

# Getting Started with Contract Design

The process of engaging a contract design company usually starts with a meeting that allows the parties to determine if they are a good fit for each other.

After an initial enquiry by phone or email, most projects start with a meeting between the design company and the prospective client. You can maximise the benefit of this meeting with careful preparation.

## LOCATION

It can be advantageous to hold the meeting at the design company's offices. This will give you an opportunity to see their facilities and equipment and understand the size and scope of their operation.

## AGENDA

The details of an initial meeting will depend to some extent on the type and scope of the project, but the following format is typical.

- Introductions
- Design company presentation. A short explanation of the services that the design company provides, their history and examples from their portfolio.
- Client presentation. This is your opportunity to describe the project and the services that you require.
- Discussion. After both sides have presented their material there is usually a free-form question and answer session.
- Tour. A walk around the office, workshop and lab areas will allow you to see the facilities and equipment.
- Wrap-up and next steps.



## WHAT TO PREPARE

In addition to the technical requirements, you will want the design company to understand your business objectives for the project, at least in outline form. This will enable them to tailor their proposal to your production, regulatory and cost requirements as well as technical goals.

Be prepared to talk about the following topics:

What does your company do? Location, staff, products? Where does the project fit?

What is the project? Overview, sketches, block diagrams, etc. Include enough information to allow the design company to understand the scope of the task, but keep it general enough to avoid getting bogged down in details.

What are the target markets? USA? Europe? This can affect regulatory requirements for radio and environmental aspects.

Which tasks are you looking to contract out? Are other partners involved? What is the plan for mechanical/industrial design? Custom tooling? Where will the product be manufactured?

What stage is the project currently at; concept, high-level design, detailed design, prototype? Is the project funded? What is the budget? What are the timescales?

If there are existing prototypes, or examples of earlier-generation products that are similar to the new project, you may wish to bring them, or photos, to act as talking points.

## WHAT TO ASK

Ask what services the design company provides. Electronic hardware design, software, firmware, mechanical and industrial design are areas to consider. It is important for both parties to have a clear understanding of the division of responsibilities.

If you anticipate the project using a particular technology, microprocessor family, software tool-chain, etc., ask if the design company has any specific experience with it. Ask to see examples of similar projects they have completed.

Ask about the cost of the project, the likely duration and when work could start. You will not get an immediate, accurate quote but you may get a ballpark estimate. If the likely costs or timescales don't fit your requirements is it better to find out now and avoid wasting further time and effort.

## WHAT TO SEE

During the tour make sure you see both the office and lab facilities.

Is there adequate equipment for assembly and rework of prototype electronics, such as soldering stations and microscopes?

Is the test equipment in use modern and in a good state of repair? Is there enough of it? Does it cover the areas required for the project; analog, digital, RF? Is there an environmental test chamber?

Is there a workshop for the creation of prototype mechanical parts? How well is it equipped?

Evaluate the general cleanliness and tidiness of the facilities and the level of care and attention that you see going in to any ongoing work.

## NEXT STEPS

If the design company has gathered enough information about the requirements and scope of the project the next step will typically be for them to prepare a Proposal and Quotation.

Alternatively, follow-up tasks or meetings may be arranged to work out details before the Proposal can be written. Make sure everyone is clear on the agreed actions.

## NON-DISCLOSURE AGREEMENTS

Non-disclosure agreements are typically not required for an initial meeting, where the discussion can usually be kept general enough to avoid any confidential details.

## ABOUT THE AUTHOR



Matthew Kendall is a principal of Ionocom Communications Inc., Vancouver, BC.

He has worked in electronic product design since 1987, first in Reading, England, and lately in Vancouver, BC, Canada.

He can be reached by email at [matthew@ionocom.com](mailto:matthew@ionocom.com).

See <http://www.ionocom.com> for more articles like this one.

## IONOCOM

Ionocom is happy to host initial meetings with prospective clients at our offices in North Vancouver.

Initial meetings are typically 30 to 90 minutes, depending on the size of the project.

Assuming that Ionocom determines that the work required is within the area of our expertise and that we are a good fit for the project, the next step will be for us to prepare a Proposal and Quotation. This will usually be completed within a few days to a week after the meeting.

A proposal usually takes the form of a short document laying out Ionocom's understanding of the project, a discussion of the major tasks and a proposed program of work including the deliverables.