The 4 Essential Elements of a Successful Design Process

Managing a creative project can be tricky because evaluating ideas is often influenced by unconscious assumptions. To avoid derailment and arrive at a successful outcome, it is essential that everyone's expectations be fully defined.

1. Job One: Creative Brief & Project Scope

To ensure clear expectations, the designer should specify the work' scope in the project proposal, and for all but the smallest projects, supply a defined creative brief. These documents become the project's benchmarks for staying on message and avoiding irrelevant tangents, and must be approved before any work begins on concepts. ***This will go a long way to make sure the process is predictable, even though the end design isn't.*** Once hired and with the above documents in hand, the designer's job as a professional is to make sure that the project proceeds properly.

2. Design is a Service

Some clients may assume that looking at drafts is like buying shoes: they get to try new ones on ad infinitum until "they are happy." ***It is important to be clear about the difference between buying a product and buying a service.*** It is also part of a designer's job is to avoid wasting time by trying ideas that are not going to work, without putting off clients. When these issues are addressed openly in a professional way, a competent designer will be better able to guide the client to productive decisions.

A project's scope of work should include a defined number of design drafts and approval rounds. If the client asks for a round of drafts beyond that number, it is up to the designer to say, "I would be happy to work up these concepts. However, they will constitute a scope change. Would you like me to give you a quote for the additional work?"

3. Reviewing the Drafts Together

When a designer shows drafts to a client, it is imperative that they look at the work together, whether in person or during a phone meeting. The designer needs to explain the thinking behind the drafts and handle any assumptions or questions that arise as the client reviews the work. If the meeting is by phone, the designer can email the drafts a few minutes before the meeting time. Then the designer can explain specifically how the work supports the goals stated in the creative brief. The client and the designer will both have the chance to ask questions, make suggestions and share feedback in real time.

4. Clarity is the Top Priority

Wrong turns or misunderstandings in a design process are caused by assumptions that can fill the voids left by a lack of clarity. For designers, clarity should be their number one priority, and it begins with them. Nature abhors a vacuum, and never more so that when it is caused by poor communication. But when communication between designers and clients is clear, project outcomes are successful and everyone wins.

There are many kinds of design projects and they will all benefit from a well-thought-out development process. If you'd like to know more about the process for your particular project, contact me and let's talk about it!