CLIENT
GUIDE
to creative services

Your project matters. That's why understanding what happens behind the scenes is an important part of making your work successful. From planning to printing, this guide explains how clients and designers work in harmony to create beautiful and lasting design.

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1 PLANNING

A great project begins with great planning. To achieve the best results, consider each of the following variables before you consult with a graphic designer.

> MANAGERIAL DECISIONS

It is not uncommon for friends, family, and/or committee members to offer their insight during a design project. Although group input is sometimes necessary, it can also complicate and delay the process for the designer. It is therefore important to assign a single person as the **project manager**, who will act as the primary decision–maker, administer communications, and serve as the main liaison with the designer.

> SCOPE OF WORK

Giving forethought to a project in its entirety will result in a clearer strategy, realistic budget, and reasonable timeline. Such considerations should include the project's due date, format, and potential need for any supplementary services (including research, writing, editing, artwork, printing, etc.)

> DISTRIBUTION

Consider how the final piece will be circulated. Will it be reproduced on paper or distributed on a digital platform? Will it be snail–mailed, e–mailed, distributed at meetings, or given out to the public? Will it be produced for a specific event, or used throughout the year? These factors are important when considering a project's budget and design.

> PRINTING

- **Quantity:** How many copies will be needed? It is usually most cost–effective to print in large quantities initially versus paying for smaller runs or reprints at a later date.

- **Page Size:** Common paper sizes in inches include half–letter (5.5 x 8.5), letter (8.5 x 11), legal (8.5 x 14), and ledger (11 x 17). Large–format printers can produce print up to 50" in height and unlimited length.

- **Paper Choice:** Your designer can provide a variety of paper samples, including cover and text weights, coated and uncoated stock, as well as recycled/eco–friendly options.

- **Color:** CMYK "process" printing uses an overlay of four colors (**C**yan, **M**agenta, **Y**ellow, and Blac**K**) to produce a fully–colored image for print. Alternatively, the RGB color space—comprised of **R**ed, **B**lue, and **G**reen—is for online viewing only. Your designer will make sure the correct color space is being used during the creative process. **Offset** printing uses different and sometimes custom–made inks for higher quality prints, but at far greater expense. Offset should be reserved for very large print runs or those which require extreme color precision, like major color–based brands. "Tiffany Blue" is so recognizable that it is protected by trademark!

2. CONTENT

Great design is only as good as its content. Consider who will provide the information for your project, what it will say, and how it represents your project goals.

> CONTENT STRATEGY

Keep your project's objective in mind as you consider these variables:

- Determine which **assets**—such as text, images, illustrations—will be included in your project, as well as who will provide them.

- Determine which grammatical style (e.g. APA or Chicago) you wish to follow to keep your text flow consistent. This is especially important for projects with long text.

- Consider how any past work will influence your new project. Will you be using the same colors or fonts? Infographics? Footers? Or will your new project be completely unique?

- Consider who your audience is and why you want to reach them. To raise money? To sell a product? To share a skill? How does *your* project meet *their* needs?

- Contemplate your project's tone. Which emotions do you wish to convey to your audience? Should your project make them feel happy? Amused? Concerned? Inspired?

> CONTENT CREATION

To avoid errors late in the process, a client's responsibilities include:

- Researching and checking content for **factual accuracy** (e.g. dates, facts, figures, etc.)

- Checking that **contact information**, including titles and names, is correct.

- **Proofreading** for content, spelling, and grammatical errors.

- Making sure that any other person involved in approving the design project **authorizes** the final version.

> CONTENT SUBMISSION

- If someone is hired to produce content (e.g. a photographer), make sure to have all of the necessary **permissions** to use their work in your project. Such content should be given to the designer at the beginning of the project.

- Text should be submitted in a Microsoft Word document. With the exception of paragraph breaks, all formatting should be left to the designer.

- All images must be submitted or purchased in high resolution (**300 dpi**). Images that have been embedded in documents or copied from websites cannot be used. Logos should be submitted in vector (*.eps*, *.ai*, or vector *.pdf*) format.

> CONTENT EDITING

Any changes to content made by the designer for the purposes of style and consistency will be resubmitted to the client for approval.

3 DESIGN

Graphic design isn't just about creativity. It involves a precise blend of organization, research, revision, and attention to detail.

> BRAINSTORMING

After meeting with a client, the designer will draft a creative brief outlining each of the project **deliverables** (requirements). Everything discussed during the intial consultation is used to begin generating concepts and ideas, which the designer will begin to explore through sketches, mind–maps, and other creative avenues. At this stage, great consideration is given to the client's brand and message.

> COLLECTION OF ASSETS

Whether provided by the client or the designer, all design elements (assets) **must** be in place **before** the execution of a project. Such assets may include photographs, illustrations, text, logos, charts, graphs, fonts, and color palettes, some of which the designer may help select. If the client prefers that the designer provide any or all assets, they must be discussed during the initial consultation and may require an additional **"incidentals" fee**.

> WORKING FILES

During the project, the designer will produce "in–progress" work that will be periodically shared with the client. This work undergoes numerous revisions in many phases, and will include many rejected ideas and sketches. When a "final" rendition is decided upon by the client, the designer begins to polish the design, paying close attention to color, typography, letterspacing, white space, organization, and visual hierarchy to ensure that the design has both a clear direction and a sense of purpose.

> TIMELINE CONSIDERATIONS

With a few exceptions, graphic design is genrally not a "lightning–fast" task! It requires research, creative exploration, and often a great deal of trial and error. Depending on the client's needs, the designer may also need to research content, take or create photographs and illustrations, sift through hundreds of stock images, experiment with dozens of fonts, and visualize how to produce complex information and data. Taking into consideration the client's deadline, an estimated time frame will be included in the Creative Services Proposal before the project is started.

> PROOFING

See section 4.

> DELIVERY

After a project has been completed and payment has been rendered, the finished product, along with an appropriate licensing agreement, will be delivered to the client.

4 PROOFING

Your project should be perfect. Reviewing text and materials before, during, and after submission helps to ensure an ideal outcome for your project.

> INTERNAL PROOFING (DESIGNER)

Although content should be proofed by the client prior to submission, the designer will also check the work for errors throughout the process. After a project has been completed, the designer will also conduct a **preflight check** to address any errors involving image placement, text overflow, color management, and file output. It is also standard to produce one or more printed proofs to see the project "on paper." After the designer is satisfied with the work, a digital and/or printed copy is sent to the client for further review.

> NUMBER OF PROOFS

Although three rounds of proofs are industry standard, with consistent and timely communication, the final project should be submitted for final review in nearly finished form. Projects involving extensive text—such as books, magazines, and reports—may require more frequent and more formal proofing by the client.

> EXTERNAL PROOFING (CLIENT)

The project manager should always attempt to coordinate and collect all edits from his or her committee and condense them into a compilation to be submitted to the designer as a single revision. This helps to avoid overlapping changes and addresses any internal issues collectively before changes are made to the project.

- The easiest way to make changes is to allow committee members to manage edits using the "Comment" editing feature in Adobe Acrobat. The "Annotations" panel provides various methods for marking up PDF proofs, but the simplest method is as follows:

  → Right–click the section or text in question to "Add Sticky Note." Here, the client can type his or her revisions into the comment pop–up box.

  → Consistently label revision versions with clear identification, using names like *ajp_5.24.2023* for reference.

> REQUESTED CHANGES

Because the project will be discussed in detail during the creative consultation, and its deliverables outlined in the Creative Services Proposal, any changes requested during execution should be minimal. Edits that are deemed "reasonably extensive" by the designer, such as text or images that require a re–flow of the design, will result in a **revision fee** and **timeline**.

> CLIENT SIGN-OFF

With the project manager's approval of the final work, the document will move into **prepress** (print preparation) phase.

5. PRINTING

Printing is an art unto itself, a intricate mix of art and science that requires careful consideration during the project's prepress stage.

> TIME FRAME

Turnaround for print runs can vary from days to weeks. The average process or offset job may take between 6–10 business days, although rush orders may be accommodated by the printer for an additional fee. The more "touches" there are on a project (e.g. trimming, binding, folding, etc.), the more production time is generally required.

> SPECIALTY PRINTING

Understandably, professional printers in metropolitan locations have bigger machinery and better paper selection than those in smaller areas. Specialty services such as large–format lamination, vinyl, foiling, die–cutting, embossing, and letterpress are often only available in cities or through specialty online printers. Any requests for special effects will factor heavily into a project's budget and must be discussed during the creative consultation with the designer.

> COLOR VARIATION

One of the greatest challenges in design is accommodating the vast variability in ink composition between printers. **In-house** (personal) printers are designed for just that, and should not be relied upon to generate colors as accurately produced as those by a printing service. Any materials to be distributed in a professional manner should always be printed at a printing service to ensure the best and most accurate color output.

> PRINTING PROCESS

Printing is a multi–step process:

- **Step 1 (Prepress):** The designer will ensure that the file is ready for print by executing a preflight check and managing color and font compatability during file output.

- **Step 2 (File Delivery):** The prepped file is transferred to the printer with an instruction sheet detailing the exact specification of the print run.

- **Step 3 (Printing):** Typical process (CMYK) prints are run on digital machines equipped with individual ink cartridges, while offset prints are run on metal plates and custom–mixed ink.

- **Step 4 (Finishing):** After being printed, jobs move to cutting and scoring machines, and / or folding and stitching machines for binding.

- **Step 5 (Delivery):** After the final piece has been printed, the client and / or designer will be notified. Delivery specifications should be decided upon during the creative consultation. **Voilà!**