

Ten Steps to Selecting a Design Firm

1. Determine your basic needs. Before you approach a firm, ask yourself what you want to accomplish. More young alumni donors? Students with higher SAT scores? Better brand recognition? Though a good firm will offer suggestions and help you clarify and narrow down your options, if you're focused from the get-go it will make the process easier.

2. Know your budget. When you have a handle on your goals, establish your budget, even if it is a range. Follow this up by researching the costs associated with the service(s) you need. This will tell you whether or not your expectations are realistic.

3. Do your research. Find out as much as you can about each firm before requesting a proposal. Ask around: which firms have your colleagues used? Visit websites; read the "about us" section; peruse blogs. Obtain samples of each firm's work. While the quality of the work is the number-one factor in choosing a firm, you also want to get a sense of the firm's personality. Will it mesh with the personality of your school? Do the firm's team members seem like the kind of people you'd work well with?

4. Familiarize yourself with process and approach. Is the firm strategic about what it does? Or is it guided merely by aesthetics? Make sure the design firm you hire will take the time to get to know your institution before assigning it a look and feel.

5. Understand the firm's capabilities. Some firms offer a range of services in addition to print design, like web design and development, project management, copywriting and/or marketing expertise. Though your institution may only need a viewbook right now, your needs could change. It may help you in the long-run to build a relationship with a firm that specializes in more than one area and can carry your brand and messages across all media.

6. Request a proposal. Your RFP (request for proposal) should be as specific as possible. Outline your needs, your goals, your audience and the ideal end result. Include your budget and a schedule if you have one. Try not to send a blanket RFP to dozens of firms—aim for five to seven.

6a. Meet first, request later. Another option: Meet with five to seven firms *before* sending your RFP. This may help you refine your needs and options and will give you a better sense of the kind of firm you'd work best with. Create a short list of three to five firms and then send your RFP.

7. Evaluate the proposals and create a short list. First note the format and presentation of the proposal. How does the firm present itself? Then carefully review the content of each proposal, and compare them with one another. Do any of the firms go above and beyond what you asked for? Forward-thinking firms will offer suggestions and outline potential ideas for your communications.

8. Meet face-to-face. Set up meetings with each firm on your short list. This will tell you right away whether or not you "click" with a firm and its creative team. Just as the quality of a firm's work is important, so, too, is the relationship you'll establish with its team.

9. Don't let cost be the deciding factor. If you're working within a tight budget, it may be tempting to choose the firm with the lowest quote. But read the fine print. What exactly does the quote cover? The right fit is also important, as those in admissions know. Be sure that you're selecting a firm that's the best fit for your institution—not just the one that offers the lowest price.

10. Go with your gut. Ultimately, the right design firm is (1) the firm that you feel most comfortable with, and (2) the firm that you think will best meet the needs of your institution—and exceed them.