How to Hire a Branding Agency

Shape.

Contents

Step 1

Perform a Brand Audit

This is the foundation of your new venture and possibly the most crucial step of all. Use these exercises to attain a more in-depth understanding of how your brand is currently being perceived and your objectives.

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01 Consult your business plan and your marketing plan.

Start at the beginning: what are you measuring? Refer to your business plan, vision, USPs, and five-year plan; whatever objectives your company has can be aligned with your brand goals.

This is also a good time to look at data and analytics about your business, such as audience demographics, best-selling products or services, and where sales or brand awareness are the more prominent.

02 Survey your customers and interview your employees.

External feedback on your brand is one of the most valuable ways to measure brand awareness and brand impact. Send surveys to your customers or your target demographic with a small reward to incentivise engagement. Here's a template questionnaire:

- Have you ever heard of this brand? (if not a current customer)
- Where did you find out about this brand?
- How would you describe the brand to someone else?
- What three words would you use to describe the brand?
- Have you had any good or bad experiences with the brand? Please explain what happened.
- Would you recommend the brand? Why or why not?
- What have you heard about the brand from others or in the media?
- Are you aware of the brand's competitors? How do you think they measure up?

Your employees also provide a unique insight into your brand. Your workforce can show you how your brand is perceived from an internal perspective as the ambassadors for your brand. If there are certain aspects to the brand they don't understand or disagree with, it's valuable to know what they are.

Ask some questions in an anonymous survey:

- What is the brand's vision/mission?
- What made you want to work here?
- Do you like the brand? Why or why not?
- What problems do you think the brand solves?
- If you could change one thing about the brand, what would it be?
- What do you think of the brand's competitors?

03 Compare your brand with that of your competitors.

You will already have gained some insight into how your audience and workforce view your competitors. Take time to go through the brand presence of each of your direct competitors. Consider what personality their branding has and what brand collateral they use. Try to make a list describing their strong and weak points compared to your brand.

04 Examine current brand collateral.

Gather every piece of branding and marketing collateral you have, from your website to your business cards. If you have brand guidelines, include these too. Examine the material. Is it consistent? Is there anything missing that you would benefit from? Make a list that will help you decide what you need and guide you on what to look for in an agency.

You may want to check for the following:

- Logo
- Website
- Social media imagery
- Business cards
- Letterheads and stationary
- Corporate brochures
- Customer brochures
- Marketing flyers

- Posters, billboards, and banners
- Marketing emails and newsletters
- Product catalogues
- Signage
- Livery
- Uniforms
- Merchandise
- Packaging

05 Conduct a SWOT Analysis

A SWOT analysis is a well-known technique used to evaluate the health of your business and determine where it stands in the current market. This can help you capitalise on your strengths, pre-empt challenges beyond your control, and even use your weaknesses to your advantage.

The SWOT analysis is broken down into four categories that intersect one another: positive and negative (strengths and weaknesses), and internal and external (factors within and without your control). Use the diagram below to perform your own SWOT analysis. Here are some examples to get you started.

- Strength: a rich brand origin story
- Weakness: a lack of defined brand values
- Opportunity: an upcoming industry event
- Threat: a competitor has released a successful new product line

	Positive	Negative
Internal	Strengths	Weaknesses
External	Opportunities	Threats

06 Define SMART Objectives

SMART stands for 'Specific, Measurable, Achievable, Relevant, and Time-based'. Defining SMART goals is important because it will give you realistic and accurate objectives that are easier to measure at the end of your project.
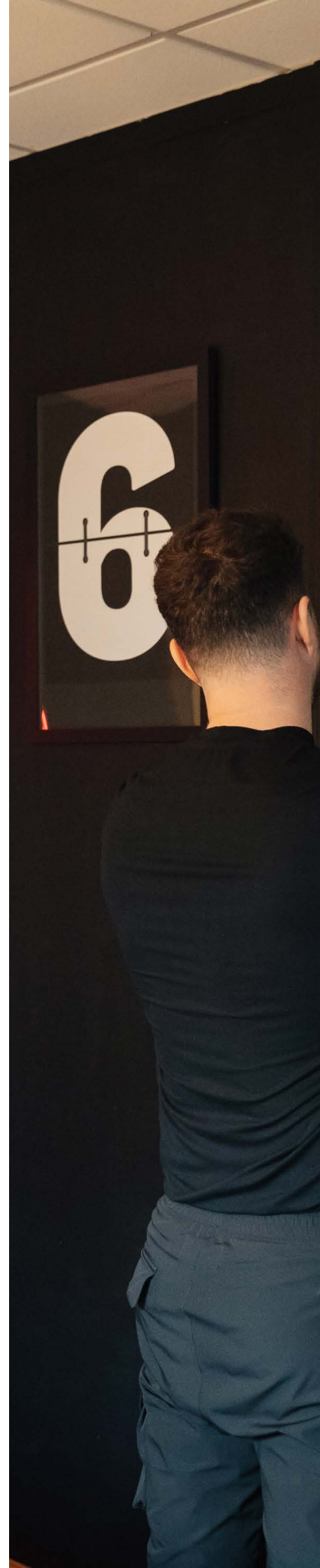
Here's an example of an undefined goal:

> "I want my branding to look more professional."

Here's an example of a SMART goal:

> "Our branding should represent our brand story, values, and mission set out in our branding brief."

Try to define up to three SMART goals to keep you focused when you approach agencies.

Step 2

Research and Compare Agencies

Now that you've got a clear idea of where your brand currently sits in the market and your SMART objectives, you can start putting feelers out to find the right agency for the job. Here's how to effectively investigate agencies before contacting them and create a shortlist of the most suitable options.

01 How to Research Branding Agencies

Every branding project is different, so you might be looking for some incredibly niche specialisms or experiences in an agency. Generally, the quality and suitability of an agency can be determined by the following six factors.

- Personality and values
- Relevance
- Location
- Cost
- Experience and portfolio
- Testimonials and reviews

Let's look at how you can find out about these...

Personality and values

The website is an excellent place to start. Explore the pages and absorb the tone of voice; this is a good reflection of the agency's culture. Read through some of the company news on the blog to see what types of content they feel are important.

Take a look on social media. Not all agencies will have an extensive social media schedule, but they need to have at least a presence. More importantly, reading the content directors and staff post will give you another good insight.

Relevance

Take another look at the agency's website to see what services they offer and the sectors they work in. This will help you determine how relevant they are to the type of project you want to embark on.

While many agencies will have multiple landing pages for sectors, they are more likely to specialise in a few in particular. Search through their case studies to get an idea of the experience they already have under their belt.

Location

This doesn't need much explaining. Location holds little sway these days as remote working is very efficient. Many agencies, including MadeByShape, work with clients worldwide without cutting down on quality.

If location matters to you, check the address of the agency online. If not, look at their case studies to see whether they work very locally or not. This will give you a good idea of whether they are used to long-distance projects.

Cost

Cost is a little difficult to determine at this stage, especially since most agencies will draw up a bespoke quote covering all individual elements of the project. Usually, this quote is provided with the project proposal after you've already contacted the agency.

While checking out previous work might give you a general idea of cost, it will not provide you with much accuracy. The best way to determine cost is to provide the agency with your project details and ask for a quote.

Testimonials and reviews

Checking an agency's experience can help you determine its relevance to specific goals in your project. Do you need an animated ident? Look for animation, video, and CGI skills. Is your brand in the kids' fashion industry? Check for projects of a similar ilk.

Don't just look on the agency's website for these. Social media platforms like Dribbble, Behance, and Instagram are full of visual examples of a company's branding and might even show more examples.

02 Create a Shortlist

Now that you have a list of agencies in mind, it's time to cut out the fat and create a shortlist of three to five to contact. By narrowing down your options at this stage, you'll save lots of time and focus on only the very best options before you.

At this stage, it's a good idea to get your SMART goals out and keep them in view as you go through your list of agencies. Look at your research on each agency against what you want to achieve out of the project and rate each agency on a scale of one to five. Use the template on the next page to create your list, writing in any relevant notes. Pick the highest-scoring agencies and go to the next step to approach them.

Agency	Personality	Location	Cost	Skills	Experience	Testimonials	Notes
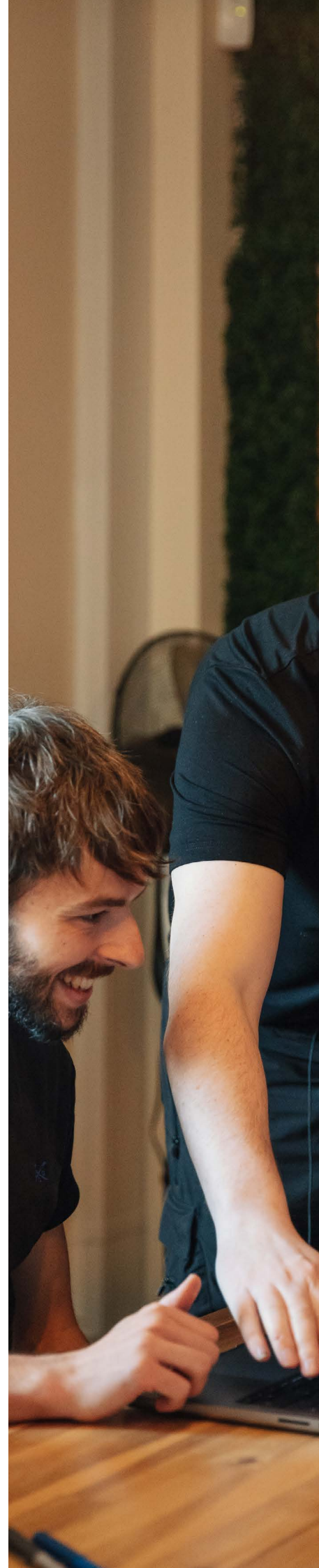
Step 3

Get the Most Out of Your Project Proposal

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01   Create a Brand Brief

When you have a shortlist of agencies, the next step is the pitch presentation. The agency will present you with a project proposal and tell you a bit more about how they work and what they can do for you. They will also likely prepare some example work along the lines of your objectives.

If you already have a branding brief, this is the best time to present it to the agency so they can interpret it and show you some relevant ideas during the meeting. So, how do you create a brand brief?

A complete branding brief should include the following. Use this checklist to make sure you've covered everything in your brief.

- The business summary
- Your objectives and goals
- Your vision statement
- Your mission statement
- Your target audience
- Competitor analysis
- Aspirational brands

- Your brand's promise
- Your brand's proposition
- Your brand's premise
- Your brand's persona
- Tone of voice
- Project specifications

We won't go into great detail about producing a brand brief here because MadeByShape Brand Designer, Ella Dawson, has already created a detailed template you can fill out.

Download the branding brief template

02 Prepare Questions for the Presentation

This is your chance to quiz the agency on their skills, experience, and ideas. Make sure you ask some probing questions to get a true feeling for the agency and whether they'd be a good fit for you.

Questions to ask before the presentation:

- **Can you include examples of relevant work?**
  (similar industries, clients, style, type of design)

- **Can you provide us with references to speak to previous clients of yours?**

- **Can you provide some draft examples based on our brief?**
  (nothing too in-depth, but enough to show how you might interpret it)

- **What information do you need from us to create your proposal?**
  (customer profiles, competitor information, etc.)

Step 4

Prepare to Meet the Team

Meeting the team you will work with is one of the most important parts of this entire process. If you don't gel with your branding team, you won't get the most out of your project. It's that simple.

Getting the chemistry right between your team and that of the agency means better communication, more constructive feedback, better alignment with the vision, and a more effortless working relationship. Trust your gut when it comes to this stage, it's usually right, and you'll thank yourself later.

Take this opportunity to have an informal chat with the people in your meeting; it'll allow you to get more insight into their personalities and ways of interacting with one another.

Questions to ask during the meeting:

- [ ] What's your impression of our current brand?

- [ ] Can you give us feedback on our brand brief? What is your opinion? Is there anything we need to explain further?

- [ ] Do you work with any other brands in our industry? If no longer, why did you stop?

- [ ] Who will be handling this project, and what are their roles?

- [ ] Who will be our main point of contact?

- [ ] How often will we communicate?

- [ ] What does the process look like for a project like this?

- [ ] What is the turnaround time on a project like this?

- [ ] Tell us about your team culture.

- [ ] How do you measure success? How will you meet our objectives?

- [ ] What is your vision of our new brand?

Signing a Contract and Providing Information

The hard work is over. This is the last step before you can get stuck into (or rather, let your new agency get stuck into) your project. Make sure you get these points ticked off, especially in regards to your contract to ensure your company is covered on all legal and financial aspects.

01 Checking the Contract or Terms of Business

- Names, addresses, and contact information of both parties.

- A deadline for the work to be completed or the contract's duration.

- A full and detailed scope of the work agreed.

- Terms of payment (when will payment be made? In full at the end? After certain milestones?)

- Terms for late payment (when is the deadline for payment? Is there a fee for late payments?)

- Conditions for adding work outside of the initial scope (at what rate is extra work billed? What constitutes extra work?)

- A termination clause (what happens when you want to end the relationship?)

- An indemnity clause (what if things outside both of your control affect the relationship?)

- What happens if the contract is breached?

- Who owns the assets created, and at what point? (for example, are assets owned by the agency until payment is processed?)

- Does there need to be a non-disclosure agreement?

02 Checklist of Resources to Send to Your Agency

Provide your agency with the right resources to learn about your business. Be selective, though. Too much information can have the opposite effect. These are the best resources to send to your new agency:

- Your brand audit, including SWOT analysis and SMART goals

- Your brand brief

- Market research and customer/audience profiles

- A list of your competitors

- Current brand guidelines

- Contact information (names, phone numbers, email addresses, roles relevant to the project, times of availability)

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