

## Creative Credits

### A Guide to Selecting and Working with a Creative Business

We have created this guide to help explain the process of selecting and working with a creative business - focusing on your needs and ensuring you get the most out of your project. If you've never commissioned a creative business before it might well be hard to know where to start and how to select the best one for the job. It's worth saying at the outset that, because all projects are different - and because the creative process itself should be a flexible one - there is no absolutely carved-in-stone way to approach working with a creative business.

However, there are a number of things you may want to consider before undertaking such a project. The purpose of this guide is to outline these considerations, leaving you well-prepared to make the process beneficial and enjoyable.

The next six sections cover:

- Eligibility and processes for Creative Credits
  - How to find and choose a creative business
  - How to agree budgets and costs
  - Writing a brief and getting the project started
  - Working with your creative business
  - Completing your creative project
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## Eligibility and processes for Creative Credits projects

In this section we will outline:

- Project eligibility for Creative Credits
- Things to bear in mind when selecting a creative business
- Checking your project is eligible
- Changing your project

### *Project eligibility for Creative Credits*

As part of the programme, there are some criteria that your project will need to meet in order to claim back your Credit. Creative businesses can undertake a vast range of activities and we want to encourage some truly innovative projects. Therefore we have only defined what is not eligible rather than limiting projects to certain types. You will need to bear in mind the eligibility criteria when selecting a creative business and scoping out your project with them.

1) At least 80% of the £5,000 spend for the project must be spent on creative activities. It is at NESTA's discretion whether or not an activity is considered creative. The following list gives examples of activities that in NESTA's view would **NOT** be considered creative. Whilst these activities (or combination thereof) may be included in projects, they must **NOT** constitute more than 20% of the £5,000 total spend.

- a. Legal or registration costs in connection with the protection of intellectual property
- b. Physical distribution or listing costs
- c. Purchasing space for trade stands or tradeshow fees
- d. Staffing costs for events or face-to-face selling
- e. Sponsorship
- f. Funding promotions or discounts to customers
- g. Printing costs or printing set up charges
- h. Direct postal mail or phone campaigns
- i. Data collection
- j. Purchasing of advertising space or airtime
- k. Webhosting
- l. Search engine pay-per-click campaigns
- m. Installation or purchasing of 'off the shelf' content management systems
- n. Purchasing of domain names

2) Projects that involve expenditure in relation to a website must clearly involve one of the following innovation improvements:

- a. Opening up a new market to the business  
e.g. Providing a route to do business with the public where only trade customers had been targeted previously.
- b. Altering the way the business distributes its products.  
e.g. Adding e-commerce to a site where it wasn't previously used.

- c. Providing a new way of interacting with customers  
e.g. adding functionality for newsletters or blogs or interaction with social media.
- d. Improving the way a site performs on search engines or user experience  
e.g. Search Engine Optimisation (SEO)

Changes that only alter the design or text content of the website without providing one of the above improvements will not be eligible. It is at NESTA's discretion if the proposed changes meet these criteria.

#### *Things to bear in mind when selecting a Creative Business*

As well as making sure that your project will meet the eligibility criteria, you'll also need to make sure that the creative business you select is one that meets the programme requirements.

The creative business(es) used to complete the work must:

- a. Be listed on the Creative Credits gallery
- b. NOT be owned or managed by family members or relations of the owners, managers or employees of the recipient business.
- c. NOT have completed paid work for the recipient business within the last 5 years.

#### *Checking your project is eligible?*

Before your selected creative business can carry out work on your project. You will need to get it approved by NESTA who will assess it against the eligibility criteria listed above. It's very quick and simple, all you need to do is use the brief you agree with your selected creative business to complete the project proposal form and send it to us for checking.

If for any reason we feel your project is not eligible for a Creative Credit, you will be given the chance to tweak or amend your plans and project proposal as many times as necessary. Projects do however need to have been approved before the 16<sup>th</sup> April 2010.

We'll aim to let you know the outcome within two working days and proposals can be sent to us at any time before the 16<sup>th</sup> of April.

If you want to carry out your own project eligibility check before submitting your project proposal form, you can use our online checking tool to assess your ideas and plans. Please feel free to use this tool as many times as you need.

#### *Changing your project*

We realise that as you start work on your project your original plans and ideas might change. Don't worry, you will be able to modify your project after you have submitted and had your project proposal form approved. If you do wish to alter things at any stage, please contact the Creative Credits team in advance of any new work being carried out so that we can make sure your project will still meet the eligibility criteria.

## How to find and choose a creative business

In this section we will outline:

- Finding a creative business from the Creative Credits gallery
- Choosing a creative business
- The importance of personality
- The creative pitch

You may already know which creative business you'd like to work with from the gallery. If so, great - you can get on with pinning down the details of the creative work. But if you're finding it trickier to choose one of the creative businesses, then here are a few tips on coming up with a shortlist and making the final decision.

### *Finding a creative business from the Creative Credits Gallery*

To be eligible for a Credit, you will need to select a creative business from the gallery to carry out your project. The creative businesses listed on the gallery are all part of the Creative Credits programme and are based within the Manchester Region.

There are several ways to find a creative business from the gallery. For instance, you might want to filter the gallery by services offered or by the sector experience of the creative companies listed. You can also search using a keyword relevant to your project. If you wish, keyword search and filters can be used in conjunction to further narrow down your results. Alternatively, you can browse through the company profiles and examples of work on the gallery to find a creative business that inspires you.

Remember that you will not be able to work with a creative business that has undertaken paid work for you in the last 5 years.

### *Choosing a creative business*

As a starter it's definitely worth trying to see two or three different creative businesses to get an idea of how well you'll work together. It is also invaluable to prepare as much information as you can for this first meeting because it is then that you'll get a sense of how their team reacts to your objectives, your business and its requirements.

A good creative business or consultancy should try and extract information about all aspects of your business, so it's worth having all the details to hand. Things you are likely to discuss in this initial meeting can include:

- Your products
- Your customers (for example, who they are and what they look like)
- The size of your business
- Its financial performance
- Your competitors (for example, who they are)
- The reason behind your decision to commission a creative project
- What you hope the outcomes of the project will be (for example, what does success look like and how will it be measured)
- The current market position of your business or products
- Your aspirations
- Your ideas for growth

- A long-term vision

Thinking through these subjects in advance and preparing the necessary information will be really helpful and will make the meeting with the creative business a lot more productive.

As a publicly-funded organisation, NESTA must remain impartial, and is therefore unable to recommend individual creative businesses. Bear in mind that the companies listed on the gallery are not vetted by NESTA. It would be good business practice to carry out some basic checks before deciding on which creative business you want to work with. For example, this could include asking to see their professional indemnity insurance certificate and speaking to existing clients.

#### *The importance of personality*

At the first meeting you're likely to be getting a feel for how the creative company relates to you and your business and how you relate to them. Make sure you see a selection of their previous work - known as a portfolio - to ensure that it's appropriate and of a high enough standard for you. You may also want somebody who has previous experience in a relevant market.

Also remember that a big factor in the selection can be based on gut feeling and personal dynamics. This is perfectly valid. The truth is that many contracts are sealed on this type of relationship. And it makes sense, because it's going to be much more fun to work with someone you like and feel you can trust than someone with whom you feel less comfortable, even if they have a higher profile or lower fees.

It may sound obvious, but in any good creative process you'll be talking a lot and it should be enjoyable and open, so ensure you get on well.

#### *The creative pitch*

A pitch is the way a creative business or consultancy will attempt to win your project. There are two main ways they can do this: they can present you with a portfolio of previous work, explaining how their experience and skills would be relevant for your requirements. This is called a credentials pitch or presentation and it is the quickest way to get a feel for what a particular creative business can bring to your business.

The second possibility is that the creative business puts together some initial creative ideas for your specific project, based on the request for ideas (or brief) you have given. This is called a creative pitch or presentation.

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## How to agree budgets and costs

In this section we will outline:

- The value of a well-run creative project
- Getting the most for your money
- What to expect from the creative business
- Planning for extra costs

### *The value of a well-run creative project*

Spending money on a well-run creative project is an investment in your company, rather than a cost from which you would not expect to see some form of return. If you're running a business which has never previously commissioned creative services it may be hard to see it that way. But it's likely to make for a smoother, more productive (and possibly cheaper) project if everyone involved views the expenditure as an investment, with positive outcomes for your business. For some people, this may require a shift in mindset and it may fall to someone in your business to champion the creative project to other members of staff and management.

### *Getting the most for your money*

Initial discussions about budgets and costs ought to take place at the first meeting. If you have absolutely no idea what you need to spend then it may be a case of requesting three proposals or quotes, as you might with a plumber. Either way, it is beneficial for everyone to be up-front about your available budget even if this is an indication rather than an exact figure. You can still ensure value for money by being clear that it will be a competitive process and that you are also speaking to other creative businesses about your project.

Remember that you need to spend a minimum of £5,000 (at least £1,000 of your own funds) with your creative business in order to be able to claim back the £4,000 Credit from NESTA on completion of the project. You can however spend more on your project if you want to and it will help if everyone has a clear understanding of how much money is available and a realistic idea of what could be achieved with it.

The creative businesses may not be able to give a completely accurate estimate of costs until they have a more structured brief in place, but once they know your requirements and how much money you have they can prepare a proposal for you to look at and consider.

### *What to expect from the creative business*

Equally, you should expect any proposals from your creative business to include a detailed breakdown of all their charges, including standard day rates, possible additional fees and what is and isn't included.

- Agree with your creative business how they will inform you about any additional costs they may incur and that these costs need to be agreed prior to work being carried out
- Creative fees are usually quoted as an estimate, fixed price or on a 'price-not-to-exceed' basis

### *Planning for extra costs*

It may also be worth bearing in mind that your project may create additional requirements that could develop either during or at the end of the creative work. These may be outside of the scope of your initial project. For example, a full company rebrand will require the production of new stationery, business cards, marketing materials and so on. Alternatively, a new product development may require significant changes to a production or manufacturing process. Such costs would fall outside the creative work itself and may not be eligible under the Creative Credits programme, so think about this early on.

The Design Business Association breaks down creative costs into three areas:

- Creative fees - quoted in advance; usually related to the amount of time the creative business will spend on a project and is usually charged at a daily rate This includes creative and account management costs
  - Expenses - costs such as travel and accommodation incurred by the creative team in connection with the job
  - Implementation costs - payment for materials and services used to complete the project (this could include printing, and costs from suppliers such as photographers or shop fitters)
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## Writing a brief and getting a project started

In this section we will outline:

- What is meant by the term 'creative brief?'
- Writing your brief
- Deciding who is going to work on your project
- Making briefs fit
- Formal agreements or contracts

*What is meant by the term 'creative brief'?*

A brief is basically a set of instructions that set out what you want your creative business to do, along with the objectives and parameters of the creative project.

It should make clear what falls within - and outside - the scope of the work. This will help everybody refer back to where they started and make sure that the creative work is developing according to your objectives.

It will also help you determine how successful the project has been when you reach the end.

Unfortunately, all too often, briefs are agreed verbally. This can result in a breakdown in communications and maybe even contracts further down the line. However, a well-considered brief can act as a general grounding document if the project appears to be heading in the wrong direction, so it's well worth putting something in writing.

And remember, the brief isn't carved in stone; it can be adapted as you go along, as long as it's done in collaboration with everyone involved and the new version is also written down.

In short:

- Make sure you agree a brief at the start of the project
- Write it down and make a copy for you, your creative business and anyone else involved
- Change the brief as the project progresses if necessary, but do so by agreement and make a new document

*Writing a brief*

Ideally, the brief will contain all the information about your business, its objectives and the rationale behind the creative project that you talked about when first meeting your creative business. The brief should also contain your investment expectations and timeframes.

Here's a checklist of some of the things you might want to include in your brief:

- Business background - e.g. customers; strengths and weaknesses; strategic objectives; competitors and existing marketing

- Project objectives - e.g. what you want to achieve and how the creative work will be used and measured
- Constraints on the creative - e.g. to fit with any existing creative work or parts; specific technical or legal requirements; manufacturing processes needed; what is inside and outside the project's scope and any environmental issues
- Creative direction - e.g. style; materials; tone; mood; communication and usability
- Project management - e.g. budgets; schedule and deadlines; details of the team or person liaising with the creative business and managing the project and how success will be measured at the end
- Intellectual property (IP) - e.g. establishing who owns IP rights to the creative work being produced. For more information on Intellectual Property please visit the Intellectual Property Office website [www.ipo.gov.uk](http://www.ipo.gov.uk)

The brief might also start to give direction on the more creative aspects of the creative work, such as style, mood or tone for graphic work, or perhaps materials, finishes and ergonomic requirements for a product creative. It can be helpful if you provide examples of work you like and don't like.

Once these types of details are being discussed and written down you may start to refer to the document as a creative specification. This is something that takes the objectives of the brief and works them into a specific creative route to be explored and perhaps prototyped and tested. A number of different creative specs may emerge from your original brief before you settle on a final idea.

#### *Deciding who is going to work on your project?*

You are going to be talking to your creative business quite a lot during the creative process so it will help enormously to determine who in your organisation will manage the project and who else needs to be kept up to date with what's going on. In larger organisations top level executives should be involved regularly to avoid snarl-ups later on if management doesn't like what's come out of the creative process.

It is extremely helpful if senior management can see the amount of work that goes into a well-run creative project so they understand the value of their business' investment and where it is being spent.

Whoever is managing the creative project (assuming it's not the managing director) should provide this regular link to top management.

If possible, it's also helpful to involve other people who will be directly affected by the new creatives, maybe gathering feedback along the way. This includes employees, but may also extend to external partners, such as distributors or manufacturers. As with any changes affecting a business, it's important to get a sense of involvement and 'buy-in' from the people involved, especially for branding projects. It can also be helpful to agree upfront who in the organisation are the key stakeholders and at what stage they will be involved as well as agreeing timings for people to review and provide feedback. This will help those involved understand when they will see the creative, what their involvement is and how long they have to feedback. Otherwise, the timing plan may go astray.

#### *Making briefs fit*

Clients brief are usually words, which can sometimes be open to interpretation. Providing examples can help lessen ambiguity. For instance, if your brief says 'contemporary' give some examples of what this means to you and your business.

Creative businesses are often need visual stimulus - eg; what has your brand looked like in the past and why, where does your brand come from, what other support do you give the brand (eg; advertising or promotion), what do the competitors look like. Providing these visual aids can be an important key to correctly interpreting briefs.

#### *Formal agreements or contracts*

It is recommended that you enter a formal agreement or contract with the creative business you have selected as well as using a creative brief. However, whether or not you use these types of arrangements is entirely based on the preferences and normal working practices of your company. They may however be useful if your project is likely to require expenditure up front or will extend over several months. Please remember that if any disputes do occur between you and the creative business you commission, these will need to be resolved between yourselves and that NESTA will not be able to become involved.

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## Working with your creative business

In this section we will outline:

- Getting involved
- Understanding the creative process
- Creative terminology

### *Getting involved*

Working with a creative business may be an unfamiliar process. Unlike the suppliers of many other services to your business, creative businesses will need to work with you creatively to achieve the best results. This means that one or more members of your business will need to invest time and thought in the process, liaising regularly with the creative business.

On the other hand, if you're already familiar with this type of creative work the difficulty may come not from investing enough time, but in relinquishing some control and allowing the creative business to take over creative responsibility.

Either way, it is worth bearing in mind that this is a collaborative process aiming to achieve what you have set out in your original creative brief.

### *The creative process*

One of the most important things to realise about the creative process is that it is fluid and that ideas will be developed, tested, refined, and passed around for feedback and discussion a number of times.

Ideas may also be dropped as part of this process. This type of cycle is an essential part of good creative work and it will involve a time commitment from whoever is managing the project.

Any given creative project may also move through a number of different stages, such as:

- Concepts - initial options and ideas
- Creative development - refining a chosen concept
- Evaluation - testing and reviewing the creative
- Implementation - production to launch

If you haven't worked through such a creative process before it may be tempting to think you should be able to tell the creative business what you want so they can go away and produce it, delivering the finished article back to you a few weeks later. But the results from working like this will almost certainly be poorer - and the process less interesting - than if you engage with the development.

Creative is not a completely black and white process, but nor is it a dark art to be left entirely to the 'creatives'. Getting into the process is not only essential, it's also fun.

When approaching the creative process, remember:

- Creative work should be seen as an investment
- You need to develop creative ideas in collaboration with your creative business
- Creative is a fluid process: prepare to invest the time to work through different routes and ideas
- Try not to control every aspect of the creative process - trust your creative business to use their own skills and judgement

### *Creative terminology*

As part of this creative process, a number of businesses find they come up against certain language barriers when trying to explain what they want, as well as in trying to understand what the creative team mean.

As with most professions, creative businesses may use a set of terms that you would never normally come across. Such technical terms and shorthand phrases have been adopted to help them work more effectively, but you shouldn't be expected to understand immediately.

You should also be prepared to describe your reactions to creative using language that may be different from how you'd speak about other areas of your business. It may need a more emotional response, or it may be helpful to make use of comparisons with other creatives you've seen when explaining what does and doesn't work for you.

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## Completing your creative project

In this section we will outline:

- Implementing your new project
- Assessing the results
- Measuring creative success
- Assessing the process
- Claiming back your Credit

Once you've worked through the stages described in the previous sections you'll be very close to your final project. Congratulations! Hopefully the process produced just what you were after and was interesting and fun too.

Now that you have your new branding, office space creative, website, packaging, product or whatever it may be, you'll need to think about producing and putting it into action.

### *Implementing your new project*

After the creative work is completed the next stage is to begin implementing the project, either through printing, manufacturing, interior construction, website coding or whatever, according to the nature of the project.

Your original brief should detail whether implementation is something that your creative business will work on or whether their part in the project is now signed off and the implementation is handled separately.

It's worth bearing in mind that creative businesses will often have skills and knowledge of implementation processes that may be valuable and could save you money. In some cases they may even be able to handle the implementation themselves.

Either way, this should be discussed at the start of the project when the brief is being written, so that when you reach this stage it is clear what happens next regarding implementation.

### *Assessing the results*

There are many different ways that you can assess how effective your creative project has been for the business, but the easiest way to clearly check whether you have met your own objectives is to refer back to your original brief.

Remember, the level of thought, planning and detail that goes into this brief will determine how easily you can see if you've achieved what you set out to do.

And as simple as it may sound, the brief may also help to indicate when the project has come to an end and should be signed off. As with any incremental and flexible process, it could go on indefinitely, with more and more tweaks and revisions, especially if you're not clear whether you've achieved your objectives. For example, a new product may benefit from further revisions after it's launched, but are such revisions within the scope of your original brief or should they be undertaken as a separate creative project, further

down the line? Constant revisions could become expensive or result in a grumpy creative business (or both), so make sure you know when you've completed the work.

### *Measuring creative success*

As success is relative to what you set out to achieve not all measures will be applicable to all projects. Also, different types of creative will have different objectives - an office interior creative may aim to make the workplace more efficient and inspiring, while a packaging creative may aim to reposition a product on supermarket shelves. But with any project there will probably be a combination of hard and soft measures that you can use to assess the effectiveness of your creatives.

Hard measures could include profits, sales figures, contracts secured or number of units produced.

Soft measures could include customer and supplier feedback, shifts in the consumers' perception of your brand, changes in market positioning, competitors' reactions and general reactions to the project.

### *Assessing the process*

As well as measuring the success of the actual creative work, your business may also benefit from a formal evaluation of the way the creative process ran, although this may be more applicable to larger organisations. A process evaluation could include:

- How the project was managed
- Whether it met timescales and budgets
- Whether relevant management/staff were sufficiently involved
- The suitability of, and working relationship with, the chosen creative business
- How processes could be improved for future projects

All in all, a creative project should be enjoyable, illuminating and beneficial. It is an investment that can bring fresh, objective insight into your business and improve its performance in the marketplace.

If you strike up a good relationship with your creative business, it is something that should continue for any number of years to come, to the mutual benefit of both businesses.

### *Claiming back your Credit*

Once your project is complete and you have paid the creative business for the work carried out you can claim back your £4,000 Credit. To do this you must complete the claim form and submit it to NESTA along with a copy of the paid invoice. We will then carry out a final check to ensure that the project was carried out as indicated on your project proposal and that all eligibility criteria remain satisfied before reimbursing you for £4,000.

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This guide has been adapted from 'Finding and working with a designer - a step-by-step guide' and our thanks go to The Design Council ([www.designcouncil.org.uk](http://www.designcouncil.org.uk)) for allowing us to use this content for the Creative Credits programme.

