



# The No-BS Guide to Selling Research for Design Agencies

Strategic tips for selling research for your next design project.

**Hopscotch Labs, Inc.**

<http://hopsoctlabs.com>

# Hello!

Dreading calls for proposals? Good news, this guide breaks down your client questions so you answer them right from the start; it covers talking points and all those assumptions to make your lawyers happy. By the end of this document you'll be crafting conversations that make clients say 'Yes please, let me give a deposit already!'"

A man in a blue shirt is writing on a whiteboard. The whiteboard is covered in handwritten notes and diagrams. The central note is 'PERSONALITY KEY ATTITUDE PRINCIPLES'. Other notes include 'EMPATHETIC', 'REFLECTIVE', 'ENCOURAGING', 'NON-EVALUATIVE', 'OSY REQUIT', 'Profess RECEIPT', 'BENEFIT Prof. & BUSINESSES', 'CONNECTION FROM SOCIAL NETWORK ENGINE', 'EXTENTIONS PLACEMENT', 'OPPORTUNITY', 'Dossier', 'Case LOCAL', and 'JOB'.

# It's time. Start selling research for your design projects

If there's one thing that impacts the bottom line it's talking with the people who will use what you're designing—the end-users.

Research adds value to the client, the consumer and YOU as a design agency. Not only can you mark it up and seem smarter to your client, it helps you create better design experiences.

# Stop stressing the process and go for it.

The visual artifacts, tactile exploration, and conversations for design research are like nothing companies are used to. It's not going to take 3 cups of coffee to understand. Approach your client conversations with these concepts in mind:

## 1. Research is a value add

Approaching your client conversations with a value mindset makes it easier to communicate the benefits to the client. This work frames customer design triggers your team will use immediately. The research you need:

- Adds clarity to the existing design brief; and personality to the customer needs
- Maximizes design efforts because you know, with certainty, what matters to your client's customers and their market
- Removes ambiguity by defining the critical needs and goals
- Long-term, it saves time and money (so dollars only go to endeavors that ACTUALLY will pay off)

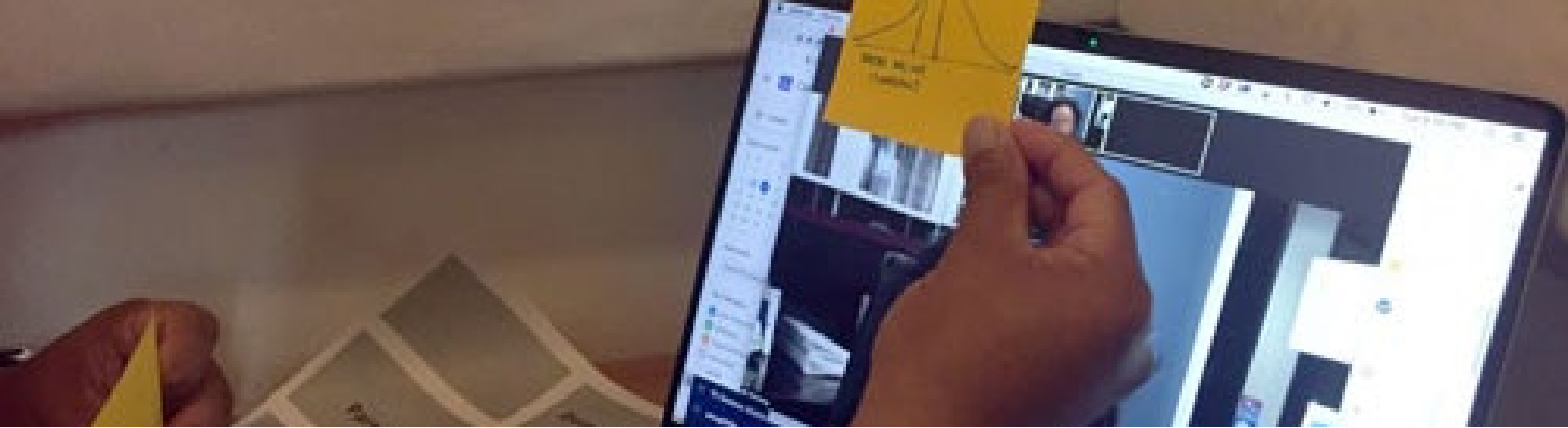
## 2. Get hyper-clear on your process

Research creates clarity and opportunity in even the tiniest pockets of a project. To capture it, you need a little bit of humility, a willingness to ask for more clarity, and an eye to spot the questions in your work. When you know what you need out of research, it's easier to speak to its value. Don't let this go unspoken-share this with the client.



**Tip:** Check out our guide on processes to check your assumptions against reality.





### 3. Know your design research method, by category

Some methods make projects uniquely come to life. After all, selling a specific method every time is problematic-no one method works the same way for every project. Use broad strokes to define the project scope and leave the actual methods to your team.



**Tip:** Read up on research methods, process and timelines in our guide on process.

### 4. Remember your margin

Professional research and user experience design commands top dollar. Whether it's discovery research, website analytics or designing a complex interaction for that mobile app, the minimum fee is usually double what traditional design can command. This is true of white labeling a consultant's work and of hiring new team members.

# Your cheat sheet to talking with clients about the value of research in your project

Who doesn't love a cheat sheet? Ours has talking points that provide peace of mind and communicate the why.

## The client benefits through saving money and time.

- Research eliminates avoidable rework.
- Fixing errors after development cost 100x more.
- Badly designed products kills trust and goodwill causing cascading issues that tank market share.
- Unintuitive software doubles training costs across the organization.

## The project benefits from shared alignment.

- Maximizing customer inputs creates organizational confidence in product launches.
- Alignment and explicit targets make business and technology decisions easier.
- It eliminates project mismanagement and the potential of unwanted and unfocused products.
- Companies see better results with demonstrable investment returns.



### **When you know what matters to your client's customers, you can:**

- Create product market fit.
- Differentiate the company and its products, making it difficult for competitors to copy their ideas.
- Develop an authentic, useful product that is sticky to the target audience.
- Launch the right product the first time.

### **When your design team connects with the consumer, they:**

- Get their questions answered
- Gain empathy for the problems that person experiences
- Learn the personal impact of their designs
- Work within a better defined constraints, allowing for greater creativity
- Create a solution that fits better into the end consumer's life, solves for consumer problems
- The client and their brands become heroes to their customers

# What goes into the proposal

Imaginative, value-driven, big ideas need a solid foundation to build trust with your clients, and get their customers to connect with the execution. From that perspective, your research is a must-have. It is strategic and immediately useful, informing design decisions.

## **Let's make sure your client sees the big (holistic) picture, they are investing in you.**

Your proposal needs to show why this data gathering process matters. By including research in your approach, not as a vague line item in an excel, you show the thoughtful consideration of their goals, and your project and team's needs.

## **Let's make sure they know what they're paying for.**

Proposals with research include methods, expected outcomes and the role the client may play. We've found that clients and designers have a hard time implementing recommendations from interviews and activities they weren't part of. When designers and clients come face to face with customers, when they see the problem people are having with the client's website or forms, that's when light bulbs click. It's also why clients are encouraged to be an integral part of research.



# Write a strong proposal

Big ideas need solid footing in the real world. Let's make sure your proposals communicate research's role driving powerful, imaginative, and value-driven ideas.

## Research is a must-have

Your research informs design decisions on tactical execution. You'll put it to use immediately—it is purposeful and it eliminates questions and ideas that don't matter.

Research saves clients money and time throughout design and development.

## Research is part of your story

Writing your proposals, make research an integral part of your story (general description, scope, approach, outcomes). Including it in your narrative ensures the cost isn't questioned.

Yes, you can break out your pricing for research, however, line items have a way of being cut. Don't give your client the chance, include it as part of the whole.

## Your research is strategic

Your research is inclusive: it should be given the time, phases and staff it deserves. Don't stress the cost, you client will recoup it in spade.

# The contract terms to keep you like a raincoat in a storm: protected

## Contract assumptions we use

**IP:** who owns the research, \*ideas that come up during research, and resulting concepts.

**Scope:** define scope of services, payment terms, and timing; include external resources + participants.

**Research location:** onsite or is travel involved.

**Insurance:** who is responsible for insurance, the type of insurance required and limits of coverage.

**Disclaimers and limitations:** what you won't guarantee or be responsible for.

**Non-disclosures:** what you can and cannot do with the content of the project, including privacy rights of participants.

## Additional legal considerations

**Research participants sign NDAs that explicitly spell out:**

- Who owns the ideas from research.
- What they can talk about.
- That they can stop the interview at any time and still get paid.
- What you plan to do with their photo, name, or other personal information.

# Jumpstart design innovation with the right strategy + research.

## **Hopscotch Labs, Inc.**

Contact: Kris Angell, (646) 831-7035

[kris@hopscotchlabs.com](mailto:kris@hopscotchlabs.com)

<http://hopsothlabs.com>

## **About Hopscotch Labs**

We were founded in 2014 to learn what matters to your customers to set your products apart in the market. Through our efficient research processes we refuel your team and help to create magical experiences that positively impact your bottom line.

We move you forward.