.aiga.org/content.cfm?alias=clientsview>.

Other organizations that will help you locate professional designers include:

- International Association of Business Communicators (IABC) at www.iabc.com
- Graphic Artists Guild (GAG) at www.gag.org
- Creative Business at www.creativebusiness.com.

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There are many websites that help you locate freelance designers, which will allow you to key in your project specifications and let the designers contact you. Two of the most reputable of these are

- Creative Moonlighter at www.creativemoonlighter.com
- Elance at www.elance.com

Of course, you might also try your local business phone book, or call your local chamber of commerce to find out whether your area has an advertising organization. Many members of such clubs are professional designers.

The very best way to find professional design talent, however, is the same way you find other critical service providers: leverage your professional network. In other words, ask your colleagues whom they recommend. They may have already gone through such a search and found someone they're quite happy with. Why re-invent the wheel?

But you mentioned all the different things designers might know. How do we find the RIGHT one for our project?

Hiring the designer that fits any given project is equally as important as making sure the candidates are professionals. Just as there are different kinds of designers for certain kinds of clothing (fashion designers), automobiles and other products (industrial designers), and buildings (architects), there are different types of designers for certain kinds of communications materials.

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STEP #1 PROJECT PARAMETERS

Project Planning & Management Structure

The first step in hiring the right designer is to determine your project's parameters. Once you decide on the end result you want, it's fairly easy to use logical processes of elimination to decide who is most likely to help you reach it. The most logical way to establish parameters is by using the "five W's" system: Who, What, Why, Where, When (and How).

Who

- Ask who comprises your target audience. Establish a primary and secondary focus; all other audiences are extraneous to this project. The rule for your most effective piece is "one piece, one audience," whether you're talking about a brochure, an ad, or a website. And remember, even in-house corporate communications such as

employee manuals have target audiences. Identifying your audience is the single most important factor in determining the tone and look of the piece.

- Ask who in your organization will be responsible for gathering all the data, information and images that will be used in the piece. This is your content point person, and is critical to getting things moving. This person may also be something of a creative director, unless you have a full marketing department.
- Determine who in your organization will be responsible for final approval of the piece. Try to assign this responsibility to no more than three people: "Design by committee" is the kiss of death to fresh, creative ideas. One person is usually unable to take more than their own point of view into serious consideration. Two may represent opposing views that will bring the project to a standstill. Three creates a tie-breaker that can make a decision stick and move the project forward.
- Who in your organization will be responsible for acting as liaison between the person providing data, the designer, and the approval panel? This project manager or coordinator should be highly organized, a good listener, personable, and capable of impartiality. An alternate should also be designated in case of emergencies, because a bottleneck in decision-making at this point will really bring the whole process to a screeching halt.

A piece that needs to be distributed as both a print catalog and through website posting will have different setup needs than one to be produced solely in print.

What

- Decide what is the most important overall message your piece must communicate. All other messages should be subordinate to this message, and should be few, if any.
- What is the end result you hope to achieve with the production and distribution of this piece? State your goal in a measurable way, so you'll be clear about whether or not the piece was successful. This result is how you will determine your return on investment (ROI), which is critical in planning future marketing pieces.
- What is your budget and timeline for producing the piece? Include everything from preparatory staff meetings through delivery of the finished piece to the end user.
- What is the critical buying path (CBP) of your primary target audience? Knowing where to find your targets when they are in an information-gathering (shopping) or decision-making (buying) frame of mind, and intercepting them with your piece at those points, will give your campaign a much greater chance of success.
- What is the format for this piece? Print advertising, direct mail, brochure, catalog, website, opt-in email blast, CD-ROM, stationary on-site kiosk? This determines much of the form the content will take. For instance, a piece that needs to be distributed as

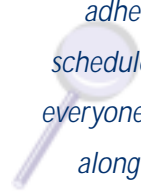
both a print catalog and through website posting will have different set-up needs than one to be produced solely in print.

Why

- Why have you chosen the proposed format for the piece? Does it really make sense, or would it perhaps be more effective in another form? Weigh all characteristics against the result you are trying to achieve.
- Ask yourself why you have chosen the people designated for the approval board and liaison positions. Make sure it's because their skill sets and availability match the needs of the project, and not just because someone's ego needs servicing. Even very enthusiastic people sometimes aren't the best choice, simply because they lack understanding of the "big picture" of what the piece is really about. Be brutally honest in evaluating your project team's potential members.

Where

- Where will the different facets of the project's development take place? Consider where you'll hold meetings for in-house project prep, designer interviews, concept brainstorming, incremental project review, and final approvals. Logistics are important to efficient administration of a project, especially one that may run over an extended period of time.
- Where will you want the actual creative work to take place? If you feel you need a great deal of control and so require on-site work, be aware that you are setting up a work-for-hire situation according to federal government definitions. This will likely limit the range of professionals who will be willing to work with you. Many full-time professionals, such as freelance designers and consultants, are loathe to work on-site because it makes them less available to their other clients on a daily basis. Also, many are unwilling to participate in a work-for-hire situation, because it limits their compensational value. The end result is that you may only be able to work with designers of limited experience and skill. Real professionals will be experienced with working with little or no supervision. Make sure you talk enough with your candidate to be comfortable with that arrangement.
- Where will your piece be distributed? This, along with target audience and format, determines much of the form the content will take. For instance, a kiosk display that needs to be distributed in an amusement park will carry content designed very differently than that to be displayed in an upscale hotel or convention center. Catalogs that mail to a list of upscale office buyers will be designed very differently than those mailed to a list of hair salon managers.



Establishing and adhering to a schedule will make everyone's job easier along the way, by establishing measurable production performance expectations.

When

- Determine when your project will need to start and end. Establishing and adhering to a schedule will make everyone's job easier along the way, by establishing measurable production performance expectations. This is also the single most useful tool you have to establish control over your project, and make sure it doesn't turn into a runaway train.
- When will you need to meet with the designer to interview and issue a work order, then for status reviews as the project progresses? Use common sense to establish these benchmarks: Make initial meetings coincide with in-house prep meetings, and progressives coincide with such things as receiving final copy from your copywriter; delivery of first, second and possibly third-round proofs; and perhaps a press check, if your designer is to be involved in that phase. This helps your designer schedule availability when you'll need it.
- When will the finished product be needed at its final destination? This date will most likely act as the control for the final project schedule, as you back all other activities off from it. It will also serve as a decision-maker in such things as choosing printers and other vendors who can and will commit to your delivery date.

Keep the lines of communication open and active by encouraging regular updates via phone, fax or email.

How

- How will your project team, including your designer and any other creative professionals you hire, work together? Avoid having meetings be the only time your project team communicates. Such a scenario will rapidly deteriorate into one of missed deadlines and finger-pointing. Keep the lines of communication open and active by encouraging regular updates via phone, fax or email. Whatever mode you decide on, make sure all interested parties have convenient and consistent access to it so they can easily fulfill this duty.
- How will you decide whether unscheduled extra meetings are necessary in the process? Most obviously, the liaison or project manager should be empowered to make this call, but you may find that other project team members also need this ability. Decide before the need becomes reality who will own this responsibility, and you'll avoid unnecessary confusion and possible hard feelings.

Now that you've established your project parameters, it's time to consider hiring your designer.

STEP #2 PICK A DESIGNER

Choosing Your Communications Designer

Much of what you've established about your project parameters will have shaped the decision about the kind of designer you need. This section will discuss details of other considerations you'll need to make regarding which designer to choose. Of course, each industry has its own peculiarities that only you can know, but this discussion will be germane to just about any project in any industry. Our bonus Designer Evaluation Checklist follows this basic structure. You can use it as is, or tweak it for your own purposes.

Once again, the Five W's really help you ask the right questions about design candidates for your project. A traditional mainstay of journalists everywhere, the Five W's method is actually a great approach to defining any task. If you don't want to follow it all the way through, it's at least a great starting prompt for discussion of another strategy. This applies when considering candidates for communications design positions, whether on an in-house, freelance or consulting basis. We recommend that you interview such candidates as seriously as you would for any other position, and take notes to refer to during your final decision-making process.

Much of what you've established about your project parameters will have shaped the decision about the kind of designer you need.

Who

- Ask yourself: Who is this person? What are her/his professional credentials and experience? What kind of personality traits does s/he exhibit that will work for or against the success of your project? You need someone who is comfortable with a lot of give-and-take, and whose confidence lies in the comfort zone between egomaniacal and lacking a point of view.

What

- What kind of designer is s/he? Does s/he specialize, and if so, in what area: graphic; logo/corporate identity; illustration; information-intensive (catalog or interactive database); website; intranet? Each of these areas requires a different (though often overlapping) skill set, personality and way of thinking. Whatever the specialty, look for a person who enjoys a challenge, and sees the work as more than just functioning as a pair of hand, but as a problem solver.
- What kind of samples does the candidate offer? Give his/her portfolio a thoughtful review, and look for work similar to that which you need for your project. Be aware that many professionals now keep their portfolio in digital format. They may hand

you a CD-ROM or ask you to view their portfolio on their website. Either way, ask a lot of questions, and choose carefully.

- What specific services will you be buying from this designer? Print only? Print that carries over to an online presence? Interactive forms backed by a database? Will the designer also be acting as a pre-press production person for print and/or coding a website? Does s/he know HTML and related applet programming? Does s/he understand the limitations of the medium you need her/him to work within? Does s/he have the ability to work with other creative content professionals if needed, such as copywriters, printers and web programmers?

Why

- Why will you hire this particular designer? Keep your decision-making based in logic and good business practices. Will s/he be working solely on this project, or do you want to establish a long-term relationship for an ongoing campaign? The latter is attractive because a single designer working on many marketing pieces can most easily establish and reinforce a consistent visual corporate image for your company.

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Where

- Where did this person receive her/his education and experience? If the person has little or no real-world experience, s/he is going to be learning on your dime. That means extra headaches and hand-holding for you, and perhaps a longer project timeline because efficiency is nearly always tied directly to experience. A novice will most likely exhibit less originality because the confidence to take some risks is not yet fully developed in this person. However, if you are looking more for a pair of hands, a less-experienced designer may be a good value for you, since fees are usually commensurate with experience.
- Where is this person located? If you require someone who can make it to a lot of meetings, you need someone nearby. However, if you really think it through, your best value in hiring a designer is NOT to tie that person up in meetings. Make as many decisions as you can (without pre-empting necessary creative input) before pulling the designer into the process, and then keep the meetings to a minimum.

Generally, today's communication technologies allow someone far away to do just as thorough and effective a job without being located in the immediate vicinity. However, for some projects, location is an important consideration. If you do choose someone with whom you will work from a distance, make sure that person not only has access to the kinds of technology you'll need — conference calling, email, FTP sites, Acrobat/PDF software for proofing, overnight delivery — but also knows how to use it.

When

- When will you need this person to be available? What are your project meeting schedules and delivery deadlines? What kind of turnaround times do you expect, and can this person meet them? Consider that a successful design pro will have other clients besides yourself, and will need to juggle your project among others. This is not a drawback; it indicates the designer is of sufficient quality to be in demand. Simply ascertain that the designer will be able to be responsive to you as needed.

How

- How will you work with this person? Will you be working directly or through a liaison, and is this designer comfortable with such arrangements? Whatever the logistics, be clear about your expectations.
- How will delivery of the finished design be made? Do you expect the designer to act as project coordinator with the printer? For web-based projects, will the designer also code the pages, or simply turn over templates to a programmer for posting? Again, establishing a very clear workflow and structure for responsibility is your best insurance against misunderstandings and unpleasant situations down the line.

STEP #3 FEE STRUCTURES

Discuss Fee Structures and Terms

Though most people rarely enjoy negotiating terms of business compensation, it's necessary to make sure that everyone's on the same page from the beginning. Clearly delineating how and when your designer will be paid for his or her services, what rights are being transferred, and what constitutes a satisfactory finished product will help eliminate misunderstandings, unhappy participants and potential legal liability further along in the process.

Of course, there is always the fee structure to consider. Most freelance designers bill for their time on an hourly basis, which can vary widely. However, for some projects that have a significant duration, retainer structures or flat project fee arrangements are not out of the ordinary. Spell out clearly the duties and responsibilities expected of the designer, and establish a structure for reporting on the work's progress that everyone understands and embraces.

Clearly delineating how and when your designer will be paid for his or her services, what rights are being transferred, and what constitutes a satisfactory finished product will help eliminate misunderstandings, unhappy participants, and potential legal liability.

Legal Considerations

Congressional legislation regarding copyright to intellectual property was significantly updated in 1992 and again in 1996 to reflect the changing nature of technology. The issue continues to be in a state of flux, but right now it remains fairly stable. In essence, the law states that intellectual property such as writing, illustration and design belongs inherently to its creator from the instant of creation. It states clearly that such rights are only legally transferred with an explicit written notice, such as a contract, usually in exchange for some kind of material consideration.

If the designer will be working for you as a freelancer or consultant, you need to specify who will own distinctive rights to the materials being created at the end of the project. Most designers realize the client's desire to own all rights, especially to proprietary material, and are willing to transfer such rights upon payment in full of their invoices. However, many designers will wish to retain the right of self promotion for their creations, meaning they are allowed to reproduce such works in their printed and digital promotional materials. As long as such activities don't infringe on or reveal trade secrets, this is common practice and should not be considered dangerous or over-reaching.

You need to protect yourself and the designer from potential trouble with the IRS by determining at the project's beginning whether s/he will be working with you as a consultant (freelancer) or as a temporary employee (work-for-hire). The IRS has fairly clear-cut standards that determine the nature of the relationship.

Essentially, if the person works on your premises, using your equipment and is under direct and close supervision, that person is considered an employee by the IRS. This means that person is entitled to the same benefits as your permanent, full-time employees. If the person works primarily off-site at their own place of business (which may include a home), using their own equipment and more or less unsupervised, they may be considered a freelancer.

Don't make the mistake of trying to play it both ways: If you get audited by the IRS, you will lose this game and be liable for fines and penalties which can be significant. It's not worth the hassle, and most design professionals won't willingly participate in such an arrangement anyway.

Time to Get to Work

Having moved this far through the process, you should feel confident in the needs of your project, and about the communications design professional you've chosen to help make it a success. It's time to get started on the project you hope will generate lots of new business!

Good luck, and remember: Cavanaugh Interactive is your one-stop shop for results-driven, professional communications design for the 21st century. Call toll-free at 877-771-8906 to put our quarter century of experience to work for you.



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