

The Design Process



Project Initiation

- Client identifies need or goal
- Client develops preliminary schedule
- If possible, client creates preliminary creative brief
- Client identifies potential designers and contacts them
- Client and designer meet for preliminary discussion and portfolio review
- Client creates and sends out RFP (request for proposals)
- Designers respond and submit proposal for design services



Orientation/ Research

- Client provides any relevant background information and materials
 - Designer leads client through creative briefing sessions
 - Client and designer commence research as needed regarding
 - Competitive landscape*
 - Target audience*
 - Market research*
 - Design research*
- Using any or all of the following:
- Observation*
 - Interviews*
 - Questionnaires*
 - Audits*
- Client and designer confirm any technical or functionality parameters
 - Client and designer confirm needs assessment and begin design problem formulation



Strategy

- Designer analyzes and synthesizes the research and information gathered
- Designer develops design criteria
- Designer develops functionality criteria
- Designer develops media delivery method plan
- Designer presents all of the above for client input or approval
- Designer develops and articulates a strategy for the design
- Designer develops preliminary plans: information architecture, pagination maps, and/or wireframes (if appropriate)
- Designer presents all of the above for client input or approval



Exploration

- Based on client-approved strategy, designer develops preliminary design concepts
- Designer's ideation can take the following forms:
 - Roughs/thumbnails/sketches*
 - Storyboards*
 - Flowcharts*
 - Mood/theme boards*
 - Look and feel*
 - POP (proof of principal) or proof of concept models*
- Designer presents the above to client for discussion, input, and approval
- Client provides insights and initial validation that the concept direction will meet the project's stated goals and objectives
- Typically, the designer will create several concepts that will be narrowed down to only a couple of concept ideas to be developed further



Development

- Based on client-approved concept ideas, designer further develops the design concept(s)
- These further iterations of the concept(s) will be provided as tighter representations of the design:
 - Comprehensive layouts*
 - Animatics*
 - Typical pages or spreads*
 - Preliminary prototypes*
- These will incorporate preliminary, often placeholder:
 - Copy/messaging*
 - Imagery*
 - Motion*
 - Audio*
- Designer presents the above to client for discussion, input, and approval
- Client provides insights and validation that the design direction will meet the project's stated goals and objectives
- Typically, the client will approve one design direction that will then be redefined by the designer

The Design Process (continued)

6

Refinement

- With a client-approved design direction, designer further refines the design
- Typically, the changes/modifications are
 - Based specifically on client requests*
 - Minor in nature*
 - Finessing of aesthetic elements*
- Designer presents the above to client for discussion, input, or approval
- Testing of the design may occur, and this may lead to another round of refinements. Testing may include
 - Validation*
 - Usability testing*
- Designer would then present these additional refinements to client for approval
- Designer initiates preproduction meeting with additional team members, if needed. These might include:
 - Printer/fabricator*
 - Manufacturer*
 - Photographer/illustrator*
 - Audio engineer*
 - Programmer*

7

Production

- With an approved design, the designer begins implementation of the design across all the required deliverables. This may include:
 - Print:** *mechanicals/key lines, finished art, digital files, camera-ready art, all elements final*
 - Web:** *modeling phase, detailed flowchart, all content, finished art for pages and graphic elements, programming, testing*
 - Motion:** *creating all project elements, animation making movies, shooting live action, editing, final rendering, mastering*
 - Environment:** *specifications, final prototyping, 3D digital models, testing in preparation for production, coordinate/manage technical team*
 - Packaging:** *high-resolution file prep per specifications, color correction, structural prototyping*

8

Manufacture/ Launch

- Depending on the project and delivery media, the production materials are often handed over by the designer to others. Although other professionals outside the design firm actually do the work in most instances, the designer must supervise these suppliers and their work. This can include:
 - Prepress/separator/printer*
 - Fabricator/manufacturer*
 - Engineer/programmer*
 - Media outlet*
 - Broadcast/on-air*
 - Launched on web/live*
- Designer may be engaged in the supervision or management of any or all of the above suppliers or it may be the client's responsibility
- Ongoing maintenance, especially in the case of web design, may be an aspect of the project, or it will be determined under a separate agreement

9

Project Completion

- Designer and client have a project debriefing (exit interview) to review:
 - Project procedures*
 - Outcomes: success or failure*
 - Additional opportunities*
- Designer archives project files. Also, writes up a case study while the project details are fresh. This is preparation for the project as a self-promotional tool.
- Designer closes out and invoices project
- Client pays designer