

6.4 Working with Professionals

TYPES OF CONSULTANTS AND VENDORS

If this all seems overwhelming, there are consultants and vendors that can help you establish the look and feel of your materials and help you get the word out to your target audience. Here are some options to consider:

Your in-house communications team. This is a good place to start, because you may be able to get their expertise for free. Be aware, however, that the communications staff of many organizations is focused on brand development and public relations, which is very different from writing targeted, audience-centered marketing materials to inspire action. If you work with them, you will need to be very clear (and very firm) about your goals, target audience, and message strategy. Furthermore, since these professionals serve the whole organization, you may need to adjust your timeline to accommodate their availability.

Advertising agencies and strategic marketing firms. These types of companies usually deliver complete campaigns. You will likely work with an account representative, who will pull in researchers, strategists, and creative and media teams as needed. These firms are expensive but may be worth using if you have little or no in-house capacity to plan, design, and implement the campaign. Although the distinction is not always clear-cut, marketing and communication firms tend to pay more attention to delivering behavioral outcomes, while advertising agencies are better at designing clever, attention-getting campaigns that raise awareness of an issue.

Graphic designers. Graphic designers offer services ranging from developing a graphical illustration of your process to the complete design and layout of your poster, postcard, flier, or other materials. They will usually look to you for guidance on the desired look and feel of the materials and then deliver two to three design options. Once you choose a direction, they will implement it coherently across all campaign materials. You can negotiate a lump sum payment for materials or pay them by the hour.

Writers and editors. Everyone can write, right? But can you write in different styles, for different audiences, at different reading levels, using language that evokes different emotions? Can you communicate your ideas clearly and concisely? And can you ensure that your material has no grammatical or typographical errors? Enough said. If your budget allows, work with a writer, or at least an editor, to finalize content for important materials. Even if you have no budget, ask another person, preferably someone unfamiliar with your program, to review your materials for clarity and brevity.

Web designers. Web design requires two kinds of skills. The first is being able to design and implement the back-end functionality, informational flow, and usability of the site. The second involves the look and feel of the site—i.e., the presentation of the material. Many software developers or web hosts offer simple templates at little or no cost, and these may offer all the functionality you need. You can also pay a web designer a small amount to customize an available template, so it looks more professional. However, it is best to work with a full-service designer if you envision a multi-layered site with more complex functionality and interactivity.

You can also write your web content yourself, but it is useful to work with a writer or editor who specializes in writing for the web. Similarly, several graphic designers specialize in designing websites and/or web-friendly documents and graphics that integrate features such as scalability across formats, interactivity, and easy updates.

Media specialists. These are professionals and firms that specialize in getting messages out to specific audiences or via specific channels. Examples include social media and online marketing firms, traditional public relations firms, event organizers, youth marketing firms, minority marketing firms, and more. It makes sense to consult one of these firms if you are committed to getting the word out via a specific channel. There are also a few companies that have expertise in all these techniques and can help you determine the right mix of channels for your audience and message.

6 DEVELOPING MATERIALS

Printers. Often, the type of materials being created can dictate the investment needed for printing. Sending out individual letters to landowners? You'll be fine using the office inkjet. Want to send out a glossy, high-quality postcard? You'll want to explore the printing landscape. Office supply and shipping stores usually offer online printing services at low prices. Online options have also greatly expanded—you can simply upload your materials and receive the printed copies in the mail. Online print shops are quite inexpensive and usually provide materials of

good quality, but you may not have the option to look at a test print for quality control.

Local print shops are disappearing, but if you have one in your community, it's definitely worth inquiring about available services. Small shops may cost more but offer more personalized service and experienced servicepeople. If you print frequently, it is worth developing a relationship with your local printer, so they understand your needs and preferences.

GETTING THE BEST FROM CONSULTANTS

Regardless of which type of consulting service you use, your collaboration with them will be much more successful if you get your house in order first.

- 1. Be clear about the scope of work, budget, timeline, and mutual expectations.** If you have a limited budget, it makes sense to use consultants strategically, on tasks where you need the most help. However, be realistic about your capacity. If you set up the project as a collaboration, then make sure you have the means to get your part of the project done.
- 2. Clearly communicate your overall goals and priorities for the project.** Most projects have multiple objectives, and that is fine, as long as you're able to prioritize these objectives. Also, tell the consultant about any design or technical parameters (e.g., compatibility with your organizational website, consistency with your organization's style guide, etc.).
- 3. Be clear about the audience and message strategy.** Professionals such as writers, designers, and graphic artists are trained to bring your ideas to life, but you'll need to have your message strategy worked out so you can give them useful direction. At the very least, you need to be clear about your target audience, what motivators and barriers you anticipate, and the desired emotional tone of the message.
- 4. Get multiple quotes,** but make sure that they are for a comparable level of service. The cost of professional services does not vary widely in the same area, so if you have very disparate quotes, it may be that the consultants have understood the scope of work differently. Once you have identified two or three potential vendors (e.g., online or through referrals), explain what you need, and ask them to write up a short bid. Then have a conversation with potential consultants to determine how well they address your questions, what questions they ask, and how they respond to new information. Good consultants should be able to adapt their ideas and suggestions based on your feedback. They should also be able to give you several references. For larger projects, it may be useful to write up a formal RFP, which pushes you to think through what you need and present that to bidders in a standardized way.