The Client Management Process
How do we find clients? and how do we manage their expectations?
Well just like any business, a design business is reliant on its clients continued patronage.
Well just like any business, a design business is reliant on it’s clients continued patronage.

Without this there is ‘no business’
So we need to understand what is involved in managing a happy
So we need to understand what is involved in managing a happy & successful business relationship?
Well let's look at it from the viewpoint of the design company.
The first task of any design company seeking a ‘new’ client is to understand what they can offer to the market place.
The first task of any design company seeking a ‘new’ client is to understand what they can offer to the market place.

What are the skill sets and services which they can actively promote?
So once we have an idea of what we can offer, who are we targeting?
So once we have an idea of what we can offer, who are we targeting?
Firstly we need to research the marketplace
Firstly we need to research the marketplace.
we need to find companies who may be in need of our services and establish who the key decision makers are.
we need to find companies who may be in need of our services and establish who the key decision makers are.
We then have a number of possible options we can use to get in front of them.
We then have a number of possible options we can use to get in front of them.

To make that all important first appointment.
Cold Calling...
Cold Calling. . .

This is by far the hardest method of introduction.
Cold Calling. . .

This is by far the hardest method of introduction. We have to navigate past the receptionist to find who we need to speak with.
Cold Calling. . .

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If we manage this successfully we then have voicemail to contend with.
Cold Calling. . .

This is by far the hardest method of introduction.
We have to navigate past the receptionist to find who we need to speak with.
If we manage this successfully we then have voicemail to contend with.

As most of our clients screen their calls. . .
Sending a Promotional Sample, of recently completed work.
Sending a Promotional Sample, of recently completed work. this can be very successful. . .
Sending a Promotional Sample, of recently completed work.

this can be very successful. . .
but does require us to follow up with a call to see if they have received and understood the intention,
Sending a Promotional Sample, of recently completed work.

this can be very successful. . .
but does require us to follow up with a call to see if they have received and understood the intention, and to try and convert them from a prospect into a strong potential client.
Letter of Introduction...
Letter of Introduction... 

This needs to be relevant to our client,

Dear Sir/Madam,

You questioned me on my knowledge in politics, telling me to read up more about politics and not just on architecture itself. I sincerely thank you for your concern and I have to admit that I’ve given up reading the newspaper since I learned how to read books when I was 2 years old. I realized reading political stuff dulls the mind because my grandfather read them and his responses to the surrounding appears to be sluggish by the minute, which explains why your responses are on par with our term paper's relatives – even, in fact, you look like one too.

Anyway, yesterday I've decided to listen to your stupid advice and actually went to bed early to earn some money on the newspaper made of recycled toilet paper, as I was reading I accidentally spilled some white stuff all over the newspaper section. As I was cleaning up the mess before my mother and our dear neighbor came home, he offered some cold rice and told me: “Scientist discovered cures for heat exhaustion and vitamin deficiency, yes the quiet and it says. “Scientist discovered cures for heat exhaustion and vitamin deficiency.” I wrote this letter to you.
Letter of Introduction...

This needs to be relevant to our client, and should contain something unique that we have discovered, that could be useful for them to see.
Letter of Introduction...

This needs to be relevant to our client, and should contain something unique that we have discovered, that could be useful for them to see.

One approach might be to say that you have recently met with their competitors to share this exciting piece of information and you would like the opportunity to show them too...
Email, weblink...
Email, weblink. . .

This can be effective but we have to ensure that we do not fall foul of ‘anti-spamming’ legislation.
Email, weblink. . .

This can be effective but we have to ensure that we do not fall fowl of ‘anti-spamming’ legislation. Which requires us (by disclaimer) to allow our recipient to request that we do not send any more materials to them via email.
Social Networking...
Social Networking...
Social Networking. . .
This can be another very effective method of introducing your self and your services to a wider audience.
So as we have discovered there are a number of ways we as designers can approach a potential client.
The very best approach is to be recommended by
The very best approach is to be recommended by ‘word of mouth’
The very best approach is to be recommended by ‘word of mouth’

In this scenario the clients seek you out, on the basis of what they have seen or heard about you, and/or your work.
This is based on building a ‘profile’ establishing your brand presence.
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This is based on building a ‘profile’ establishing your brand presence.
An awareness of your company amongst your peers, and the design industry as a whole.
This ‘profile’ building can take many years but once attained, can become a great source of potential work, with little effort other than maintenance.
Vince Frost
designer,
London, Sydney
step 1

the credentials presentation
Aim/Objective

To be given an opportunity to meet the client face to face to demonstrate your skills and to ‘quote’ on a potential project.
Aim/Objective

To be given an opportunity to meet the client face to face to demonstrate your skills and to ‘quote’ on a potential project.
Areas you should cover in your presentation include...
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• Brief intro to company/organisation
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• Brief intro to company/organisation
• Description of services offered by agency
Areas you should cover in your presentation include.

• Brief intro to company/organisation
• Description of services offered by agency
• Explanation of design process and working methodology
Areas you should cover in your presentation include...

- Brief intro to company/organisation
- Description of services offered by agency
- Explanation of design process and working methodology
- Examples of recently completed projects
  - that are relevant to the clients needs
Areas you should cover in your presentation include...

- Brief intro to company/organisation
- Description of services offered by agency
- Explanation of design process and working methodology
- Examples of recently completed projects - that are relevant to the clients needs
- Explanation of cost structure for services to be provided.
Now let's look at things from the viewpoint of the client.
Typically clients may be considering more than one company for any potential project/piece of business.
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Assuming that the client is just trying to establish the suitability or ‘fit’ of a given design company.
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Assuming that the client is just trying to establish the suitability or ‘fit’ of a given design company.

You may not walk away with a brief. However, if they have already decided to pitch this out to 3 agencies or more you might...
In the current competitive environment it is likely that every project is going to be scrutinized on a ‘cost’ basis.
In the current competitive environment it is likely that every project is going to be scrutinized on a ‘cost’ basis.

What you have to remember is that the client is trying to find the ‘perfect partnership’ for the project but is going to be basing their decision on a number of factors.
factors influencing clients decision process:-
factors influencing clients decision process:

- Perceived capabilities - structure & suitability
factors influencing clients decision process:

- Perceived capabilities - structure & suitability
- Proven track record - portfolio
factors influencing clients decision process:-

- Perceived capabilities - structure & suitability
- Proven track record - portfolio
- Creativity - portfolio
factors influencing clients decision process:

• Perceived capabilities - structure & suitability
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• Creativity - portfolio
• Methodology - design process (demonstrated)
factors influencing clients decision process:-

• Perceived capabilities - structure & suitability
• Proven track record - portfolio
• Creativity - portfolio
• Methodology - design process (demonstrated)
• Can see themselves working with this agency - this is the ‘personal’ factor and should not be underestimated.
factors influencing clients decision process:-

• Perceived capabilities - structure & suitability
• Proven track record - portfolio
• Creativity - portfolio
• Methodology - design process (demonstrated)
• Can see themselves working with this agency - this is the ‘personal’ factor and should not be under estimated.
• Explanation of cost structure for services to be provided.
If all of the perceived criteria for the project are met, the final element might still be cost . . .
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If all of the perceived criteria for the project are met the final element might still be cost . . .

Obviously some clients may put ‘price’ at the top of the list and may be prepared to compromise on other aspects to achieve their goals if a limited budget is the main issue for them.
Personal relationships are the most important factor in developing trust between the two parties on any given design project.
step 2

ensuring the client understands what to expect from the design process, and you.
I will manage my client’s expectations
I will manage my client’s expectations

Managing a client’s expectations starts with a great relationship, where they value your input and respect your recommendations.
Understanding the relationship informs how you will lead.

These are mantras that declare your intent to focus on their needs and expectations in a proactive manner, and make the experience of working with your firm easy.
Too often, we can’t lead our clients because we haven’t:
Too often, we can’t lead our clients because we haven’t:

• Understood how the client wants to work with us.
Too often, we can’t lead our clients because we haven’t:

• Understood how the client wants to work with us.

• Defined our expectations (to the client) of the collaborative relationship.
To manage your client’s expectations, you need to make clear your policies and procedures.
Do you expect timely approvals?
Do you expect timely approvals?
Put it in your contract, and make it clear to them.
Do you expect timely approvals?
Put it in your contract, and make it clear to them.

Do you provide weekly status reports?
Do you expect timely approvals?
Put it in your contract, and make it clear to them.

Do you provide weekly status reports?
If so, are they aware that you do?
Do you expect timely approvals?
Put it in your contract, and make it clear to them.

Do you provide weekly status reports?
If so, are they aware that you do?

Should they call you for every little edit?
Do you expect timely approvals?
Put it in your contract, and make it clear to them.

Do you provide weekly status reports?
If so, are they aware that you do?

Should they call you for every little edit?
If not, whom do they call?
Do you expect timely approvals?
Put it in your contract, and make it clear to them.

Do you provide weekly status reports?
If so, are they aware that you do?

Should they call you for every little edit?
If not, whom do they call?

If a client doesn’t understand how your firm works,
then you will constantly be responding
to their requests, instead
of proactively anticipating their needs.
I will lead my clients
I will lead my clients

Do you wait for the client to call or send copy, or is your firm proactive in monitoring the project schedule?
I will lead my clients

Do you wait for the client to call or send copy, or is your firm proactive in monitoring the project schedule?

It’s easier to wait for the “trigger,” the email from the client that indicates you need to drop what you’re doing and fight that fire.
Do you wait for input from your client, or do you take the lead role in the collaborative relationship?
Do you wait for input from your client, or do you take the lead role in the collaborative relationship?

Anticipating deadlines, respecting timelines and awareness of your client’s needs will allow you to manage your time and lead your clients.
Do you wait for input from your client, or do you take the lead role in the collaborative relationship?

Anticipating deadlines, respecting timelines and awareness of your client’s needs will allow you to manage your time and lead your clients.

This thinking can be applied to everything from business development to project management.
It allows you to control the relationship and the workflow, rather than letting it control you!
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It allows you to lead your clients, and guide them not let them pull you along.
It allows you to control the relationship and the workflow, rather than letting it control you!

It allows you to lead your clients, and guide them not let them pull you along.

A recommendation?
It allows you to control the relationship and the workflow, rather than letting it control you!

It allows you to lead your clients, and guide them not let them pull you along.

A recommendation? Develop your leadership skills.
It allows you to control the relationship and the workflow, rather than letting it control you!

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A recommendation? Develop your leadership skills. Your clients will notice.
It allows you to control the relationship and the workflow, rather than letting it control you!

It allows you to lead your clients, and guide them not let them pull you along.

A recommendation? Develop your leadership skills. Your clients will notice. The rest will follow.
If you have difficulty communicating these guidelines verbally.
If you have difficulty communicating these guidelines verbally. Then put them into your ‘design proposal’ with your terms and conditions of business.
step 3

estimating the project
Design is a service business
Design is a service business

It is true to say that design and creative agencies are service businesses. That is, they provide a design service to a client for an agreed cost.
Design is a service business

It is true to say that design and creative agencies are service businesses. That is, they provide a design service to a client for an agreed cost.

They structure their costs on the basis of time spent working on the project.
time = money
There are many service businesses in the world around us. Many of them work on a ‘fixed price’ structure which may include materials and labour.
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• Cleaning - domestic & commercial
There are many service businesses in the world around us. Many of them work on a ‘fixed price’ structure which may include materials and labour.

- Cleaning - domestic & commercial
- Hairdressing
There are many service businesses in the world around us. Many of them work on a ‘fixed price’ structure which may include materials and labour.

- Cleaning - domestic & commercial
- Hairdressing
- Instant printer
There are many service businesses in the world around us. Many of them work on a ‘fixed price’ structure which may include materials and labour.

- Cleaning - domestic & commercial
- Hairdressing
- Instant printer
- Digital photo lab
There are many service businesses in the world around us. Many of them work on a ‘fixed price’ structure which may include materials and labour.

- Cleaning - domestic & commercial
- Hairdressing
- Instant printer
- Digital photo lab
- Car tyre depot
Whilst their pricing may vary depending on the quality of materials being used or the quality of the service being provided.
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It is fairly easy for us to establish what these services are likely to cost us.
Whilst their pricing may vary depending on the quality of materials being used or the quality of the service being provided.

It is fairly easy for us to establish what these services are likely to cost us. We can ring the hairdresser and simply ask what they charge for a ‘cut and blow dry’.
Whilst their pricing may vary depending on the quality of materials being used or the quality of the service being provided.

It is fairly easy for us to establish what these services are likely to cost us. We can ring the hairdresser and simply ask what they charge for a ‘cut and blow dry’.

We can take our car to the local tyre depot and quickly establish ‘the price of replacement tyres’.
With design it is much more difficult, because generally no two projects are the same.
With design it is much more difficult, because generally no two projects are the same. Design services are generally more ‘bespoke’ like having a suit made to measure for an exact fit!
With design it is much more difficult, because generally no two projects are the same. Design services are generally more ‘bespoke’ like having a suit made to measure for an exact fit!
So how do we cost design services?
So how do we cost design services?
So how do we cost design services?

Well the simple answer is that we have to ‘guess’ how much time is going to be spent on each stage of the project - based on experience.
We need to consider who is going to be producing the work at each stage of the process, who is going to be managing the process, and who is going to be liaising with the client.

Typically all design projects are run in stages;
Whilst there are 3 distinct overall stages of any given project it is more likely that these will be further divided into separate development phases.
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Whilst there are 3 distinct overall stages of any given project it is more likely that these will be further divided into separate development phases.
Stage 1: Research & Planning
Initial research
Conduct design audit
Analysis
Estimate project
Write proposal

1st client contact - meeting credentials presentation
2nd client contact - meeting/briefing
3rd client contact - meeting to present proposal

(this could be emailed and discussed via phone).
Stage 2: Design & Development
Initial idea generation
concept design
select concepts
build 1st presentation
with design rationale

4th client contact - meeting to present initial concepts

Outcome; client presents onto ‘key’ stakeholders within company
Stage 2: Design & Development (continued)

Adjustments to concept direction based on feedback.
Application of design to other items of collateral material to test design effectiveness.

5th client contact - debrief meeting.
Client delivers feedback on presented concept work.
This could be delivered in the form of email, and/or conference call.

6th client contact - 2nd presentation of creative work
Outcome; again client presents onto ‘key’ stakeholders within the company.
Stage 3: Production & Implementation

Design approved ✓

Production/Artwork phase starts. . .

Refinement of the design is undertaken with careful consideration given to legal mandatories, technical specifications, colours and printing processes.

7th client contact - review production meeting
to discuss likely technical production requirements, this may just be with internal client team, at this point.

8th client contact - pre-production meeting
this is where the designer, pre-press team, printer, your client and key stakeholders get together to discuss all aspect of the proposed design from a technical stand point.
So we are likely to be reviewing the following details.

**Brochure** - size, number of pages, actual copy content, layout adjustments, number of images to be sourced, photographed, deep etched.

**Identity/brand** - application of design - items to be branded, sizes, colour specs, number of pieces of artwork to be created.

**Pack Design** - How many variants in the range. . . how many pieces of artwork, how many facets/pack surfaces. photography, art direction, illustration required?

**Website** - How many pages, interface required, navigation system, flash content, database, HTML programming.

**Motion Graphics** - How long is the time sequence, music/dialogue, imagery, creation, animation, cgi, rendering of 3d objects.
Once we have completed our artwork or production pieces and have sign-off, we can then hand over our electronic artwork files on CD rom/DVD or via FTP upload - to the companies who have been assigned to produce the materials.

**Production requirements:**

- **Brochure** - high res. artwork, pre-press, print - bind - delivery.
- **Pack Design** - high res. artwork, pre-press, printing.
- **Website** - build, beta test, upload, maintain.
- **Motion Graphics** - build, test, edit, deliver - DVD, website, broadcast, (imagery, creation, animation, cgi, rendering of 3d objects).
So all of these elements have to be taken into account, and a budget allocation needs to be made for each component, in the process.
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When we are ‘outsourcing’ things like photography and illustration, we also have to consider copyright ownership issues, and the likely time frame required to produce all of this, with the necessary approvals from our client.
So all of these elements have to be taken into account, and a budget allocation needs to be made for each component, in the process.

When we are ‘outsourcing’ things like photography and illustration, we also have to consider copyright ownership issues, and the likely time frame required to produce all of this, with the necessary approvals from our client.

This could necessitate a number of meetings with the client and their internal production team. Or meetings with different departments, to establish their requirements.
Depending on the size of the project we could meet with our client at least 8 to 10 times from first initial contact, to the final production phases.
Once we have added all of this together, looked at, and confirmed the project timeline, included our material costs, the estimates from all 3rd party suppliers and other requirements. Not forgetting our ‘project management fee’. . .
Once we have added all of this together, looked at, and confirmed the project timeline, included our material costs, the estimates from all 3rd party suppliers and other requirements. Not forgetting our ‘project management fee’... 

We can send through our project estimate, along with our design proposal & terms and conditions of trade.
Once we have a ‘budget’ sign-off from our client and they have raised a purchase order our project can proceed.

---

### Project Estimate

**To:** A client  
125 Pacific Highway  
North Sydney  
NSW 2060  

**Date:** 21/1/08  
Creative Ways Design  
46 helvetica way  
surry hills  
nsw 2010

**Job No.** ABC 101  
**Job Title:** brand redesign MARKETING concepts  
**Description:** Creation of New Identity applied to business stationery

<table>
<thead>
<tr>
<th>Description</th>
<th>Fee</th>
</tr>
</thead>
</table>
| **Concept design phase 1**  
Creation of 4-5 concept directions for brand identity, applied to business cards x2 letterheading and with comps. | $1,200.00 |
| **Design development phase 2**  
Modifications to selected concept direction based on client feedback  
Fee | $500.00   |
| **Design development phase 3**  
Application of design to A4 presentation folder and parcel stickers  
Fee | $500.00   |
| **Finished artwork phase 4**  
Creation of electronic artwork files for:-  
- business cards x 2  
- Letterheading  
- with comps slip  
- A4 presentation folder  
- parcel stickers  
   | $200.00  
$100.00  
$100.00  
$400.00  
$100.00  |
| **Sub total**                  | $900.00   |
| **Grand total**                | $3,100.00 |

I accept the figures and agree to your terms of payment and conditions shown. I authorise you to proceed with the work as described above. Signed for and on behalf of the client.

Signature: ___________________________  
Date: ___________________________
So what are the methodologies that we might use to communicate with our client, as we work on their project?
Reverse Brief
Put in simple terms listing back to them all the key points of the brief to show our understanding of their needs.

Contact Report
After attending meetings with the client and or marketing team, we take notes and write up the ‘minutes’ of what was discussed and agreed.
Conference Call
A common practice to ensure all parties are involved in the planning stages of any given project.

Video Conference Call
Suitable for long distance meetings, or interstate/international clients.
Email

Regular correspondence via email can ensure smooth running of any given project.

Just be mindful of email tone... sometimes the written word can seem harsh or instructional which may not have been intended. Also emails do not always get through, so if you want to ensure clear communication pick up the phone!
Phone Calls

When making a phone call remember that your body language can be translated over the phone and picked up by the person on the other end of the line.

So sit up straight, be aware of background noise around you, move to a quiet room or shut the door.

As soon as the person receiving the call has picked up, introduce yourself and let them know with whom you would like to speak.
Speak slowly and clearly and have respect for the other person’s time. They may be in the middle of another task.

When answering the phone do so promptly, using your name in a warm confident voice. Be helpful, listen carefully and take notes if necessary giving the other person your undivided attention.
So what can go wrong?

“When working with clients, what do you see as the top problem areas?”

The projects that I have worked on that “blew up” seem to all suffer from poor communication between myself and the client.

It can be difficult for a non-design person to understand what you are doing, and if you aren’t communicating well, disaster is inevitable.
I think many good designs never get off the ground because the designer assumes that the client is sensitive enough to ‘recognize a good idea’ when they see one.

Part of our jobs as designers is to educate our clients.
Another View . . .

1. Proofing. Clients just don’t proof their copy.

2. Unreasonable expectations:
   yes it can be done,
   but are you willing to pay for it?

3. Clients don’t always understand that our expertise is valuable, and that our time is therefore billable.

If you want to ask for our opinion or input,
you must therefore value it.
Please be willing to pay for it.
4. Clients who claim expertise because they have experience in some sort of marketing.

More and more, if a client contact isn’t a communications professional, then I anticipate that the project may not go smoothly, and there will be frustration on both sides.

Brian Sooy | Design Consultant
The most common, frustrating and damaging problems are that ‘clients have preconceived notions that are actually at odds with what they want to accomplish’, and the fact that they aren’t clear about what they want to accomplish.
1. Preconceived notions. Clients want a logo or web site that looks like someone else’s or even looks like something they have in their head.

I have to disabuse them of these notions, because the look of something should only come after it’s really clear to them, and everyone else, what they want to say.
Which leads to point 2 . . .

2. Clients hand you lemons and expect you to make wine. Creatives need something to work from.

The more specific, concise and focused the client is about their needs, the more creatives can meet them. These have to be specific, and within reason.
3. Creating graphics for themselves instead of their clients and potential clients. Design may be about you, but it’s for your potential and current customers.

Customers want to know, “What’s in it for me? and why am I bothering with you?” as quickly and clearly as possible.

It’s more important what your target market thinks - than whether you, or your 13 year old like it!
4. Unrealistic expectations, deadlines and budgets.

Tell them a reasonable timeframe, and if they need it much faster, make sure they know the additional cost.

Daniel Will-Harris | Communication Designer
Time. Money. Results.

You’ve got to be clear about all three up-front, and if your client is unrealistic, it’s your job to set them straight - now, or they’ll just be angry or disappointed later.
and Finally. . .

You often find that the design process starts when the client realises that they are due to re-order a print-run.

The current design is out of date or needs a refresh, it will take 3 weeks to print, collate & distribute, 2 weeks to do the film & plates, 2 weeks to do the artwork 1 week to get it finally approved. . .
forgetting that it has yet to be briefed-in or designed and we should have started this a month ago... What can you turn around for us in 4 days?

Our time is always limited by the client, the deadlines remain the same!

Paul Devonshire | Brand Packaging Designer
Thank you!
This presentation was built with source materials from the following references:
(as well as from personal experience).

Kathryn Best's Design Management
Marty Neumeier The Brand Gap
AGDA-forum

created by Paul Devonshire (BillyBlue lecturer) - 2009
reworked - edition 2011