

QUESTIONS FOR INTERVIEWING DESIGNERS

During the interview process, you are trying to determine whether the person or firm:

- Has the expertise and experience you are looking for.
- Can deliver your project on time and within budget.
- Will work with you in a way that's compatible with your needs, personality, and preferences.

The questions below can help guide your conversation and discover if the designer is the best fit for your project.

What is your design philosophy?

Here's the chance to talk about the vision this designer will bring to your project. Whatever is important to you should be important to your designer.

- What is your style?

What is your design process?

Most designers follow an established path for each project, although that process varies slightly from firm to firm and project to project.

- What process can I expect throughout this project? What are the project milestones?

What projects have you done that are similar to this in type, size, and complexity?

You want to make sure your designer is comfortable with the size and complexity of the project you're proposing.

- Do you have portfolio examples that are similar?

Do you foresee any problems with this project?

If you're dealing with a unique challenge, a limited budget, or other complications, be up front. How the designer reacts to these challenges will tell you whether they're suited for the project.

- How would you solve these problems? Have you had similar experiences in the past?

Will I be working directly with you or someone else on your team?

If it's a large firm, you will want to clarify who will be designing your project, and who your contact person will be.

- What is the experience and style of the person I will be directly working with?

How much time will the design process take?

Be sure the designer has the time to devote to the project and can complete it within your timeline. Remember, the designer can account for their time, but not unexpected delays like a client's indecision or a contractor's scheduling conflicts.

- Will you be available to consult with me throughout the process, if necessary?
- Can I expect a timely response to all inquiries?

QUESTIONS FOR INTERVIEWING DESIGNERS Cont'd

Find out what tools your designer will use to engage with you. To save time and money and minimize back/forth with your designer during the project, consider using communication and collaboration tools such as:

Common collaboration tools:

- | | | |
|---|-----------------------------------|--------------|
| <input type="checkbox"/> Google Workspace | <input type="checkbox"/> Slack | Other: _____ |
| <input type="checkbox"/> Microsoft Teams | <input type="checkbox"/> Trello | _____ |
| <input type="checkbox"/> Asana | <input type="checkbox"/> Notion | _____ |
| <input type="checkbox"/> Zoom | <input type="checkbox"/> Calendly | _____ |

If you are unable to be the point person for communication and/or are unable to use the tools, either learn the tools by asking your designer for a quick tutorial or have someone on your team lead this to help avoid additional hours and costs.

Will you need certain software to open files for in the project?

- | | |
|--|--------------|
| <input type="checkbox"/> Adobe CC
(InDesign, Photoshop,
Illustrator, XD, etc.) | Other: _____ |
| <input type="checkbox"/> Sketch | _____ |
| <input type="checkbox"/> Figma | |

How (and how often) will you and your designer communicate?

- Bi-weekly
 Monthly
 Quarterly
 24/7

What is the preferred method of communication?

- Email
 Phone
 Text

Who is paying for images/artwork?

- Designer
 Client (your business)

If the designer is purchasing it:

- | | |
|---|--|
| Will you receive a copy of the the original files? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Will you have to reimburse the designer? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Can you approve images before they are purchased? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Is your designer creating original artwork (photos, illustrations, etc.)? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| For any artwork that is not original can they provide documentation that ensures your brand can use it legally? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

QUESTIONS FOR INTERVIEWING DESIGNERS Cont'd

What type or form of design deliverables can I expect?

The type of deliverable is not an indication of a "better" designer, but if you're more comfortable with one than the other be sure to bring this up.

- Will you share the raw or working files or just the final product?
- How will it be delivered to you? Will it be a hard copy and/or a link to a cloud file?

Can you provide references for projects you've worked on that are similar to mine?

The designer may be able to provide professional references from past clients or even show you projects they have created or collaborated on locally.

- Do you have any work nearby that I could view?
- When you call their references, make sure to ask specific questions. Did this designer save you money? How did he or she handle conflicts? Was the project completed on time? What value did they bring to the project?

Which parts of the design process will you specifically be accountable for?

Be sure you're clear about which parts of the process you or someone else on your project will be responsible for versus your designer. Make sure both of you understand what is expected of the other.

- How will we divide responsibilities? How can I help you complete your tasks on time? What do you expect me to handle?

Should I expect any additional costs along the way?

This will help you make sure the designer understands what is included in your Scope of Work and your contract or agreement. This portion of the conversation should include a thorough discussion of budget and costs.

- What extra costs might you predict and why will they occur? How could we avoid these costs? Are there any suggestions you could make to cut costs?

What is your fee, and how is it structured?

Don't leave the interview without a firm understanding of what the designer's fees are, what they are based on, and how and when you will be billed.

- Will I pay for all services at the end of the project? Or pay for half at a predetermined midway point?
- Do you require a deposit to start? If so, how much? You may want to confirm you will withhold a final portion of the payment until you are satisfied the project is complete and all deliverables have been turned over.

The information gathered from these questions will help you decide which designer to hire, but you may not want to rely on their answers alone. You should also ask yourself a few questions.

- | | | |
|---|------------------------------|-----------------------------|
| Did they provide honest, thorough answers that were easily understood? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do they understand the size, complexity, and scope of your project? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Will they take pride in the project and see it through to the end? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Will they act as a partner and treat you with mutual respect? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Can you trust them to deliver what they promised on time and within budget? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Did you have a frank discussion about your budget? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

DEFINING YOUR BRAND STRATEGY

Defining your brand is a journey of business self-discovery. It is important to establish a baseline for reference as your business ebbs and flows and your brand story unfolds over time. It may be difficult, time-consuming, and uncomfortable, but if you haven't already, answer the questions below. They will help your designer better understand your business so that they can accurately represent you and your brand.

What is your company's mission?

What are you selling?

What are the benefits and features of your products or services?

Why are you doing what you do?

What do your customers already think of your company?

What do you want people to say about their experience in your store and online?

What qualities do you want customers to associate with your company?

What do you want people to say about your business, product, or service?

Defining Your Brand cont'd.

02. Who are your customers? What are their lifestyles, interests, hobbies, ages, ethnicities, income?

03. Your story as defined by others

Ask 3 of your customers or neighbors what makes your business unique.

List all of the places that people see or interact with your brand. Think signage, your website, your employees. Is their experience consistent?

04. Competitive Analysis

What makes you the expert in your industry?
Why do customers chose your business rather than other similar businesses?

04. Neighborhood Context

How does your brand fit within the context of your neighborhood?

How does your business serve the broader community/neighborhood?

05. Are there any markets or customers you don't have but would like to attract?

PROGRAMMING QUESTIONNAIRE

One of the first things any design professional will do is start asking questions. While these questions may vary by industry, the following will give you a general idea of what will be asked:

01. What products or services does your business provide?

02. Who are your customers?

Be as specific as you can about demographics.

How old are they?

Where do they live?

How much money do they make?

What is their level of education?

What is their cultural identity?

03. Are there new market opportunities in your future?

Will the space need to be designed to accommodate changes in products, services, or customers?

04. How many people work in the space?

What are the staff-specific needs?

05. What specific areas or zones are needed in your space?

What spaces are for customers and which might be for staff only? For example, a restaurant usually has a "front of house," where patrons come in and eat, and a "back of house," where food is prepared and staff convenes. A clothing store might also have an employee break room or storage area, which is separate from customer space.

BRAND PERSONIFICATION

01. If your brand were a person, what would they be like?

For example, are they loud, honest, and in your face or quiet, shy, and introspective? Write a list of at least five personality traits that describe your brand:

1. _____
2. _____
3. _____
4. _____
5. _____

02. Where does your brand hang out on a Friday night?

What does the crowd look like? What does the interior of the space look like? For example, is it a fancy jazz club, or is it dive bar? Write a description of your brand's perfect Friday night hang out:

03. If your brand were the weather, what would it be?

For example, is it a stormy, blustery day that forces everyone to pack an umbrella, or is it a warm sunny day in paradise? Write a description of your brand's future forecast:

04. If your brand were an animal, what would it be?

For example, is it an overfed indoor house cat that lives in a bookstore soaking up the sun by the window, or is it a lioness, ruling the pack in the wild? Write a description of your brand's animal instincts:

05. What are songs featured on your brand's playlist?

For example, is it a selection of Motown classics, or does it have an eclectic mix? List at least five tracks that would be on your brand's list of jams:

1. _____
2. _____
3. _____
4. _____
5. _____

REQUEST FOR PROPOSAL (RFP)

Cover Page

The cover page of the RFP should include your company's main contact information, including: your company name, address, and logo; the proposal name; its due date; and to whom the proposal is going. The design should reflect your company's brand, and the layout should be arranged in a clean and organized manner.

Table of Contents

A table of contents page should come before the main content of the RFP. A sample list of section titles that can be incorporated in your table of contents can be found below. Make sure the layout is clean and organized and includes page numbers.

Summary and Background

This section of the RFP should provide a high level description of what the request is for and the purpose of the requirements. It may provide background information on the organization requesting proposals as well. Most of the requirement details will be included in subsequent sections of the document.

Proposal Guidelines

This section of the RFP should provide a description of what each responding organization's proposal should contain. It should also include a deadline. Any required information should be described in detail in this section of the RFP.

Project Purpose and Description

This section of the RFP should provide the purpose and description of the project or work to be performed using as much detail as possible. In order for companies to submit accurate proposals, they need the details of exactly what work needs to be performed and the purpose of the work. The purpose of the work is important because sometimes bidders may be able to provide different, but more effective solutions.

Project Scope

While the project description provides bidders with general information about the project, this part of the RFP should include detail of what exactly is required for the project.

RFP Cont'd.

Project Timeline

The RFPI should provide known information about the timeline for the RFP process as well as the project itself. Much of the project timeline will be determined in the project initiation and planning phases once the winning bidder is chosen. However, any known deadlines or timeframes should be listed in this section.

Budget

This section should explain what budget information bidders should include. Often, an RFP will ask bidders to list pricing a certain way or describe what exactly should be included in the pricing for the proposal. This may describe specific items to include or exclude depending on the project or task, and could be project based, hourly, or other. It is important to remember to provide all necessary information in order to find the best possible match with a designer. You don't want to receive proposals from a \$50K web developer, if the budget for your landing page is \$4K.

Bidder Qualifications

This part of the RFP should describe the criteria that will comprise the successful bidder's organization. You may solicit examples of work from bidders, contact information, company history, executive background, information on company size, organizational charts, or any other information to aid in the decision making process.

Proposal Evaluation Criteria

Here, the RFP should describe exactly how proposals will be evaluated. It should include a list of criteria that will be reviewed and describe what is suitable for each of the criteria. The more detail that can be included, the more thorough and complete the proposals will be.

Template courtesy of Design Core Detroit.

DEVELOP A MOODBOARD

Now that you've developed your company's identity, it's time to create a vision for your business utilizing Pinterest or DIY magazine clippings. This is called a moodboard, and it is a physical or digital collage of ideas that can represent your business goals and help you define your direction.

Materials Checklist:

- A posterboard or corkboard
- A stack of old magazines
- Scissors
- Markers or paint
- Glue, tape, thumbtacks, or pins



Image Selection

As you are collecting images for your moodboard, be sure to write down why you like the certain images you have chosen.



Activity

Set aside an hour to complete your moodboard. Find a quiet space where you can fully concentrate on the project.

Find images that represent your company's identity and vision. The images should represent a feeling and show your designer the kinds of things that you like. Don't worry about details such as materials, your design professional will figure out how to make it a reality!

Print or cut out images from magazines, and paste them on your board!

PRIORITIZING GOALS

Use this worksheet to prioritize goals to help build revenue, grow awareness, and streamline your workflow. The goals with the highest totals should be done first.

List your goals in Awareness, Revenue and Efficiency.

Rate them on Desirability (1-10, no-yes) and Doability (1-10/hard-easy)

Awareness: How might you get people to hear about you?			
Description	Desireability	Doability	Total

Revenue: What will generate revenue?			
Description	Desireability	Doability	Total

Efficiency: How can you systemize and simplify?			
Description	Desireability	Doability	Total

360° WALKTHROUGH

Objective

First, visit other brick-and-mortar locations, then look at your own. When completing this observation exercise, try to visit the location during a variety of times of day and days of the week.

Use all Senses: What do you see? What do you hear? What do you smell? What can you touch? What can you taste?

Observe the space from a variety of perspectives:

Driving in a car, standing across the street, standing outside the front door/window, standing at the back of the space and front of the space. Walk through looking only at the ground, then at eye level, then above at upper displays.

What do you see? Is it compelling at all eye levels? Does it need to be?

QUESTIONS TO ASK YOURSELF:

Is the space inviting?

Does it stand out from its neighbors?

Does it represent its services?

How long does it take you to walk the entire space?

Does it inspire you to want to come back to experience it again and learn more?

SCOPE OF WORK

A Scope of Work establishes clear expectations for a project, so all parties understand what work each party will perform and deliver, when it's due, and the agreed upon price.

Briefly describe your business products or services, including your brand and core values, if applicable:

Explain the project or challenge for which you are currently seeking design services:

Project Deliverable:

- | | | |
|--|---|---|
| <input type="checkbox"/> Brand Strategy | <input type="checkbox"/> Messaging | <input type="checkbox"/> Signage & Wayfinding |
| <input type="checkbox"/> Visual Identity | <input type="checkbox"/> Marketing Strategy | <input type="checkbox"/> Packaging |
| <input type="checkbox"/> Website | <input type="checkbox"/> Advertising Campaign | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Social Media Graphics | <input type="checkbox"/> SEO | _____ |

Desired Result or Goal:

- | | | |
|---|--|---------------------------------|
| <input type="checkbox"/> Create brand consistency | <input type="checkbox"/> Reach a new market | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Increase sales | <input type="checkbox"/> Recruit employees | _____ |
| <input type="checkbox"/> Establish a digital presence | <input type="checkbox"/> Sell more efficiently | _____ |

Provide a brief description of of your project including existing challenges or constraints.

SCOPE OF WORK Cont'd

Provide a timeline for execution and completion of your project. Some details here will be specific to the type of project (i.e. delivery of brand assets, new website), however, most design projects will at least loosely follow these steps. Be sure to consider any upcoming holidays, product launches, or events that will impact your timing or deadlines.

PROJECT MILESTONES

Expected date for delivery of the following milestones:

- _____ Scope of Work Completed
- _____ Project Goals Set
- _____ Budget Set
- _____ First Draft Due
- _____ Second Draft Due
- _____ Final Draft Due
- _____ Final Product Launched

What are your primary priorities for the project? Think about what you want your business to be exceptional at and let that guide your selection process. Number in order of importance.

- _____ Economic (basing decision primarily on price)
- _____ Maintenance and Execution (timeless and/or easy to update or change yourself)
- _____ Inclusive (adheres to inclusive and/or universal design principles)
- _____ Aesthetic (striking and unique design)
- _____ Sustainable (design that is good for the environment)
- _____ Cooperative (created with designers you regularly work with)
- _____ Unique (custom design that requires lots of research to create special solutions)
- _____ Timeline/Urgency
- _____ Accessibility
- _____ Other

Do you know how much you can afford to spend for the services you're seeking? It can be a range, to leave room for discussion and negotiation, but should be realistic in terms of capacity and the scope of the project. Detail the amount below.

SCOPE OF WORK Cont'd

Describe how you would like designers to respond to your SOW. Be sure to indicate when it's due and how to submit it.

Be sure to indicate what you expect them to include. Consider requesting relevant case studies or prior experience, firm overview (mission/values), firm structure and key staff, anticipated consultants or contractors, fee proposal, and project timeline are included. Describe what you would like your designer to include in their proposal (below).

Be sure to include point of contact information for the project, so that interested designers know who to send their proposal to.

Name

Role

Email

Phone

Be prepared to share more information to help the designers understand what you're looking for. This could include attaching examples of existing marketing materials, collateral, your logo, a link to your website, your mission/values, social media handles, etc.

WEBSITE WORKSHEET

01. Business Snapshot

What is the name of your company?

Website URL:

What does your company do? What products and services do you offer?

What budget have you allocated for this project?

03. Is there anything about your current site that serves the business well?

05. What are the reasons your ideal customer will visit your website?

02. What are the top 5 goals for your new website?

① _____

② _____

③ _____

④ _____

⑤ _____

04. Who is your ideal customer?

06. How do you want people to feel when they interact with your brand?

Check or fill in the box on the scale below.

Playful <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	Serious <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	Youthful <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	Mature <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>
Inclusive <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	Exclusive <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	Local <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	National <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>
Affordable <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	Expensive <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	Relaxed <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	Intense <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>
Progressive <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	Conservative <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	High Touch <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>	High-Tech <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/> — <input type="checkbox"/>

07. List your competitors' websites:

09. Are there any other websites in particular that you like the design of? Why?

08. What do you think your competitors are doing successfully?

10. If we were to be celebrating a successful website strategy in 12 months time, what would that look like? How many website visitors? How many leads? How many sales? Be as descriptive as you possibly can.
