

The Complete UX Agency Hiring Checklist

Use this checklist to track your progress through the 10-week hiring process.

Phase 1: Define Requirements (Week 1)

- ☐ **Define Project Scope:** Written down exactly what needs designing (pages, screens, flows).
- ☐ **Identify Users:** Clarified who the users are (B2B/B2C, demographics, context).
- ☐ **Set Budget Range:** Determined a realistic, approved budget range (e.g., €40k-€60k).
- ☐ **Determine Timeline:** Fixed hard deadlines vs. flexible targets.
- ☐ **List Constraints:** Identified location, language, timezone, and compliance needs (GDPR).
- ☐ **Define Success Metrics:** Set measurable goals (e.g., "increase conversion to 3%").
- ☐ **Stakeholder Alignment:** Got internal buy-in on all the above.

Phase 2: Source Agencies (Week 2-3)

- ☐ **Initial Sourcing:** Found 15-20 potential agencies via:
 - ☐ Curated directories (UXAgencies.com, Clutch)
 - ☐ Referrals from network
 - ☐ Design portfolios (Dribbble, Behance)
- ☐ **Quick Filter:** Narrowed to 8-10 agencies based on:
 - ☐ Relevant portfolio work
 - ☐ Professional online presence
 - ☐ Appropriate team size (5-50)

Phase 3: Vet & Filter (Week 3-4)

- ☐ **Deep Portfolio Review:** Verified 2-3 highly relevant case studies per agency.
- ☐ **Check Reviews:** Verified 3+ client reviews on third-party sites.
- ☐ **Team Check:** Confirmed leadership and team composition on LinkedIn.
- ☐ **Specialization Check:** Ensured they aren't "jack-of-all-trades."
- ☐ **Location/Logistics:** Verified timezone overlap and language fluency.
- ☐ **Shortlist Created:** Selected top 5-6 agencies to receive RFP.

Phase 4: RFP Process (Week 4-5)

- ☐ **Draft RFP:** Created comprehensive Request for Proposal including:
 - ☐ Company context & goals
 - ☐ Detailed scope of work
 - ☐ Budget range (transparent)
 - ☐ Technical requirements
 - ☐ Evaluation criteria
- ☐ **Send RFP:** Emailed to 5-6 shortlisted agencies.
- ☐ **Q&A Period:** Answered agency questions (shared answers with all).
- ☐ **Receive Proposals:** Collected all proposals by deadline.

Phase 5: Evaluate Proposals (Week 6)

- ☐ **Create Comparison Matrix:** Spreadsheet to compare costs, timelines, teams.
- ☐ **Normalize Pricing:** Adjusted quotes to compare "apples-to-apples."
- ☐ **Score Proposals:** Scored each against weighted criteria:
 - ☐ Understanding (25%)
 - ☐ Approach (20%)
 - ☐ Team (20%)
 - ☐ Price/Value (15%)
 - ☐ Other (20%)
- ☐ **Select Finalists:** Narrowed to top 3 agencies for interviews.

Phase 6: Interviews (Week 7)

- ☐ **Schedule Interviews:** 90-minute video calls with each finalist.
- ☐ **Prepare Questions:** Customized question list for each agency.
- ☐ **Conduct Interviews:**
 - ☐ Met the ACTUAL working team (not just sales).
 - ☐ Asked about process, challenges, and communication.
 - ☐ Assessed cultural fit and enthusiasm.
- ☐ **Debrief:** Scored agencies immediately after calls.

Phase 7: Reference Checks (Week 7-8)

- ☐ **Request References:** Asked for 2-3 recent, similar clients.
- ☐ **Call References:** Conducted 15-20 min calls (don't just email).
 - ☐ Asked "Would you hire them again?"
 - ☐ Asked about budget/timeline adherence.
 - ☐ Asked about problem-solving.

- ☐ **Verify Findings:** Cross-referenced with other data points.

Phase 8: Decision & Contract (Week 8-9)

- ☐ **Final Selection:** Made data-backed decision on #1 choice.
- ☐ **Negotiate Terms:** Discussed:
 - ☐ Payment schedule (milestone-based).
 - ☐ IP ownership (immediate vs. upon payment).
 - ☐ Cancellation clauses.
 - ☐ GDPR/DPA compliance.
- ☐ **Legal Review:** Had contract reviewed (especially for cross-border).
- ☐ **Sign Contract:** Both parties signed.
- ☐ **Notify Others:** Politely declined other agencies.

Phase 9: Kickoff & Onboarding (Week 10)

- ☐ **Pre-Kickoff:** Sent brand assets, access keys, and research data.
- ☐ **Kickoff Meeting:** Held 3-hour session to align on goals and process.
- ☐ **Establish Norms:** Agreed on communication channels and meeting cadence.
- ☐ **Month 1 Check:** Scheduled "30-Day Kill Switch" review meeting.