

Managing Client Expectations

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One of the most critical activities in the course of any design engagement is managing client expectations. That means addressing what clients expect will happen or be achieved. It's that simple, and that complex. Sometimes a client's true expectation is never fully expressed until it goes unmet. Then and only then, does the designer get the full insight into their client's actual desires. However, meeting all of these client expectations, spoken or not, is an essential component of customer satisfaction and creative approval.

Clients need to understand what is occurring at each stage of the design process. They need to know when they are expected to contribute information, content, feedback, or even design fees. Some design management techniques to employ:

- Collaborate with Clients to Scope and Plan Projects
- Manage to a Creative Brief
- Encourage meaningful Client participation in Design Critiques
- Nurture creative risk taking in Clients
- Develop an effective communication style with each Client
- Lead Clients through a logical approval process
- Increase Client satisfaction, and therefore, repeat business

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Components of a Creative Brief

1. Background Summary:

Who is the client? What is the product or service? What are the strengths and weaknesses? Ask the client for any documents (research, reports, etc.) that help to understand the situation.

2. Overview:

What is the project? What are we designing and why? Why does the client think they need this project? What opportunity will the design support?

3. Drivers:

What is our goal for this project? What is the purpose of our work? What are our top three objectives?

4. Audience:

Who are we talking to? What do they think of the client's product/service? Why should they care?

5. Competitors:

Who is the competition? What are they telling the audience that we should be also telling them? What differentiates our client from their competitors?

6. Tone:

How should we be communicating? What adjectives describe the feeling or approach?

7. Message:

What are we saying with this piece exactly? Are the words already developed or do we need to write them? What do we want audiences to take away? Are there any disclaimers or legal information that must be included?

8. Visuals:

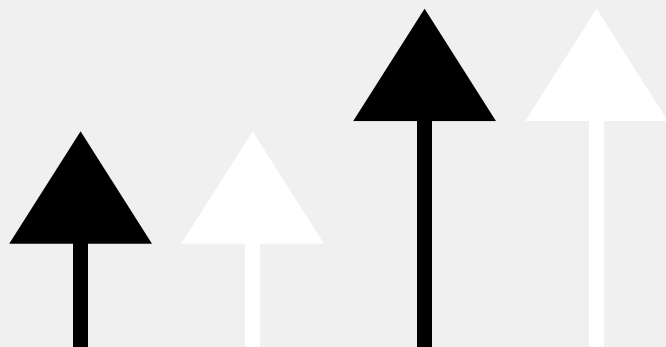
How should these images look? Are we developing new images or picking up existing ones? If we are photographing them, who, what, and where are we shooting, and why? Are we commissioning illustrations or picking up stock?

9. Details:

What is the list of deliverables? What is the delivery medium? Are there any preconceived ideas, format parameters, or limitations and restrictions regarding the design? What are the timeline, schedule, and budget?

10. People:

Who are we reporting to? Who exactly is approving this work? Who needs to be informed of our progress and by what means?



The following ideas can boost a designer's credibility:

- **Exhibit competence:** Be prepared for meetings, calls, questions, and problems.
- **Be confident:** Speak clearly and trust yourself, your team, and your process.
- **Showcase your track record:** Cite examples, talk about case studies, and prove that you have relevant experience.
- **Keep emotions in check:** Remain calm, and keep a clear head and an even hand.
- **Don't lie:** Even small inauthenticities can spoil your reputation.
- **Deliver on time and on budget:** Manage the schedule and contain costs.

Salesmanship

Whether it's receiving approval on a design solution or securing a deadline extension, getting your way may take a bit of selling. One element of salesmanship is all about showmanship: a dazzling and compelling performance. However, the best salesmanship in design occurs in the form of quiet persuasion, when the client doesn't feel you are selling them something. Rather, your suggestions seem to be logical, inevitable, and desirable.

Any designer can learn from a great salesperson. Here are some things that effective salespeople do that might help a designer:

- Have a clear objective.
- Do their homework.
- Have good timing.
- Stay in the moment.
- Use relevant triggers.
- Present persuasively.
- Listen and respond.
- Enjoy negotiating.
- Connect with others.
- Use visual aids.
- Aren't afraid to use charm.
- Keep their eyes on the prize (the clear objective).
- Don't take things personally.
- Know when to call it quits.
- Rise up and do it all over again.

Giving Feedback

There is an art to giving and receiving feedback on creative work. Here are some ways both designers and clients can be more effective:

Do

- ▶ Give feedback when asked.
- ▶ Consider your response carefully before speaking.
- ▶ Be specific and concise.
- ▶ Tie objections to a clear rationale; put comments in context.
- ▶ Notice the body language of the person you're talking to.
- ▶ Encourage discussion and useful debate.
- ▶ Make sure the person understands your feedback.
- ▶ Think of solutions or alternatives if invited to participate.

Don't

- ▶ Get emotional; keep it professional.
- ▶ Attack the person; challenge his or her thinking instead.
- ▶ State opinions as though they were facts.
- ▶ Walk away if the person wants further discussion.
- ▶ Get defensive if the person doesn't like your feedback.
- ▶ Demand it be done your way simply to power-trip someone.
- ▶ Provide a new solution or alternative if it isn't your job to do so.

Six Tips for Getting Client Approval

Getting clients to buy into the design, no matter what stage the project is in, is vital. Designers must figure out how to sell their ideas to their clients. Accomplishing this is partly informing them and partly charming them, with a lot of salesmanship thrown into the mix. Here are some tips on persuasion:

1

Set the tone.

Be on time, dress to impress, and have presentation materials in order. Establish a friendly bond with the client and show them respect and warmth. Set the stage for them to receive the presentation and listen to you in a positive frame of mind.

2

Summarize the background.

Remind the client of previous discussions. Review any research, strategy, or prior thinking for the work. Sum it up again so that the client understands the context of the current presentation. Reinforce that this is not an arbitrary concept, but a design based on the creative brief.

3

Tell them a story.

Explain briefly how this idea works. Take them through the decision-making process for the design in narrative form. Show how the idea evolved from the client's goals, and is the perfect solution.

4

Employ relevant buzzwords.

Speak as the client would speak when talking about the design's goals, context, and appropriateness. Refer to the client's language from briefings. If they wanted to "dominate" or "reignite" or "dazzle," tell them that your idea does exactly that.

5

Give them a solutions hook.

Clients love a short, easily repeatable explanation of the design that they can express to their internal team. Make it clearly definable and memorable. Explain the concept as a sound bite that obviously solves their problem. Let this be the take-away they can explain to others.

6

Know when enough is enough.

Make your case. Do it with confidence. Then stop talking and invite feedback. Think before you speak and especially avoid defense mechanisms.

Project Postmortems

The only way to understand what is influencing a design firm's profitability is to review business data carefully. One of the most significant measurements is looking deeply into your work breakdown structure and comparing it to what your time sheets and expense reports reveal what really happened on the job. Some project management software allows for this comparison very easily. Whether you are doing it using software or via some other kind of system, this kind of job postmortem yields a lot of valuable information.

To do a postmortem or exit review, ask yourself:

- How well did we meet the client's brief? Is the client satisfied?
- How differently was the project implemented from our planning of it? Why? Why not?
- Were there significant changes to time, scope, and schedule? Did we change-order the client for these revisions?
- How do the estimated fees and expenses compare with actual costs?
- How effective were our quality control and quality assurance efforts? What can we do better next time?
- What were the impediments to creativity and productivity? Can we control any of these things better in the future?
- What was our profit on this project? Can we recoup any loss on a future project with this client?
- Ultimately, what were the lessons learned on this project, from this client relationship?

How to Run a Creative Meeting

Throughout the design process, no matter what the project, every graphic designer has to have meetings. Some are internal, and some of the most important ones are with clients. Here are some recommendations regarding meetings.

The main reasons to have a meeting:

- Evaluate information.
- Make decisions.
- Make key creative presentations.
- Inspire the team.
- Bring people together.

Don't call a meeting if you

- Have a simple message to deliver, especially if it requires no immediate answer
- Are more persuasive on paper or via telephone than face to face
- Can reach your goal by other means

If you must call a meeting

- Prepare for it in advance.
- Define the meeting's purpose and goals.
- Invite the minimum number of essential people to attend.
- Create an agenda, send it before the meeting, and stick to it at the meeting.
- Make sure all attendees have the relevant logistical information (location, time, parking, etc.).
- Start and end the meeting on time.
- Keep it short and to the point, but make sure all attendees have a chance for input.
- Present only relevant background information.
- Emphasize people—listen to the group, exchange ideas, stimulate discussion.

- Assign follow-up action items and then make sure they are done.
- Close the meeting by summarizing decisions and next steps.
- Confirm commitments and responsibilities.

A meeting will tend to fail because

- It was unnecessary or held for the wrong reason.
- The objectives and goals weren't clear.
- The wrong people were present.
- It was badly timed.
- It wasn't properly controlled and was subject to poor decision making.
- It took place in an uncomfortable environment.

To be effective in meetings

- Clarify and summarize.
- Listen and question.
- Concentrate and focus.
- Be polite and patient.
- Serve as a role model.
- Encourage participation.
- Don't dominate the discussion.
- Control your emotions.
- Judge content, not delivery.
- Observe verbal and nonverbal cues.
- Tolerate divergent views.
- Act as a mediator.
- Stay impartial until all information is out.
- Be fearless.

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