Clients: Friends You Never Had

Imprint

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Cover Design: Veerle Pieters
eBook Strategy and Editing: Vitaly Friedman
Technical Editing: Cosima Mielke
Planning and Quality Control: Vitaly Friedman, Iris Lješnjanin
Tools: Elja Friedman
Idea & Concept: Smashing Magazine GmbH

About This Book

A fruitful and balanced cooperation with clients is the dream of every designer. However, to bring this dream to reality, designers constantly need to prepare for the various challenges that different clients tend to bring along. Whenever things don't work out as expected or planned, or when opinions end up drifting apart, it's quite easy to put the blame on the client. But what can you do to generally improve the collaboration with your clients and — on a long-term basis — foster stable relationships in which both parties are actually pulling in the same direction?

This eBook covers both the designer's as well as the entrepreneur's point of view and is sure to provide you with valuable advice that you can easily incorporate into your own workflow when working with your clients. From structuring meetings to managing dissent and staying connected even after the project has ended, the authors of this eBook cover a variety of aspects to consider before, during and after a project. As you will see, it's the small things that make a big difference.

—*Cosima Mielke, Smashing eBook Producer*

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Getting Engaged

BY ANDY RUTLEDGE ❧

You probably hear about it every week, if not every day: a spiteful or ragged relationship has ended badly. There are bitter arguments, custody battles, legal entanglements, lives and homes broken in the wake of moral incompatibility, poor choices, and a lack of sober discrimination.

It's the predictable result of kids getting married too young or impassioned people who barely know each other rushing into marriage. The tale is often similar with designers and their clients after a rushed, ill-considered marriage.

Like most people, most designers have been through a bad relationship or two… with a client. The bad designer-client relationship is likely an inevitable early-career growing pain, and one difficult or near impossible to avert. The lessons learned in those bad relationships, however, probably pay dividends over time. So, despite the damage done, if you're responsible, you can grow from those trials and benefit from the experience.

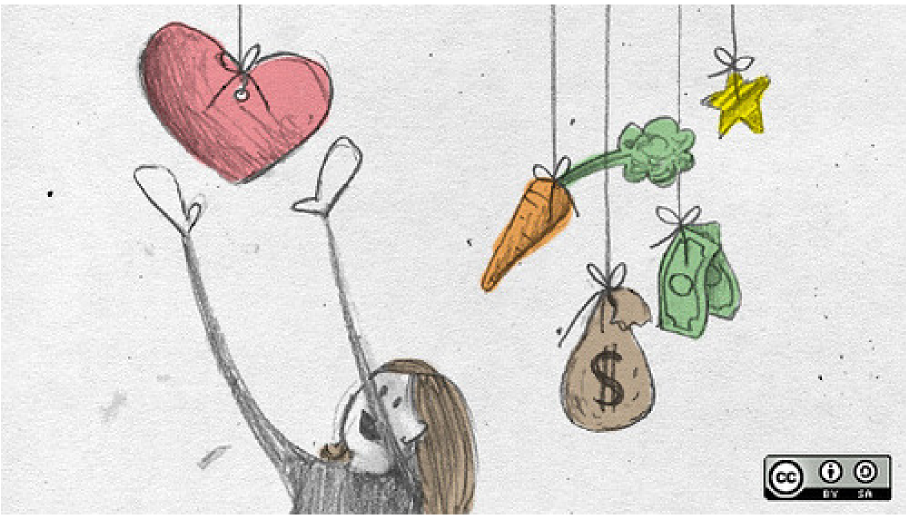
The sad thing is that too many designers serialize these bad relationships. Whether due to habitually poor choices, a lack of concern or simply an inability to find and fix the problem, they'll go from one bad hookup to another. Ironically, they also tend to complain about it as if the cause were someone other than themselves.

If you're a designer, then you are not an exponent of product creation, but rather an exponent of process. Successful design practice is the result of learning to coax, observe, indulge, respond to, and profit from process. But too many designers forget this fact when engaging potential clients. They'll thoughtlessly and irresponsibly aim for the first product — the signed contract — rather than for the fruit of responsible process, of a pre-bid engagement period. The inevitable result of such a shallow and ill-considered approach is a relationship based on almost nothing, flimsily built, and prone to crumble under the slightest stress. Meh. Easy come, easy go, right?

Hookin' Up

Yup, "hookin' up" is probably the best term for how most bad designer-client relationships get started. Forget the engagement: let's get us some instant gratification! The potential client is on the make for a designer and — wouldn't you know it? — the designer is aching for some cash. It's a marriage made in pimp heaven.

I'm no saint. I've done it. I could have done it a lot more, but for the occasional fit of rationality and responsibility. In all seriousness, many times a potential client has called and, if we hadn't been careful, we could have committed to a project within 15 minutes. It really does happen; sometimes a project's details are just that simple. But project details are not the most relevant details in a design project. There are important matters to consider: the people involved, for instance. How about we get to know one another first?



It's better to look at the people first than to ache for the cash. (Image source: opensourceway[1])

A design project is, first and foremost, a social relationship… you know, between people. It is the people who make or break a project. Not the contract. Not the deadline. The people. In light of this rather important fact, you might want to devote some energy to making the process productive to ensure that the people involved are compatible.

I remember once receiving an invitation to a small project from the owner of a well-known and successful digital products company (whose products most Web designers and small agencies use today). It was a short email simply asking if I was interested in throwing in. I replied that I might indeed be interested and asked when we might have a phone chat. I received an email reply that offered some project details and another invitation to decide whether I wanted to do the project.

1. http://www.flickr.com/photos/opensourceway/4862920379

Now, I'm sure that many designers would be quite happy to accept such a pleasant invitation based merely on this threadbare information, especially considering who it was coming from. One might even assume that this person had done his homework on us and was sure that I or my studio was a perfect fit for the project. Hrm… but there was the little matter of his not knowing me personally in any capacity and my not knowing him at all in any relevant context. We were, in every meaningful way, strangers. So, I replied that I remained interested, if we could but have a brief chat. I never heard from him again. Good riddance. I dodge bullets for a living. Some of them are easy to dodge.

You do not contractually bind yourself to strangers — not in marriage and not in design projects. You need shared footing. You need mutual understanding. You need mutual insight. You need an engagement period.

Getting Engaged

My wife and I knew each other in high school but didn't really connect until we met again years later in another city. We became friends, then good friends, then more than friends, and got engaged. We both felt sure about things, but we followed responsibility rather than mere desire and set a nuptial date that would give us a one-year engagement.

In that year, we got to know each other. We had the opportunity to learn each other's values, explore compatibilities and consider each other's character in good times and hard times. As our marriage date approached, our love had grown strong and was based on mutual respect and understanding, rather than on a rush of novelty and lust. As of today, we've been married for more than 22 years. No, I don't deserve her, but deserve has got nothing to do with it. We didn't deserve each other. We earned each other, in our engagement and every day since.

Our story is not special. Millions of couples follow this advisable tradition; and not because it's tradition, but because it is advisable. Yes, love and a solid relationship can be found or built in other ways, but an engagement has a purpose. It's not some quaint affectation left over from a simpler, more naïve time gone by. It is the stage to responsibly prepare for the serious and joyful matters to come.

It should be no different in your budding relationships with potential clients. Responsibility first, joyful benefit later. This is the rule. Exceptions to the rule court disaster.

Responsible Engagement

As with most things in the design process, there's more than one way to skin a cat, but the foundation of a strong engagement is consequential discussion and interaction.

Have a chat or two, or six.

If you're going to get to know each other, you've got to interact, especially in discussion. Face to face is certainly best, but Skype or phone can work, too. It's got to be consequential interaction. That doesn't mean it has to be all business. Rather, it must be discussion that reveals dimension, that provides insight, that probes values, that elicits response, that invites questions, that challenges, and that establishes the requirements and boundaries for an actual relationship.

This pre-bid process doesn't have to drag on forever, but it needs to last as long as is necessary for all parties to be comfortable making a consequential, binding decision… or to decline further pursuing the relationship.

As the design pro, your job is to ask the right questions, venture the right challenges, exhibit the right qualities and invite copious response. Even more so, your job is to pay attention: to observe and to listen. If you have the luxury of spending time in the same room as your potential client, watch how they interact. Watch their body language, especially in how they interact with others on their team during your pre-bid discussions.

Words are not most important when meeting face-to-face.
(Image source: Marc Wathieu[2])

2. http://www.flickr.com/photos/marcwathieu/2980385784

In these face-to-face conversations, words are the least communicative elements. Your job is to recognize and understand the more consequential communication going on physically. There's a book's worth of detail we could explore here, more than this chapter could possibly allow. But suffice it to say that, as a designer, if you're not an expert in kinesics[3], then you lack important[4] design competence.

If you don't have the opportunity during pre-bid discussions to engage face to face, then finding the right information and gaining and sharing adequate insight will require a bit more work on your part. But always keep your goals in mind. Some of them will be specific to the project or person in question, but you'll need to know a few basic things about every potential client and project.

Get Some Answers

In your pre-bid engagement, work hard to learn answers to a few vital, fundamental questions.

- **Do they seem rushed or harried in your conversation(s)?**
  If they're rushed now, they'll be rushed and harried during the project. Evaluate carefully. If they don't have time for this engagement period, then they won't have time for the project. Pass.

- **Are they primarily interested in your expertise or your technical and comp-generation ability?**
  If the former, it bodes well for both of you. If the latter, then they'll likely want to dictate efforts and deliverables in a way that ignores your expertise and that harms their enterprise. Find out, in as direct a manner as possible, if they're prepared to trust you. On this, everything depends.

- **What about personality? Are they personable? Pleasant? Terse? Abrasive?**
  You're going to be working with them for a while. Do you like them? Could you trust them? Make sure you're willing to spend a project interacting with this person. If they're abrasive, best to call off the engagement.

- **Challenge the premise of their project in some logical way. How do they respond?**
  You need to know if they're open to thoughtful challenge and to new

3. http://en.wikipedia.org/wiki/Kinesics
4. http://www.andyrutledge.com/elements-of-communication-part-1.php

ideas or if they seem to view it as some kind of insubordination. Evaluate carefully.

- **Express your requirements of your clients and projects. How do they respond?**
  First, make sure they're prepared to meet or abide by your requirements. But that's not all. Observe how they respond to your requirements. Their manner expresses information vital to your relationship. Pay attention.

- **Is their project something you care about? Agree with? Disagree with?**
  Before you decide to throw in with a project, make sure it's not just the profit you're after. For everyone's sake, make sure the project is something to which you can dedicate excellence and bring value.

- **Probe their personal and/or business values. Reveal your own. Is there compatibility between you?**
  You're going to be working closely with this person for some time. Work to discover any moral or ethical issues that could create friction or discomfort between you during the project.

Mutual respect and understanding makes your design project a happy relationship. (Image source: Steve Snodgrass[5])

5. http://www.flickr.com/photos/stevensnodgrass/6496538781/

Your Day Of Bliss

Don't simply pursue what you think you deserve. Earn your projects. Earn your clients, and let them earn your expertise in the engagement period.

If you've devoted proper time and responsible effort to the consequential matters of pre-bid engagement, you can emerge informed and prepared to make a knowledgeable decision about your relationship. Better yet, so can your potential client. If you both agree that it's time to take the next step (but not if just one of you thinks so), you can both do so with a pretty good idea of what the future holds.

Unlike a hasty, impassioned hookup, this sort of designer-client marriage is far more likely to survive. It will have a strong foundation, built on the things that ensure success and that help those involved weather any difficulties with resolve and dignity.

Don't simply follow the tug of novelty and lust. Spend time getting to know your potential clients, and let them get to know you. Help them to make decisions that they fully understand; do the same for yourself. And together, go and make amazing things, secure in the knowledge that your relationship has a strong foundation based on mutual respect and understanding. ❧

How To Build Long-Term Client Relationships

BY JEREMY GIRARD ❧

Everyone loves a happy ending: the hero slays the dragon, true love conquers all, the Death Star is destroyed, the new website is launched and both client and users alike are thrilled. While this last example may not have the Hollywood ending that the first few examples do, for those of us in the Web design industry, it is the story ending we want for all our project.

Much attention is given to how you kickoff projects, or how best to design and develop websites. But the final stages of the Web design process are never discussed as much as those early and middle stages are. How you wrap up a project, as well as what you do after the project is completed, is critical when it comes to building long-term relationships that will lead to future business.

We want a fairy tale ending for all our project stories – (Image: ZeRo'SKiLL[6]).

In this chapter we will look at some ways in which you can end projects on the right note, and also what you can do after they are launched to help your project stories have happy endings (and many successful sequels).

Avoiding Unhappy Endings

Before you can create a happy ending to your project's story, you need to make sure you do not create an *unhappy* ending. Oftentimes, when a project goes bad, it happens in the final stages of the process. There are a variety of reasons why this happens, but a few easy ways to avoid some of these common pitfalls.

ADDRESS ISSUES AS THEY HAPPEN

When a problem arises, discuss it with your client immediately. We often avoid issues (such as a bit of scope creep, or something taking a little longer than expected) hoping that we can "make it up at the end." We do this so we can avoid having an uncomfortable discussion with our clients about change orders and increased budgets.

This is a nice sentiment, but it usually does not work out. Budgets don't magically grow at the end of a project to compensate for overages earlier in the process. If you wait until the final stage of an engagement to address a problem, your client will feel blindsided by the news coming at that late hour, instead of being able to handle the issue when it occurred. One way or another, you will need to discuss the situation with your client, but if you do it later rather than sooner, you risk leaving them with a negative final memory of an otherwise successful project.

PLANNING A WEBSITE'S LAUNCH

The date of a website's launch is usually planned very early in the process. Other times, that launch date is more flexible and is determined as the project nears completion. In either scenario, preparing for the launch of a new website is extremely important.

Regardless of testing done prior to a launch, last minute issues discovered after a website "goes live" are certainly not uncommon. Preparing for the launch means that you take a look at website analytics to determine the best time (based on website traffic) to make the changes needed. You want to find a time that will have as little impact on busi-

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6. http://www.flickr.com/photos/39046851@N08/3866477161/

ness as possible as these changes are made. You also want to ensure your team is available and ready to resolve any issues that may arise. Whether the date of the launch was determined well in advance or more recently, as you firm up those launch plans, you want to make sure you have the appropriate personnel on hand for that launch.

By preparing to quickly address unexpected issues, you minimize chances that a small problem will turn into a large one, resulting in downtime, frustration, and that aforementioned negative final memory.

Planning for a website's launch ensures your team is on hand to handle any issues. (Image: Pedro Vezini[7])

DEALING WITH THE MONEY SITUATION

Very few of us enjoy talking about money and payments with clients. It is an often uncomfortable (yet necessary) part of our jobs. Whether your contract calls for your project to be paid in full prior to the launch of the new website, or if you make other arrangements with your client, problems with payments are one of the quickest ways to turn a good relationship into a strained one. There is no secret formula for handling issues with payments, just some common sense rules you can

7. http://www.flickr.com/photos/47287396@N05/7337314762/

follow to minimize any damage that outstanding money concerns may affect your client relationship.

This includes discussing the payment terms and your expectations at the very start of the process, getting everyone in agreement on. It also includes giving clients ample time to pay any invoices and being respectful (and as accommodating as possible), when something does not go according to plan. Financial issues can cause a strain on any relationship, client or otherwise. How you handle those strains can either damage (or strengthen) that relationship.

Leaving A Lasting Impression

First impressions are important, but lasting impressions are just as crucial. Just as a few mistakes at the end of the process can cast a pall over an otherwise successful project, a really great and memorable end to a project can turn an engagement that was unremarkable into one that clients will enthusiastically share with others. Here are a few simple ways you can leave your clients with a very positive, final memory of their experience.

SEND A TOKEN OF YOUR APPRECIATION

It seems so basic (and it really is), but it amazes me how rarely we take the time to show our appreciation after a project is completed. This isn't unique to Web design. When was the last time a company you hired to provide a service went out of their way to thank you after the work was completed and paid for? It doesn't happen very often — which is why it will have an impact if you do it.

Your "thank you" doesn't need to be extravagant to be effective. Some companies you work with may even have a policy against "gifts." One of my favorite ways to show appreciation at the end of a project is quite inexpensive and very simple — sending a handwritten note, with a personal message, for the client. I also like to have others in our organization (including people who didn't work on the project, or have any interaction with the client at all) sign the card. This shows how important their business is to the company — *the entire company*, not just the few of us that they've worked with so far.

The main thing here is to show the client that, even after their project was completed, you were thinking of them. The handwritten nature of the note shows that they were important enough for you to take the time to recognize them in a personal way (instead of just sending a standard "thank you for your business" card or email). Simple, yet effective.

CELEBRATE THE LAUNCH

A celebratory event of some kind is a great way to cap off a project. Again, this does not need to be elaborate. The "party" could simply be a breakfast or lunch for the client and their employees to introduce them to the new website. Doing this not only shows your appreciation, it also gives you some time with a larger segment of the organization. It allows members of the company who may not have worked directly with you on the project a chance to connect with you and ask any questions they may have about the new website. In some cases, a project may actually warrant a bigger party.

If the new website is part of a larger initiative (such as the launch of a new company, or a big change in that organization), then they may already be planning an "open house" type event. Ask your client about their plans, and if they are intending to throw a party, request to be involved. Being involved in this party is great for you, giving you exposure to all the attendees in a very positive way — but it is not only a self-serving request. I have found that clients love it when you ask to be involved. They truly appreciate the fact that you care enough to want to be a part of their event and they like the idea that someone who can speak for the technical side of the project may be included in the festivities. It's really a win-win situation.

Celebrate the launch of a new website and end the project in a memorable way. (Image: SimonWhitaker[8])

8. http://www.flickr.com/photos/22352091@N00/2152420550/

SHARE WITH OTHERS

Clients are often very proud of their new website and are eager to show it to others. As such, they will be very appreciative when you help them spread the word of that new website.

As long as your contract allows you to do so, you can help raise awareness of the new website by blogging about the project or sharing lessons you have learned during its creation in articles that you author. You can also share it with the Web design community through websites like dribbble or others social networks you use to communicate with your peers or your friends. You should also be on the lookout for the occasions when others talk about or share the new website. If the website is recognized in one of the many online Web design galleries out there, be sure to point this out to your client.

Seeing this type of recognition from outside sources is a great way to remind them of the successful process and positive results of your project with them.

REFER SOME BUSINESS

Another simple way to do something positive for your client after a project is completed is to refer them some business. One of my favorite things to do is to identify two clients of mine who may be able to help out each other with the services that they offer, and to make a connection between the two. Schedule a casual lunch to introduce the two companies and you will not only be able to make business referrals for each of them, but you will also get some time with both of those clients under very positive circumstances. This process of referring business and connecting with clients after the project is completed is a perfect segue into this chapter's next section — how to build long-term relationships with your clients.

An Ongoing Relationship

The best source of new business for your company comes from your existing clients. It is much easier to work with organizations that already know and trust you than it is to sell your services to companies you have never engaged with before. As such, a process to connect with your existing clients on a regular basis can be very important to your long-term success.

As a project is wrapping up, one of the final things you should do is schedule a follow-up meeting — or better yet, a series of follow up meetings (to review the website post-launch). Regularly scheduled meetings between you and your client allow you to discuss not only how the website is performing and what feedback they have received from their audience, but also what changes may be happening with their company (or what changes you are seeing in the industry that they may need to be aware of). It is a rare instance that I sit down with a client to discuss their business where some kind of work doesn't come out of it. This is the value of long-term relationships and being a trusted partner to their business. When you help them identify business needs, and can help offer solutions for them, you are more able to develop new business for yourself.

So I don't give the wrong impression here, let me be clear — even though there is a sales element to these meetings, these are not sales calls. I have long trumpeted the value of creating real relationships with your clients[9], and these follow-up meetings are part of that process. This is less about selling them something and more about having a conversation to determine what they may need, and how you can continue to help their business succeed.

Clients Spread The Word

Another great way to get new business is through word of mouth, and the words that come from the mouths of your clients carry lots of weight.

Clients talk to others about their website and the company that helped them build it, so striving to forge a good relationship with them will result in more leads for you.

You can also encourage your clients to talk about the work you did for them by asking them for a testimonial as soon as the project is done. Even if you don't use testimonials on your own website, asking your client to provide one (or asking them to act as a reference, or provide a recommendation on LinkedIn) allows them to verbalize their experience with you and your company while it's still fresh in their mind. The process of writing it down will also help them commit it to memory. Later, when someone asks them who did their website and how their experience was, the positive comments they wrote will come to mind and you will get a quality referral.

9. http://www.smashingmagazine.com/2012/01/25/how-to-deliver-exceptional-client-service/

Clients talk to others about you and the work you have done with them. (Image: lawgeek[10])

Your Work Spreads The Word

Your clients' websites can also help spread the word of your services if you add a link to your website at the bottom of theirs. This practice of "signing" the website is a bit controversial. I have heard passionate debates from both sides of the argument as to whether or not it is appropriate to add a "designed by" link to a website, one that you were paid good money to create. In fact, for many years I felt it was wrong to do so. What changed my mind was two things:

1. I saw many other Web design agencies, both big and small, doing this on the websites that they had developed. Many of the agencies I saw doing this were ones that I greatly admired and whose teachings and examples I had followed in many other aspects of my work. I decided to also follow in this and give it a try with my own projects. This led to the second reason why I changed my tune on this practice of signing websites…
2. The company I work for has added a "website designed by" message and link to every client project that we have launched over the last few years, and in all of that time, not one client has complained. On the contrary, I have had clients actually tell me that they liked having our link

10. http://www.flickr.com/photos/35034347820@N01/484678361/

on their website because it made it easier for them to find us or to send others our way.

Needless to say, my mind has been completely changed on this practice of adding our link to clients' websites and hearing "I saw your link on a website and I really liked your work" from a qualified lead is a great start to a conversation with a prospective new client.

Consistency Is The Key

As you read through this chapter, you most likely said "I do that already" for some (or maybe even all) of the examples presented here — but how often do you do them? It's one thing to say that you show your appreciation to clients or schedule regular follow-up meetings, but do you do it for all projects, every single time? Not likely.

It is very easy to put off sending a thank you note until later, only to have it be forgotten in the mix of other responsibilities that you have. It is easy for a meeting to be cancelled and never revisited, causing your schedule of regular conversations with your client to fall apart. The ideas presented in this chapter are not ground-breaking — they are all things you can easily add to your projects, but they are also things that are easy to dismiss or set slide.

The key to realizing consistent returns from these practices is to apply them consistently to your work. If you make them a part of your regular workflow and essential to your process, then the positive results you enjoy from them will also be consistent.

In Summary

- Be mindful that bumps at the end of a project do not derail an otherwise successful engagement.
- Look for small things you can do at a project's end to really leave a positive lasting impression with your client.
- Connect with your clients for regularly scheduled meetings and build long-term relationships that will lead to future projects (and great referrals).
- Establish a process internally to make these tasks a consistent part of your workflow so you can consistently realize the positive benefits that they can deliver.

By ending projects well, and establishing quality relationships with your clients, you will be one step closer to ending all of your project stories with “happily ever after.” ❧

Keys To Better Communication With Clients

BY JEREMY GIRARD ❧

I recently spoke with a prospective client who started the conversation by saying that he had called us because he was unhappy with his website's current design and development team. Questioning what about his current team he didn't care for, I discovered that it wasn't the company's product or its prices — he was satisfied with the work they did for him and felt that he was charged fairly for it. He was unhappy with their communication.

Communication Breakdown

Communication will fail if your messages are confusing to your audience. (Image: Jon Wiley[11])

Poor communication is a surefire way to damage any project or relationship, but when I dug deeper into this particular case, I realized that lack of communication was not the issue; the company provided regu-

11. http://www.flickr.com/photos/61436699@N00/1208632794/

lar updates on projects and milestones and so on. Rather, it was the words they used when giving those updates and answering questions. The problem was that the provider spoke "Web speak" and nothing else.

This isn't the first time I've heard this complaint from someone when discussing their Web team. While they appreciate the provider's knowledge of the profession and industry, they bemoan the reality that they cannot translate that knowledge into language that someone who is not a fellow Web professional would understand. While the updates may be plentiful, the communication is still poor.

PEER-TO-PEER COMMUNICATION

Those of us in the Web industry enjoy countless opportunities to exchange knowledge with our peers. From attending conferences and meetups to contributing to conversations on blogs to communicating on platforms such as Twitter and Dribbble—Web designers and developers can share information and learn from each other in a myriad of ways. The way we communicate in these circles, however, is very different from how we must communicate outside of them, even though we are often discussing the same topics.

The way we speak about issues such as browser inconsistencies and approaches such as progressive enhancement and responsive Web design must be tailored to the audience we are addressing. This is, of course, easier said than done. After speaking with our peers in technical terms that we all understand, how do we then alter our language and way of speaking to present a technical piece of information in a non-technical way? The truth is that, like everything else in our industry and in life, it takes practice.

Practice, Practice, Practice

Over the years, I have been told by a number of clients that they enjoy meeting with me and discussing their website because I "make it easy to understand." I have been commended on presenting these technical concepts in a very accessible way and on the fact that it seems to come naturally to me. While I appreciate that my clients feel this way about my presentational skills, the truth is that I have worked hard to be able to talk in this way.

In this chapter, I will go over a few of the ways that have helped me adjust how I speak about what I do in order to better communicate with my clients. I will also address some warning signs of communication breakdown, as well as ways to get those conversations back on track if they do falter.

BUSINESS SECOND

I have long praised[12] the benefits of having casual non-business conversations with clients. This practice also has a place here as you strive for more effective communication with clients. Too often, communication is strained from the start because a client fears you will speak to them in terms they do not understand. No one wants to appear confused or uninformed, especially in a business setting, and that type of anxiety can make a bad situation even worse. By starting a meeting off with light informal conversation, you help to minimize any anxiety the client may have and set the tone for the rest of the meeting. Additionally, you might learn something about the client or they about you, helping you to continue building a genuine, long-term relationship that goes beyond just the business you do together.

By starting out the conversation with something other than business talk, you enable the client to see you as someone other than just "their Web designer," and you have a chance to break the ice and strengthen the relationship before the discussion turns to business.

LEARN THEIR LANGUAGE

While casual conversation is a good way to start a meeting, you will have to get to business sooner or later. To complement the technical explanations that you normally give, you could also learn your client's language and speak to them in terms they understand and are comfortable with.

"Speaking their language" doesn't mean adding horrible business jargon to your vocabulary. It just means understanding what is important to the client and speaking to those topics. By correlating technical information to their business goals, you will find that the message is much better received.

For example, you may be well versed in topics such as HTML5, CSS3, responsive design and so on, but you should go beyond the technical application of these topics. You must also know how they can be used to help meet the business goals of your clients. This is the language that clients speak. If you explain how CSS3 media queries enable a website layout to reflow according to screen resolution, creating a UX that is optimized for the user's current environment, then you will usually be met with a blank stare. Instead, say that you will build the website to work well on a variety of devices, from large desktop monitors to handheld mobile phones, thus enabling the visitor to complete their

12. http://www.smashingmagazine.com/2012/01/25/how-to-deliver-exceptional-client-service/

task as easily as possible, whether that task is to read content, sign up for an account or make a purchase. Such tasks are the purpose of the website and are directly in line with your client's business goals. By making it easy for people to complete those tasks with whatever device they are using at that time, you give the website the best chance to convert those visitors into actual customers.

Understanding what is import to your clients and tailoring your communication to those needs will help get your message heard. (Image: darkmatter[13])

In the end, you are still talking about responsive design and CSS3 media queries, but you are focusing on the business results instead of the technical execution required to achieve the results — and your client can certainly understand and get excited about business results.

WRITE NON-TECHNICAL ARTICLES

As you begin to use new technologies and experiment with new techniques, one way to reinforce your learning is to write about it. Authoring an article helps you to fully think through the process. It can also

13. http://www.flickr.com/photos/85494010@N00/54973638/

generate conversation that furthers your knowledge of the subject. However, if the only articles you author are technical ones meant for other designers and developers, then you may be compounding the challenge of being able to communicate with a non-technical audience.

If you enjoy writing articles about Web design, try producing some that are geared to your clients or other business owners. By writing about the aspects of Web design in a non-technical, client-focused way, you can continue to explore the best way to present those topics. Over time, you will find that your explanations in the articles become part of your normal vocabulary with clients, giving you talking points that find their way into your meetings and conversations.

TEACH WHAT YOU KNOW

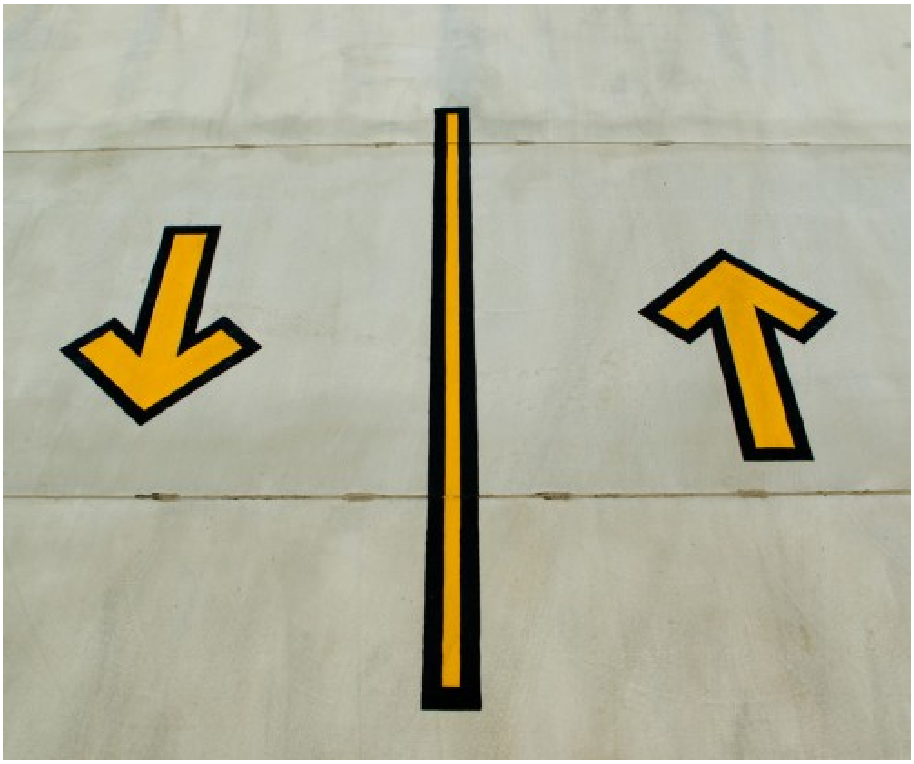
In addition to writing articles, also take your knowledge and experience to the classroom or stage and verbally teach what you know to others. The website design and development course that I have been fortunate enough to teach at the University of Rhode Island[14] for the past few years has been an enormous help to my presentational skills. Being able to present technical information to students, a group that actually bridges the gap between technical and non-technical, has helped me find ways to discuss these topics in a manner that is accessible to beginners but also informative enough to be applied to the work they are doing.

Even if you don't have the opportunity to teach a class at the university level, consider volunteering to lead a class on basic HTML and CSS at your local library or high school. The benefits you get from the experience will influence how you speak with clients and help you better present technical concepts in a way that is easy to understand, never condescending and always productive.

Communication Is A Two-Way Street

While these tips may help you improve your own skills, the fact of the matter is that quality communication is not one-sided. It has to flow in both directions: from you to your clients and from your clients back to you. Part of your job is not only to improve your own skills, but to ensure that your client's are up to snuff as well.

14. http://www.uri.edu/prov/certificate_noncredit/certificate/Multimedia/MultimediaTech.html



Communication is a two-way street between you and the client. (Image: Jerad Heffner[15])

Here are a few things to look out for on your client's end of the conversation.

LOST IN TRANSLATION

When kicking off a project or speaking with a prospective client, one of the first things you should do is determine who you are speaking with and what their role in the project will be. Are they a decision maker with the authority to provide quality feedback on the project, or are they a messenger? If you are dealing with someone who is essentially a go-between, then you run the risk that your words will be mangled when recounted to the actual decision makers or that their words will be mangled when recounted back to you. This is a recipe for misunderstanding and tension.

This scenario is especially common when dealing with large companies in which meeting with the decision makers is very hard to arrange. Still, you should be pushing for this. Key decision makers must be present at key meetings and presentations in order to maintain quality communication. This might sound strict and a bit unrealistic, but anything less will not do, and this is what you should demand. Explain that you understand that their schedules are tight – yours is as well – but

15. http://www.flickr.com/photos/80974239@N00/2611679744/

developing a successful solution will be a team effort, and key personnel from both sides must be in contact with each other directly for it to work. This doesn't mean that C-level executives need to be at every meeting, but it does mean that you shouldn't be meeting with only a messenger.

The success of a project is directly related to the quality of the communication during the process. Make sure you are speaking with the right people during it.

RESPONDING BEFORE READING

Feedback given in a project will often contradict previous feedback or decisions. In some instances, this happens because the client gave that initial feedback hastily without fully understanding the nature of the issue or the decision being made. Whenever this happens to me, it is almost always because an email was not fully read and the reply was sent too quickly.

Email is a necessary form of communication, but it is also easy to rush through and even dismiss entirely. If you rely solely on email or another kind of digital communication, then you risk the conversation breaking down.

Pick up the phone or schedule an in-person or video meeting to review and decide on key points in the project. Dismissing a conversation is much harder in a meeting than when opening one of the hundreds of emails they likely get each day. If you require digital communication as a record of the decisions made, then you could certainly follow up on the meeting with a recap of what was discussed and decided. Meeting to make decisions and then using email to recap and reinforce those decisions lead to fewer misunderstandings caused by hurried responses from a distracted team.

LATE TO THE GAME

Another scenario to be mindful of is when someone jumps into the communication loop deep into the project. Even if you have excellent documentation on the decisions and communication that have happened so far through project management software like Basecamp, these late additions to the group will rarely be able to assimilate all of the information that has been accumulated, meaning their feedback and comments will not have the benefit of this historical knowledge. This can be dangerous. The new team member will often want to make an impact on the project, but if they do not understand the decisions that have been made thus far or why they have been made, then they could easily derail the project. Of course, you want to avoid this.

If a new member does jump into the project, bring them up to speed and direct their enthusiasm in a positive way. Schedule a meeting or a call with them and perhaps one or two others from the team, just to "get up to speed." Explain what the team has decided so far and detail what the next decision points are and how their input into those upcoming decisions will be helpful.

By directing their enthusiasm at upcoming decisions instead of back to previous decisions, you enable their contributions to help, rather than hinder, the project.

PAYING ATTENTION TO THE SIGNS ALONG THE ROAD

Despite your best efforts, there will always be times when communication breaks down and the project is put at risk because of it. While working to avoid those breakdowns is important, being able to identify them and recover quickly is just as important.

Paying attention to signs along the road will help you determine whether you are traveling at a comfortable speed or need to proceed with caution. (Image: Eric Bjerke[16])

Obvious signs of strained communication in email include expressions of frustration, clearly miscommunicated messages and decisions that contradict previous conversations. When you see these emails, do not reply to them to "set the record straight." Pick up the phone and do it. When communication is already strained, a flurry of emails back and forth usually does little else than compound the frustration. Once again, this is where an in-person or video meeting helps.

16. http://www.flickr.com/photos/13815852@N06/4658636393/

By discussing the issue verbally, you stand a much better chance of resolving it and getting everyone back to healthy communication. Regularly scheduled meetings are great, but if you notice signs of miscommunication, don't wait until the next one happens; ask for a quick call or meeting to address the issue immediately.

Quality Communication For All

Communication skills do not benefit Web professionals alone. They apply to anyone, from any industry or business, who has to communicate with others. No matter what business you are in, healthy communication skills will help you do it better. ❧

Guidelines for Successful Communication With Clients

BY SAM BARNES ❧

Let's face it — it doesn't matter *how well* you can design or code; as a freelancer or if you're running a digital agency, if you don't get the client management right, it can spell disaster for your business. By getting it right from the very beginning, you'll most likely see things flourish.

In a previous article on How to Explain to Clients they are Wrong[17] I discussed one aspect of client management, but oh my, there are *so* many and that is why I would like to discuss yet another aspect in this chapter: how to maintain project productivity and momentum when working with clients.

A Common Scenario

Most of us have been there: we're working on a project for a client, we plan it, we set down a timeline with milestones and everyone is happy. We then complete our first task that requires feedback and wait for the response on the date mutually agreed, one that would keep the project on schedule… and then it happens. The response doesn't come, or it does, and it in no way helps the project along. In fact, it actually makes you want to go and hibernate for a few months in a warm safe place and put the client into carbon freeze.

So what can you do to help avoid these Web project crimes? Hopefully, the following tips can save you some stress and ensure that you aren't completely grey haired by your mid-twenties.

17. http://www.smashingmagazine.com/2009/12/10/how-to-explain-to-clients-that-they-are-wrong

"The Infinite Chase" of pleasing the client by Tommaso Meli[18]*, adapted by SM Editorial Team.*

Regular Schedule and Budget Updates

It seems like an obvious one, and something many of us start out doing at the beginning of a Web project, but as the workload builds up and other projects on your plate are starting or ending, it can often fall by the wayside. This might not seem to be a problem in the short run, but it will become one the minute something doesn't go according to plan.

From the very beginning it's really important to remain disciplined and send your client a revised project schedule and updated budget *every* week. In this update you could highlight the following:

1. Completed tasks from the previous week.
2. Budget spent and budget remaining on each phase, e.g. design, functional specification etc.
3. Planned tasks for the following week and who is responsible, you or the client.

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18. http://www.flickr.com/photos/tommy_pariah/3563714640/

4. Any tasks that are slipping over schedule or over budget, and if so why. Also consider the potential impact on the project.

It may seem a little over the top to do this the week after the project starts, as very little has changed from the initial schedule; but as the project progresses and things *inevitably* slip, it's in no way a surprise to the client and makes negotiating additional time or budget a lot less painful.

BUY NOW, DON'T PAY LATER

Too often I see people running Web projects that don't send weekly schedules and budget updates with it invariably ending up the same way — the project slipping in various places, small places, but building into significant schedule and budget problems over time. Then, after a few months, the client suddenly asks *"Are we on track for go-live?"* or *"Are we on budget?"*

This is when the smelly stuff hits the fan as the client, quite rightly, says *"I assumed all was OK as you hadn't mentioned anything before!"* Not only do you have to fumble your way through an awkward phone call or meeting but you've put yourself in a weak position and damage has been done to your relationship with the client and their level of trust in you. Bad times, and all because you weren't disciplined and clear from day one.

THE CLIENT IS A TEAM MEMBER

Constantly highlighting tasks that need attention by a certain date from a client, with the impact of non-action being clear, really helps keep the client focused on completing what they need to do in the short-term. At the same time, it helps you maintain the bigger picture view of the project — after all, clients inevitably have a business to run and so your job is to make things as simple for them as possible by essentially managing them and their project tasks as if they were a team member. Oddly enough, in my experience, most clients actually appreciate you managing them.

From the initial stage of the project, it is a good idea to make it clear to the clients that you see them as a team member of the project and expect cooperation and support during the entire project. This also means that you should expect to have a dedicated person in the client's company who will be answering your questions, and who will be the only person answering your questions. This will help a lot during the whole process and will prevent problems and misunderstandings down the road.

SHIFTS IN SCHEDULE AREN'T ALWAYS BAD

Slipping project schedules are often associated with a project going wrong, but it doesn't always have to be. Remember, an initial go-live date set out in an initial schedule isn't always as important as the client has said it is. Sometimes other more important things pop up, and these things often need to be carefully examined, discussed, resolved and implemented — and often it just takes more time than expected.

Have your Plan B prepared… (Image by Tommaso Meli[19])

If a project you're running is in danger of missing milestone dates due to lack of timely client feedback, as long as you have constantly communicated impact of late feedback you can always approach the subject of a new go-live or milestone completion date with the client and see how it plays out. Argue that the quality of your work is very important to you and you wouldn't want to compromise the quality of the project due to the communication problems. It's a good idea to find time to review the work done, discuss the problems in communication and find solutions to improve the workflow in the next stage of the project.

The more important the deadline is to the client, the clearer your time requirements and feedback requirements should be in the initial stage of the project.

In my work, I find myself often starting a conversation along these lines expecting "*the go-live date is fixed*" reply, but instead got a more reasonable response if the client has been given regular updates and

19. http://www.flickr.com/photos/tommy_pariah/3253688210/

knows that the main reasons for the delay are not design agency's lack of discipline, but rather company's late feedback or other reasonable problems. Give it a go: you may be pleasantly surprised at the power of disciplined and honest regular updates.

Help the Client Out, Be Pro-active

This is an important point: always be willing to help the client out with tasks that you shouldn't necessarily be doing or are being paid to do. Common examples of this include microcopy, icons, print version of the website, small teaser images and lower level page banners.

A hard-nosed stubborn Web Project Manager will insist that *all* images and copy, including the little bits and pieces like thank you e-mail copy and success messages, are delivered by a date in order to remain on schedule, and when these aren't delivered, then the project could well be delivered late and it's all the fault of the client. Well, maybe it is, but do we actually *have* to wait for the client for every single bit of the project?

You know the business, let your client know! (Image by Kyle van Horn[20]*)*

You use the Web every single day, you're a Web professional, you know the project inside out and you've learned about the target audience from the meetings with clients. This knowledge enables you to assist the client when timelines are slipping by, getting these small things created for them if necessary.

Now of course in an ideal world all of these elements would be paid for and carefully crafted by designers, UX teams and copywriters, but this is just not the way it usually works in practice. Sometimes *commercial reality* for both your business and the client must take precedent and it's time to roll your sleeves up.

GET REAL, GET COMMERCIAL

For the sake of keeping a project worth thousands on track, and if you are sensing these could be stalling points, go ahead and pre-empt the delay in getting the smaller things on time by preparing some example pieces of microcopy and submitting to the client for approval. Yes, I hear you, it's not your job to do, but if you want to save the project, sometimes it's your responsibility to take care of it in a reasonable, professional way. Or how about producing a lovely content template spreadsheet for the client to fill in rather than asking them to work on a blank canvas (if you can call MS Word a canvas).

Clear it with your boss that by getting a designer or copywriter to work for a couple of hours unbillable will keep a project and cash flow on target — rarely will the request be denied and the client will probably really appreciate you taking the lead on things that, to them and their business plan, are small details.

As long as the time you spend helping the client out balances out financially in the long-term, it's always a perfectly good solution to keeping a project on track when necessary and encourages a positive relationship with the client.

Dealing With Multiple Stakeholders

Often when working for a client, you only interact with one or two persons but they have to report to many more. A common cause for delays in Web projects is the time it takes your primary contact to get their superiors to review, provide feedback or approve portions of work and communicate this back to you.

With the best will in the world from all parties this can be incredibly frustrating and the time to get the feedback you need isn't always easy

20. http://www.flickr.com/photos/kvh/4633956242

to do with communication lines. It can also be because your primary contact will encounter not only “design by committee” but also “decision by committee”, on the smallest of things. The good news is that there are ways to combat this.

IDENTIFY THE CLIENT-SIDE PROJECT MANAGER

First of all, it’s a good idea to make sure you ask who will be the client-side Project Manager and if this person has decision making authority as early as possible in the project, preferably at the kick-off meeting. In some situations, especially in boardrooms with Senior Directors, plus your contact sitting there, this can feel like an awkward question to ask but it’s vitally important to do so.

Of course, the Directors will identify your contact as the Project Manager their end, but if they hesitate on confirming that they have decision making authority, quickly but calmly communicate that it’s not a problem and you’ll just have to work decision making time into the timeline. Although this is a bit of a fluffy statement, it sets you up to raise it at a later date if it becomes an issue with regards to timelines and also gives your contact some leverage when pushing their probably very busy bosses for timely feedback.

MAKE YOUR PRIMARY CONTACT LOOK GOOD

Another piece of client management advice that is very helpful for facilitating a smooth project, is to always do your best to make your primary contact look good to their superiors — even if the primary contact made some mistakes or doesn’t communicate things clearly enough.

What this means is that regardless of what calibre your primary contact is regarding running things from their side, always try to hit their deadlines, allow them to take credit for your suggestions and ideas (within reason) and just generally give them the best service you can. This isn’t just a good, ethical and worthwhile approach to providing a service, but if you make your primary contact look good to their superiors, they will absolutely love you for it. Consequently, they will put more effort into keeping the relationship fruitful by making things smooth for you and ultimately want to keep working with you rather than someone else. And that’s a project productivity win and long-term client relationship win as well.

Don't let your concept go up in flames. (Image by Tomasso Meli[21])

WHEN YOU JUST CAN'T ROLL A CONTACT IN GLITTER

In the absolute worst case scenario it may be necessary to consider going above the primary contact's head, to their boss, in order to get things moving again or increase the speed of feedback. But use this approach with massive amounts of caution! Obviously, it has the potential to permanently damage the relationship you have with the client, including their boss, and while they may begin to provide feedback quicker, some more unscrupulous clients will make sure to cause you stress and grief in other ways as punishment and revenge, and even nice ones will be really annoyed to say the least.

The only reasonable advice in such situation is to ask the design agency's head to call the company and insist on sorting things out to keep the project's flow as smooth as possible and avoid problems down the road. However, this should certainly be the last resort.

21. http://www.flickr.com/photos/tommy_pariah/3309648060

If you work for a company, you can be certain that somebody senior will be able to strike up a conversation with someone senior on the client side and approach the subject in a much more subtle way than you could, if you can leave that to the silver tongues of the world.

If you're a freelancer, then, well, you're in a really tough position and it's a good idea to try to somehow manufacture a reason you need to speak to the someone senior and very gently sway the conversation to how the project is going, and ease into the part of the conversation that explains how busy they all must be, how everything's going fine and if one improvement could be made then it would be response time on certain aspects...

If this technique sounds a little fluffy and a bit underhand, that's because there is definitely no single right way to do it, and it does feel a little wrong. But if executed the right way it can have the effect desired with no egos bruised.

Face-to-Face Sessions And Meetings

When you encounter a client that just seems impossible to get timely responses from, it's usually not because they are unprofessional, but rather because of their own personal hectic schedule of internal work which is constantly winning their attention over this '*outsourced*' project.

One approach you can take when the list of responses and decisions you're waiting for are just not coming, is to arrange the ultimate solution to the problem — a face to face client session or meeting.

SESSION AND MEETING MANAGEMENT

The truth of the matter is that some clients you literally need to drag into your office and not let them leave until you have all the feedback and decisions you need. More often than not these sessions can be incredibly productive and get a stalled project right back on track.

When having a face to face meeting session with a client to get a project back on track, it's important to clearly define the reason for the meeting and provide clients with enough time to prepare everything they need beforehand. It's crucial to maintain focus on this main goal during the meeting and not let it get sidetracked by any other business. So if the conversation suddenly veers off course, make sure to pick your moment and reign it back in, perhaps by noting down the topic or question and postponing the other topic after you've got to the end of the agenda.

WEEKLY CLIENT MEETINGS

Another meeting-based solution to help with client and project productivity is to arrange weekly client meetings. It's not necessary to arrange them face to face but personally I've found these more effective than phone calls.

Admittedly, not all weekly meetings are good. To avoid getting caught in the hellish, lengthy, counter-productive weekly meetings, start them with a strong statement: encourage all participants to keep focused. Set a specific timeframe for the meetings to make sure that they are not taking too much time: usually 25–40 minutes is more than enough to discuss the most critical things that require clarification.

When I first came across the concept of weekly meetings, or having a focused call with a client, I felt that it just wasn't worth it and would take a lot of work time that could rather be used for more productive and meaningful work. I assumed that an hour each week would feel very much like in every other meeting I'd been at and hence result in few decisions and more questions than answers. I must admit that I was wrong.

Conclusion and Delusion: Some meetings just don't help. (Image by Tommaso Meli[22])

If handled correctly with strong focus on being efficient and to the point, a weekly meeting or call can be incredibly beneficial to a project's momentum, and for very simple reasons. They:

1. Increase the project's perceived importance in your and your agency's field of vision.

22. http://www.flickr.com/photos/tommy_pariah/3274208686

2. Reduce the temptation to delay something on that project for the sake of another as you'll have to report on progress in less than a week, e.g. schedule and budget updates.
3. Allow for a constant flow of review and decision making at regular intervals, hence making planning easier.
4. Rapidly encourage a good working rapport with a client making things easier for both sides.

Overall, the main benefit of weekly meetings, and probably the reason I initially resisted them so much, is that they actually keep the pressure on to complete a project and stick to the project plan. And that's a damn good thing. Once I saw the difference in how quick a project with effective weekly meetings was delivered over one that was allowed to be delayed due to the lack of regular communication, I embraced them and found myself zipping through projects quickly.

It's Not Always the Client That's the Bottleneck!

Despite it's often very comfortable to criticize the client for delays (and it is sometimes very true and therapeutic), it's often not the client that holds up a project. Keep your workflow organized and review your internal processes every month, trying to find bottlenecks and improve the flow of your projects. Criticize yourself first and never criticize your clients. Mutual respect and honesty is much more helpful than putting labels on things; be professional and make sure that your work is always professional as well.

NON-DIAGNOSED MEDICAL CONDITIONS HELP

One obvious way to ensure that you don't become the bottleneck in a project is to be so organized that if a medical professional were to observe you for a week they would most likely prescribe you pills and a psychiatrist for obsessive behaviour.

Being organised is a discipline but, in my humble opinion, also a character trait that can't be taught easily. You either are an organized person or you're not. While everyone can't be built the same way, if you want to maintain productivity on a project, you need to find some mechanism to keep things in flow and on track. Use simple tools and use them well. For instance, sometimes a simple .txt-file is more than enough for keeping deadlines and managing to-do lists.

So what are the important things you can do to get more organized?

1. Delegate tasks if you have someone to delegate to, even ones you enjoy.

2. Seek support from your superior if you're overwhelmed with work – they'll help you prioritize.

3. Try using a workload management system such as GTD[23] or Pomodoro[24].

4. Review your project schedules daily, adjust them and communicate them to the client.

5. Review your to-do list daily and shuffle things around to create a realistic completion list for the day.

6. Avoid dealing with ad hoc requests the minute they come in, often they're not as urgent as they seem.

7. Have a consistent project folder structure and file naming convention.

8. Follow consistent processes, so you get better at estimating how long similar tasks in the future will take: e.g. creating a proposal or functional specification which are dependent on size of the project.

9. Get a great pair of headphones and listen to the music you love, e.g. the Star Wars soundtrack (or Predator soundtrack if you fancy something a little fruity).

Get to the chopper!

HAD A BAD WEEK? BE HONEST ABOUT IT

If you've done everything you could, but just can't keep on top of things and a project is slipping slightly, just be honest with the clients and tell them you've had "one of those weeks".

Clients are more approachable and understanding than you might think. If you sincerely tell a client the reason for the delay, they will completely understand; be professional and make sure to provide clients with a new (realistic) deadline when you will deliver for sure and stick to it.

Failing to deliver a second or even third time is a pretty good sign to a client that they may have hired the wrong person. More importantly, it should be an alarm bell for you: your way of working isn't working, be it by not being organized, being too optimistic with deadlines or just taking on too much work. Analyze the problem and adjust your workflow appropriately. That's your wake-up call that you need to change

23. http://en.wikipedia.org/wiki/Getting_Things_Done
24. http://www.pomodorotechnique.com

something. And if you react quickly, you'll grow as a professional and will be able to keep your current project.

What tips do you have for maintaining productivity on Web projects when working with clients?

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Effective User Research And Transforming The Minds Of Clients

BY LEONARD SOUZA ❧

Ah, the love of a client. That is indeed what we all seek as professionals, is it not? If we lived in a utopia, then that's all there would be. Openness. Honesty. Passion. Flowing in both directions, client to service provider and vice versa. We want our clients to be right behind us in our ideas and open to new ones. In order for this to happen, there has to be trust.

Clients that deal with large agencies tend to place their trust in the big brand names of these shops. Freelance designers and small agencies do not always inspire the confidence in clients that large shops do, which means that trust has to be built, nurtured and never taken for granted.

So, what tools do freelance designers and small agencies have at their disposal not only to get a client on board with their ideas, but to inspire them and encourage buy-in from other stakeholders in the client's company? We'll take a look at few of them in this chapter.

GETTING A WIN-WIN

Getting a win-win is when you deliver solutions that address the client's business problem. The client should respond to your ideas with respect, placing their trust in ideas that they may not immediately identify with, and turning down ideas they intuitively know will not work. We must be able to respond with the same respect and trust, allowing some of our ideas to fall by the wayside and letting others shine.

Keep in mind that challenging opinions is OK, especially ones that are bound to fail. In this type of relationship, both parties handle tension objectively, putting aside personal feelings, to complete the goal. Indeed, this well-oiled platform allows for the creation of amazing work. So, how does a win-win transpire? It transpires through actions, research and delivery.

Actions: Engaging Your Clients

The way that the teams from the client and agency engage with each other is critical. First and foremost, be what you want your client to be.

If you want them to be honest, be honest. If you want them to be passionate, show your passion. They may not immediately reflect your enthusiasm, but they will feel it, and over time it will reinforce your efforts. This is Client Relations 101 and should not be ignored.

Often, though, this honesty, enthusiasm and passion aren't enough. One of the stakeholders might have wanted another contractor to win the bid, or a variety of other issues might prevent the relationship from maturing. At this point, get the client to stop thinking about any perceived shortcomings, and get them to think objectively about the problems they're facing, with you as the catalyst for solving them.

When we come across a resistant client, we look to customer insight as the means to help the client focus on the user and the business problems that need to be solved. By discussing these in a controlled, test-driven environment, the biases of both the client and agency are eliminated, and the issue becomes how to objectively solve the problems together.

Research And Customer Insight: The Objective Problem-Solving Approach

Before diving into ways to use customer insight to guide a project, I'll go over the types of research methodologies and testing protocols that my firm commonly uses. These include ethnography (a research method from the social sciences that involves field research and up-close observation in the user's environment), heuristic evaluation (a form of usability inspection, in which usability specialists judge whether each element of a user interface follows a list of established usability heuristics), focus groups, surveys, prototyping, usability testing, user interviews and more.

These methodologies yield valuable data, and from this data we can build persuasive artifacts to convince the client of strategies that we know have a high probability of success in the real world. In addition to customer research, stakeholder interviews can be invaluable in highlighting, and gaining consensus on, the scope of UX engagement.

Some of the research methods described above can be extensive and could require the client to commit some of their budget. But conducting research up front to understand customers and what they want is less expensive than spending time and money correcting a solution after it has launched. If the client does not have a budget that supports social science research, then light inexpensive testing can be performed. Nothing is wrong with heading to the nearest coffee shop, finding five to ten people in your target demographic and asking them contextual questions or giving them a run-through of a proposed solution. This is generally enough to make a case for change.

CASE IN POINT

My company was recently hired by Boeing Commercial Aviation Services, the services arm of Boeing, to help transform its customer portal, MyBoeingFleet.com. As part of this transformation, we conducted a large ethnographic research project. It was a huge endeavour, with more than 150 users interviewed around the globe. Though large in scale, it gave us valuable insight into Boeing's users, enabling us to identify challenges within its existing customer portal. Once we obtained the data, we analyzed it in detail and created a series of artifacts to help the Boeing team clearly understand what we had learned. These artifacts and deliverables also served to convince the Boeing team of our capabilities and expertise, as well as help sell the project to key internal stakeholders.

Upon completion of the ethnographic study, we created a document called SUDA, or "system, user and domain audit." This comprehensive document detailed the results of the ethnographic research, transferred knowledge of fundamental UX processes, and compiled our findings into persuasive artifacts. This was then presented to all major stakeholders. Two primary artifacts in the SUDA helped to convince our clients and other stakeholders not only to trust us, but to become our champions: those artifacts were the personas and customer journey maps.

These deliverables are a turning point in translating the user research into design. In addition, you will need to develop other artifacts, including wireframes, which must be thoroughly understood before any design work begins.

PERSONAS

Personas are artifacts commonly produced by agencies that perform research. They are key tools for creating empathy among everyone involved in the project. They consist, by definition, of an archetype that represents the needs, behaviors and goals of a particular set of users.

One of my favorite examples of personas is the diptychs of Jason Travis[35]. While not typical personas, which are generally accompanied by a textual explanation of the archetype, they still convey a user's state of mind through the objects they carry. In order to build something for

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35. http://www.flickr.com/photos/jasontravis/sets/72157603258446753/with/5933207979/

someone, you must first put yourself in their state of mind; this is one of the definitions of empathy. In the diptych below, you can quickly gauge how the person might think based on what they are carrying. A tremendous amount of information is conveyed through these objects.

One of the diptychs[36] of Jason Travis.

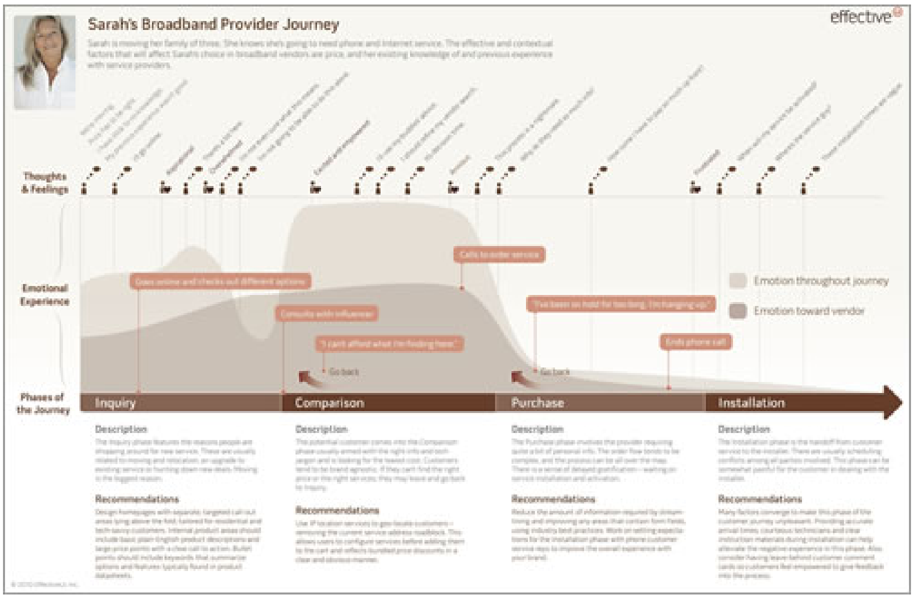
The challenge in developing personas for the Boeing project was the sheer scope and number of users. It could have easily led to 30 different archetypes, which would have been too many for the stakeholders to consume. To make our findings more digestible, users were divided into four major groups based on their activity or goal with the portal. Each group received one to five personas, based on real users. This was incredibly useful, because it enabled our team not only to construct a general archetype, but to expand on subtler aspects of the archetype through actual users. In the end, we had four archetypes, and nine total users to support those archetypes.

With these personas, we could attach a face to the actual navigation flows and interactions in Boeing's customer portal. Our goal was to elicit empathy in our client and get them to feel the precise emotions their users felt so that they'd be willing to change the product for the better. To accomplish this, we chose to demonstrate the flows through customer journey maps.

36. http://www.flickr.com/photos/jasontravis/5933207979/in/set-72157603258446753

CUSTOMER JOURNEY MAPS

Customer journey maps are graphs that demonstrate a user's level of confidence and patience when performing various touch points in an interaction flow. Data is provided from an interview in which the user is guided through a particular task. As they move through the flow, we ask them how they feel at key intervals. For instance, if they are being guided through a shopping flow, we would let them perform the actions required, but when they click the "Buy now" button, we would ask how they feel about the process so far. They might be very frustrated or at relative ease. These feelings are then recorded, which gives us an emotional rhythm we can graph over time. Displaying the emotional journey in this way makes it easy for clients to understand, and it sometimes reveals shocking pain points.



An example of a customer journey map. View large version.[37]

For Boeing, the journey maps were eye-opening. By getting a visual representation of the emotional state of their customers, the client suddenly understood how important planning the user experience is to the product development process — and not only for the development phase, but for overall customer service as well. Presenting these and all of the other findings in the SUDA enabled us to begin tackling the design phase objectively, hand in hand with the client.

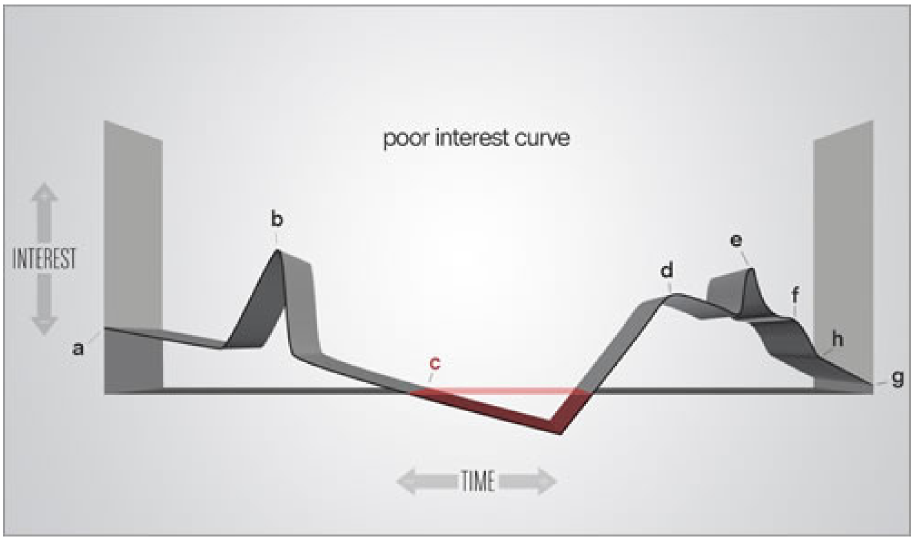
37. http://media.smashingmagazine.com/wp-content/uploads/2011/11/journey_map_large.jpg

Delivery: Design And Interest Curves

There is a cognitive science theory called the "aesthetic usability effect[38]." It states that functional objects that look appealing inspire confidence in users, imparting in the users a higher tolerance for faults, a higher likelihood of overcoming learning curves and a slew of other benefits over less appealing alternatives. This is true even if the objects are actually harder to use! The theory also applies when you present your ideas and solutions to a client. Once you've prepared your materials, it is time to present them to the client. The more appealing the delivery, the more likely the solutions will be accepted.

Delivery is a critical moment in the transformation of a client's attitude. If at all possible, make it face to face, and bring any executive-level sponsors from your company with you. With Boeing, we took our time to make sure that what we presented was visually appealing and well organized. Paying close attention to delivering the content builds trust; sloppy work will only work against your objective. Because most of you are designers, I am sure your presentations are incredibly visually appealing, but how do you construct your content so that it has the most impact? My advice: use interest curves.

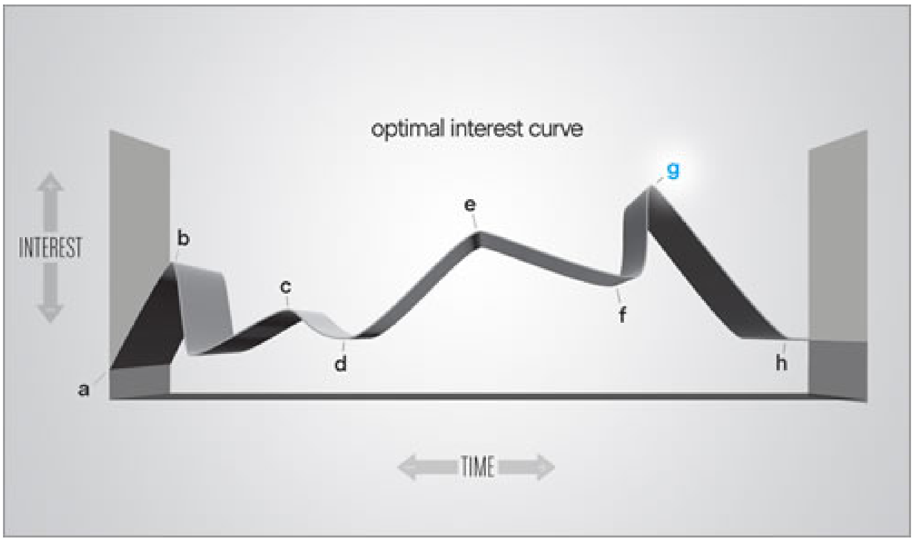
Interest curves set the timing, or pace, of when to introduce various moments into your presentation. Take the following curve:



View large version[39]

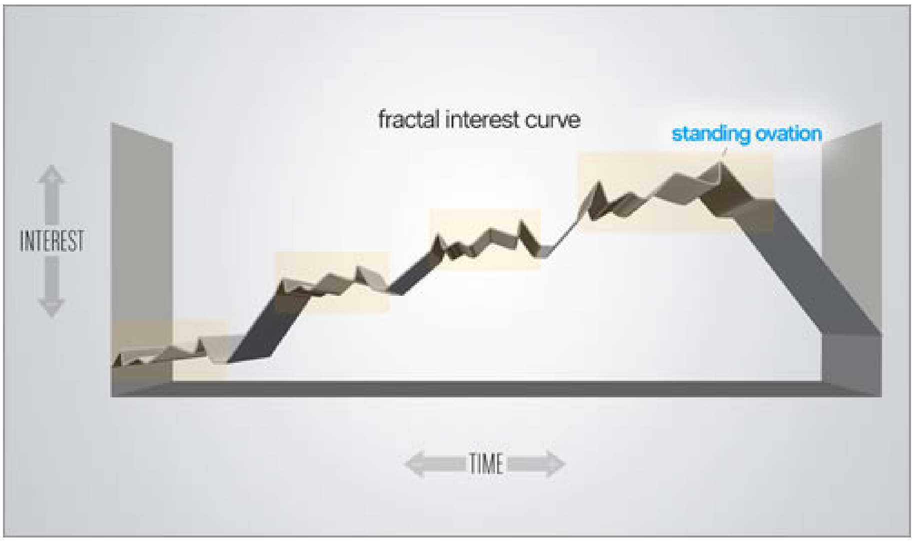
This shows interest points over time. It is also a poor interest curve. Now look at an optimal interest curve:

38. http://usabilityfriction.com/2010/03/30/aesthetic-usability-effect/
39. http://media.smashingmagazine.com/wp-content/uploads/2011/11/poor_interest_curve_large.jpg



View large version[40]

You can see that you want to start off the presentation with something that immediately captures the attention of the audience. From there, slowly build to a climactic point (for us, that would be the journey maps), and end the presentation quickly thereafter. This will keep the audience simmering for more, and it generally leaves a great impression. This type of curve can be found in many forms of entertainment, from rock concerts to movies, and, for whatever reason, our minds are tuned to this pacing of interest. To create further interest, these curves can be embedded within each other, as the following graph demonstrates:



Fractal interest curve. View large version[41]

40. http://media.smashingmagazine.com/wp-content/uploads/2011/11/optimal_interest_curve_large.jpg

The point is, keep the client hooked with undulations of interesting moments, and make those moments grow in intensity until you impress your final point deep into their subconscious.

For The Win: Actions, Research And Delivery

Through your actions, by gathering customer insight and by creating meaningful, engaging visuals and deliverables that support your strategy, not only will you have concrete data to inform your designs and the project's direction, but you'll likely achieve that win-win. Getting clients on board with your recommendations translates to a more productive, successful project for everyone.

Good luck in transforming the minds of your clients! ❧

41. http://media.smashingmagazine.com/wp-content/uploads/2011/11/fractal_interest_curve_large1.jpg

Why Account Managers Shouldn't Prevent Designers From Speaking To Clients

BY PAUL BOAG ❧

Working as a Web designer can suck sometimes. This is especially true when you don't get to work alongside the client. Unfortunately this scenario is more common than you would think. Many organizations have been carefully structured to keep the Web designer and the client apart. But is that really sensible? Would projects run much smoother without your account manager or boss acting as the middleman?

Image credits go to Brett Jordan[42].

This issue came to my attention following the release of my latest book "Client Centric Web Design[43]." In this book I provide advice about how

42. http://www.flickr.com/photos/55497864@N00/2209126473/
43. http://boagworld.com/season/3/

to work more effectively with clients. However, I had made an assumption in the approach I presented, an assumption which turned out not always to be true. It assumed that the Web designer and client can work collaboratively together. Following the book's release I realized that for many Web designers that this is not the case.

Whether working in house for a large organization or as part of a Web design agency, many Web designers never get to interact directly with their clients. Instead, the client's requirements and comments are filtered through a middleman who manages the project.

In this chapter I examine why I believe this is damaging to projects and what can be done to rectify the problem. However, before we can answer these questions, we must understand why this way of working has become common in the first place.

Why We Have Account Managers

I want to make it clear that I believe that both project and account managers play a valuable role. There are good reasons why they are part of the Web design process and I am not suggesting they should be removed.

It is the role of account managers to provide outstanding customer service. This is a vital (if often overlooked) role of any Web design agency — we are not here just to build websites, we are here to provide a service to our clients. That means making our clients happy by communicating well, meeting deadlines and delivering within the budget. Our project managers regularly receive gifts from our clients thanking them for a job well done. This is how close the relationship between client and account manager can become. By lifting the responsibility for customer service from the Web designer, account managers allow us to focus on the job of actually designing and building websites — a luxury that many freelancers envy.

The account manager also deals with the plethora of organizational tasks which keep a project running smoothly, not to mention protecting us from the endless comments and questions from the client. I have had the misfortune of working on many projects where we have been drip-fed feedback from multiple stakeholders almost continually throughout the project. If it wasn't for the account manager, I would have very quickly lost control of what needed to be done on the website. Let's face it, they also protect the client from us, as we sometimes have an overwhelming urge to rant at them uncontrollably (or perhaps that is just me). They also act as interpreters, taking our technobabble and translating it into a language that the client can understand.

In short, a good account manager ensures the client is happy and that the project remains profitable. Those are valuable roles and one that a designer would struggle to do on top of their other responsibilities. Just ask the average overworked freelancer.

If then the account manger is so valuable, where is the problem?

So Where Is The Problem?

Although having an account manager is incredibly useful, things often get out of hand. The role of account manager transforms from being a part of the project team to the sole conduit between client and designer. Instead of facilitating a smooth running project they become the bottleneck through which all communication must pass. This funnelled approach to communication prevents collaboration between the client and the Web designer. This kind of collaboration is essential to ensuring a happy client and a successful website.

Without collaboration, educating the client is difficult. Unsurprisingly most clients don't know much about the Web design process. However, by working alongside the client throughout the project, the client learns the best practice for Web design and why certain design decisions are made. This educational process works both ways. The client will learn a lot about the Web design process, but the designer will also learn a lot about the client and his business. When the Web designer understands the nuances of the project, business and client, they produce better websites. Without that understanding they are much more likely to go down the wrong road by wasting time and money, while frustrating the client.

This isn't just limited to designers either. Like many Web design agencies, we excluded developers from client meetings for a long time. Their time was precious and we didn't want to waste it in meetings. However, we eventually discovered that when the developer understands the details of a project, they produce more elegant solutions and often suggest directions which nobody else had considered. When all communication has to pass through a middleman, the chances of misunderstanding and mistakes are further increased. Like a game of chinese whispers, what is said by the client or designer can be distorted by the time it has passed through an account manager.

I remember experiencing this regularly when I worked for an agency in the late nineties. A passing comment made by a client would become a dictate from the account manager that I had to follow. Instead of being a designer who could bring my experience to bear on a project, I became a pixel pusher. Because I wasn't hearing directly from the client, I could not judge the strength of their feelings and so had no opportunity to challenge them over issues I felt passionately about.

Finally (and probably most importantly), without the client and designer working together on a project the client feels no sense of ownership over the design. The projects that inevitably go wrong at my agency are those where the final decision-maker is not actively involved in the design process. If a client has been involved in the design process, commenting and working with the designer at every stage, they are less likely to reject the final design — they will feel the design is as much their creation as that of the designer's. However, if their feedback was through an account manager, they won't have that sense of hands on involvement.

Fortunately, we can have the best of both worlds. We can have the benefits of an account manager, while still allowing the designer to work closely with the client.

The Best Of Both Worlds

At Headscape[44] the role of the account manager is not to control all of the client communications, but to act as a facilitator for those communications. This provides all of the benefits of having an account manager and none of the drawbacks.

For a start, the Web designer and developer always attends project kickoffs, so they meet the client at the beginning of a project. This also ensures that they get all of the background on the project firsthand, rather than via the account manager. The Web designer also works directly with the client discussing ideas and presenting design. This gives the designer the opportunity to present their work in their own words and hear the feedback directly from the client. They can also work collaboratively with the client on some aspects of the design, such as wireframing, to help increase the client's feeling of ownership and engagement. This also has the added benefit of allowing the designer to question and challenge the feedback they receive, engaging in a much richer discussion with the client.

The account manager is still very much a part of the process. He is still the client's primary point of contact and remains responsible for ensuring the project stays on time and within budget. Also, whenever possible, he should be involved in discussions between the designer and client, to ensure he is fully aware of everything agreed upon. Where conversations take place without his involvement, the Web de-

44. http://headscape.co.uk/

signer should report back to the account manager on the content of those discussions.

This all sounds great in theory. However, in the real world of company politics and long-held working practices, you may meet resistance when implementing this approach. In such situations it is important to proceed carefully.

Getting The Support Of Your Account Manager

None of us like change, especially when it involves others telling us how to do our job. It is therefore hardly surprising that you may well meet resistance from your account manager if you suggest the approach that I have outlined in this chapter.

The key is to not to get frustrated if you meet resistance. Look at it from their point of view: how would you feel if they came along and told you to design websites in a different way, or worst still, suggested they should be more heavily involved in the design of client websites?! No doubt you would be horrified, so take the time to empathize with your account manager and seek ways to make the transition easier.

I occasionally encountered designers who complain to me that they have tried to implement my approach and had been shot down by their account managers. Inevitably the reason behind this failure has been because they have tried to rush the transition. If you go in all guns blazing, the idea will be rejected. Instead, start small and build up over time.

One starting point that has worked for others I have spoken to is to sit in on key meetings. For example, if you are not normally part of the kickoff meeting, start with that. Or if you don't get to hear the client's feedback firsthand, ask to be involved in that call. Reassure the account manager that all you want to do is sit in so you can hear what was said. That way they won't worry about what you might say in front of the client. Once you are involved in those meetings regularly it becomes easier for you to start slipping in the odd comment.

I also recommend thinking carefully about how you present this approach to your account manager. It would be easy to focus on why you want to do it. However, you will have much more success if you present the benefits the approach provides for them. Remember, their primary concern is to ensure that the project is delivered on time and within budget. Therefore, when suggesting your heavier involvement with the client, explain that this will reduce the chance of misunderstandings, leading to a faster sign-off. This in turn will mean less iterations and higher profits on the project — all music to the ears of your average account manager.

Finally, point out that if you work directly with the client it will ultimately mean less work for them. Everybody loves the sound of less work! If you present the idea of direct collaboration with the client as having benefits for the project (and for the account manager personally), the chances are you will meet a lot less resistance.

I confidently believe that allowing the Web designer to work with the client ultimately leads to better websites, happier clients and a greater sense of job satisfaction for the designer. However, I am also aware it has its challenges. I would therefore like to see more discussion about how to best get this collaborative relationship working with organizations that traditionally keep these two parties apart. ❧

How Do You Deal With Overstressed, Irrational Clients? An Entrepreneur's View

BY BRIAN SCORDATO ❧

As an entrepreneur who has been on the client's side of the design and development process, I'd like to discuss the thought process of the client, as well as some effective ways to interact with them. For example, why do they ask for Shakira music on the home page? And how do you respond to that?

I was recently referred to Sam Barnes' piece on Smashing Magazine "How to Explain to Clients That They Are Wrong[45]." The article was well written and made a lot of sense to me, but there are two sides to every story, and I'd like to add value to the argument by responding from the client's point of view.

For the most part, Sam did a great job of discussing how to evaluate and act on poor decisions made by clients. What he missed, however, was the impact that the nature of the relationship between clients and creatives has on how decisions are made by both sides. By "creatives," I mean anyone involved in the design or development of a website or application. Understanding this relationship will enable you, and your clients, to make better decisions about the product.

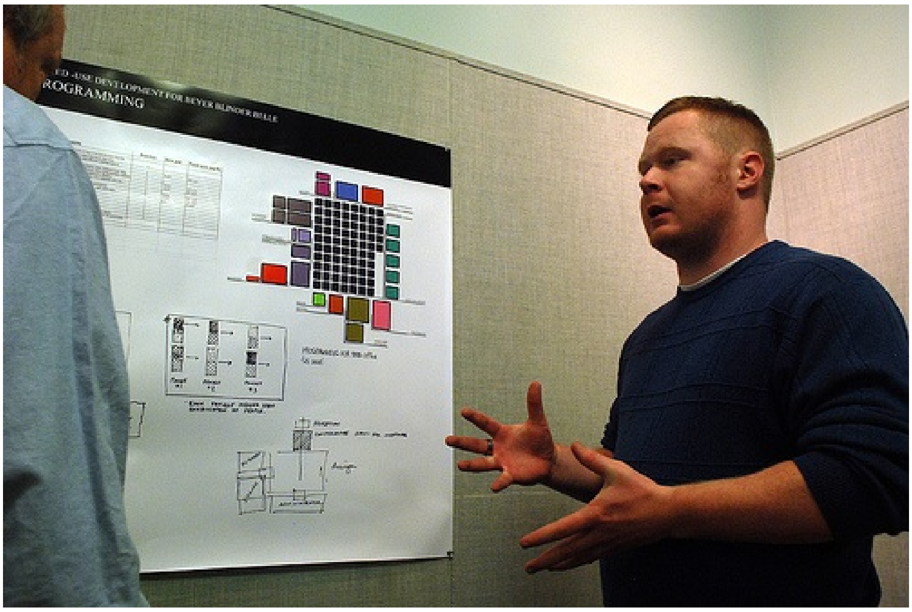
What's On the Line For Us

Before getting into the decisions that entrepreneurs make, let's look at some of the factors that motivate these decisions. Setting the scene will shine a light on the thought process of entrepreneurs and give you a better idea of how to deal with them.

You'll notice I use the terms "entrepreneur" and "client" interchangeably. Even if your client works within the confines of a corporation, as opposed to at the top of a new venture, it would not be unusual for them to act in an entrepreneurial capacity. And even if they aren't

45. http://smashingmagazine.com/2009/12/10/how-to-explain-to-clients-that-they-are-wrong/

entrepreneurs, but middle men who were assigned the project, chances are they will still behave accordingly.



How do you deal with clients who often come up with weird, irrational requests? Image source: super.heavy[46].

First, let's think about the person you're working with. They believe in an idea. They believe in it so much that they've left a paying job for it. They've worked nights and weekends for it, alienated their spouse, friends and family for it. They've begged, borrowed and stolen for the opportunity to pursue it. They've put everything on the line for *their* idea, their vision. And you know what the most important part of their vision is? You. It's not them. And to be honest, it never really was. The first question investors ask after hearing someone's idea is, "OK, who's building it?" Your client knows that their creative team is the only thing that can make their idea a reality.

You're the most important piece of their puzzle, and, despite what they tell themselves, what they know about you before starting the project is often limited.

So, how did they find you?

Clients turn over every stone in search of a designer or developer, because, by that time, the necessity of a good creative team has settled in. Entrepreneurs might look harder than others because of the pressure of their particular situation, but the importance of a good creative team is lost on no one. And this isn't like finding a lawyer, a doctor or even a girlfriend. It's way harder.

46. http://www.flickr.com/photos/adamcnelson/2090704218/

The Leap of Faith

There are three gigantic problems with the process of finding a creative team. First, the client has probably never done this before. Secondly, finding a creative team is tough. Products such as Elegant.ly will help, but because clients generally don't speak your language, assessing the strengths of a firm and how it would mesh with their product is difficult. When the team I picked told me they were experts in Ruby on Rails, my first thought was, "Is that a train or a restaurant?" Thirdly, and by far the most important point, for those of us not in the Web design or development community, feeling comfortable with our evaluation of creatives is impossible.

This is a relatively young industry, one with very low barriers to entry. Heck, my designer took his first client when he was 13. There are very few, if any, metrics we can use to evaluate a creative team. We can look at its past work, speak with the head of the team and maybe get some sort of sample or mock-up, but for the most part, we are flying blind. There are no requisite degrees, certifications or guarantees. If you go to a physician who hasn't finished college, you probably wouldn't be willing to let them operate on you. A developer who hasn't gone to college could build you the next Foursquare.

The Search

In our search for a creative team, we come upon cousins and uncles of acquaintances, people who have designed investor-relations websites for Fortune 500 companies, people who wait tables but build iPhone apps on weekends. We have absolutely no idea what to think of all this.

First-time clients especially don't understand how hard their product is to create, or how long creative design takes, or even if you've done this sort of work before. It's all Japanese to them, and it's an enormous leap of faith. All we can do is look at some of your prior work and decide whether we like it. In what other sphere of life would you make a decision this important on a gut reaction? (Wait, don't answer that.[47]) It'd be like grabbing someone at the grocery store and asking them to marry you because you both have Fruit Loops in your carts.

Even when we look at successful companies in our fields, their success is not always commensurate with the development or design of their products. Take Craigslist[48]: great business idea, poor design; but it doesn't matter because the content is great. On the other hand, Flip-

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47. http://3degreesnation.tumblr.com/post/11030883436/why-im-betting-it-all-on-a-gut-reaction
48. http://www.craigslist.org/

board[49]'s design is fantastic, and that's enough to make the product successful, even although its functionality isn't really revolutionary.

Flipboard.

Grasping For Control

With reservations and doubts lingering in the back of the client's mind, in steps the creative team. You start pumping stories into Basecamp[50], PivotalTracker[51] or some other product-management system that the client's never heard of, and suddenly they are on your turf. Now the client works when you work, and often sits quietly on their hands when you don't. The product goes when you say it goes, and their input is limited. Worst of all, we flat out don't understand what you're doing.

This is extremely hard for people who are used to complete control. Your client has gained so much momentum to get to this point that, when the creative team takes charge, the ground drops from under them like they're some unfortunate cartoon character. This reversal of control is jarring.

This would be fine if the entrepreneur was working with a lawyer, an accountant or even a bank. But early on in the life cycle of a company that depends on a creative team for its success, nothing, and I mean *nothing*, is as important as the creative team. And our control over the success of this phase is so limited. That's why we make uninformed

49. http://flipboard.com/
50. http://basecamphq.com/
51. https://www.pivotaltracker.com/

suggestions like, "Let's make that @ symbol spin," and "I think users would like some Shakira playing when they land on the home page. I know I would." Because we're grasping at straws.

We are trying to hold onto our vision, because suddenly it's in your hands. We may know what we want, but we often don't know how to do it, and we have trouble expressing it. I've often found myself telling my developer things like, "I want a magic search box that pulls information from the Facebook API [I learned that term a few months ago, no big deal], Twitter and Foursquare and spits out relevant people based on our compatibility algorithm," only to have him respond, "... Yeah. Let's start by allowing users to log in with their Facebook account."

I know how I want the product to feel to the user, but I have no idea how to get there without my team's help. Saying, "I want it really simple, easy to use and elegant" is not helpful. Grasping at some visual element that we comprehend is sometimes the only bullet in our gun.

So, How Do You Deal With Overstressed, Irrational Clients?

Now you have an idea of the sometimes fragile psyche of the client. The question is, how do you handle us when we say we want Shakira?

Sam's points are all well taken and, for the most part, right on. But they are directed at a rational, faceless client. The overview is good, but implementing it in real life would be difficult. So, here is the perspective of a client with a face. The following five actionable tips should drastically help your client relationships.

1. **Show us.**
   This one is the most important. It's very hard for us to visualize our idea. We know how we want the product to feel, but we don't know how to get there. We would certainly recognize that Shakira isn't the answer if you showed us this on our website — or on a comparable website if building our mistake would be too time-consuming. Usually, if the client was savvy enough to get to this step in the process, they would know what works and what doesn't. And if they don't, their idea is hopeless anyway.

2. **Tell us.**
   This one wasn't in Sam's points. Good entrepreneurs are flexible and can adjust their vision to meet the reality of the situation. If we want something, but you think it would take too long and not be worthwhile, tell us. Suggest a workaround if you want, or just ask us if there's another way. Entrepreneurs are usually great at creative solutions; we

make our living by avoiding barriers. But we can only avoid barriers if we know what they are.

3. **Explain the rules of the game.**
   If you're building a basketball, you know what you can and can't do. You could probably make one that's bouncier or more durable than competing products. But you couldn't make one that goes in the basket every time. You know your limitations, but sometimes we don't, and creativity is only able to flourish inside the box of reality. Because we don't know the rules of the design and development game, we often don't know what's possible. More often than not, we'll assume that something isn't possible when it actually is. The head of my creative team had a good solution for this: he created a folder of ridiculous ideas that I wished could be part of the website, and I dumped stuff in there from time to time. More often than not, he'd ping me saying, "Hey Brian, that's possible. Let's try it out." Being creative is difficult when the canvas is blank. If you can give us a line to start with, some sense of what you are capable of, it'll help us enormously on the creative side.

4. **Be confident and enthusiastic.**
   Everyone appreciates an expert. Sam touches on this, and it's extremely important. When I told my designer that I was considering profile pages that end users could design, he said something like, "Well, it certainly worked for MySpace." Point taken. Demonstrating your expertise puts clients at ease and instills trust in your decision-making abilities. Also, don't be afraid to occasionally ask for forgiveness rather than permission (as long as the change is not customer-facing). It will reaffirm that we made the right decision. Nothing is more invigorating than someone who believes in your vision.

5. **We can't act like locals.**
   Clients aren't completely oblivious to their mistakes, either. They know that some of their suggestions are absurd. They know that they don't understand this stuff one-tenth as well as you do. They know they've stepped into a subculture that they couldn't possibly fit into. It's like when you go on a ski vacation and try to act like the locals. No matter what you do, you won't be one. And we hate that we are an outsider in your world. That manifests itself in a number of ways: weird suggestions, holding firm on an irrelevant point, demanding certain color schemes that probably don't matter (but sometimes do). This will still happen, but now that you know where they're coming from and how to assuage them, you should hopefully have a more effective connection with clients. On the flip side, expect to be treated with the same level of suspicion and hesitation when you step into our world. Sam urges you to speak the client's language, to set goals in business terms. Be very

careful with that one. Misusing one business buzzword can waste your credibility, just as one suggestion for a spinning @ symbol will make you wary of any other design ideas. Discussing markets that you have exposure to but aren't immersed in can have adverse effects. Know that we are all tourists. Which leads to the final point.

The Odd Couple

In writing this chapter, I realized how odd the relationship is between creatives and clients. Without my creative team, I would have no shot at getting my company off the ground. I rely on them 100%, but I have no clue what they do, how they do it or if the work they do is reasonably priced. This forces me to try to speak their language, to attempt to enter their world by learning quickly, and to try to maintain control of a vision that they are responsible for bringing to life.

Creatives, on the other hand, rely on clients only somewhat. They don't live and die by each project, as clients do. Their work is in great demand; many of the firms I considered are growing quickly in this recession.

However, bits and pieces of Web design and development work are slowly being fragmented and commoditized, and for the same reasons that evaluating designers and developers is difficult: the barriers to entry are low. This opens the door for *99Designs* to pick off clients, especially vulnerable entrepreneurs. These services leverage the crowdsourced model by matching designers who have little or no experience with clients who don't understand the nuances of the craft well enough to be able to tell. This pushes creative firms to differentiate themselves through means that clients can understand. Business acumen is an incredibly helpful skill for creatives to have, and something 99Designs can't offer.

Summary

So, we're left with two groups, each possibly operating in unknown waters, working to create a product that requires both of them to be firing on all cylinders in order to succeed. That being said, do business-savvy creatives exist? Heck, yeah. I've got them helping me build my company, and it makes all the difference in the world. Do design- or development-savvy entrepreneurs exist? Probably. I've got a Mac — does that count?

The goal is to establish a working relationship between the two parties that leverages the strengths of each to quickly and effectively create a product and bring it to market. The tips above should help those working on the creative side. I'd be interested to hear a designer or developer's take on what I should be doing to get the best out of my creative team. After all, we've got to have more in common than liking Fruit Loops for this thing to work.

Go easy on us poor entrepreneurs. I realize we make dumb suggestions sometimes, but it's just an attempt to maintain some control over a process that we occasionally feel we've lost control over. And consider the business decisions that clients make from both sides. We've had a lot of practice with this stuff.

RELATED ARTICLES:

You might be interested in the following related articles:

- How To Respond Effectively To Design Criticism[52]
- Useful Business Advice And Tips For Web Designers[53] (an overview of articles on Smashing Magazine) ❧

52. http://www.smashingmagazine.com/2009/10/01/how-to-respond-effectively-to-design-criticism/
53. http://www.smashingmagazine.com/useful-business-advice-web-designers/

How To Sell The Value Of Mobile To Clients

BY MARK REEVES ❧

As Web designers and developers, we see the value in supporting mobile devices every day. We're well-versed in tactics and techniques for adapting our work to mobile. Our challenge is to be equally well-versed in selling our clients on that value as being something in which they need to invest precious budget dollars.

The Mobile Imperative

I've been describing what I call the "mobile imperative" for a few years now when talking to clients or advocating support for mobile devices[54] in Web design projects. The mobile user experience is not an add-on. It's now a major part of the Web as we know it, and our clients' content and tools will appear on an increasing number of devices, screens and contexts.

As the distinction between the Web on desktop and mobile continues to blur, supporting mobile is increasingly something we do as part of every website design or build. It should become second nature to us, but there are still additional costs: design enhancements at multiple breakpoints, testing across a wide gamut of devices, defining and maintaining media queries with associated CSS or JavaScript, perhaps even a distinct mobile-oriented website. To those who are less informed, these may be seen as unnecessary enhancements. The traditional websites that they've been acquainted with for the past 20 years may be all that they interact with or deem necessary.

Some clients come to us requesting mobile support. They know they need it; they know its value. They come with reasonable budgets in hand for a traditional website, but additional funds to support the extra effort that mobile requires didn't make it into this year's marketing allotment, and their scope checklist has already been pared down. We don't want to turn them away, but we have an obligation to ourselves and to our business to bill all of our clients on the same terms.

Our responsibility as Web professionals is to educate and inform our clients, to impart upon them the value and necessity of supporting mobile and, for those worthwhile clients and projects we don't wish to

54. http://www.slideshare.net/clearbold/mobile-marketing-7469482

turn away, to craft a solution that can achieve their goals within a realistic budget.

Start By Listening

Even the simplest of websites don't conform to a one-size-fits-all solution. We're trying to deliver a website to our clients that will hold up for a few years' time, that should work on today's devices and those we haven't yet seen.

Any recommendation we make to our clients, whether it be to have a responsive website, to have separate mobile and desktop websites, or not to worry about mobile at all, should be based on an understanding of our client's needs. More often than not, supposedly fixed variables such as budget, scope and timeline can and do change. Must-haves become secondary goals in light of other considerations. The project that the client brings to you is not necessarily the project that the client actually needs.

Listen to your client's needs and constraints, and really seek to understand the nature of their business and their situation. This should help shape your recommendation. If you listen carefully, you should also be able to determine how best to make the case for incorporating mobile support into their website project.

My experience is that clients typically come with something in hand that they're hoping to achieve, or they exhibit distinct values that we can speak to. I'm going to look at how to make the case for mobile to clients who fall into one of four likely categories: data-driven, competitor-driven, cost-driven and socially conscious.

The Data-Driven Client

When trying to convince someone of anything, data and statistics are your clearest and most objective tool. Fortunately, the Web is an incredibly measurable medium, and a ton of data exists on usage behavior and adoption rates.

Here are a few recent stats I've been citing:

- In "Data Monday: Impact of Responsive Designs[55]," Luke Wroblewski cites increased revenue, conversions and website visits following responsive redesigns.

55. http://www.lukew.com/ff/entry.asp?1691

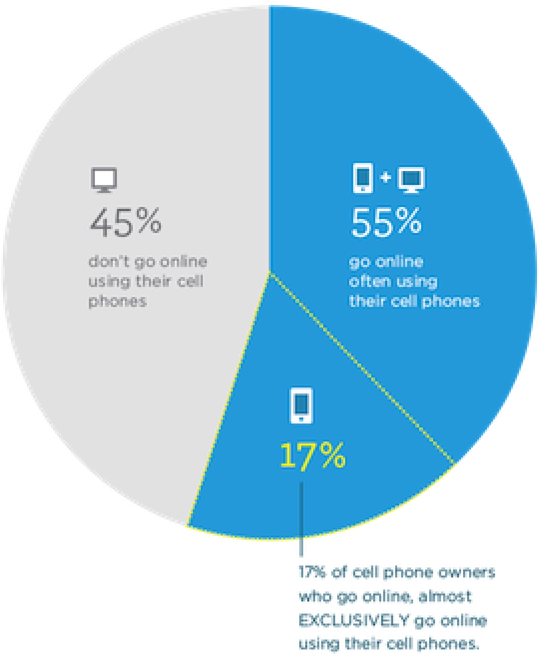
- Pew Internet's study of US adults, "Cell Internet Use 2012[56]," is full of recent figures. 55% of mobile-phone owners use their phones to go online, and 31% of those users go online mostly on their phone.

- QuirksMode's "Browser Stats for Q4 2012 and All of 2012[57]" shows that mobile browsing — counting phones, not tablets — "now accounts for 11% of all browsing."

- Campaign Monitor states that more emails are read on mobile devices than on desktop[58].

- Technology Review's "Mobile Computing Is Just Getting Started[59]" shows that sales of mobile handsets overtook sales of PCs in 2012.

- In addition to citing industry data, we regularly request that new clients give us access to their Google Analytics profiles so that we can size up their traffic. A clear picture may emerge from their current audience.



According to Pew Internet[60], in 2012, 55% of mobile-phone owners went online. 17% of all mobile-phone owners went online mostly via their phone. We've poured blood, sweat and tears into supporting IE 6 for fewer users than that.

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56. http://www.pewinternet.org/Reports/2012/Cell-Internet-Use-2012/Key-Findings/Overview.aspx
57. http://www.quirksmode.org/blog/archives/2013/02/browser_stats_f_6.html
58. http://www.campaignmonitor.com/blog/post/3843/apple-leads-email-client-market-share-but-android-gains-ground
59. http://www.technologyreview.com/news/511766/mobile-computing-is-just-getting-started/

The evidence is clear: The shift to mobile is well underway. As important as the Web is to any business or institution, mobile is the Web and is just as important. If data and numbers would make the case for your client, show up with enough studies to overwhelm them with mobile's impact.

The Competitor-Driven Client

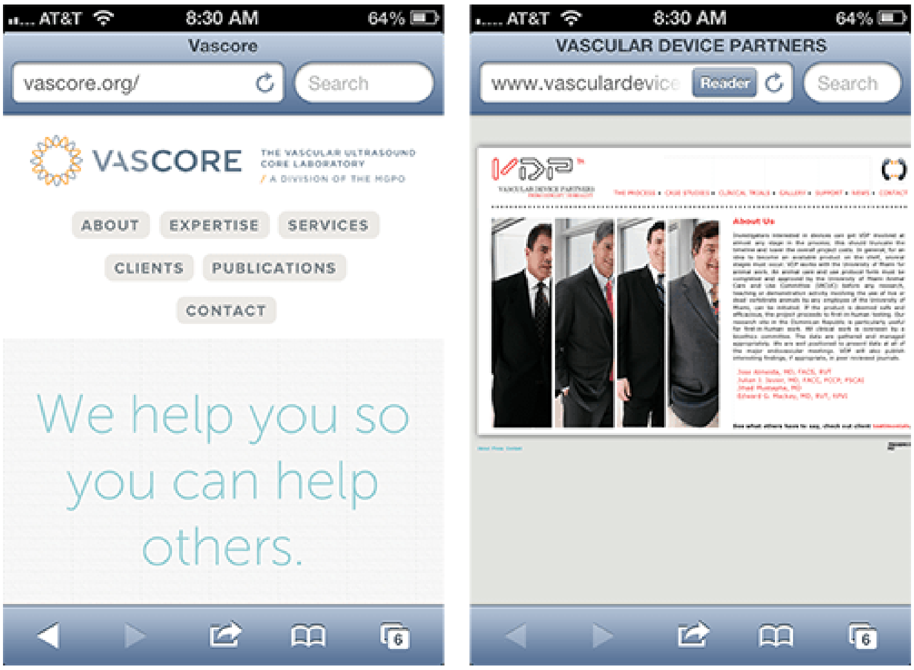
Has your client come to you with a lot of competitors' websites in hand? You're in luck. You have a client who's establishing a standard among other websites as a measurement of success.

Your job is to set a standard that your client should aspire to. Do your research on mobile-friendly competitor websites and try to compile data and examples that you can use to highlight the benefits of a more intuitive, engaging user experience.

If you come up short finding a direct competitor, find an industry of similar complexity or with a similar target audience or comparable demographics. Find examples, and have your client try them out on your mobile devices. Encourage your client to empathize with users who will encounter and interact with their website and make decisions accordingly. Explain to them that mobile users are growing less patient and that a frustrating mobile experience could hurt their perception of the brand[61], and show how an optimized mobile experience will make it easier for new and existing customers[62] to forge deeper relationships with their business, resulting in more purchases or revenue.

And if your client is really competitive and not just keen to check out the competition, then encourage them to spend the time needed to really optimize performance[63]. Aim higher than just to have the best-looking website. Design and build the fastest-loading, easiest-to-use website there is.

60. http://www.pewinternet.org/Reports/2012/Cell-Internet-Use-2012/Key-Findings/Overview.aspx
61. http://marketingland.com/google-survey-what-users-want-from-mobile-sites-22606
62. http://www.lukew.com/ff/entry.asp?1691
63. http://bradfrostweb.com/blog/post/performance-as-design/



Two websites, one industry: On the left, Vascore (designed by Jodi Vautrin and coded by my firm, Clearbold) uses responsive techniques to adapt the design to mobile screens. Another firm's website, on the right, falls short.

The Cost-Driven Client

In many small businesses, any spending on marketing comes straight out of the owner's pocket. Those dollars are hard to part with. Marketing teams at larger companies might be seeing their budgets cut based on other shifts in their industry or business, or they might not get to apply for more funds until they've put together next year's budget.

Empathizing with your clients and putting yourself in their shoes are important. They've come to you for a reason. They're not trying to gouge you; they're seeking access to the services you provide within their own reality or constraints.

If they're in a position to free up more funds, help them to justify that or to present the case to their superiors. Emphasize that increasing their up-front investment in a sustainable, future-friendly[64] website will decrease the likelihood that it will need to be redesigned or reworked in a year. Remember that the goal of responsive Web design is not to create five different designs at five different dimensions. The goal is to establish a fluid, flexible design system[65] that will adapt to different contexts. Those contexts may be screens on mobile devices and desktop monitors. In a year or two, those contexts might be embed-

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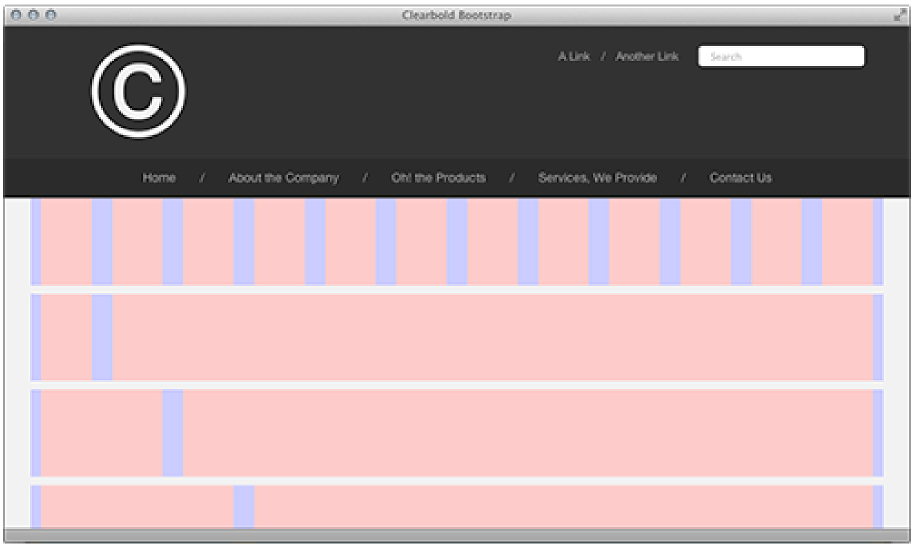
64. http://futurefriend.ly/
65. http://trentwalton.com/2013/01/07/flexible-foundations/

ded screens in refrigerators, TVs or Google Glass. Future-friendly responsive design seeks to anticipate the unknown and reduce the need for additional work every time something new hits the market.

If cost truly is a factor, what sort of constraints can you impose on the design process to keep things in check? What sort of tools can you leverage to minimize effort, while still addressing your client's unique needs and positioning? Responsive front-end frameworks, such as Zurb Foundation[66] and Twitter Bootstrap[67], are a great option in this scenario. Zurb Foundation 4, recently released, has shifted to a mobile-first approach and emphasizes performance.

One of our clients approached us with a budget in hand and some content to build an intranet for a hospital department. The website would feature simple navigation, a staff directory, news postings, a calendar and highlighted stories, and it needed to support iPhones and iPads, which had been adopted by the physicians in that department. We turned to Zurb Foundation to streamline development and design.



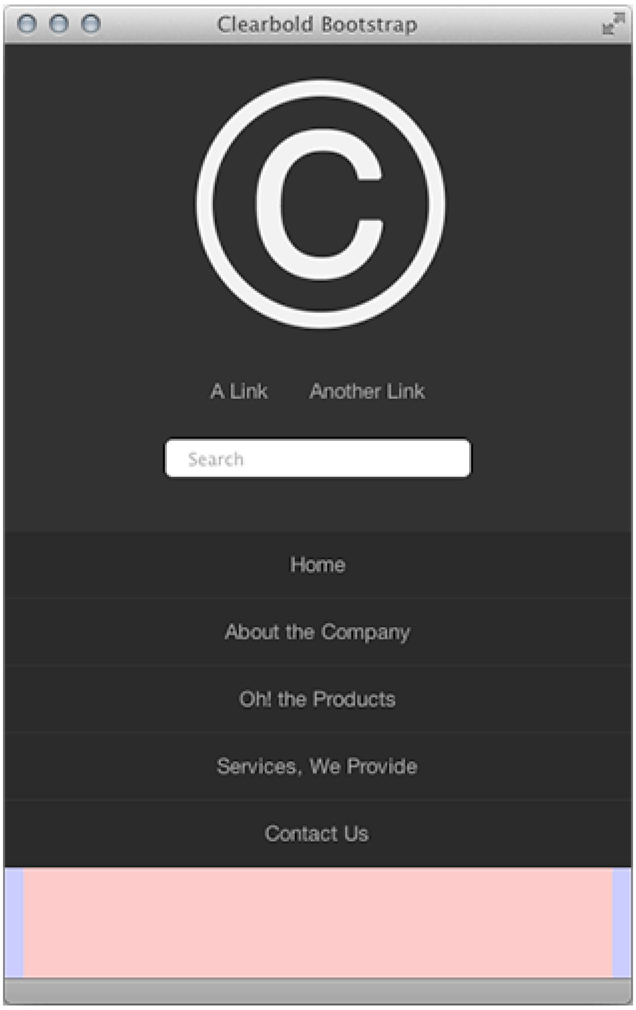
A responsive framework such as Zurb Foundation[68] defines columns that float side by side on large screens…

We found this project a great opportunity to upend the traditional design and development process. With the content provided, we skipped wireframes and comps and whipped up a complete prototype of the website using Zurb Foundation, which we presented to the client. With their approval, we applied design elements to enhance the user experience — typography, colors, photography — all within the grid-based

66. http://foundation.zurb.com/
67. http://twitter.github.com/bootstrap/
68. http://foundation.zurb.com

structure provided by Foundation. Sticking to Foundation's grid and leveraging ready-built components kept us on schedule and on budget. The launch met with rave reviews.

Relying on a framework may run contrary to our idea of work as craft, but we should be willing to acknowledge cases where using one to deliver a mobile-friendly website in the face of other constraints is a solid win.



... and that reflow into a single column for small screen dimensions. We've shared a streamlined demo[69] on our website.

The Socially Conscious Client

If your client appreciates your efforts in building websites that are accessible to those with physical impairments, consider that Internet access is fast becoming a basic right and necessity in modern society. An

69. http://clearbold.com/bootstrap

Android smartphone offered by a cellular carrier may be the closest we get to universal broadband Internet access.

The mission of the Web Standards Project[70], founded in 1998, includes "delivering sites that are accessible to more people and more types of Internet devices." On 1 March 2013, in a post titled "Our Work Here Is Done[71]," it said that "the Web as an open, accessible, and universal community is largely the reality." By relying on semantic, standards-based HTML markup and leveraging ARIA roles[72] and best practices, we can be confident that the content we put online can be accessed with assistive technologies. Good markup is good citizenship, and accessibility means ensuring that everyone has equal access to the Web.

But enabling software to parse the content on a website and enabling users to interact with a website on small screens are two different things. When we look at the migration of content and tasks onto the Web – job postings and applications, breaking news and weather alerts, healthcare records, social networks – accessibility is about more than screen readers. It's about access to the Internet, and for more and more people, the Internet is a small screen. We need not only to support interactions on mobile screens, but to ensure content parity. Supporting mobile, too, is often done by stripping out content. But omitting content to fit a smaller screen is not equal access – it turns mobile users into second-class citizens.

According to Pew Internet[73], 17% of all US mobile-phone owners "go online *mostly* on [a] cell phone." Among young adults and non-whites, that number is even higher, as it is among those with an annual household income lower than $50,000 and those who have not graduated college. In developing countries and on other continents, mobile phones may be the general population's only means of accessing the Internet. Investing in semantic markup and a mobile-first[74] approach ensures they can access your client's content, too.

Ignoring mobile not only means ignoring a significant segment of society, but risks limiting the ability of many to find work, to find information or to enjoy equal access to what are becoming essential rights. If your client is sensitive to these sorts of issues, then this valuable insight should resonate with them. In some industries and with some

70. http://www.webstandards.org/about/mission/
71. http://www.webstandards.org/2013/03/01/our-work-here-is-done/
72. http://www.webteacher.ws/2010/10/14/aria-roles-101/
73. http://www.pewinternet.org/Reports/2012/Cell-Internet-Use-2012/Key-Findings/Overview.aspx
74. http://www.lukew.com/ff/entry.asp?933

types of information, such as job postings and healthcare data, ignoring mobile could one day constitute discrimination.

Mobile Is An Opportunity

If you've been doing this for a while, like I have, then you'll know that the growth of the Web has been painful at times, with browser wars, table-based layouts and Flash. Mobile offers us an opportunity to reset expectations to some degree. It gives us a chance to do things right from the outset. Future-friendly, mobile first — these aren't trite buzzwords. They represent a shift towards building websites that are accessible and intuitive for users, while being sustainable and profitable for our clients. We have the opportunity and incentive now to create websites that are platform-agnostic, that allow content to reflow and shift to fit different contexts and that can adapt to dramatic shifts in user behavior over time.

At the same time, we have more work to do. Quality assurance across multiple devices, better up-front planning, and coding for multiple design breakpoints all add layers of time and effort to a standard website build. Every project offers a chance to try a new tool or technique, and we're still finding our way to best practices. It's a matter of finding and adapting a new design process and using it efficiently.

The key in all client interactions is to understand the goal before focusing on the specifications, to listen, and to present a solution to the client that addresses their needs. That solution, and how you present it, should instill confidence that their investment in your work is sound.

At this stage, mobile is always on the table for us. More often than not, by adjusting the scope and expectations, by seeking out options that fit the budget and requirements, by informing and educating our clients in alignment with their values, we can find victories big and small in our projects and do our part to move the Web forward. ❧

Encouraging Better Client Participation In Responsive Design Projects

BY ANDREW CLARKE ❧

At the fabulous Smashing Conference[75] in Freiburg, I gave a new talk, one I'd written just a few hours prior[76]. I chose not to use slides, but instead to speak about three things that I'm incredibly enthusiastic about:

1. Responsive design is not (just) a design or development problem;
2. The client participation process is broken;
3. How to call your client an idiot, to their face.

Here are the (slightly expanded) notes that I made before my talk.

Responsive Design Is Not (Just) A Design Or Development Problem

In all the excitement about responsive Web design over the last few years, someone forgot to tell our bosses and clients, so we've been treating responsive design like it's a design or an implementation problem, whereas in fact it's as much an issue for business. In fact, it's an issue for everyone involved: designers, developers, content specialists, the people who commission websites and those who structure the teams who make the websites.

THE TRADITIONAL WORKFLOW

Here's a common, if grossly over-simplified, project workflow:

- Plan,
- Design,
- Develop,

75. http://smashingconf.com/
76. http://stuffandnonsense.co.uk/blog/about/i-spoke-at-a-smashing-conference

- Deploy.

Into planning, you might roll up content audits, requirements, user issues, wireframes and the like. (Aside: Perhaps it's because I've had too many bad experiences with too many bad UX specialists, but I've a problem with any part of the process that limits our potential for great design. This includes wireframes — typically desktop-only wireframes — that are produced and often signed off by a client long before they arrive in the design studio. Nothing is wrong with UX per se, only when it's prescriptive and not part of a flexible, iterative design process.)

Design is where you'll find a myriad of creative activities, including graphic and layout design and more. Here, static design visuals — you might call them comps — have been the traditional currency of the visual designer. They're what designers use to experiment with creative ideas, then exchange with clients for sign-off, and subsequently deliver to front-end engineers as blueprints for building.

Development is likely the responsibility of front-end engineers. I know from experience that engineers often work separately from designers and might have only limited interaction with them.

As for *deployment*, I know I'm making light of this, but it's black magic and I simply don't understand it.

This waterfall-style process is similar to the old-fashioned pre-press workflow that I remember when I worked in pre-digital photography. It took up to seven people to take a transparency from a camera to a color proof. Each person's work was an opportunity for sign-off, but more importantly it was an opportunity for billing. The same is mostly true of our Web design processes today.

Compare that to what I've cheekily been calling a "post-PC responsive workflow":

- Plan,
- Combined and iterative design and development,
- Deploy.

In this agile-style iterative process, everyone works more closely together, designing, developing, testing, redesigning and refining.

DESIGN TESTING AND DEVICE TESTING

I find testing my designs on real smartphones and tablets while I'm working to be incredibly useful. This means that I have access to several devices. But how can we afford to buy all of the devices we need?

This year *(Editor's note: in 2012)*, Stephanie Rieger wrote about the range of devices we should use[77]. She included iPhones, iPads, Kindle Fire and three different versions of Android. But I think her advice could be misleading.

Do we really need to own a myriad of smartphones and tablets or do we need just a few to develop an affinity for them? Image: opensourceway[78].

It's important to remember that there is a big distinction between two types of testing: design testing and device testing.

Designers need to use only a subset of devices, because what matters most is that we develop an affinity for how our designs work on any type of device when we hold it in our hands. To be clear, how a menu *feels* when used on a smartphone is a very different issue from whether it technically works on a particular make or model of smartphone. That's why designers don't necessarily need to buy a myriad of smartphones and tablets, just those they need to develop an affinity for.

RESPONSIVE DESIGN REQUIRES RETHINKING

Businesses (agencies, companies, customers) now need to refactor many aspects of their businesses to allow for better responsiveness. Our clients now need to restructure their buying process. For example, at my agency, Stuff and Nonsense[79], I still get prospective clients asking us only for static design visuals. They assume we work in Adobe Photoshop, Fireworks or the like and that we deliver static visuals, because that's what designers have provided them with for well over a

77. http://stephanierieger.com/strategies-for-choosing-test-devices/
78. http://www.flickr.com/photos/opensourceway/4749432145/in/photostream/
79. http://stuffandnonsense.co.uk

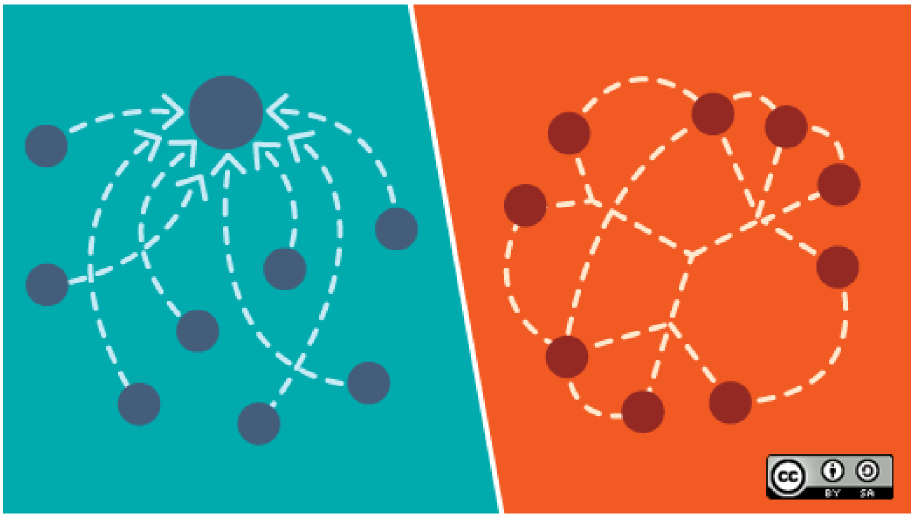
decade. That's why, while many of our clients don't often expect responsive templates as a deliverable, they love it when they find out that that's what we deliver.

Design and development teams need to reorganize. It's a fact that purely visual designers have the most to learn.

Those Photoshop or Fireworks static visuals I spoke about are no longer equipped to provide what we need from them in a responsive context. As I've said before, it's like bringing a knife to a gunfight[80]. More on that in just a minute.

The Client Participation Process Is Broken

I know that most people know me from my writing and speaking about CSS, and some people might not know that I make my living by designing for clients. In the last year, I've worked on projects with STV[81], where I'm part-time the design lead; the Hillsborough Independent Panel[82], whose report into the tragic deaths of 96 Liverpool fans in 1989 I designed the website for; and the ISO[83], the International Organisation for Standards.



For a designer, sharing regular feedback with clients and involving them in every step of the design process might sound like a risky proposition, but it is necessary and beneficial to the design process — when done properly. Image: opensourceway[84].

80. https://speakerdeck.com/u/malarkey/p/bringing-a-knife-to-a-gunfight
81. http://stv.tv
82. http://hillsborough.independent.gov.uk
83. http://iso.org
84. http://www.flickr.com/photos/opensourceway/4370250237/in/set-72157628736893483/

Every designer should want to make the best work possible, feel proud about that work and make their clients happy. Unfortunately, the ways that designers and developers and our clients have communicated in the past has so often lead to frustration, unhappiness and, most importantly, work that failed to meet everyone's expectations.

Think of the traditional media that we used to communicate our designs: static wireframes and visuals (comps) that we made using drawing tools such as Photoshop or Fireworks, many of which pre-date the Web. These visuals are like bringing a knife to a gunfight[85]. Think about the aspects of design that a static medium cannot communicate and all of the possibilities for misunderstanding that this creates. Static visuals cannot do any of the following:

- Display Web fonts or browser font rendering;
- Demonstrate different browsers' CSS capabilities;
- (Easily) demonstrate percentage-based layouts;
- (Easily) demonstrate animations, transitions and pseudo-classes (states).

When I say "easily," I mean not without hours of tedious repetition that we could otherwise spend being creative.

This isn't to say that designing *in* a browser is always better. Unlike Stephen Hay[86], I use Fireworks to design atmosphere (typography, color and texture) and to develop fine design details, an extra layer of polish, after all of the sketching and interactive prototypes are done.

DESIGN ATMOSPHERE

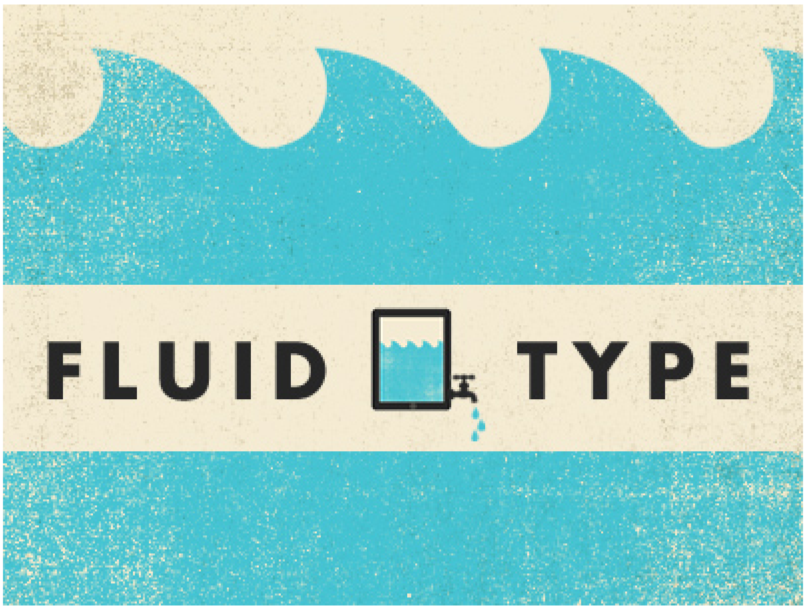
What do I mean by "atmosphere"?

Many people continue to mix layout with other aspects of design. How often has a client said to you, "I don't like the design" when they really meant, "The sidebar should be on the left, not the right"? That's why we need a new word for what's left when we remove layout from a design. I call what's left "atmosphere" because atmosphere is often about something that you feel but can't explain, like the atmosphere in a room after two people have been arguing, or like the atmosphere at a great concert or football game.

85. https://speakerdeck.com/u/malarkey/p/bringing-a-knife-to-a-gunfight
86. http://bradfrostweb.com/blog/mobile/bdconf-stephen-hay-presents-responsive-design-workflow/

Worse than being inefficient, static visuals set the wrong expectations in the minds of our clients. I wrote about this very thing[87] back in 2009.

Aside: Why are most websites fixed and centred at 960 pixels? Could it be because a designer showed their client a 960-pixel-wide static visual and asked them to sign off on it? That's what developers have been told to build. That's why, in the past, we've spent hours hacking HTML, CSS and JavaScript to make rounded corners display in old versions of IE. We sold rounded corners to our clients through those visuals. It's our own stupid fault. No one else's.



Even small "snapshots" of the design, such as this one from Dribbble, can communicate atmosphere — the visual direction, style and overall feeling — of the new website. Image: Fluid Type[88] by Trent Walton.

Work in Photoshop and Fireworks, by all means (I do). Make static visuals as rich and as detailed as you want them to be. Just don't set the wrong expectations by showing them to your clients as examples of how their website might look across browsers and devices or by using them as sign-off artefacts. The same goes for screenshots of Web pages. Set the right expectations by demonstrating interactive designs made using HTML, CSS and JavaScript.

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87. http://www.stuffandnonsense.co.uk/blog/about/time_to_stop_showing_clients_static_design_visuals/
88. http://dribbble.com/shots/610632-Fluid-Type

How To Call Your Client An Idiot, To Their Face, Without Getting Fired, And Then Have Them Thank You For It

One thing I've learned over the years is that clients *love* to feel involved in the design process. Sometimes, though, they make suggestions only so that they feel they have put their stamp on the project. I know that occasionally designers think that such requests aren't necessary and that sometimes they're stupid. Don't worry. You *are* allowed to say that to clients (more about that later), but better still, avoid the issue entirely. Here's how…

Don't email pictures of websites to your clients and then ask for their "thoughts." Are you mad?! In the same vein, don't simply upload static visuals to Basecamp and expect constructive feedback without providing some direction on how to receive them.

Don't wait until after weeks of work before having a "big reveal." Down this road lies frustration and resentment. Instead, keep clients involved at every step, all the way through the design process, and not only at those traditional sign-off points. That's why for the last few years I've tried hard to physically work alongside my clients as often as possible. When that's not an option, I set up shared Dropbox folders so that the client can check in on my progress as I work. We even keep a Skype window continually open.

Set up the proper environment to receive structured feedback, and then ban all unstructured feedback you might receive by telephone or email. Insist that your feedback sessions be face to face when possible, and then limit their scope to aspects of the design. For example, ask for answers to specific questions about typeface choices and typography.

At my design agency, I help facilitate structured feedback by organizing feedback workshops with our clients. More on those now.

Please remember: *you* are the designer. You are the person who has been hired to solve a problem that the client either couldn't or doesn't have the time to solve themselves. Your solution to that problem is worth a lot to their business, so never underestimate your role, skills and influence in the design process.

With that in mind, remember that you can set rules about receiving the constructive, structured feedback that's so important to helping you make a great design.

RULE 1

As mentioned, don't ask for unstructured feedback out of context. Emailing or uploading static visuals just doesn't cut the mustard anymore. You must control the discussion, so take the time to explain your designs and the thinking behind the decisions you've made. I've found that, because of this approach, my clients enjoy learning about what goes into making a design and are far less likely to request unnecessary changes simply to put their mark on the project.

RULE 2

Take control of the environment in which you present your designs. Host feedback workshops or design "crits," and use them to get to know your clients better and to develop a deeper relationship with them. Make these workshops face to face when possible, and set time and scope limits, even if you hold them over Skype. These workshops work best when everyone is encouraged to be honest and to let their ideas out in the open. That's why, although it may seem a little old fashioned, it's important for someone to keep a written record of what everyone has said.

Make it clear to your client that only the people who show up to a workshop may have an opinion about the design. This must include even the CEO, who sometimes makes "helpful" suggestions 24 hours before launch (or when you want to get paid).

RULE 3

Remind everyone to leave their feelings at the door, because in a design crit only the work matters. Personal feelings don't matter; so, inside the crit, frame the conversation so that your clients can openly express their opinions. Encourage them to speak their minds, to be brutally honest if they need to be and to scribble across your notes and sketches to get their point across. By the same token, you're free to disagree with any suggestions they make. Be free to say the suggestions won't work, and suggest better alternatives. This shouldn't be about ego, only about the integrity of the work.

If you feel they aren't listening, you're free to call them an idiot, too, if you must. Say it to their face, and don't worry about getting fired – if you've established a good enough relationship with them, they'll thank you for it, too, because they'll know you have their interests at heart and are passionate about doing your best for them and their business.

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About The Authors

Andrew Clarke

Andrew Clarke is a designer, author and speaker who's known for his design work, books, conference presentations and contributions to the community. Jeffrey Zeldman (the Godfather of Web standards) once called him a "triple talented bastard." If you know of Jeffrey, you'll know how happy that made him. Over the last fourteen years, he has made designs for amazing clients and written two books, *Transcending CSS* and *Hardboiled Web Design*. He has given over 50 conference presentations and hosted workshops and training events for other Web professionals all over the world. Twitter: @Malarkey[89]. Website: Stuff & Nonesense[90].

Andy Rutledge

Andy Rutledge is a UX design lead at Kalkomey in Dallas, Texas. When not working or with his family, he's likely either on the bike or at his piano. You can follow Andy on Twitter. Website: AndyRutledge.com[91].

Brian Scordato

Brian Scordato is the founder of Find Your Lobster[92]. He also teaches entrepreneurship and business/product development at General Assembly, and serves as EIR at Mayday-Mayday-Mayday[93], a branding and creative consultancy. Brian currently lives in New York City, but he's a Tar Heel at heart. Twitter: @Dato22[94]. Blog: http://datodaily.tumblr.com/.

Jeremy Girard

Jeremy Girard was born with six toes on each foot. The extra toes were removed before he was a year old, robbing him of any super-powers

89. http://www.twitter.com/Malarkey
90. http://stuffandnonsense.co.uk/
91. http://andyrutledge.com/
92. http://www.findyourlobster.com/
93. http://mayday-mayday-mayday.com/
94. https://twitter.com/Dato22

and ending his crime-fighting career before it even began. Unable to battle the forces of evil, he instead works as the Director of Marketing and Head of Web Design/Development for the Providence, Rhode Island based Envision Technology Advisors. He also teaches website design and front-end development at the University of Rhode Island. His portfolio and blog, at Pumpkin-King.com[95], is where he writes about all things Web design[96]. You can also find Jeremy on Twitter @jeremymgirard[97].

Leonard Souza

Leonard Souza (follow him @_leonardsouza_[98]) loves instigating epic battles between the left and right hemispheres of his brain. Upon studying both Computer Science and Fine Art, he has worked hard at mashing the two disciplines into fun and exciting solutions to complicated problems. Today, he happily works for EffectiveUI[99] (@effectiveui[100]) as a Lead Experience Architect, where he is given many opportunities to play with art and technology. Over the years, Leonard has been fortunate enough to work with several outstanding companies such as Panasonic, DirectTV, Intel, MGM, FedEX and Boeing, as well as many startups. Leonard lives in Las Vegas, Nevada with his wife and two young boys.

Mark Reeves

Mark Reeves is a Web developer and founder of Clearbold, a development & consulting practice focused on content management and front-end Web development. You can find him on Twitter[101], subscribe to his newsletter[102] or visit Clearbold.com[103].

Paul Boag

Paul Boag has been working with the Web since 1994. He is now co-founder of the Web design agency Headscape[104], where he works close-

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95. http://www.pumpkin-king.com/
96. http://www.pumpkin-king.com/
97. https://twitter.com/jeremymgirard
98. https://twitter.com/_leonardsouza_
99. http://www.effectiveui.com/
100. https://twitter.com/effectiveui
101. https://twitter.com/circa1977
102. http://clearboldne.ws/
103. http://www.clearbold.com/
104. http://headscape.co.uk/

ly with clients to establish their Web strategy. Paul is a prolific writer having written the *Website Owners Manual*[105], *Building Websites for Return on Investment*[106], *Client Centric Web Design*[107] and numerous articles for publications such as .net magazine, Smashing Magazine and the Web Designers Depot. Paul also speaks extensively on various aspects of Web design both at conferences across the world and on his award winning Web design podcast boagworld[108]. Website: boagworld[109]. Twitter: @boagworld[110]. You can also find Paul on Google+[111].

Sam Barnes

Sam Barnes is a Development Team Manager at Global Personals[112]. Although a little short for a Stormtrooper, he can be found posting articles at thesambarnes.com[113], a blog dedicated to the subject of Web Project Management. Twitter: @thesambarnes[114].

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112. http://globalpersonals.co.uk/
113. http://www.thesambarnes.com/
114. http://www.twitter.com/thesambarnes

About Smashing Magazine

Smashing Magazine[115] is an online magazine dedicated to Web designers and developers worldwide. Its rigorous quality control and thorough editorial work has gathered a devoted community exceeding half a million subscribers, followers and fans. Each and every published article is carefully prepared, edited, reviewed and curated according to the high quality standards set in Smashing Magazine's own publishing policy[116].

Smashing Magazine publishes articles on a daily basis with topics ranging from business, visual design, typography, front-end as well as back-end development, all the way to usability and user experience design. The magazine is—and always has been—a professional and independent online publication neither controlled nor influenced by any third parties, delivering content in the best interest of its readers. These guidelines are continually revised and updated to assure that the quality of the published content is never compromised. Since its emergence back in 2006 Smashing Magazine has proven to be a trustworthy online source.

115. http://www.smashingmagazine.com
116. http://www.smashingmagazine.com/publishing-policy/