



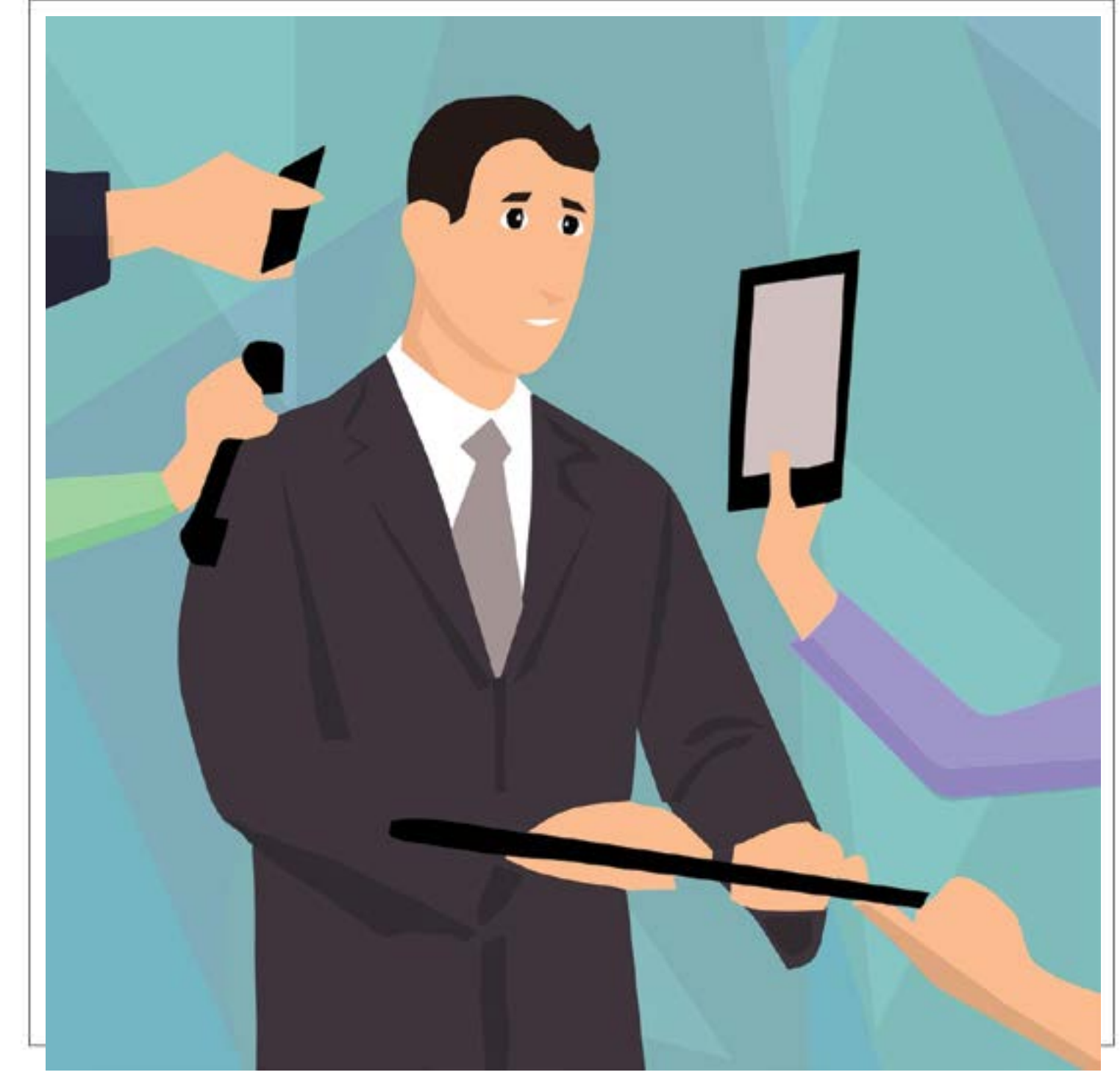
## Introduction: Project Management Basics

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## Getting Started: Methods and Procedures



### ● The Other Half:

Producing good design is only half of the battle.

The work that you do also has to be on schedule, be on budget, meet client expectations, and produce a profit for your design firm. A good system for planning and tracking projects can make all of this easier.

For example, you must define what your client expects to achieve. This involves establishing goals and objectives, deciding a course of action, and measuring the result to determine whether the design solution is successful. Such tasks might sound overwhelming, but they're really just practical questions that lend you strength just by asking.



### ▶ Making a Solid Plan:

Yes, design involves a great deal of research, abductive reasoning, visual investigation, and eventually the synthesis of concepts and treatments.

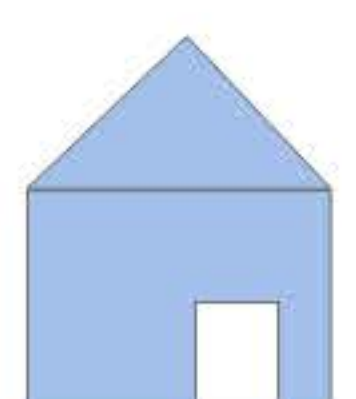
However, design is rarely ever a directionless free-for-all. Any designer who thinks design to be this free wheeling should reconsider their career choice and contemplate becoming an artist instead. You should start with some general preparation that is relevant to all of the client work that you do: map out your own preferred creative process, calculate standard billing rates that you can use in developing preliminary budgets, and research standard contract terms and conditions that are appropriate to the type of creative services that you provide.

### ▶ The Information Game:

Gather as much information as possible about the client and their business needs in order to clearly define the scope of work to be produced.

With this information in hand, you'll be ready to develop a comprehensive project schedule and budget. This internal planning should be done with a spreadsheet that will help you determine the size of the team that will be required, estimate the number of hours that will be needed for each person, and plan any outside expenses that will be necessary.

The design you produce isn't really for your client; instead, you are making design that needs to impact your client's audience. And until you appreciate what their audience needs, wants, and dreams about, the odds of facilitating a connection with this group is negligible.







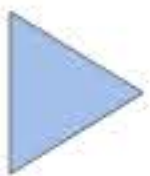
# Keeping Records: On the same page



## Creative Files:

Small firms tend to start with a manual system based on two separate files.

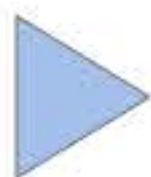
The first is the creative file, where you will accumulate the various design elements as they are developed. Here's where you keep your actual design files, the stuff you work on. Typically, it should contain nothing else but a list of files with your designs in various versions or revision stages, and other design-based things such as stock photographs used in the project.



## Business Files:

The second is the business file, which will contain the project's legal and financial documentation.

The business file will sit on the desk of the person primarily responsible for project-management issues, including budgets, schedules, and logistics. Invoices, payment reminder letters, sales brochures, email, balance sheets, spreadsheets, reports – All businesses create a variety of documents in the course of doing and keeping track of business. Over the course of the project, signed proofs from the design and production process will be collected as well. These might be included in the business file, but it's more likely that they'll be placed in the creative file for easier access by the rest of the design team.



## Tips and Tricks:

Keep the overall size of the business file manageable.

Do this by periodically weeding the folder or binder of any duplicate or out-of-date information. Don't throw anything away — just separate “reference” information that will be accessed often (such as the proposal, budget, and schedule) from “archive” information (such as earlier versions and superseded documents) that can be stored somewhere else.

How will your documents be filed? Follow good file management practices to decrease future workload and gain customer trust.

Create a File Locations List, which will remind users where particular types of files go – and where to find particular documents.







## Managing Changes: Adapt and Overcome



### ● Documentation

No project will ever go completely according to plan.

There will always be at least minor adjustments. If the changes remain within the overall scope that was previously agreed upon, however, they will not pose a problem. In any design project, it's a designer's job to challenge, to reframe, to provide the outside perspective. Designers know that it's a good strategy to try something crazy once in a while. It's not necessarily so that the strange thing you suggest is a good solution, but it sparks other ideas that might work.

### ▶ Trade-offs

Every designer knows that, on some projects, it takes a little longer to come up with the best creative solution.

For your own internal management purposes, you might be able to shift the budget around a bit between tasks or phases to accommodate this. Savings in one area can be applied to an overage somewhere else. Usually this is not apparent to the client.

Each journey starts with a single step.

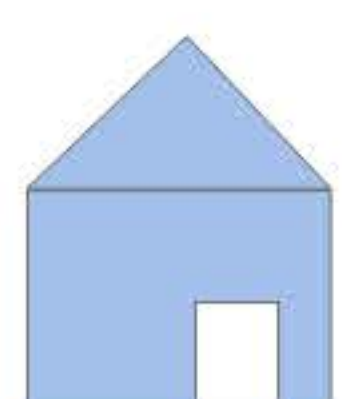
So you need to design the first step, the Minimal Viable Product (MVP). This is not only to get quick wins but also to learn if the solution you designed works in reality. As a designer, you will always strive to produce the very highest quality of work possible. As a businessperson, make sure that you are making informed decisions, with a clear understanding of the costs and the impact on your company.

### ▶ The Right Approach

To make your life easier, the process of generating a change order must be as simple as possible.

Many design firms place a pad of preprinted, multicopy change order forms near the telephone at each team member's desk. Do not perform the additional work until the client has signed the change order. On a fixed-fee project, make sure the client understands that this work will be billed in addition to the original contract total. Once the need for a change has been identified, the supporting information needs to be reviewed, added to and amended where necessary in order to support the amendment. If your client is making a large request for something "instead of" as opposed to something "in addition to," it may be time to re-estimate.

If a client initiates major changes to the overall specifications or scope of work partway through the project, just close out the old paperwork. This will allow you to start fresh with new documents, including a new proposal from the design studio and a new purchase order or requisition from the client.







## References:

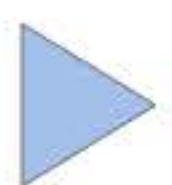
Resources for further learning

- Primary Source:

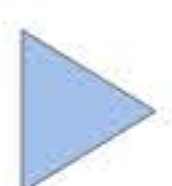
- Getting Started



- Keeping Records



- Managing Changes



- Graphic Citations



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