



Training Staff to Interact with Clients

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Thanks for the introduction. I am going to give you a bit of an overview that will explain my perspective on presentation skills. The information should be useful to you a student, a professional or whether you are a manager of designers and figuring out what to do with these people as resources in your company and how to help them go forward.

My perspective is definitely in points defined by the background I had before coming into design. As was mentioned I did a Bachelor of Commerce and Marketing, then went to design school and then opened up my company and went back on the business side making an Executive MBA at the Rotman School of Management at the University of Toronto. So I have been back and forth between being on the business side and being on the design side and at any given point I am probably pretty critical of both sides of the industry and my staff has heard me complain equally about business people as they have heard me complain about designers.

I have one partner in the business, Leeor Levy. Leeor is also pretty important at the front of our business as of she comes from a research and sciences background before studying design, so a lot of our process is due to effectively good communication design that does influence why there is such an importance put on presentation.

If you think of the communication design business, basically we are in the persuasion business one way or another, so from a macro perspective we represent a range between ideas. So at any point if we think of where value is often eroded, we'll often come up with a good idea but what if we blow it in the presentation side, well, then what was the value of the idea to begin with anyway?

I think you can see what is important about it right through the chain. And the other thing I am going to give is an economic argument. It is important for us to preserve our value and assets by presenting our views well. And I am going to finish off with some actual steps, I am going to talk through some tangible things that we have done as a company with our staff that I can recommend to you, whether you are a student or a manager, you can implement, manage and measure there over time.

So communication design at its core is about creativity, which I still think is the most important economic asset that exists. Basically at the end of the day creative people have the ability to make things or create value come out of thin air. So if I sit you down and say you have to

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communicate this for a specific client, you start off with nothing and you come up with something. That kind of infinite game is incredible valuable. I find the business community often undervalues the value of creativity.

Communication, as I have said, is part of our business and even though many of us are trained in visual communication it is not going to be enough to just rely on visual communication. You really are going to have to resort to your verbal and written communication skills to complement what you know as a designer that helps to protect the value of what you know.

Design as we understand it is definitely on the most commercial side of the creative field. So it is not as if you are an artist. I talked about this with some other participants of the show yesterday. You know artists put their work up and you can come and take what you want from it but as designers we have a responsibility to make sure that that value and the message is clearly communicated. So, this whole idea of bridging design and business means at some point we really have to be speaking the language of business in order to make sure that they understand what we are trying to get across when we are selling an idea. One of the things that has probably shocked me is sitting in the Executive MBA class in a room full of people from manufacturing, financial services, automotive and I have to say that they understand very, very little about design. So if you can think of that as a challenge in terms of the people who eventually are going to make decisions on communication and design that we present. They are having a hard time understanding exactly we do, what we have done or don't respect your training. So much for trying to sell your idea if you can't get through to them.

From the economic side of it, there are probably some things that have gone on in the industry that are probably not very good at the moment. So, I'll describe the design businesses being very competitive, there are hundreds and hundreds of firms, there are hundreds and hundreds of designers, everyone has slightly different skills. I am not sure that the client always understands the difference between a web designer and a graphic designer. Who is authorized / equipped to work on brand development or marketing issues? There is a big worry out there, and I think this makes it a bit more difficult to get our messages across.

The other thing that is important right now is that designers become a bit of a commodity. I am sure some of the senior people in the audience look back at the industry and say "What was the value of design seven years ago, five years ago, what is the value of design now." If our customers are having a hard time understanding our value then it is important for us to make sure we differentiate ourselves and communicate what has changed in order for you to make best use of your resources.

So, if you think of the designer coming into a company on the first day, the first week, the first month, that is probably the best opportunity to underscore the value of presentation skills. While you are at school, the amount of experience you gain, the practice of your presentation skills is somewhat inadequate. You are not really put under that pressure often enough to get comfortable with presenting your own ideas. And this is basically going to hurt you but the sooner you can start, the better. The way you have to think about it is, every presentation oppor-

tunity is an opportunity to practice.

So, in our studio when we are working through the concept development, stage, the designers get used to the idea of presenting to each other, to defend and protect your idea and push it forward. It is not as if we are going to put them in front of a client the first month, two months, six months, but they start to understand the value of being able to present their idea and protect it themselves.

One of the things I don't believe in is the split between account services and creative services, and they form these ghettos and they hate each other. That really doesn't make sense. I think creative people have to learn to protect their own ideas and if they can get comfortable understanding what is at stake very early on in the business, then they have a better chance of growing as they become more senior in their practice. Look at what is the difference between a junior and a senior designer. The senior designer has achieved a certain level of independence, responsibility and likely will be able to present his/her own ideas to a director or team. So to manage that transition, it is probably good to start practising very early.

The other thing that we do, is that every member of our team whether they are on the project management side or the design side or the admin side or business development goes through a seminar on negotiation skills. Negotiation is often where things break down, whether it is speaking to a supplier or trying to defend an idea and pushing it through with a client. So

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we realized that if the creative people learn to understand the opponent's point of view while they still trying to push their agenda forward, they will actually improve on their ability to push an idea through. So it is an odd thing to think about negotiation that way but when you have a good idea and trying to present it to a client that may be nervous or resistant, really what it is you are doing is negotiating. So every one of our staff members went through negotiation which included role-playing as well. So we give them a situation that they would have to defend. What it means is they start to become nimble on their feet at defending their idea because you don't always have an answer preset as you can't always predict the questions that they are going to come at you. So that kind of training really helped them think on their feet, defend their idea and push their agenda forward.

The other thing we also recommend is pretty traditional. Everyone had to learn to present an idea in front of the video camera. We go back and review in incredible detail. It's incredible how much is magnified by a video camera, where and how they'd be able to improve on their presentation. That had to do with everything from putting their hands in the pockets, playing

with their keys, nervous habits. Everything pretty much comes up when you are on camera. But that is a pretty old school way to practice presentation skills but it really does work. You do get extra self-conscious in front of a camera but you really need to get through that anxiety and really be able to study yourself under that much detail.

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The third thing is in design school it was very noticeable that people said: “Well I am really just responsible for creative and the whole business stuff is someone else’s problem. I really shouldn’t have to sully myself by engaging in that kind of business discussion or activity.” There is probably a problem with that right from the beginning because really everyone in your company has to come to an understanding of what’s at stake. As far as I am concerned everyone is involved in business development which means that when you are representing yourself, you are out there and you say you work for such and such company. So let’s say you work for Ove. Well, if I was the owner of Ove I would be pleased to know that my designers, even at a junior level, can fully articulate what it is that they do for Ove and then can clearly articulate what Ove does for a living. So when I say it is important all the way through the chain, even someone out there speaking on behalf of the company is part of that store value.

So, very early on in the company, after starting the position, I think it is important to take your designers through the understanding of what’s at stake, how business is won, how business is defended and where value is retained. And that comes with some practice. It is not as if someone is going to go out and represent your company right away, but if they get used to the idea of representing themselves in the business context you already improved the likelihood of them presenting their own ideas in a business context and understanding the language.

The support of visual communication has to be followed by verbal and written communication. It is not unusual for us to present case studies on what we have to do. If anything, as clients become more cautious about how they are spending their design dollars, they really do want to see more documentation, more and more proof that you know what you are doing. So, once again, in support of visual communication we are being called upon to explain what it is that we did for another client six months ago, a year ago, to improve their confidence in us.

I’ll often say that if you can’t measure something, well then you can’t manage it. So, if we think about implementing these presentation skills initiatives, we really have to put it into the context of every six months or every year. We have to look at it in terms of individually or as a group. Have we gained something by improving our designers’ ability to present? Really what has to happen is the measurement on the improvement of presentation skills should be tied into performance evaluations. So, if someone has worked with me for a year, when I go through that evaluation a year later, I have to look at it and say “Have they improved in their ability to defend their own ideas internally. Can I trust this person, can I start to transfer responsibly to this person so that they can present their own ideas in terms of presentation.” And one of the best ways to do that is to make sure that the designer is conscious of that right from the time that they start working for me.

So, for the managers out there, it is probably worth thinking about including presentation skills / presentation performance as part of measuring whether a designer is growing or not. If

someone has been in the industry for ten years and they still can't present an idea, it means that I am not able to bring them up in the organization to help me do my job better.

One of the other things that I make our designers realize is that as we start to get into bigger and bigger presentations you have to look whether your client level; matches your skills. So, you may be work with an account coordinator, you may be working with a director of marketing, a VP of marketing, president and all the way up to the board. As you go up the chain, it is more and more likely that your presentation skills are going to have to be better as you get to higher level executives. Often we won't trust a Director of Marketing or VP of Marketing to present what we have put forth. Because if they can't defend the idea well, they might be a little bit nervous presenting to their president or their board. We can take that into our own hands. Then we are better off in terms of saying, "Well we are outside of politics, we understood where and how we developed the idea, this is how we relate it to the brief, this is our group of solutions that we propose to put forth to solve the communication of design problem."

So, when you think of what it means to present at a president or executive level, really, their expectation of you meeting an equal and if you come in with a poor presentation to a board meeting, and you built up all this time and all this value you well erode it within a half an hour of poor presentation. So, when a designers look at their careers and start to understand the longevity of career, assuming that you are going to be in this business for thirty, forty years, you'll notice that the senior people aren't really designing all the time. What is it that they are doing is often presenting. They are often defending the team ideas, they are out there in the context relying on their other skills that require more than their visual communication skills. So, for those of you in your first or second years, are you really going to be sitting in front of the computers fifteen years from now. Maybe, maybe not. Do you want to be sitting in front of a computer fifteen years from now? Maybe, maybe not. Start to realize that there is more opportunity for you to take a larger role in the industry, the sooner you understand that the better. And the sooner that's recognized by management, the better for you.

So, this is a framework that I am suggesting. I have given you a couple of examples on how to put these initiatives forward. I'll take ten minutes for questions and then I am going to wrap up. Is there anything that I have said that anyone wants to address.

Q: Are there any courses in negotiation skills?

SQ: There are a lot of courses out there in negotiation skills and that's because the business community is realizing the value of improving the communication skills of all their managers as well. So there is quite a lot, even I am noticing a lot of radio advertising for presentation skills, training and seminars. There is quite a lot out there.

Q: I was wondering if you could tell us more about how negotiation, presentation skills help your staff manage the client once they are in the working relationship?

SQ: Negotiation actually feels like a negative framework because you feel that you are in a defensive position the moment you have to negotiate. And that's often true where a client may be aggressive because of the price that they are paying or because of the pressure that they are under internally and how that aggression comes out from the client can be at any point in the chain. It can come out with how they are dealing with the accountant, service person, it can come out with how they are directing the design process. It can come out with how they arguing about the price. So I can pretty much find a point in the entire chain where negotiation is needed or being aware of the need to find common ground to move an agenda forward. I can pretty much find the point in all parts of the chain where it does come into play. Does that answer your question?

COMMENT: I think so. It helps people push back and ask something for them

SQ: And I think you underscored another good point. One of the things that comes out in negotiation training is, it really is about empathy. At some point it is not just about defending your agenda, it is maybe understanding the other point of view and then leading them back to a zone of comfort whereby they are able to accept your idea. So, that becomes your way of pushing back but it takes it out of a negative framework and puts it into a positive orientation.

I'll wrap up just in terms of putting it into to context where I think our industry is going. There is going to be increasing pressure for us to perform as a professional service and what does that mean? I'll often say to my staff: "You might think this is only design but if you want to be taken seriously imagine how you respond to your lawyer. Do you expect him to be flaky; do you expect him to be inarticulate? No." Or I'll say: "Imagine how someone responds to a problem in an emergency room. So when someone goes into an emergency room and the doctor is faced with an unpredictable problem. They are able to draw on their experience and then articulate to the patient what it is take going to, take to get the patient comfortable with an understanding of the process. Sure, what we are doing is not necessarily rocket science, it is not nuclear medicine. But if you start to put it into that framework, you start to understand what it means to be a professional. And I think that is the point I am trying to underscore. To be a professional in our industry is going to require being able to defend ourselves rationally as well as creatively.

And one of the things that has happened from a macro point of view in business, especially after going through this kind of economic downturn, people are going to be scrutinizing every point in the value chain. So what that means is, design is going to be under increasing pressure to be measured. People are going to say: "You know what, that's nice, you got a great portfolio, how can we know that you are going to be able to increase our business, or improve our performance, or improve our presentation for our audiences."

Now, obviously design and creative is one of those things that is hard to measure. So that might not be the component that ends up being measured. What may end up being measured is: How well did this client feel did we manage the account? How efficiently did we manage the budget? Were we able to support them in their ability to achieve their internal goals? Often our

clients are so frightened by their own internal politics that when we can help them present and push the agenda forward, they'll actually be looking back and say: "You know what, I can measure the value in terms of how much a firm has helped me presenting." Even though you are just a supplier, be able to perform more as a partner, is really where it is going to be.

So I hope that gives you a good snapshot on some approaches and some suggestions to move forward with.