Logo Design Guide

Exploring the process and value of a visual identity

func-tion

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Contents

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Intro

What's this guide all about?

We spend a lot of time thinking about and working with logos. Logo design was a major part of our design educations, and represents a pillar of our studio service offering.

We believe logo designs have the power to define the perception of entire businesses. They can be the difference maker in a world saturated by similarity – directing our affection, loyalty, and hard-earned paychecks.

In the last ten years, there has been a major shift in the relationship between business and design. Thanks largely to the meteoric success of companies defined by strong branding and user-oriented products, more organizations have come to recognize the importance of visual communication. It's no longer a conversation reserved for a handful of highly trained specialists and a minority of progressive boardrooms.

As such, there is a growing number of people in our circles who show an interest in the curious craft of logo creation. They are freelancers, marketers, developers, educators, and entrepreneurs – smart, engaged people that want to learn more about the principles and benefits of good design.

Who are we writing for?

We imagine this guide will find itself in the hands *(aka download folders)* of various professionals working in the design space, or those whose work is related in some way to a design deliverable.

Specifically, this guide is intended for three primary audiences:

Creative Professionals with an interest in visual communication who want to explore another perspective of the design process, or include logo design as part of their service offering.

Clients & Entrepreneurs who want more tools to assess the quality of design work, or become more deeply involved in design conversations.

Project Managers, Marketers, Sales Professionals who want to better understand and communicate the value of design and the benefits of visual consistency when applied to brand collateral.

This guide is for: Creative Professionals

It's an exciting time to be a designer. The world has finally awoken to the opportunities created by the Voltron-like force of design and business working in tandem. More and more companies and business owners are interested in seeing how design strategy and targeted communication can help them achieve their goals; gone are the days of design as an afterthought.

As entrepreneurs incubate and bring their ideas to market, they create a steady stream of companies and products that require positioning in the competitive landscape. And as businesses mature and offerings change, those iterations often require updates to the existing visual representation. This constant demand for design work creates a well of opportunity that is difficult to ignore.

We hope that this guide will find its way into the reading lists of designers. Ideally, it will contribute to their understanding of the design process as it applies to logo design and encourage them to incorporate it into their service offering.

This guide is for: Clients & Entrepreneurs

It takes guts to own a business, or to own business decisions. There's a lot at stake, and a lot of responsibility. Savvy business people know their strengths and are able to step back from decisions they may not be fully suited to make. But that doesn't mean they should check out of the conversation completely.

This guide is meant to assist decision makers by elaborating our terminology and design philosophy. It aims to walk them through some important processes, and communicate the value of conceptual thinking paired with consistent execution.

We want to convince clients that design is worth the investment and provide them with some tools to better understand what's going on under the hood.

This guide is for: Marketers, Project Managers, Sales Professionals

A design education teaches someone how to create beautiful, meaningful things. However, a conventional design education doesn't always tell the whole story. It sometimes fails to express that a beautiful, meaningful design doesn't sell itself. If the client on the other side of the table is not convinced of its value, that design will likely never see the light of day.

It can be difficult to articulate the value of design. A designer may have an understanding of why something resonates, but struggle to express that understanding with brevity and confidence. This guide is partly aimed to address that issue. We want to express our perspective on the value of the design process and the positive effects of visual craft and consistency.

Our Vocabulary

There seems to be an ever-growing collection of words used when referring to design, so a quick recap of some general definitions will help us get on the same page.

What is a logo?

Logos have been used by people for thousands of years. Ancient merchants relied on markings to delineate ownership between similar-looking clay pots and burlap sacks. Likewise, owners of livestock would also *(and still do)* mark their animals as a means to prevent confusion and confrontation.

Eventually, trade guilds and trade unions started marking their products with symbols of authenticity. Since their products were typically of higher quality, those markings would come to suggest superiority and reliability to the end user. Consumer affinity and loyalty soon followed.

Logos now have a role representing businesses, organizations, and individuals, in addition to products. They are symbols that capture some key aspect of a brand's culture, character, value proposition, or aspirations.

In many cases, these marks are used to differentiate between products that may otherwise seem identical. They can also come to embody a service or group that has no other kind of visual representation. Logos have the power to make two

similar things feel completely different and are sometimes the only visual manifestation of a service, collective entity, or effort.

Wordmark

A wordmark is a kind of logo that relies solely on the use of letterforms. It has no additional graphic accents or icons. It is an efficient mark that usually offers the viewer less visual information to interpret.

Brand Icon

A brand icon is a symbol that can be used independently or in conjunction with a wordmark. These potent images can easily speak 1000 words *(whether simply and directly or with a powerful ambiguity).*

Combination Mark (Lockup)

This is a word we use when a wordmark and brand icon appear together. Combination marks can effectively encourage brand recognition, as they help the viewer make a visual association. This pairing can also be called a 'lockup' because they will often appear in the same configuration. Businesses may have a small set of different lockups for various design applications.

(Keep in mind that not all logos are going to fit neatly into these three categories. Sometimes a wordmark will incorporate some kind of non-typographic element – so is it still technically a wordmark? Not really... Which part of the combination mark is the 'logo?' Put simply, all of it. 'Logo' is a term that can casually refer to any wordmark, brand icon, or combination mark. When encountering a design that is hard to classify, just say logo!)

Logomark

This is a slightly fancier way of saying 'logo.' To us, there is no real difference in meaning. It's just a handy piece of honorific language that can be used to add a bit of reverence when referring to a particular logo design.

What is a visual identity?

The term 'visual identity' is used to describe the graphics, typography, and other visual elements that appear alongside a logo design in various design pieces.

Logos are seldom seen floating alone in empty space. Usually they live on posters and packaging, in apps and websites. These design environments need to be curated. Through the careful use of supporting typefaces, colours, photography, illustrations and patterns, a more dynamic and targetable communication is made possible. If a logo is the lead singer, a visual identity is the whole band – capable of creating rich layers of communication.

Visual identities also outline how to consistently display the logo and other supporting visual elements in various applications. They can standardize alignments, primary/secondary colour systems, typographic relationships, photographic treatments, and other art direction.

Typography

We use this word to refer to the style and treatment of letterforms. It's a term that can also describe how a particular font is used in a visual design.

Type Pairing

This phrase refers to the selection of two *(or more)* typefaces that appear together in a single context or application.

Art Direction

Art direction is a term we use when referring to the combined visual mood/tone of various curated elements in a design piece.

Creative Direction

We use this term to refer to high-level conceptual approaches to a design solution. Creative direction guides the communication strategy; art direction guides the execution and visual tonality of that idea.

Design Collateral

Design collateral refers to any piece of media that is a product of the design process and is used to represent or promote the associated brand.

Deliverable

Similar to design collateral, deliverable is a word used to describe the final product of a design process. It's the thing *(or package of things)* that is ultimately delivered to the client.

Branding

We use this term to refer to all the core visual identity elements: wordmarks, brand icons, combination marks, and alternate logo versions are all considered to be pieces of branding.

Brand

A brand is a little more difficult to describe. It's a word that refers to the full sensory experience of an organization *(or individual)* – not just the visual stuff. This includes social media presence, customer service experience, interior design, and even things like the choice of music in the elevator or the quality of paper towels in the washroom.

Another Thought

Why are identities important?

The final design of a logomark is important, but should not be the end goal of a branding project. Visual designers need to ensure a logo looks intentional when applied to various pieces of brand collateral. These collateral pieces will each have their own range of content requirements *(text content, image content, other visual elements)*. The appearance of this information needs to be considered if the logo *(and brand)* are to communicate the intended feeling successfully.

Without a clear definition of elements like supporting typefaces, colours, and image treatments, the logo is left to wander in a haphazard environment. Even high-quality logo designs cannot stand up against an ill-considered backdrop. Logomarks need a plan to ensure they sing, regardless of the context. Visual identities provide that plan.

Where to Start?

We believe that the creation of a visual identity system should be the end goal of any logo design project. Logos don't live in isolation. The designer needs to provide a plan for the accompanying visual elements that support a logo design in application.

Before the identity can be explored, the logo itself needs to be resolved to a functional degree. Logos are the cornerstone of visual identities. Their visual flavour and structure will influence design decisions made at the identity level, and in collateral application. As such, we feel the design process needs to begin with the logo to establish communication goals before moving forward into any supporting identity treatments.

Before starting work on a logo design, the stage must be set by a creative brief. A creative brief is a document created through conversation and collaboration with the client, and is the essential starting point of any visual design challenge. This is where our design process begins.

Section 1
The Creative Brief

The brief is an essential document as it describes the design problem and provides the means to measure the success of future creative work. It's the strategy roadmap for the duration of the project. The creative brief helps to calibrate the designer's mind to the task, and also holds the client accountable to an approved creative direction. It should be used when it comes time to review design concepts, and will help to diminish the effects of personal bias *(more on that later).*

This document also defines boundaries that are beneficial to the designer's creative process. Limitless opportunity can sometimes inflict a paralysis of choice. But knowing where not to step can clearly illustrate the path forward.

Essential elements

In general, the creative brief should cover the following bases:

Describe the company

Its history, personality, and values

> *This&That Inc. is a luxury design and lifestyle brand for the cat connoisseur. Founded in 2014, the company has grown into the destination for design-obsessed cat owners who are looking to invest in high-quality feline furniture and goods. This&That is the Chanel of cats.*

Describe the task at hand

The challenge, restrictions, and project deliverables

> *This&That requires a new logo and supporting identity system for the launch of their online store. In addition to digital applications, a 1-colour version of the mark will be required for laser engraving on wood and metal. An icon version of the logo must also be considered for use in various social media properties.*

Describe the target audience

Tailor design solutions to specific audiences for maximum effectiveness

> *The primary audience is 30–50 year old cat-obsessed professionals in North America who are willing to invest in high-quality, design-focused objects for their cats. These aficionados are tech-savvy and engaged in interior design trends, always seeking the latest and greatest; they are split 70% female and 30% male.*

Outline the main communication goals

The objectives for the work and priority of main messages

> *All deliverables should position the company as the high-end choice in feline goods, represent a commitment to animals and the environment, and reflect a dedication to quality and craft. Though This&That should project a feeling of luxury, communications should also be approachable and speak to the audience in an honest way.*

Assess the competitive landscape

Knowing other companies in the same space helps the designer intelligently position any new work

> *Local competitors include... Global competitors include... This&That is also indirectly competing with luxury furniture brands, such as...*

Provide a high-level creative direction/key concepts

A succinct roadmap for the conceptual foundation of the work, which can sometimes be achieved through a list of adjectives created with the client

> *All brand communications should feel: confident, refined, luxe, well crafted, and vibrant. Avoid cutesy, whimsical or traditional cat iconography (no whiskers, paw prints, cat ears, etc.)*

Steps to a successful brief

The appropriate path to a creative brief depends on the size of the project and the expectations of the client. The exact approach varies, but the general process stays the same:

1. **Ask questions**
   - IRL discovery meeting/interviews with stakeholders
   - Questionnaires/forms, user interviews or surveys
   - Learn about company, goals, values, audience
   - Understand how the company wants to be positioned visually

2. **Review answers**
   - Process the responses
   - Identify key points, eliminate redundancy
   - Distill into a single document
   - *(email, PDF, website, PPT, shared doc, wood carving, etc.)*

3. **Arrange and present the important points**
   - Use phrases, sentences, bullets, infographics
   - Reference visual examples, read between the lines
   - Submit for client review

4. **Revise and get approval**
   - Incorporate feedback, embrace clarity
   - Insist on client sign-off before design commencement

A rough framework

The quality of the brief is determined by the quality of the questions asked. Depending on the size of the project or expectations of the client, the creative brief can range from a simple email to an elaborate, multi-page document. Consider some of the following questions *(this is by no means an exhaustive list):*

Company Background

Who is the company? What is the product or service? What are the core values and what does the brand stand for?

Project Overview

What is the purpose of the project? Does the project face any specific challenges or restrictions? What are the project deliverables?

Content & Messaging

What is the project trying to achieve? What are the main communication objectives? What is the priority of key messages?

Target Audience(s)

Who are the primary, secondary, and incidental audiences? What is their current relationship with the product or service? Why should they care about the product or service?

Competition

Who else exists in the competitive landscape? What are their differentiating factors? How are they speaking to their audience with art direction and copywriting?

Voice & Tone

What are the desired adjectives to describe future communications? What are the goals for the art direction and visual design?

Crafting and delivering a creative brief

Good

Discovery:

- Prepare a Google doc questionnaire or Google form
- Have a discovery phone call to review answers or ask additional questions

Creative Brief:

- Email a basic creative brief for client approval, state the following:
  - the design challenge
  - communication goals
  - general audience profile
  - competitive landscape
  - 5 adjectives for creative direction

Awesome!

Discovery:

- Hold a multi-day discovery session to fully explore various discovery questions
- Conduct independent stakeholder interviews to further elaborate business/communication goals
- Send out user/customer surveys
- Interview members of the target audience
- Perform comprehensive competitive landscape research

Creative Brief:

- Prepare a PDF or web page to present the creative brief
- Consider including the following sections:
  - company profile
  - statement of the design challenge
  - communication objectives
  - list of key ideas to express through design
  - priority of messages
  - list of adjectives for creative direction
  - detailed audience profiles (primary/secondary)
  - visual mood boards
  - competitor analysis (local/global/indirect)

Another Thought

"I'm just not a fan of yellow."

A client's personal bias is a common issue encountered by designers. Whether it's a *(strange)* affinity for the colour brown, or the dismissal of an effective typeface because of one previous bad date, decisions made on unfounded gut feelings rarely improve a design solution.

Effective logos and successful identities are designed to resonate with a particular audience. Sometimes the client needs to be reminded that they aren't a part of that group. The creative brief helps keep the conversation centred on the expectations, visual/cultural vocabulary, and other sensitivities of the target audience. It doesn't matter that the client hates yellow if that colour communicates the right message to the intended audience.

Use the creative brief as a shield against personal bias when presenting and reflecting on the effectiveness of a design solution. Allow it to be the justification for the creative work and all parties will benefit from a stronger solution in the end.

Section 2

Logo Design

Designers don't sell logos. They sell a process. This process will ultimately deliver a solution to the client's problem, and should be tailored specifically to each client based on their needs and budget.

It may seem like a trivial adjustment to consider the process *(not the logo)* as the project deliverable. However, we find this shift helps the client recognize the time and effort required to create a simple, effective design.

The logo design process

1. **Problem Definition**

   Put simply, the designer needs to know what problem they are trying to solve. In terms of logo design, this could be a problem with a brand's position in the market, a lack of existing visual representation, or a logo that is illegible at small sizes. Whatever the case, everyone needs to fully understand the design challenge before any solutions can be tabled.

2. **Research**

   Before a designer can start their creative process, they need to study up on the competitive landscape, audience, and production techniques.

   A competitive landscape review is essential. It helps prevent the presentation of a design that may be embarrassingly similar to a competitor, or other tangential company or product. It also gives the designer a view of the visual language used in a particular space, allowing them to position the new mark intelligently.

   In addition to the competitive landscape, the designer must have some perspective on who will be looking at the logo, and which

group of people it is important to appeal to directly. Every human being has their own configuration of visual and cultural vocabularies. The designer's job is to use their powers of empathy to anticipate how a particular group will respond to certain forms and colours. Once the audience is defined, the designer can research the expectations and preferences of that audience *(through an assessment of visual design precedents, audience interviews/surveys, review of social media commentary, etc.)*, and build that knowledge into their design execution.

We also recommend a designer quickly research the opportunities and limitations of various production techniques that may be applied to the logo design. Are there opportunities for simple and meaningful animation? What are the visual effects of letterpress or screenprinting? Can the logo present a smaller, simpler version of itself in extreme contexts? Investigating various production methods may inspire a particular treatment or other conceptual approach.

Research can be an exhaustive step in the design process, but it ultimately leads to more successful work. Designers should treat research like investing: a greater contribution will yield a greater return.

3. Divergence

This is the sketching *(aka braindumping)* phase. Once the designer has calibrated their mind for the design challenge *(problem definition, communication goals, audience profile)*, they are ready to let loose with their ideas and creative intuition.

Most importantly, divergence is a time reserved for unedited exploration. We've encountered many junior designers who believe sketching equals 'drawing the solution' – they try to solve the whole problem in their head and then draw the final answer. We take a different view: sketching is a time for exploring how different key

ideas or messages can be presented visually. It's about seeking various components of a solution, not the final solution itself. Designers should use this stage to experiment without the fear of failure. The goal of this phase is to capture a dynamic range of ideas and expressions.

We recommend that designers stay off the computer and actually sketch during this phase – using pencils, pens, whiteboards, or whatever is most comfortable. Filtering ideas through cumbersome digital tools can interfere with the meandering of the mind, or force a designer's ideas into too much structure prematurely. Alternatively, using a pen or pencil is like a mainline to the brain.

It's also important to note that divergence can happen any time, and doesn't need to be so strictly or linearly defined. Designers may be inspired by a particular piece of research, or even during the creative brief phase. Just remember that design is the solution to a problem – so a solution that arrives before the problem is fully understood might not be the most successful answer.

4. Convergence

The goal of the convergence phase is to measure the effectiveness of the sketches by using the creative brief. What ideas stand out and what makes them successful?

Which ideas most directly communicate the key messages *(e.g. bold, established, traditional, innovative)?* Which ideas have the greatest chance to resonate with the intended audience? Are there certain components to a sketch that can be successfully combined with the components of another?

The designer needs to isolate the effective concepts and invest more time in their visual execution. This means rendering them in vector, choosing proper typefaces and type treatments, and conducting further exploration digitally with colouration, size and form.

5. Presentation

Creating beautiful, meaningful things is a wonderful ability. But unless the client understands the value and appropriateness of a piece of work, it will not see the light of day. Since the client's approval determines which idea goes live, the presentation itself can be as important as all the underlying design work.

Presentations are an opportunity to uncover aspects of a concept that aren't satisfying the requirements found in the creative brief. They can initiate conversations on key issues and provide opportunities to better understand the audience and the task at hand. These deeper levels of understanding lead to stronger work.

We never show up to a logo presentation without some supporting examples of logo application. There is limited value in seeing a logo design floating alone on screen. Logos are applied to things – they live in various printed and digital spaces, surrounded by other information. By taking the time to explore how the various logo concepts look in context, we give the client a more valuable perspective on the proposed logo designs. These unpolished example applications remind the client that a logo is part of a larger identity system, and needs to be evaluated in that way. Section 4 dives deeper into the intricacies and philosophy behind good visual identity presentations.

6. Revisions & Implementation

Collaboration between the client and the designer is an essential part of the logo design process. When approached correctly, it leads to stronger solutions.

How many rounds of revisions are appropriate? That depends on the design team and the scope of the project. But we suggest stating a limit to the number of rounds of revisions in your project agreement. Whether it's two or 20 rounds, it's necessary for all parties to agree on the number before the project commences, otherwise this phase of the design process could go on forever *(Note: if a client expects 20 rounds of revisions, GTFO).*

For identity design projects, we generally scope two rounds of revisions with any additional rounds billed hourly *(if required)*. Section 5 takes a closer look at the revision process.

What makes a good logo?

Good question! It's difficult to provide a standard for the assessment of logo design. No two design challenges are the same, and different audiences have their own set of subjective criteria. The same design viewed by two different people may evoke completely different reactions. Even so, we believe there are some core tenets of logo design. By adhering to these tenets, designers will be more likely to create a successful piece of communication that stands the test of time.

Good logos are: Simple

Generally speaking, a logo should be simple. As we mentioned previously, the natural state of a logo is in application – it is crafted to be used in various design pieces. Sometimes those pieces have limited space for the logo to appear, or present some other display-related challenge. Overly complicated designs, or logos with extraneous details, are not versatile and perform poorly at small sizes. If a logomark cannot scale down in size *(think favicons and mobile social icons)* and retain some legibility, it fails as a design. Additionally, if a logo cannot be replicated in a single colour, its potential for success in certain applications *(and therefore its value)* may be limited.

Simple things are attractive. Succinct visual designs deliver their messages with potency, confidence, and refinement. Brands want to benefit from the positive effects of focused

communication. It is for these reasons we believe a logo should be simple, first and foremost.

How can simplicity be achieved?

- choose one main concept to express in the logo *(recognizing the logo is only one facet of the identity, and doesn't need to say everything)*
- eliminate any superfluous visual elements that don't contribute directly to the expression of the main concept *(extra circles, underlines, hipster Xs, etc.)*
- learn to rely on the beauty of unaltered typography *(someone already spent years crafting those letterforms; maybe they don't need to be messed with?)*
- ensure all graphic/visual elements are sized generously enough to remain visible when the logo is reduced in size, or provide alternate versions with simplified solutions to be used at small scales
- be mindful of supporting/tagline text sizes
- make sure the logo design has a 1- or 2-colour fallback option in case certain production methods are required

Good logos are: Memorable

A good logo should be simple, but not without character. There needs to be some expression or identifiable characteristic the viewer can recognize and use to recall the mark later. After all, part of the logo's job is to help build affinity with a company, product, or service. If it is not memorable in some way, it does nothing to help the viewer recognize the associated brand and ultimately build a relationship.

A designer should ask: how is this logomark 'ownable?' The goal is to create a mark that feels like it belongs to the associated brand, and no one else. When viewed from the perspective of

ownership, a more tactile dimension is added and it seems easier to 'feel' specific visual details.

How can memorability be achieved?

- explore intentional colouration that helps the logo stand apart in the competitive landscape *(requires some competitive research)*
- craft a logo design that enables strong alignments, allowing it to appear confidently and consistently in various layouts
- don't be afraid to step outside of the well-worn channels of type selection *(maybe everything doesn't need to be in Gotham?)*
- use clever or meaningful graphic/visual elements that accent the name or key message
- aim for high visual craft, pleasing forms, smooth curves, and sensitive proportions

Good logos are: Meaningful

A meaningful logo design successfully represents a key characteristic, goal, or value of the brand. This means that each visual component of a logo *(like form, typography, and colour)* are chosen because they depict, or combine to depict, a facet of the brand.

A designer must also take the target audience's visual/cultural vocabulary into account when choosing visual components. The forms and colours of the logo must speak to the audience in a 'language' they understand.

How can a logo become more meaningful?

- typography should be selected to present or accent a desired communication objective *(friendly geometric sans serif type can feel approachable; condensed uppercase sans serif type can feel mature/confident)*

- specific colours or colour combinations should be used to define or underscore a key message *(if the logo needs to feel approachable, perhaps blue is more effective than red; if the logo needs to feel confident, perhaps red is better than green)*
- eliminate all decorative elements in a logo design: decoration is never meaningful
- look to the use of visual metaphor to communicate with poetic potency *(an apple can represent knowledge, a turtle can represent reliability, wings can represent freedom)*

Good logos are: Well crafted

Logomarks must be expertly crafted and beautiful to behold. As ambassadors for brands and representatives of the collective efforts of entire organizations, logos should be dressed to impress. Even though the audience may not be equipped to articulate the visual quality of a logo, poor execution still has a negative effect on viewers. Like bad karaoke, the audience can hear when something is off-key, even if they are not trained singers themselves.

What contributes to a well-crafted logo?

- ensure all kerning *(letter-spacing)* is specifically adjusted for an optimal presentation of text
- ensure that the wordmark uses proper typographic marks *(apostrophes instead of footmarks, optically sized trademark symbols, etc.)*
- avoid machine skewed type effects by using actual condensed, extended, italic, or bold typefaces when required
- pay attention to the appearance of curved lines *(making sure there are no unwanted bumps, wobbles, or nipples)*
- avoid creating awkward shapes or gaps when overlapping elements by giving each component room to breathe

Tackling the logo design process

Good

Research:

- Do quick internet searches on the list of competitors provided by the client; build a small reference folder of logo images and site bookmarks
- Look at the social properties of various competitors and review the audience of people who are engaged in conversations with those brands

Divergence:

- Set aside 1 or 2 afternoons for divergence and visual exploration
- Explore how different ideas can be expressed in sketches; stay off the computer

Convergence:

- Identify the most effective sketches and convert them to vector
- Experiment with stroke weight, colour, proportion, and positioning
- Choose meaningful typefaces that align with the creative brief

Presentation:

- Email a PDF presentation with notes or conduct a screen share to review the concepts
- See section 4 for suggested approaches and content of presentations

Revisions & Delivery:

- Include at least 1 round of revisions in the initial project scope
- Ask for the client's feedback in writing
- Make revisions to the selected concept based on client input

Awesome!

Research:

- Research local/global competitors; build image resource folders of their branding assets; take notes on their messaging strategy and other art direction
- Build a file that demonstrates the primary brand colour of various competitors
- Look at the social properties of various competitors and review the audience of people who are engaged in conversations with those brands
- Prepare a questionnaire and conduct user interviews to determine how people feel about a particular product or service

Divergence:

- Reserve at least 1 week for divergence and visual exploration
- Keep a sketchbook on hand at all times
- Explore how different ideas can be expressed in sketches
- Push past the initial layer of ideas; find other ways to represent key ideas; combine approaches to create new concepts
- Stay off the computer!

Convergence:

- Identify the most effective sketches and convert them to vector
- Experiment with stroke weight, colour, proportion, and positioning
- Isolate successful vector renderings and perform additional cycles of digital divergence; see how else that idea can be represented visually
- Apply meaningful type selections to each concept; explore a range of options

Tackling the logo design process

Good (cont.)

- If additional rounds of revisions are required, estimate and bill for the time required
- Prepare approved logo files for delivery – see section 5 for tips on building out the final Logo Pack deliverable

Awesome! (cont.)

Presentation:

- Meet with all stakeholders to present concepts; provide print outs or follow along screen presentation; provide a PDF after the presentation with slides and summary notes of each concept
- See section 4 for suggested approaches and content of presentations

Revisions & Delivery:

- Include at least 2 rounds of revisions in the initial project scope
- Ask for the client's feedback in writing or provide a written summary of revisions discussed in person
- Make revisions to the selected concept based on client input
- Continue to refine the mark if an additional round of work is required
- Prepare approved logo files for delivery – see section 5 for tips on building out the final Logo Pack deliverable

Another Thought

Music is a time machine

A metaphor is a form of communication that equates two things by highlighting some hidden or implicit similarity between them. "Music is a time machine" is a metaphor because 'music' does not literally 'transport someone back in time.' By claiming that music is a time machine, the phrase identifies points of comparison between both things and suggests a fundamental connection.

When metaphors are used in logo design, the viewer is encouraged to consider the similarities between the brand and the objects and ideas in the logomark. Twitter is a good example: a tiny songbird is used as a metaphor for mobile communication and community dialogue. By using a songbird as their brand icon, Twitter successfully associates their service with the idea of short, sweet messages that can be shared from essentially anywhere. That little bird does some very heavy lifting.

Keep in mind that metaphors don't need to be explicit illustrations, or actual pictures of something – the application can be much more subtle. Selection of a bold font for the wordmark can communicate stability, trust, or confidence. Using rounded geometric forms in a brand icon can be a metaphor for playfulness or youth. Rigid forms in the logomark can equate the brand character with a concept of maturity or precision.

The overt or subtle use of metaphor in a logomark is a sure way to add layers of meaning while increasing the potency and effectiveness of the design.

Section 3

Visual Identity Design

Logos are designed to be used. We believe that the relationship between the logo and supporting elements is the real design deliverable. The client doesn't need a great logo – the client needs a great logo that is brought to life by a beautiful system, one that helps communicate more dynamic and targetable brand messages through the thoughtful combination of visual elements.

A good identity design considers the requirements of logo application to various collateral pieces and provides a plan for consistency. This is achieved through the design of mock pieces, which are then presented alongside each logo concept. These example pieces can be further explored and revised once the client chooses an initial design direction to pursue.

In addition to a logo design, our identity presentations propose an art direction through typography, type pairing, colour, and image treatments.

Typography

Typography is a vessel for mood and emotion, and the selection of supporting type is the soul of every visual identity.

An effective supporting type system will identify which font size and style should be used to present various pieces of written information. Headlines, intro paragraphs, body paragraphs, emphasis text, and numeral treatments are a good starting point. Identities that more articulately describe the use of fonts will benefit from greater consistency across various collateral applications.

Type Pairing

Blending the use of two *(or more)* typefaces is similar to the blending of flavours: a more interesting and dynamic experience can be the result. And pairing two typefaces can help the designer satisfy the brief. For example, if the brief calls for the design to feel "established and approachable," perhaps that result could be achieved by combining a professional-feeling serif wordmark with a friendlier, humanist sans serif body typeface.

Colour

A meaningful colour palette will elevate any identity system. It has the power to symbolize an idea, evoke emotion, and relate directly to cultural stories and values. Colour is a core element of visual language that people process before they are consciously aware of it. Because colour is such a powerful element of visual communication, it's important to use it intentionally.

Primary, secondary, and supporting colour families should be selected with the audience's visual vocabulary and expectations in mind. Designers should also give the competitive landscape special attention to ensure the identity design is intelligently positioned in the group, either through harmony or contrast.

In addition to single, 2-colour, and full colour versions of the core logomarks, there are other special applications of colour that need to be considered. The identity should define digital palettes *(like links, button colours, and web typography)* and other targeted treatments that may be used by specific applications *(like the colour of uniform material, or Pantone specials only achievable in offset printing).*

Building a rich system

Type and colour are usually the pillars of a visual identity system. An art direction can be further enhanced by incorporating graphic elements such as photography, illustration, and pattern, and through specific, consistent usage of design principles.

Photography & Image Treatments

A consistent approach to photography, both in style and subject matter, creates an additional through line that audiences recognize and associate with the brand. Intentional image crops, standard colour treatments, and other filters/effects are important to consider when establishing an art direction. For example, if the tabled identity concept suggests portraits of people are an effective way to connect with the audience, make a plan for consistent lighting, cropping, background, and model styling/tonality if possible. This will result in a style of photography that is as memorable as the logomark itself.

Illustration

Illustration is a great way to capture abstract ideas in a visual form *(something that is often difficult with photography).* They can be informative while adding additional character to the brand voice. Like photography, illustrations also need a consistent approach to visual execution, visual tonality, and subject matter to maximize their effectiveness in an identity context.

Pattern

Just like a brand mascot or illustration style, the use of pattern in an identity system can become an iconic element that the audience recognizes and gravitates towards. Whether it's a single pattern used in various applications, or a family of different meaningful patterns, they can be a successful way to visually communicate an additional layer of brand character. Well executed patterns also provide a brand with more visual versatility, as they can be applied to specific visual environments that other identity elements may have trouble with *(like wrapping papers, textile designs, and backgrounds for text).*

Showing a logo design concept in context

Good

Sample Applications:
Consider these simple logo applications that don't require the design of additional layouts:

- presentation folder
- tshirt/uniform
- mug
- step & repeat pattern
- app splash screen
- truck graphic
- bag
- environmental graphic

See section 4 for more info about the full contents of a visual identity presentation

Awesome!

Sample Applications:
Consider these more complicated logo applications to help show the concept in context. These may take more effort to create since they involve more content and craft than just applying a logo to a space:

- business card
- responsive web design
- presentation deck
- brochure
- postcard
- corporate badges
- billboard
- print advertising

See section 4 for more info about the full contents of a visual identity presentation

Another Thought

You're just my type

Type selection is one of the fastest ways to make or break an entire visual identity system. Each typeface comes with a world of meaning and history baked into its humble glyphs. Good designers can anticipate how a typeface *(or type pairing)* will resonate with a specific audience, and can make intelligent selections that will deliver the intended meaning of the text.

Interpretation of type is always subjective, and is based on the visual and cultural vocabulary of the viewer. However, there are some common audience reactions that can be anticipated: serif typefaces tend to feel more traditional than sans serifs *(thanks to the history and chronology of type design),* uppercase text settings typically feel more mature/rigid than lowercase settings, and Comic Sans shouldn't be used on anything that wants to be taken seriously.

Beneath the more obvious layers of association is a world of typographic nuance and subtlety that is experienced on an emotional level. The designer's careful engineering of these characteristics should be explicitly noted in a visual identity presentation to support each concept's rationale. An example comment could sound like, "This rounded font used in a lowercase setting feels friendly to directly appeal to the desired 'approachable' quality defined in the creative brief." It's important for designers to clearly justify and articulate their type choices so that clients can better judge the effectiveness of those selections.

When selecting type for wordmark concepts and as supporting type pairings, consider the following:

- how does the font feel visually *(based on its geometry/structural detail, overall weight, style)?*
- are those feelings meaningful to the key concepts in the creative brief?

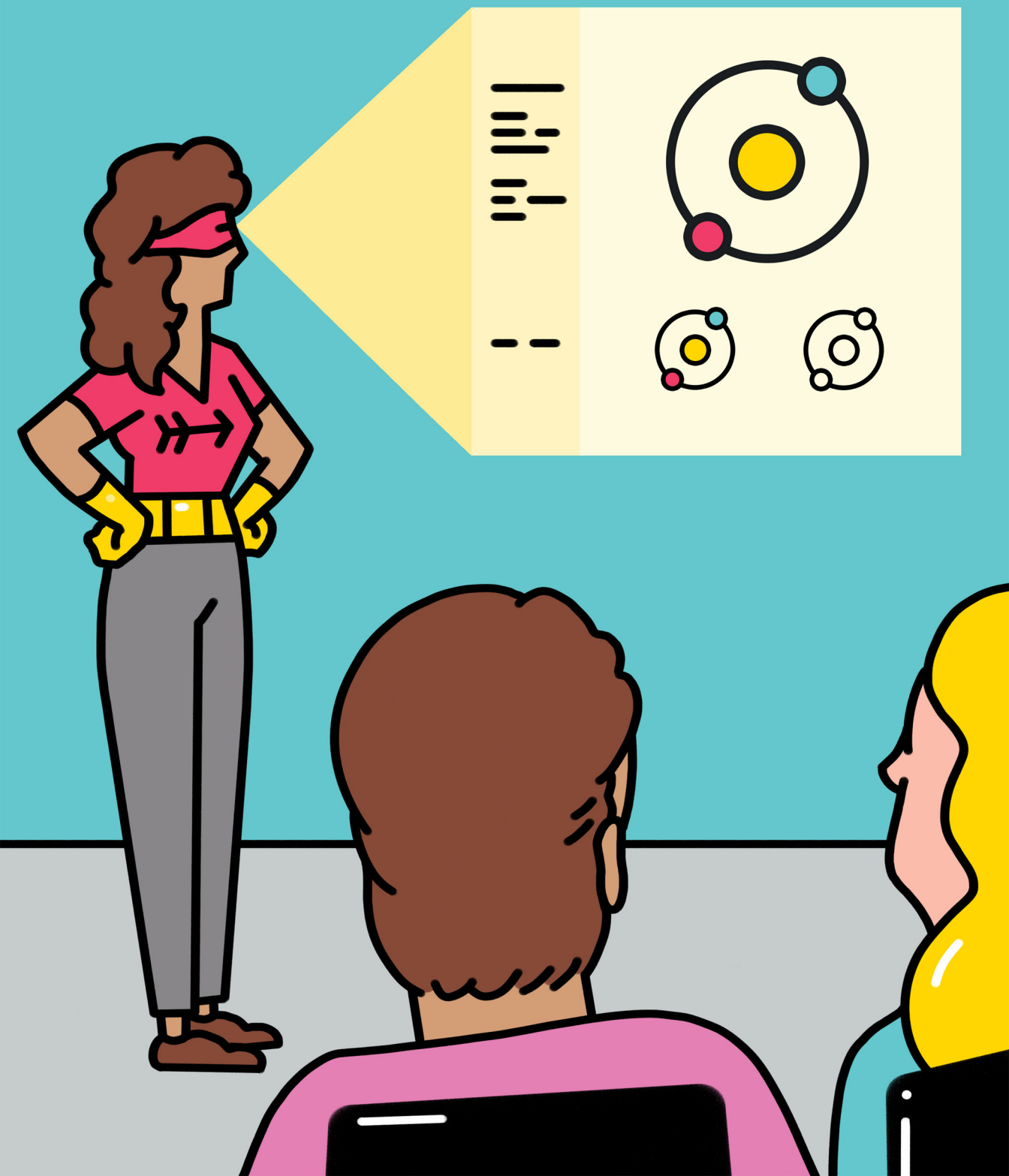
Another Thought

You're just my type (cont.)

- what text setting *(lowercase, Title Case, camelCase, ALL CAPS, etc.)* or tracking/letter-spacing is suitable for the font in order to convey the right message to the audience?
- are there any existing cultural references to the typeface that should be weighed? *(e.g., Didot and other modern serif typefaces are dripping with 'fashion' references in our visual landscape, which may cause a mixed message if used incorrectly)*
- are the selected typefaces well crafted and technically suitable for the needs of the identity system? *(e.g., if print collateral appears in English and French, does the selected typeface provide the appropriate French accents?)*
- is the selected type complementary to the message or meaningfully opposed?
- is the selected type pairing visually and conceptually harmonious? *(whether the pairing is selected based on complementary or contrasting geometry or the history of the typefaces, it's important that the pairing is meaningful to the creative brief)*
- will the selected fonts provide enough versatility to satisfy all the needs of the visual identity system and deliver the right feeling and message across all touchpoints?

Section 4

Notes on Presenting



Good design does not sell itself. A thoughtful and articulate presentation of design work is essential if a successful concept is to become a real solution. The designer needs to capitalize on their intimacy with each concept and clearly explain how they solved the challenge.

Many successful designs are simple. Designers must reveal the intentionality behind these seemingly simple solutions to their clients. Clients need to be shown that a particular typeface, or some other visual treatment, has been chosen because it directly applies to an aspect of the creative brief.

We never share sketches with the client – they contain too many ideas for a targeted, effective presentation. Sketches also typically fail to demonstrate an articulate solution. Instead, we usually share our first round of logo convergence. These ideas are confidently defined, but still offer the client an opportunity to weigh in on the visual design early in the process.

We always table at least 3 logo/identity concepts. This allows us to explore multiple interpretations of the creative brief and can help the client confidently choose a design direction to pursue.

We don't include any concepts that make us nervous, or that we wouldn't want to see live in the world. Sometimes a client will ask us which option we prefer personally. We tell the client that we believe in all of the concepts presented, and that it doesn't really matter which we prefer – they should choose the concept they believe will resonate most powerfully with the audience defined by the brief. Research is extremely valuable, but designers will never have the same degree of audience

intimacy as the client. The client is in the unique position to select a design based on their deep understanding of their business, audience, and communication goals.

Tips for murdering a design presentation

1. **Review the brief**

   Every visual identity presentation should begin with a quick recap of the approved creative brief. This will calibrate all parties prior to the assessment of work. Design is the solution to a problem, and each design needs to resonate with a target audience. Referring to the brief before sharing concepts provides a refreshed perspective on the task at hand. And by encouraging all parties to view the work from the audience's perspective, personal bias is reduced.

2. **Review the competitive landscape**

   Occasionally, our presentations take a quick spin through the competitive landscape before showing design concepts. Sometimes competitive landscapes can be dominated by common themes or colours – we use this as an opportunity to show how specific concepts could be positioned against those existing designs. For clients that live in more saturated or fiercely competitive spaces, this simple positioning step provides a valuable vantage point for assessing the effectiveness of the following concepts.

3. **Highlight the details**

   Each concept needs to be thoroughly explained. Details that may seem obvious to visually-minded designers can be lost on a client who may not have as much experience reviewing and assessing visual nuances. We leave nothing to chance. We feel it's better to err on the side of thoroughness than to have some valuable strategy or detail go unnoticed. Additionally, each concept should be presented with as little personal bias as possible, allowing the client to assess how each solution meets the needs of the creative brief.

4. Set a comfortable pace

Pacing describes the rate at which concepts and slides are presented. This is highly variable and needs to be adjusted on a per case basis. Our general recommendation is to go slow. Designers spend hours staring at and refining visual concepts. They are intimate with the details, but can forget that clients are seeing the work for the first time. Clients need time to take in the details and assess the work from the perspective of the audience.

In addition to moving slowly between slides in a presentation, we also suggest putting pauses between each concept. Like a bite of pickled ginger between sushi pieces, blank screens between identity concepts can cleanse the visual palate and build anticipation for the next 'bite.'

5. Show each concept in a standardized way

Present all logos and example applications in a standard format. We strive to establish a consistent visual system to show the components of an identity so the client is better able to focus on the differences between each creative solution, rather than variations in the presentation itself.

In general, we include the following slides for each concept:

- **Primary logo design**
  The logo design should be shown alone on white space at a reasonable size *(not comically large)* so the client can appreciate the mark's details and communicative value.

- **Size reductions**
  Demonstrate that the logo can be reduced to very small sizes and still retain legibility – if it doesn't work small, it doesn't work at all.

- **1-colour version**
  Even if the client has not requested a 1-colour version, include one to demonstrate the versatility of the logo design, and its ability to anticipate any future production requirements.

- **Alternate versions / lockups**
  Show any secondary lockup configurations that may be required for specific deliverables, such as square social icons.

- **Colour palette**
  Isolating the colour swatches from the logo design helps the client fully consider and appreciate the palette so they can judge its effectiveness.

- **Type pairing**
  Choose a sample text setting of relevant content to outline the proposed fonts for headings, subheads, body text, etc. Provide licensing information and costs associated with each proposed typeface.

- **Basic applications**
  Choose example applications that are relevant to the client's business goals or audience expectations. Apply the logo and other identity elements to these applications to demonstrate the viability of each proposed identity system.

- **Summary**
  Include the main logo design, size and colour reductions, selected example application, and a short written summary of the approach. Ideally these summary pages should be printer-friendly *(so no solid black backgrounds).*

6. Summarize each concept

As mentioned above, it's important to include a summary slide at the end of each concept before moving to the next. This provides a concise picture of the proposed identity concept and gives the client an idea of the whole system. Each summary should include the logomark, size and colour reductions, a couple of important example collateral applications, and a short written description.

These summary slides can be pulled out of the presentation and delivered in a solo, printable deck for the client's convenience.

Recipes for a successful identity presentation

Good

Presentation Intro:

- Bullet point notes, audience recap, and key concepts from the creative brief
- List of biggest competitors as a reminder of how the work will be positioned

Logo & Visual Identity Presentation:

- Present at least 2 concepts to the client
- Each concept should include:
  - the logomark
  - size reductions of the logo
  - 1-colour version of the logo
  - an example icon treatment
  - basic type pairing
  - a simple example application to demonstrate the logo in context (e.g., tshirt design)
  - summary

Delivery Format:

- Prepare a single flat image for each concept
- Email the presentation with notes to elaborate each design solution or conduct a presentation via screen share
- Request client feedback and revisions by email

Awesome!

Presentation Intro:

- Full reiteration of the creative brief details, summarized in bullets points and diagrams
- Audience profiles and summary to remind everyone who the work is trying to reach
- In-depth competitive landscape analysis with visual examples and notes about each competitor – focus on the tone and voice, general art direction, and their approach to copywriting and logo design

Logo & Visual Identity Presentation:

- Present at least 3 concepts to the client
- Each concept should include:
  - the logomark
  - size reductions of the logo
  - 1-colour version of the logo
  - alternate lockup versions of the logo
  - colour palette in use (swatches and any associated mood images)
  - type pairing and licensing info
  - example icon treatments in context for various social media uses
  - a variety of more complicated sample applications to demonstrate the logo in context (e.g., business card design, print ad, example use in the nav of a web page with proposed type systems)
  - summary

Delivery Format:

- Prepare an annotated, multi-page PDF or presentation web site with all concepts
- Provide written rationales for each aspect of the concept (not just the logomark)

Recipes for a successful identity presentation

Awesome! (cont.)

- Schedule a meeting with all stakeholders to walk them through the designs on screen; provide print outs to reference during the presentation
- Capture first blush feedback and answer questions to help validate concepts
- Following the meeting, email the printer-friendly PDF presentation with summary slides of each concept, or leave a copy of the presentation on USB
- Schedule another meeting or call to discuss additional feedback and revisions
- Request client feedback and revisions by email or capture verbal feedback in writing for the client to review and confirm

Another Thought

Presentations need to be designed

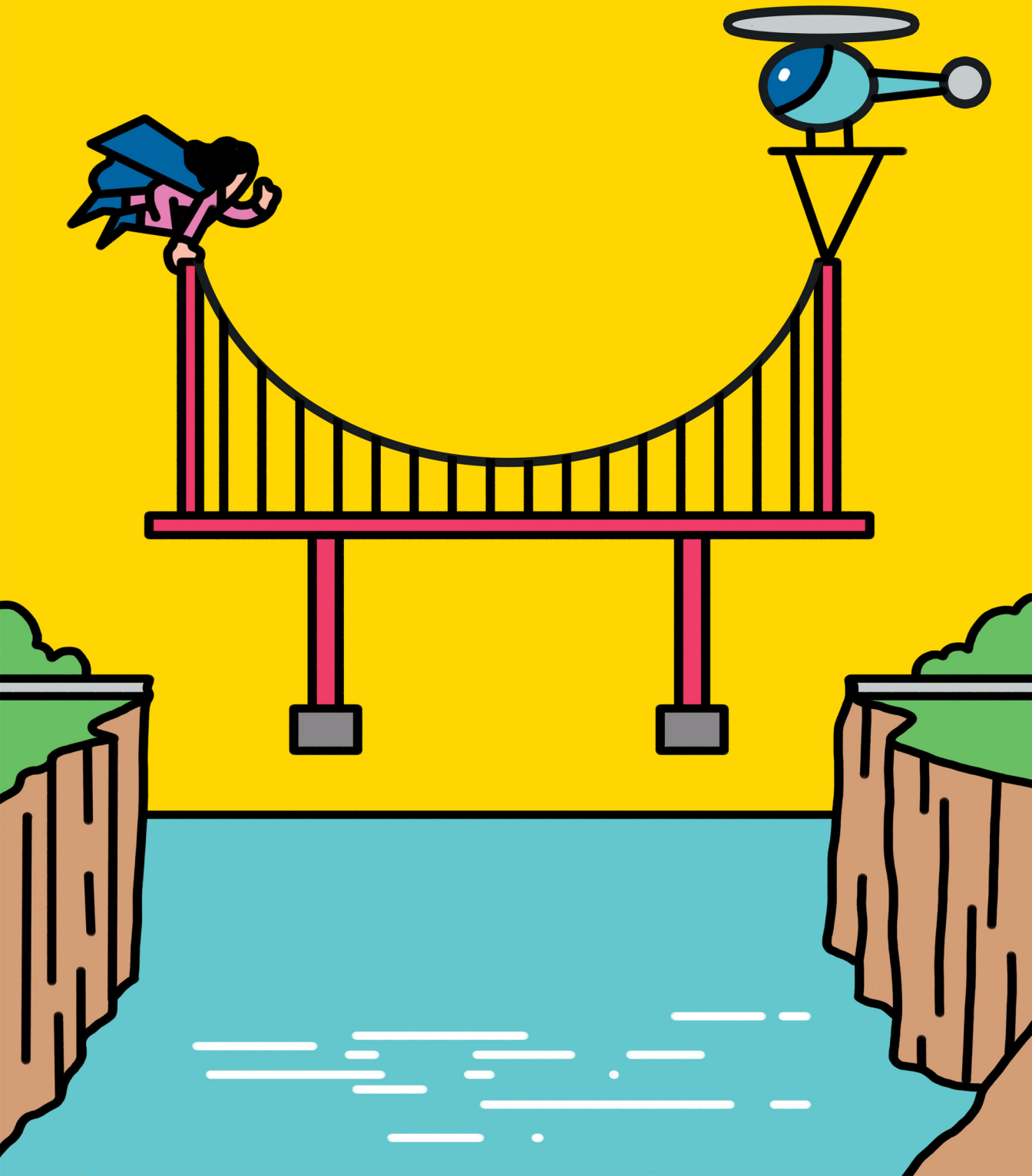
It might sound a little meta, but presentations are design pieces themselves. Beyond solving the initial design challenge of creating effective logo and visual identity concepts, designers face an additional design challenge of deciding how to best present *(and sell)* those concepts. In the case of a logo presentation, the client is the audience. Designers need to fully consider the best way to appeal to the client's sensitivities and tailor their presentation. How much time and patience do they have? What would comfort or confuse them? What are their expectations and what is their level of visual acuity or savviness?

In terms of pacing a design presentation, we approach the problem by considering what the client is expecting to see, based on our past interactions and discovery meetings. Designers make a living on being able to empathize with others and consider different user experiences from their perspective; crafting a presentation is no different.

By delivering a presentation within the comfort zone of the client, you are less likely to scare them off or make them nervous *(unless that is the desired effect, in which case, ignore this advice!).* Suppose we're presenting a logo redesign and throughout the discovery process the client has seemed reluctant to move away from the existing logomark. We'll take that into consideration when crafting our presentation. Our presentation may start with a logo concept that feels closest to home, reassuring the client that we're taking baby steps. From there, we would slowly migrate to concepts that feel like more of a departure.

Section 5

Revisions & Delivery



Revisions are a fact of life and a vital part of the design process. They provide opportunities to delve further into the most effective ideas.

Client feedback should be centred around the identity concept that most successfully addresses the requirements of the creative brief. Revision notes should be framed as issues *("this concept doesn't feel confident enough")* rather than solutions *("make the logo blue").* This allows the designer to explore diverse solutions to the problem, rather than implementing a revision that may not address the core issue.

Revisions to a concept should always be captured in writing so there is a list of approved changes for everyone to reference. Whether the client provides feedback via email, or the designer sends over meeting minutes of the requested changes for the client to approve, it's important that the revisions are written down. This helps ensure everyone is on the same page and makes it easy to track and delineate the rounds of revisions.

Once the final identity design is approved, the logo files should be packaged in a way that non-designers can easily use: think JPGS and transparent PNGS of all versions. Source artwork, fonts, and colour palette references should also be provided for anyone who needs to work with the visual identity in the future. Bonus points are awarded for more specialized file formats that may be requested down the line: SVG, PDF, or legacy working files.

Logo Pack FTW

Good

Revision Process:

- Include at least 1 round of revisions in the initial project scope
- Ask for the client's feedback in writing and make revisions to the selected concept based on input
- Continue to refine the mark if an additional round of work is required; estimate and bill for the time required
- Prepare approved logo files and visual identity design for delivery (the Logo Pack ZIP)

Logo Pack Contents:

- All logo files in full colour, 1-colour, and alternate lockups provided as AI for use in print
- All logo files in full colour, 1-colour, and alternate lockups provided as JPG, transparent PNG, and SVG for use in digital
- Collection of square logo JPGs or PNGs in different colours for use in social properties, app icons, etc.
- Master AI file of all logo lockups in all colours with organized/named colour swatches
- Fonts used in the logo and visual identity design (depending on license)
- PDF or web page colour reference sheet with swatches, cymk, and rgb/hex values

Awesome!

Revision Process:

- Ask for the client's feedback in writing or provide a written summary of changes discussed and make revisions to the selected concept based on input
- Continue to refine the mark if an additional round of work is required; estimate and bill for the time required
- Prepare approved logo files and visual identity design for delivery (the Logo Pack ZIP)

Logo Pack Contents:

- Table of contents readme.txt providing direction on when each logo file should be used
- All logo files in full colour, 1-colour, and alternate lockups provided as AI, EPS, PDF for use in print
- All logo files in full colour, 1-colour, and alternate lockups provided as JPG, transparent PNG, and SVG for use in digital
- Collection of square logo JPGs or PNGs in different colours for use in social properties, app icons, etc.
- Master AI file of all logo lockups in all colours with organized/named colour swatches
- PDF or web page style guide of typography
- Licensed fonts used in the logo and visual identity
- PDF or web page colour reference sheet with swatches, cymk, rgb/hex, and Pantone values
- PDF or web page of basic logo standards guide for alignments, clearspace, other usage details, and dos and don'ts
- Library of any additional art direction elements like pattern swatches, sample photography, PSDs of photo filters, or GIFs showing approved logo animations

Another Thought

"How much for a logo?"

We recommend designers look at every new project through the lens of process *(not delivery)* when building an estimate. It's important to remember that identity design is a multi-phased effort that takes time, even if the end deliverable is a simple graphic mark expressed within the boundaries of a simple visual system.

When it comes to quoting, the best a designer can do is spell out their process and decide on a price that is fair compensation for the time and skills required. This can be done by tallying hours required by each step of the process, or by considering the final solution and charging a fixed fee based on the value it delivers. Whichever the case, clients should understand that quality design requires skill, and that successful identities have the power to define businesses and drive prosperity.

Closing

TL;DR: design is a process that delivers a solution to a problem. When it comes to their audiences, most brands want to be taken seriously. Even if the underlying message is lighthearted or whimsical, good design can ensure that a brand feels credible and trustworthy.

Visual identities are more important than logos. The quality of an identity design directly represents the quality of a business, service, person, or product. Sometimes identity design is the only visual manifestation of a particular service or company.

Last but not least: identity systems allow brands to communicate with consistency. A sense of consistency is valuable because it promotes memorability and recall. It creates trust and builds affinity. Consistent visual communication facilitates brand loyalty and all the great things that follow: rewarding experiences, referrals, and repeat business.

Thanks for reading!
We hope you've discovered something useful about the creation of visual identities that can be incorporated into a future project. If you found this information valuable, please share it with a colleague.

We released this as a **pay what you want** resource so more creative professionals would be encouraged to examine what

goes on behind the scenes of a logo design. If you feel this guide is valuable to your workflow or business, consider making a contribution at *studiofunction.com/logo-design-guide/* or help us spread the love with a tweet.

More from our brains

If you have the energy for more words from us, we also wrote The Dev Pack: A guide to preparing design mockups for development. This resource recommends and outlines different ways to prepare visual designs for dev handoff *(beyond sending a PSD).* Grab it from *studiofunction.com/dev-pack-guide/* and let us know what you think!

About Studio Function

Our studio is built on three key ideas: We want the freedom to ask the right questions. We want to produce meaningful, functional, beautiful designs. And we want to partner with clients that are solving important problems.

Special thanks

All illustrations in this PDF are by Sam Island. Check out more of his work at *samislandart.com*. Copy editing and general good vibes provided by Caleb Sylvester.

Colophon

This PDF was created using Adobe InDesign. The text is set in *Crimson Text* by U of T engineering student Sebastian Kosch, available via Google Fonts. Headlines and other chunky bits are set in *Nimbus Sans Novus* by URW++.

Help us improve this guide

Our visual identity design process has been a work in progress over the last decade. We're always on the lookout for different approaches and would love to hear your feedback. Tweet @studiofunction or email us at info@studiofunction.com and let's chat.