Principles of Design Consulting
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"Because if you are not growing your business, you are actually going out of business. There is no such thing as standing still in the design industry."

I thought I would make this presentation a little entertaining so I have actually brought some clients to talk about. I think it is important to understand the client's perspective because design is all about selling a service. I am going through this fairly quickly. At the end I am open to any questions.

I am going to give you an opportunity to look into what a design firm does. A little background on our firm: we have 45 designers, about 30% of our work is here in Canada, the remainder is actually abroad, mostly in the US and the UK. We have two disciplines: one discipline is package design, so we do a lot of brand work and the other one is environmental design. We design a lot of stores, like right now we are heavily involved with Rogers here in Canada, Barnes and Noble in the US. My background: I am a designer, I graduated from Sheridan College in 1978, when we were still working with computer graphs and ruling pens. I grew from being a designer to managing designers to managing clients over my career period. And today really the focus of my presentation is not about creativity; it is about the business of design. I am hoping that my presentation will help you better manage your process and provide the ability to present your creative to your clients in a way that you want them to buy the product from the start.

The topic really is How to Grow Business and Build Strong Relationships with Clients. Because if you are not growing your business, you are actually going out of business. There is no such thing as standing still in the design industry. You either grow your client base, grow your business or you are looking at breaking margins competition in your client base. I think really this whole process of the business of design starts with one key fundamental, one underlying fundamental about the business of design and that is attitude. I just want to show you something I came across:

Video: It all Starts with the Right Attitude.

When I grow up I want to work in advertising. You are forced to work ten hours a day. Twelve hours a day. Fourteen hours a day. I want to work like a dog and bust my ass for a fifteen hundred dollar raise. When I grow up I want to be an account coordinator. Gopher, get coffee and donuts. And sit in client meetings and contribute absolutely nothing. When I grow up I want to be a media director. A director. Have my ass kissed my by every media rep on the face

of the earth. When I grow up. When I grow up. I want to be a Creative Director. Save all the great TV projects for myself. When I grow up I want to be a web designer. A freak. Use terms nobody understands. And convince myself I am no longer the geek I was in high school. When I grow up I want to pitch new business. Do a lot of spec creative. Not get paid a god damn dime for any of it. When I grow up. When I grow up. I want to be copywriter. An egomaniac. Laying awake at night, writing the great American novel that will never get published. When I grow up I want to be an Art Director. Wear black clothes. Work a lot of dope. When I grow up I want to work in agency management. Tell people what to do. Get away with bad habits. I want to be so far removed from the day-to-day business. Work as an accountant. Be a receptionist. Work in HR. And be considered as nothing more than agency overhead. When I grow up I want to be in production management. Go on press checks. Become an expert in trash and trinkets. And point the finger somewhere else every time something goes wrong. When I grow up I want to be an account executive. When I grow up I want to own my own agency. Get a corner office. See my name on the door. Have people wonder what I do all day long. When I grow up I want to be a producer. Have big budgets. Have no budgets. When I grow up. When I grow up I want to work in advertising. Win a Clio. I want to be in advertising and be the envy of all my friends.

Thank god we are not in the advertising business. Obviously this doesn't reflect our industry at all (laughter). I guess it start with attitude. Very often I have dialogue with designers and design firms. I hear that , we are the victims of our clients decisions. And in reality we are not victims. It is actually a process that we need to manage in partnership with our clients. Let's talk about the steps you need to look at as you build your business. And these are fundamental and they are actually in RGD Ontario's book, if you buy the book The Business of Graphic Design. They are clearly identified. I just reformat in a way I think it makes more sense in a presentation like this.

Number one is: You are in the business of building relationships. Very often I hear, "well we are designers, it is all about creativity." Yes, creativity is very important and creativity is a fundamental part of the service, the product you offer to the client. But you actually are in the business of building a relationship with the client. You are actually there to foster. Like my father used to say: "don't go after the puck when you are playing hockey, go after the player." It is about building relationships because those relationships as you know move around in the industry. If you are dealing with brand management you know, they are life cycles in a company of three to four years. As they move around you are going to prosper if you have built a strong relationship when they move to new clients, to new companies.

The second point we are going to talk about today is that key to any success is communication. I would say that 99% of all relationship breakdowns are due to poor communication. Actually poor communication internally within your company and poor communication with your clients. And we are going to talk a little bit on how to manage this communication process with your clients. So there are no surprises.

Third is a clearly defined process. Avoid surprises. It just amazes me when I go to client

meetings and we win an account and we talk a bit about our predecessor. How poorly they managed the business prior to us and how unstructured their processes were. I think it is very important for you to understand that there are processes in place that you use. You may not actually communicate them properly or you may not leverage them effectively. We need to look at that.

And then finally capabilities. You know, we all need to identify our resources. And if anybody in the industry is really doing a bad job of clearly aligning capabilities it has been the advertising agencies. We have tried to be everything to everybody. It doesn't work. So clearly define your core competency and your capabilities. Leveraging those with your client is a smart move. And clearly defining those capabilities that are in poor now but part of your growth plan. As you looked at graphic design is getting into web design that was part of the growth plan but don't misrepresent yourself. If web design is not part of your core competency but is something you want to do then you should get firm with your clients. We will talk about that also. So we have broken this down into these four categories. Let's hear one of our clients talk about relationships.

Client Video: The three wows that Shikatani displayed throughout the process in bringing this design to life was tremendous degree of partnership and close work with the brand team as well as on a North American basis with Labatt senior management. They very clearly established a point of partnership where we would be able to discuss the design in term with a member of the Shikatani team present and Shikatani very much kept us closely in the loop on the development and integration to be able to ensure that we were making progress in a timely, efficient and effective manner.

So basically if you look at relationships it is understanding your client's point of view. And if you look at your clients' business today and if you look at what is happening in the market place, what you are going to find is once your clients have gone down some major downsizing, you know that where they used to have internal design departments they now have design managers. Where they used to have Assistant Brand Managers and Production Managers, well now they only have Senior Brand Managers. But that means that they rely more heavily on you,

"We have tried to be everything to everybody. It doesn't work. So clearly define your core competency and your capabilities."

the designer to manage the process. We are doing today a lot more project management on our client's business than ever before. That is amazing. You don't notice it year to year. But look at a four, a five-year period. We are basically doing the job of our client in most cases. And you need to understand that, is going to continue because as clients get forced into better margins, return on investment for their shareholders, they are going to rely more on outsourcing. That's great. We wouldn't be here today in this business if it wasn't for the fact that our clients are outsourcing. Second point is, it's nearer to the customer. You know the web technology, product information, the consumer now is king. It used to be manufacturers had control over the consumers

because they had all the information. And consumers really didn't have time or energy to shop to do comparison pricing. But today consumers have more information at their fingertips than the sales person. So the next time you go into Future Shop you are actually more knowledge-able about the TVs that they are selling, than the sales person on that floor. You are much more knowledgeable about the technology and the options available to you. The challenge for our clients is that if it is a customer driven environment then they need to be responsive which brings us to the next point speed. They need to be responding very quickly to a competitive environ-ment and the consumer needs. What that means for you as a designer, design company, compres-sion of time frames. I remember the first project we did for Labatt was the launch of Labatt Ice Beer. We had about three months to work on that assignment. Three to fruition to final art stage. Now a typical project will do in six weeks. And that gets shorter, we actually just finished an as-signment for a client and we did it in a week. And that is the reality of the business. That is the reality that you are facing and if you are not planning to respond quickly to your client's needs and if you don't have the process in place, (and I am hoping today I'll be able to share some of these tools) you know the odds are you won't be in business long term. Speed is king.

"If you say, 'I am in the design business,' I say, 'you are wrong.' You are actually in the service business. You are servicing a need for your clients."

The other thing is quarterly earnings means financial accountability. More and more of your clients come back to you and say "I know we spent that last year, but we can't afford that this year. Even if it is the same project, even if it is the process, we can't afford it." The challenge for you as designer is: How do we make a profit? How do we still generate that revenue that we need to generate without compromising on the integrity of the design? We'll talk about processes; there are ways of doing that. There are ways of getting to the market a lot quicker. There are ways of educating your clients on the value in that process of design, the importance of design. So, really at the end, the question that you need to ask yourself: What business am I really in? If you say I am in the design business, I say you are wrong. Today you are wrong. You are actually in the service business. You are servicing a need for your clients. The fact that your product is design is secondary. The reality is your clients are buying a service. And they want to be serviced. And as they get pressure through time, downsizing, they are going to rely a lot more on you to deliver those services. So think of your business differently. It is not just about creativity, it is not about winning awards, it is about how well you service your clients needs, no matter how small or large a design firm is.

Let's move on. Let's talk about relationships. You know yesterday was a great day, one of the presenter's who talked about clients as angels. Clients are good or bad and one of them was viewed as angels. When we interview designers for positions we talk about the relationships with their previous clients. And a lot of them say: "You know with this industry it would be great if

we didn't have clients." Well, the reality is, if we didn't have clients, we wouldn't have an industry here. So you need to view your client as a partner. How you approach a client, how you approach a client's business is very important because it sets the tone moving forward on your relationship with them.

The other thing that is important to understand is, even though you acquired a client, you know your clients change on a regular basis. You may have Company X as a client but the contact you are dealing with may change. Well, every time that happens you have to rebuild a relationship and that relationship doesn't happen over night. And the other big mistake: we assume the relationship. Never assume anything. Every time there is a new brand manager, every time there is a new client in an organization, you have to start all over again. First of all, they don't know who you are. You might have a great track record with a predecessor, that doesn't mean they are going to work with you. So it is all about starting all over again and working on that relationship. Trust and mutual respect are the foundation of any relationship. You need to look at that and it is a two-way street. They need to trust your capabilities and respect your opinion. On the flipside I think it is very important that you respect their opinion and trust their decisions. Very often this is where the relationship starts falling apart. Either we are overpromising something we can't deliver or they are being too demanding and we are not pushing back. Then the trust starts breaking apart. And once that happens, once the trust is gone you can never regain it. It's like lying, once you have lied to somebody you can never regain their trust or respect. So be very careful on your actions, be very careful on what you commit, what you don't commit too. And also be very careful on how far or aggressive you push back the client. Those are all elements of building a relationship, elements of trust.

The other thing is that business relationships are multi-dimensional. It is not just about design. It is not just about project management. It is about financial accountability, responsibility. It is also about looking at opportunities you might have not looked at. You know, in most of the reviews we get from our clients, there is a section called leadership and innovation. Five years ago that didn't appear on our client reviews. They didn't review us on leadership and innovation, it was all about creativity and about budget control. Now it is all about innovation and the reason for that is we are an industry that helps our clients innovate their business. And they view us as innovators. That's a great way of looking at the design industry. The liability today is that you got to live up to their expectations, you need to innovate. And innovations is not just waiting for the next design brief that the client is going to send you, it is looking at your client's business and understanding the challenges they face. They may be looking at new printing technologies that saves them money. They may be looking at new paper suppliers and looking at more cost-effective materials that lowers their costs and delivers a better quality product to the consumer. It may be a process that instead of having a project hit the market in six months, gets them to market in two months, three months. Maybe a new container, new plastic, new printing process. Our clients are looking for us for leadership and part of that leadership is innovation. When was the last innovative idea that you brought to your client? How long ago was that? Was that asked by

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the client or was that something you took initiative with? That's critical. They judge you based on those.

The other thing is that you have to look at your clients as partners in your business. I know that's tough because once you put money in the relationship it becomes a different animal. But the reality is your client's interest are best served by a partnership and your interest is best served by having a client partnership, working together. And one of the tools we are going to talk about today is building that relationship, strengthening those bonds between you and your client. And there are tools. Better communication is one.

The other thing I learned is much more appropriate for larger design firms or firms that have employees but it is also applicable to individuals. Especially the second point. The fact is your employees are a reflection of who you are and who you are depends on how you treat your employees. If you are arrogant, top down, dictatorial type of individual which used to work in the old days doesn't work today. Then your employees are going to reflect that kind of attitude to your client. They are going to reflect that kind of attitude in their work, they are going to reflect that kind of attitude with their suppliers and that gets around. This is a very small industry. It is amazing how small this industry is. If you have a bad reputation for the way you treat your employees or your vendors it is going to come out. It is going to come back and haunt you. And the reality is if you are really a believer in partnership and building relationships then you need to start in your own house. Then you need to start with your suppliers and that's critical. So when you start thinking of relationships and communication you really need to start thinking at home and with your employees. It is critical.

"The other thing you need to do is to really understand and walk in the footsteps of your clients"

The other thing you need to do is to really understand and walk in the footsteps of your clients. It is really easy for us to judge clients and say: "Well that was a really dumb decision." I had a situation just yesterday with a large North American firm representing a new name, a new logo. And the chairman decided out of the blue that the name we had selected, which was researched, validated, was the topic across Canada, the US, wasn't the name he liked. He picked a different name, he picked Dot Com as the name. It was a terrible name. I mean talk about leveraging all the demises and excesses of the last five years and branding a store on that. You know through dialogue and through a positioning document, a point of view, we were able to convince the chairman that that name was a really bad name. You know we could have said: "clients are dumb, what do they know about decisions. This is foolish." And just put up our hands and forget about it, we are not going to do anything about this. That's the management's decision. But we didn't. We fought, but not in an aggressive, arrogant way. We just told the client what the liabilities of those decisions were. So you need to understand that even though the senior management was on board with us they had a bigger challenge, they had a chairman they had to educate. Most of the situations you have, your client is probably not the final decision maker. The president, the CEO, the chairman is the final decision maker. What kind of tools do you give your clients to be able to sell up the concept? What process can you put in place to help your client avoid the pitfalls? Mr. Client, Mrs. Client I think at this point you need to move this up the ladder because if

we don't get approval on this part of the project, this could delay the process down the road. You know, we view ourselves as professionals, consulting and identifying pitfalls and challenges before they become a problem. I have always said: "The sign of an incredible account person versus a mediocre account person versus a junior account person is the ability of raising that flag well before it becomes a problem. Well before it becomes a disaster." Are you looking over the horizon at your client's business and the project you are working on and saying, here are the issues, the pitfalls that may arise in this project and here are the tools you need client to avoid those pitfalls. Here is what we have done on previous assignments to avoid these issues.

The other thing is to find their corporate culture. Every company has a different corporate culture. Every single one of our clients has a different corporate culture. And it is critical that you understand what that corporate culture is. Why? Because it is within that corporate culture that conflicts arise. It is understanding the decision-making process within the corporate culture. Is there a level of willing to take risks? Canadian clients tend to be very conservative. Their revolutionary ideas are very different from a US client. So understanding North American culture is very important but understanding the culture of your specific client and their willingness to take risk. Because basically you are in the business of managing risk. That is the business you are in. Design again is a by product. You are in the service business and you are in the business of managing risk. Because every time you do a change to a package, a brochure, an identity, a website you are creating risk. And your job is to make sure that that risk is limited but the opportunity is maximized. So understand the level of risk your client is willing to take. It is critical. It is all part of their corporate culture.

You also need to review their internal approval process. The first thing we do when we have a new client is we clearly identify what we call a "RASKI" chart. RASKI is: R stands for Response, A for Approve, S for Support, K for Key consult, I for Inform. So we find out on all of those tasks who is approving these, who has the final say, who do we need to inform in this process, who do we need to consult to get the answers to get the work done to get it approved. Because if you don't clearly identify the approval process within a client's business you are going to come in for some big surprises. We have had situations where we thought the client we are dealing with had the actual approval only to find out we have done all the work, all the work, all the way up to final film and the chairman and the president decided they didn't like what we were doing. So find out where are the critical approval processes internally with that client. And work with them in developing and streamlining that process so there is no surprises.

Learn from your predecessors. Everyone of you in this room is working on clients that another design firm worked on. Now the client might have changed that firm for whatever reason, but don't you think you should ask why? Don't you think you should find out why they changed firms? Why did they pick us? Oh, we are great designers. Ok. What else? Because creativity is very subjective. Well they really weren't good at managing our business. Why? Well, they always gave us a surprise. They gave us an estimate and they are always 30 / 40% over budget. And I only find out about it at the end of the project. Ok. Let's do a better job at that. What else? Well, we never have access to the designers, we always have account people showing up. Ok. What

else? Those are the things that you learn from your client's previous suppliers, previous professionals that you can streamline your business. Because every client's business is different. So it is very important. You know walking in your client's footsteps is critical. Look at their business from their perspective. You know your business really well but you don't understand their culture and their needs. It is critical. It is all about building relationships.

Strive for an environment of trust and honesty. You know I have to tell you, the Enrons, all these large corporations, Martha Stewart, Icom. You know there is an environment of distrust in the marketplace. There are companies who are not working honestly and you know what you are bound to run into one. People who don't pay their bills, who make promises, who sign contracts and don't live up to them. And these are not just small companies, these are large companies. But obviously, in the last part of our presentation we talk a bit about some criteria which you need to look at. But here it is all about building that trust and respect. One is, you need to manage

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your expectations. You are in the job of managing a client's expectations. How many concepts do you deliver? Let them know ahead of time. Also, one of the things that we have learned is when a phase is finished, you should tell them that it is finished. You are assuming they know. We are presenting the concept, they should know the phase is finished. Don't make any assumptions. The reality is, the majority of your clients have not gone to design school, the majority of your clients didn't take a degree in design management. A lot of your clients come from marketing, sales and they have no idea about design. It looks easy, right? I can pick and choose my ideas. The reality is you need to educate them and manage your expectations, no surprises. The ultimate sin for a design firm, for a designer is to surprise the client. That is the ultimate sin. And that sin can cost you a client.

Be honest about your capabilities. For example, recently a large bank we are doing an identity for, asked us to their annual report. We said: "We are not in the annual report business. Thank you very much for the opportunity. Here are three great firms that can do the business. We are not in the annual report business. We have no interest in being in that business. Although it is a great revenue stream and a real nice design challenge, it is not part of our core competency nor do we want it to be part of our core competency." So, understand your capabilities and clearly align them with your client needs and don't over promise what you can't deliver. That leads to a surprise.

Identify areas of opportunity. We talked about innovation. Your job as a professional is to look at your client's business in all of its elements and to clearly identify added value, things that you can do to your client's business. It could be a sourcing issue. You got six printers, six film

houses. Why don't we help you consolidate those to one or two and you have great efficiency, less resources required to manage that process. Or maybe saying: you are spending a lot of money on these substrates. You know I have come across these great papers, they are less expensive. When you put your feet in your client's shoes, you look at their business from their perspective. And there are great opportunities. Innovation is one. Once again, when was the last time you brought a new idea to your client when it wasn't asked for?

Finally, establish and keep performance review dates. How many of you get asked by a client to give you an annual review? The only time you actually find out whether you are doing a bad job is after that they say adios. You know, they hate doing that. I have to tell you, clients hate doing reviews because it is work. So guess what, we established a form that we send to our clients. Here is a form, fill it out. Easy. An Excel spreadsheet, fill it out, do it by hand. And when you do that, establish some criteria especially when you just been hired by a client. When you build that relationship with a client, right at the beginning you say: "listen I like to be reviewed every three months, I like to be reviewed at the end of the year, that it is important for us to get some proper feedback." The first time they do it, they are going to grudgingly agree to it, but once they know that they are giving you proper input that's going to help grow their business, they are going to do that. Sit down with your clients and plan a review date. Once a year. And get feedback from all the divisions that your business touches. It is critical. And then they will no surprise for you. You actually have a clear understanding of the things you need to improve, the things you do well, the things you can leverage on future projects with that client. And guess what, you can learn from one client and apply it to another. If you have a strength that a client is telling you, you can actually apply that: "Oh by the way, we have been reviewed by five companies and this is what they are saying about our strengths." Here is where you need to be honest with your clients, because they'll find out.

"Process is a great tool because you create milestones, you create gates that manage the client's expectations.

Client Video:

The whole process and the involvement of Shikatani Lacroix was very, very rewarding for our franchises. It was rewarding for us because we were able to associate ourselves with the company that took far more interest in what our business was. They took the trouble to learn the nature of our business. To us that is extremely credible.

That was one of our clients. I always say creativity is very subjective but how you manage the process isn't. It is black and white. Either they are doing a great job or not. Process is a great tool because you create milestones, you create gates that manage the client's expectations. So basically I need to look at two things. One of them is business development, if we are going to talk about how to grow your business we need to talk about new business and then tools on going through projects.

I am amazed at how many times clients or new business prospects tell us when we are pitching their business: "You know, you guys are incredible, you actually have done your homework. You know the firm that just pitched before you didn't even check our website, didn't visit our stores, didn't have a point of view on our packaging." Why would you do that? Why would you actually go to a client and pitch their business if you don't know about their business? How are you as a consultant and professional going to be able to add value in a meeting and clearly identify some opportunities that they might have not considered. We call it SWAT analysis. And SWAT analysis looks at strengths, weaknesses, opportunities and threats. It is a great door opener, it is a great discussion piece in a new business presentation: "By the way we went to your stores and by the way we looked at your packaging. Here are the strengths we identified and by the way are you aware that these are weaknesses. Here are trends happening in the market place, we are moving to organic products, we are moving to recyclable material and your packaging is very environmentally unfriendly." Or "you know what your packages communicate to the consumer. Here are the three attributes but this not really what the consumer is looking and buying based on these trends. Opportunities are saying: You know what have you looked at a shape? Have you looked at new printing technologies? Here are some examples of assignments we have done where we have changed that. Look at the sales increases, it is 30, 40% sales increases. And threats are: Are you aware that this US company is going to launch a product in this market place? Are you prepared?" The more you can demonstrate that you understand your client's business, the more you are a viewer of the opportunity they are looking for, the more they are going to feel comfortable dealing with you. So before you present to any client make sure you do a SWAT analysis. Look at consumer insights, the web is incredible. You can find out anything and everything about a company over the web. Stuff they might not even have time to look at. Isn't it great to start a relationship and a new business presentation where you know as much as they do? Promise as much. Look at merchandising, better analysis, pricing promotional activities in the market place. Coming informed is critical if you are getting in a new business. And actually before you even pitch the client what a great way: "Hello, I am Shikatani Lacroix, I would like to do design work for you." "Oh we already have a supplier, thank you very much." "Oh, W. H. Smith, you know we are looking at the market place, and I don't know if you are aware of these issues that may come back to bite and haunt you … we would love to sit down and talk about how we can grow your business and leverage these opportunities that you may have not considered." "Oh, why don't you come in and talk to us." Very different approach, because you are talking their language and they are all faced with challenges and issues.

Practice, very important. You know, first presentation, come prepared, make sure you rehearsed before your presentation. You need to find out the type of meeting. Are you going to present to one individual or a whole group? That dictates how many brochures and information to bring. Determine the style and content of your presentation. It could be formal. Before you pitch a client dial up and say: Ok, who is going to be in the meeting? Is a decision-maker in the meeting? Yes or no. And then we'll say what is the opportunity what are the challenges. Ok, it is

a cold pitch or a meeting where they brief you on something, part of a three or four firm pitch. Based on that you can decide which design team to the meeting. You have a dial up meeting versus a pitch, because as much as a Director movie or a PowerPoint presentation are a great tool it is actually a liability. Because when you bring a Director movie to the meeting, they are not talking to you, they are viewing the screen. So you need to decide that kind of dialogue. You need to decide who from your office is going to attend the meeting. Just recently we won a large account. We were the only firm that brought the entire team to New York. To me it says a lot about commitment to their business. It was a lot of fun too. Basically, develop a focused presentation. We have a rule, we distil everything in four words, everything we do is distilled in four words. And the whole presentation revolves around four words. These four words may change but it's great because a client will see these four words and remembers these four words and he'll remember you for these four words and if these four words are relevant to their business then you are going to stand out from the competition. You are going to stand out.

Have a backup plan. I remember doing a presentation and the laptop went dead on me. Actually I couldn't boot it up. Luckily we had a company brochure, we did the presentation flipping

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"I think it is very important that you reinforce what you talked about in a leave behind document. By the way, don't give it to them at the beginning of the presentation because you lose control over your presentation."

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through the company brochure. Always have a backup plan. Don't assume. You know sometimes they say they have a LCD projector, you show up and there is no projector. Have a backup plan, it is critical. Arrive early and make sure to rehearse. Always ask before you pitch the business: can we get in to the boardroom half an hour earlier. We would like to set-up. Getting comfortable or rearranging the room. For some of our presentations we actually rearranged the boardroom, so it is more casual or more formal. You can only do that if you arrive before the meeting starts. Be sure that you leave a proposal copy and talk to the client's key contacts. I think it is very important that you reinforce what you talked about in a leave behind document. By the way, don't give it to them at the beginning of the presentation because you lose control over your presentation. At the end, or you may even do it as a follow-up email. And leaving promotional material behind is critical also because it sets a tone.

RFIs, RFPs, and Estimates. We respond to a lot of RFIs and RFPs and you know what at the end of the day they all look the same. There is a lot of similarity. We prepare a lot of information, so we can just plug it in. Keep it updated, when you have new projects and your financial numbers have changed. Keep that updated. It just simplifies the process. The other thing is clearly define. It is amazing. We hired a chap from the states, Steve Brady. He was part of committees that hire design firms and advertising agencies. He says it's amazing, we send these RFIs out and

people actually don't answer the questions. They screw around with it. But they don't actually say yes we do, no we don't. We have a client going through 30 or 40 or 50 RFIs. You want to make their job easy, you want to be very clear. Yes or no and why. So when you get an RFI make sure you answer the questions. Because very often you may have screwed it. You may think you have answered but if you don't start by saying yes we do, no we don't you actually haven't answered the question.

Always reinforce points and emphasise your knowledge of your client's business needs. So when you receive an RFI and you have done the SWAT analysis, start weaving some of the information you have in that information that they are requesting. Take the project you think is relevant based on their business needs into some of the case studies that they ask for and you respond to. Critical. Consider adding complementary points of observations which demonstrate that you can bring value to process. There are always open questions. You should fill those in because that is where they judge on innovation and leadership. You should say: "Well have you considered this? How are you positioned in this growing trend? We noticed these parts in the market place, we have noticed that they have been launched, but we don't see them doing well. Are there things we can learn from them?" Show leadership, that's what they are buying.

"Show leadership, that's what they are buying."

Clearly define the phase and tasks and how these align with fees. Critical. Every one of our tasks, every phase is numbered and every task is numbered against the phase. And then our fees align up with the tasks. So the client can clearly understand the process from the phase, critical path to the budget. There is no ambiguity, there is no confusion. They don't have time to figure out information. It has to be very clear to them. Because again, think of it, an RFI typically they go to thirty, forty firms. Have you ever sat down and read every RFI? You know how many hours that takes from a client's business? And they already have another job that they need to do. So make it easy for them.

Initial tips. Ensure differentiation from competitors. It is critical that in your RFI, your proposal, your RFP, whatever you do, that you think about how you should position yourself against your competition. You are independently owned, the other four firms are owned my multi-nationals. That's a competitive advantage. The money that they give you doesn't go to some shareholder in Europe, it actually goes to the employees doing the work. You are multi-disciplined, the firms that are pitching are not. You may have experiences in project management processes the other firms don't have. Look at your strengths and clearly define the competitive advantage. Very often they won't tell you in an RFI who the competition is. But assume based on these categories; assume these are the people you are going to talk to. How are you positioned against your competition? Can you clearly tell your client why you are different? It can't just be creativity. Why are you different from your competition? It is critical you can do that. If you can't do that why would they hire you versus somebody else?

Include a summary, especially large proposals. Clients don't have time to read 80, 90 pages of documentation. So do a one pager in the front, here is the phase, here is the task, here is the objective, here is the budget. And the CEO is going to read that part of it, it is going to make his

life easy. So he is going to think positive about you versus the other firm that has 85 pages of documentation that he has to read through. And he doesn't have time, he is going to be cursing that design firm. Number each page, provide an index. It is critical. So they can glance over. The CFO doesn't want to know about phases, he wants to know all about money. The lawyer will want to know about the contract section. Well, make it easy for them to find it in the document. Always provide a cover letter. Don't just send the RFP or the proposal without a cover letter. You say, well that is kind of common sense. Well not everyone does it. Again we spend a lot time talking to potential clients and existing clients about how our competitors approach them. It is just amazing how sloppy it can get. And you don't want to be perceived as a sloppy design firm.

Don't make the assumption that the FedEx guy delivered on time. Never make that assumption. You should always follow up once you have sent a package to a client, be it a brochure, introduction letter, an RFP, an RFI proposal, whatever it is, always follow up with a phone call and say: "I am just trying to find out… Oh, you didn't get it yet. Let me put a trace on it." Wouldn't it be terrible, here is an RFP that comes up, it is a half million dollar assignment, you are qualified for this project, you got all the best attributes and it never gets delivered? And you don't even know about it until they send you an email back saying: "we disqualified you because we did not receive your proposal on time." It is scary. And it happens.

"We need to manage that process through strategy. Providing proper strategic documents clearly identifying the brand attributes that your design meets."

You have heard me say this. I am a designer. I think design is very, very important. But the reality is creativity is a very subjective point of view. And you know, you go to a meeting and the marketing manager likes this design over here, the president actually likes the design over there. And when they start articulating why they like it, it has nothing to do with the strategy, it is just their emotional link to the design. We need to manage that process through strategy. Providing proper strategic documents clearly identifying the brand attributes that your design meets. To a professional, design is a professional tool. I think what you need to do, is to make sure that the design is judged by the strategy which means that before you even start designing, you need to clearly define the strategic intent of your design. What is it trying to accomplish? What is the tone of communication that it needs to communicate? What are the key brand attributes that need to be reinforced? Because they end up being the arbitrator when you got a group of executives with all big egos making business decisions. That becomes the benchmark, the judge of what design gets selected. That gives you a competitive advantage in the discussion. It really talks about efficiency. Either we now go back and change the brief or we look at the designs based on this filter, these attributes, these objectives. It helps the client make a proper buying decision. It gives you support, so it doesn't become a subjective point of view. Again, my colleague in the

United States said: "creativity wins the account, account management keeps it." It couldn't be more true. I mean they already know you are creative, because they hired you. But how you manage the process is critical. And how you manage it on a daily basis is also important.

In the process you clearly identify the team, especially firms that have more than one individual. Actually even the firms that only have one individual. You need to reinforce that you are not alone, you need to reinforce that you have a support. And if you are a larger company with more than one or two employees you need to actually clearly identify to the client who the team is. This is added value. They actually want to know who is working in their business. It doesn't mean you want them calling that designer or that production artist but you want to know that there is a team working on their business. Who is the main contact? It is very important, especially if you are an owner, operator. It is very important to say: "I am going to be responsible for strategy." When I go to a client presentation I say I am responsible for the strategy. I am respon-

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"In our industry, the biggest challenge isn't design inspiration, isn't design adaptation, isn't final art work, it is design refinements. That's where we lose money or make money in the job."

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sible taking it to the frozen design stage and I have an accountant team that is going to manage the business through the entire process. And here is Adam or Keith who is going to work on your business as the main contact point. Clients want to know that. Who is accountable for our business? Who is accountable for your client's business in a company? Is it you? Who is the back up if you are travelling or in another client meeting. They need to know that. They need to clearly understand that, who are the members of the team.

Scheduling is very important. I am sure you do all of this. But you should definitely have a weekly status meeting. You should list all the projects, the deliverables, the due dates. With some of these we actually give access to our clients. They actually go up on the Internet and get all the projects laid out with their critical path, the status of each project, 24/7. Share this information with your client and factor in additional revision time. In our industry, the biggest challenge isn't design inspiration, isn't design adaptation, isn't final art work, it is design refinements. That's where we lose money or make money in the job. That's where, if you don't manage this process and allocate enough time, factor in in you proposals or estimates, three rounds of revisions. And in your timelines, make sure that you clearly define that: revision or design refinement. Design refinement 1, design refinement 2, design refinement 3. Within that factor in the concept approval time, because if you are going to build trust in a relationship, they actually need to be told where they need to approve the project. Then you don't need to rely on their president. If we have a key milestone, a frozen design on February 28, they need to make sure that the president and the chairman or the CEO is available and the VP of marketing is there. They may be on holidays. They may be travelling. Having a critical path and clearly defining these steps can allow

the client enough lead time to book their time, to lock up some time in front of them. Because without that you are actually going to slip your time.

Clearly defined process. Every project we have, we have different words for them but this is what it looks like. It is critical in your proposals to have fact finding, a stage for briefing. So you go and get the information from you client but that document that becomes a roadmap for the thing you do, the initial design brief. They need to approve that. It is a contract. And by the way if you are a larger firm make sure you credit people or your board. You need to make sure that they believe that what's in that brief, they are supportive, that they are going to be behind you. Then exploration, we all know what that is about. But then again, you need to deliver key dates and deliverables. How many concepts are you going to present? What format are you going to present them in? How many of them are going to be mounted on board? How many additional

"Clearly define process, phase the task. Clearly define the task, align to timing.
And timing aligned to budget is the way to go."

properties are you going to provide them with? Because that all factors in to how you budget your job. Artwork and print supervision. Again, critical to assign timelines so each one of these tasks. This is critical. Because this becomes the framework in which you build a relationship with the client. And if you can't organize it in this fashion you are going to provide surprises because you miss deadlines. They are not going to be able to manage your internal resources for approvals. And this thing is going to be off the rails by the time you get to design refinement. Clearly define process, phase the task. Clearly define the task, align to timing. And timing aligned to budget is the way to go. Then there is no ambiguity about what you are delivering and how you are going to deliver.

I don't want to talk a lot about creative. Creativity is very important but it is about the management. But obviously since we are designers we are managing the creative process. How do you get clients to buy your ideas? How do you get them to structure? I give you one hint which is: if you have the proper brief, you have a criteria for judging your designs. And if a client's left brain has approved that process, that becomes kind of a target on which your designs need to focus. Determine the amount of change with your client. Are they risk averse? What is their definition of revolution? Their definition of a revolution could be a tweak for that company. They are very conservative. We had a recent client where their definition of change was minor tweaks. We were giving them revolutionary designs. It went right over their heads. We weren't talking to them. Only after the first presentation did we realize that their definition of change was this much, not this much. Would have been smart if we had figured out what they wanted beforehand.

Work with a client identifying key brand attributes. I talked about the benchmark, the way you judge your designs. You need to sit down with them and ask what does this package, this brochure, this poster, this website need to communicate? And clearly define them and get them

to approve it. Always give the client what they ask for and then what you think is right. That is our company motto by the way. We tell our designers: "Follow the brief, give the client what they ask for, it may not be right, but give them what they ask for. And then as a professional give them what you think is right." And you know what our hit break of getting the client buying our design goes right through the roof. Because it is a relationship of trust and respect. If you actually don't respond to their needs and you actually don't do what they ask for you actually have shown a disrespect for their opinion. Now if you disrespect somebody's opinion, how easy do you think it is for them to listen to you in the beginning of a presentation? They are not going to pay attention because in their mind throughout the entire presentation they say: "These guys, typical designers, don't listen." That's what they'll be saying. So when it comes time for you to make that recommendation, they are tuned out, the don't even want to hear what you are going to say. So make sure to give them what they have asked for. Make sure you do it. And then give them what you think is right. And you know the odds of you selling what's right are going to be extremely high. You can actually talk against why they have done that, why it is not going to work, because you have done it for them. You have actually shown them.

Evolutionary, revolutionary ideas. We have just talked about that. This is very important. And finally, I think it is very important that we do our yearly tune-up. Feedback from your client is very important, also implement yearly client performance reviews and identify areas of improvement. So when we finish an assignment we sit down with a client and say: "what are the things we did right? What are the things we did wrong? What are the things we could have done better?" And instead of waiting until the end of the year to find out, we do that at every project. And it helps the client articulate if they were frustrated at a certain point, if the approval took longer. You can actually have a conversation with your client and educate them why things take longer than they seem. Why it took a week instead of two days to do that revision. We had to arrange for the photography to be retouched, we had to do this, we had to get the rights re-negotiated, we had to do that, we had to call the printer. At least then they understand the process. Then the next time they ask for a revision, they actually understand that it is going to take a week not two days. It is all about education.

Client Video: The relationship that we have with Shikatani is a very open and honest approach. We encourage them to express their viewpoints as to what is important for the brand elements of the packaging. Also their understanding of not only packaging but also retail experience that they can bring to us, to help us open our minds, to explore other, new different ways to communicate to consumers through packaging and other vehicles.

External and internal communications. Number one is that all briefs are created equally. The project kick-off brief is the most important brief of all briefs. It is important for you to do your due diligence in the initial brief. Spend the time to write the brief, to get the insights. Work with your client in getting them to approve your brief . Your briefs should have background, target groups, product service categories, competitive set, creative mandate, executional consideration, printing limitations, stock limitations, distribution limitations, deliverables, timing and allocated

budget. And also get a budget for your designers because they should work to a budget. An ongoing design brief is similar. We either call it contact report or design brief. Basically here is a list of all the things you need to add. And that is the book. These are all the key elements that you need to reinforce as you move forward. Briefs are critical. Designers need proper briefing if they are going to meet your timelines.

Another thing is a weekly status reports with your clients. If you have clients with which you have multiple projects, it is important to have weekly status reports with them if you are working on a project where you have 30 or 40 assignments within that clients business. It is important to let them know what is happening and when you need their help or approval. Chain charts are very important for you to avoid surprises. Meeting and call reports. Think of itas an agreement between you and the client. It actually improves all the decisions made. If a relationship is going to fall apart, it is because of poor communication. Minutes solve a lot of that process. Approval documents. Make sure your clients sign off on final designs. I am surprised how many projects go all the way to final output when they actually don't even have a signature on the design. It is critical. We call those CAFs, concept approval forms, we have DARFs, digital art release forms,

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"If a relationship is going to fall apart, it is because of poor communication."

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and the client signs off on those. And then obviously approval and transmittal. You got to have a paper trail, it costs time but it is important.

Client Video: Shikatani Lacroix has tremendous expertise and skill not only in design but in project management and facilitating integration, communication and alignment within our internal organization.

So, first I think it is important to understand capabilities. You need to hear your client's needs. I mean it is great if you do websites and it is one of the things you are excited about, but if right at that moment they are not interested in websites, they are just interested in how you are going to design that brochure, then talking about websites, can waste a lot of time. So you need to be very focused on identifying what they are looking for at that moment, aligning the services that you provide. A critical element, is to find what they are looking for. That is important so that you can hit the market sooner, quicker, faster, cost-effective. Because if you don't do that, basically what happens is that you meander, you kind of hit and miss. You need to clearly define the critical elements of the client's needs in order importance and priority.

Align your capabilities accordingly and finally identify external and internal resources. It is important for you to be honest that the copywriter is not an in house guy that our web programming is farmed out, that our French translation is farmed out, we don't have in house photographers, we don't do in house retouching. It is important. Because what happens in the relationship down the road: "I'll have to get back to you because I need to talk to the Photoshop guy." "Why can't I talk to him?" "Well, he is a freelancer." Oh surprise. No surprise, please.

Finally, the questions you need to ask: Do you make the grade with your client? Here are some criteria. What are your qualifications? Are they relevant? Industry reputation, team experience, who will work on the client's business, ability to handle the project? How competitive are you, from a price stand point, from a service stand point? How can you bring added value? What are the things you can bring that the competition can't do? Any conflicts of interests? Do you have clients you are working on, so you can't work on other business? Financial stability? Are you going to be around in a year from now? Or are you just on the verge of going out of business?

Very often we get into relationship where we get surprised, where the client goes belly up or they are a terrible client because they don't do approvals or they don't like your creative or they don't understand the design process nor do they have any interest in understanding the design process. Why is the client seeking a new firm? What went on before this that they would call you? I think it is very important for you to understand and you can actually write your proposal around why they select new firms. Do they client's objectives match with yours? Where they are going, is that where you want to go? Is that what you want to do? Are you well suited to serve the client's needs? Do your capabilities and theirs match? What is the company's structure? Governance and admission are important. You should always ask that question. How is their financial position in the market place? You do screens on potential clients. You talk to their suppliers and find out: How do they pay their bills? Are they 90 days, 60 days, 30 days, 120 days? Then at least you can make a decision if you accept this client. …

What is the decision making process with the client? Is it an owner owned company and everything is decided by the company? Restructuring? Are they restructuring? What about confidentiality? Both ways. Are they going to keep the information process you have given them confidential or is it going to end up in the hands of the competition? And that goes on? How many design firms are they talking to? Thirty, forty, or three or two? Experience working with design firms. I remember, my partner Mike said that Don Watts would go into a meeting and would ask the client: "have you ever worked with a design firm before?" And the client would either say yes or no. If the client said no, he would say: "you know what, why don't you go and work for another design firm. When you have learned how to work with a design firm why don't you come back and talk to us." That may be arrogant but just understanding if you are working with a firm that has never worked with a design firm you are going to do a lot of handholding. You are actually going to spend a lot more time managing that client than you would with a client that understands the design process. And what is your client's reputation?

And finally, reinforcing your strengths. What is your competitive advantage? Make sure that your marketing tools and your promotional material clearly position you differently. Is your website clearly communicating what makes you unique? Is your website communicating the services you offer? The type of clients you work with? It is important that everything aligns, that your capabilities are clearly communicated.

Conclusion: A successful design firm, designer or design professional, needs to look at these four things to be successful: relationship, communication, process and capabilities.