



Undertaking a design project

Overview

Before embarking on any design project, large or small, it is important to be clear about what your audiences need from you and what you need from your designers.

Whatever the design project in hand, whether it be the design of a logo, brochure, advertising campaign or house style and visual scheme, the essential approach, process and principles are the same.

The design brief

The design brief is the central reference point for you and the designers. Your initial brief should include as much of the following information as possible.

Who are you?

- What do you do?
- Give your background and history (if relevant).
- What is your purpose?
- What is your organisational structure?
- What services do you provide?
- Who are your competitors and what distinguishes you from them?
- What is your personality - what photos and tone of voice are appropriate for your organisation?

A description of the project including:

- The context, objectives and purpose.
- Messages, tone and qualities to be conveyed in the design.
- Your decision-making process.
- Target audience - prioritise them if there is more than one.
- What do you want the audience to do, e.g. make a donation, contact you, learn about you?
- Schedule and deadlines.
- Do you have in-house facilities for templates, print and production?

A list of printed items to be designed and details (if known) such as:

- Content - what key information will need to be included, e.g. thanks to funders, logos?
- Copywriting - will you do it in-house or will you need a copywriter?
- Number of pages, size, format and paper stock.
- Sourcing of images - illustrations or photography.
- Practical and technical requirements of the design, e.g. the item must fit in a particular envelope type, or weigh less than 60 grams.
- Do you have existing guidelines for style and use of logos?
- Print and production responsibilities.

The more detail you can provide, the easier it will be for the designers to provide estimates and for you to compare them.



Decision-making

A small project team (usually the head of marketing and one or two other key staff) with the authority to make decisions throughout the process will ensure maximum efficiency and minimise cost.

The team should be responsible for agreeing the brief, choosing the designer and for being available for meetings and presentations throughout the process.

The designers will expect input and constructive feedback from the project team during each stage of the process. Be decisive and at all stages say exactly what you think and feel about what is presented. If you don't feel that something works, say so, and why.

If your team does not include top-level decision makers within your organisation it may be necessary to plan presentations to them at crucial stages.

Choosing a designer

If you need advice, the Media Trust can suggest a range of suitable designers.

First, set up preliminary meetings with a few recommended designers to talk about your needs and to see their work. It is helpful if you can give them some idea of the available budget at an early stage so that they can determine whether or not they can work to it. This will save everyone's time.

After these initial meetings, decide on a shortlist of two or three designers whose work you like and with whom you feel you can work well. Send your design brief to the shortlisted designers, asking them to respond with an estimate of fees and additional costs. If the project is substantial you should ask for a proposal outlining their approach and the steps they would recommend with a corresponding breakdown of fees.

You may want to meet with them again to go through their proposals before making your final decision. Once the designers are appointed you should arrange a meeting to plan the project and confirm a final brief.

Planning and confirmation of design brief

If the project is relatively straightforward, it should be possible to agree the details of the final brief, schedule and budget in an initial planning meeting.

If it is a major project, e.g. a visual identity or branding review, it will usually be necessary to plan a phase of research and consultation, after which you can refine the details of the final brief with the designers.

Research and consultation

The extent of this phase depends on the nature of the project, the size of the organisation and how much consultation and research has already been conducted, both internally and externally.

In a typical identity review the designers will:

- Conduct one-to-one interviews or group brainstorming sessions with the project team, key people within the organisation and people who use the services you provide.



- Review your current material, the material of your competitors and any relevant market research you have conducted.
- Present their findings and recommendations (either verbally or in a written document) and discuss them with the project team. The decisions made will constitute the final brief.

All parties must agree the final brief because the success of the creative work should be judged by how well it answers that brief.

The design process

The following is a summary of a typical design programme. Fee estimates are usually given for each of these stages.

Design concepts

Visual ideas are created in response to the agreed design brief. The designers should:

- Produce a number of visual concepts.
- Present and discuss these ideas with you.
- Choose with you one concept to develop and discuss how to proceed.

Design development

The chosen concept is then developed incorporating your comments and ideas. This stage involves:

- Refining the details of typography, colour, layout and style.
- Finalising and checking text and images.

If it is necessary to get agreement from others in the organisation before the design is finalised this should be done before this stage is completed.

Artwork

Once the final design is agreed, the designers will produce artwork. Your sign-off of the artwork is required before this stage ends.

Implementation

If the project has included the design of an overall house style for your materials, it is during this stage that the actual items will be designed. If templates are required it is very important to clarify the systems used and the users' needs.

Guidelines

These are only necessary for visual schemes and publications systems. In order to ensure they will really fulfil the needs of users it is best to design actual materials before the guidelines are created. They should inspire users and communicate the vision behind the design as well as give specifications.

Guidelines are driven by the needs of their users. Before the guidelines are created, you should clarify:

- How they will be used and by whom.
- What items should be included and the specifications required.
- Their length and form (printed, on-screen or both).



Print and production

If you require the designers to oversee the production of the materials, this stage will involve:

- Obtaining print estimates.
- Briefing the chosen printer.
- Checking the colour proofs with you.

Creative pitches

Most designers will be reluctant (or refuse) to participate in an unpaid creative pitch. There are good reasons for this:

- The best creative ideas usually spring from a thorough understanding of your organisation and its communications needs.
- This understanding can only be gained through face-to-face discussion and dialogue with you, not through a written brief.
- In major projects the phase of research and consultation is essential before creative work begins and should not be bypassed or taken lightly.
- Creative work involves considerable commitment, time and cost to the designers.

Selling in

It is important to generate a sense of ownership of the new design within your organisation, as well as to your external audiences. If the project involves a significant change in the design of your logo or materials you may need to communicate the reasons for the change and the chosen design.

Consulting and interviewing key people involves them in the process, enabling them to contribute to the design. Newsletters, internal memos and scheduled presentations can help to communicate the change to staff and stakeholders.

If the designer's participation in these activities is going to be required this should be included in the brief.

Counting the cost

All charities are very conscious of being accountable for budgets. It is very difficult to measure the return on good design. However, in an age where we are bombarded by a proliferation of words, images and information, clear, distinctive design is recognised as being more and more important.

Good design should be regarded as a sound investment. Setting up a consistent and flexible house style can save you time and money by making the production of your materials more efficient. A well-designed campaign can spur people to action and achieve results. A striking logo can help to change perceptions of your organisation, inspire people and raise your profile.

Language

Design and language are inextricably linked. It is vital to get your words and message right.

And finally

How you are perceived ultimately depends on the reality of what you do and how well you do it. A designer's job is to help you communicate it.