

MAKING CLIENTS PART OF THE DESIGN PROCESS OVERVIEW

THE ARC OF A CLIENT COLLABORATION SESSION

PART 1: THE WIND UP

- Light food, drink, coffee
- Encourage casual chat
- Quick intros & bios
- Re-present agenda sent out in advance
- Establish brainstorming “pool rules”
- Short icebreaker or share research/inspiration to create area for focus

PART 2: INTO THE DEEP END

- Introduce the first exercise
- Focus on individual and small group collaboration
- Everyone draws their ideas
- Big sheets focus groups, make it easier to re-present
- Use lunch as a time to present group work to everyone
- Make clients present group work to the room, then there is a “silent” vote

PART 3: SHOOT THE MOON

- Avoid the lunch “food coma” by making people work through it
- When possible, afternoon exercises should thread in material from previous exercises (inputs, outputs)
- As people loosen up, make them work as hard as possible
- Don’t lose momentum when sharing ideas between exercises
- Keep clients together in their groups; rotate the designers

PART 4: EVALUATE

- Establish criteria for evaluating design ideas
- Apply criteria to most-liked ideas in front of the room
- Outline what happens next with the output

8:30 AM

NOONISH

4:30 PM



HOW SHOULD I COLLABORATE WITH A CLIENT?

Collaborate early. You should know if you need to collaborate well before the design phase of your project. Your mutual efforts should guide the initiation and ideation within projects. Having them collaborate late in the process can place you in a position where they want to “play designer” or risk them feeling like you need to be micromanaged.

Common types of client/designer collaborations that happen before executing design ideas:

At project inception/kickoff:

- Determining constraints
- Aligning on goals
- Understanding fears
- Cataloguing biases

Synthesis of research + ideation:

- Comprehending research
- Empathizing with customers
- Identifying opportunities
- Brainstorming ideas

Collaborate deeply. It’s not about solving the largest problems together. It’s about being aligned regarding how they’ll be approached, and discerning the right information from your clients early enough that it can be woven into the approach that you take.

Collaborate honestly. Be yourself. Clients don’t hire design robots, and need to relate to you as a person in order to inform you about what is truly happening in their organization.

Collaborate effectively. Treat your time with the client seriously, and maximize it. Make them work, and it won’t feel like work. And make sure they don’t try to multitask while they’re on the clock. Creativity takes focus!

Make sure the evidence of your collaboration is manifest in whatever deliverables they impact. There must be time in your project schedule to analyze what you’ve learned from your collaboration, and how it infuses what you’re seeking to make.

PREPARING FOR COLLABORATION: PROVIDING FOCUS

Collaborate to identify opportunities for your clients to reach desired business outcomes.

This should happen at the proposal stage. Get to the root cause of why they've suggested a certain strategy or design approach. Stated client needs are often symptoms of a larger, more interesting business problem—one that you're probably best off defining before you start designing. Otherwise, you may be focusing at the wrong target.

CLIENT SAYS → ASK TOUGH QUESTIONS → FOCUS THE OPPORTUNITY

We want to add **location-based services** to our streaming radio mobile app.

“Could you tell me more about the **data (or insight)** supporting this request?”

“What are your **goals** for adding these new features?”

“What **business conditions or user needs** caused these problems to emerge?”

“What **other strategies** did you consider before choosing this course of action?”

“What other **related problems** are also on the horizon?”

Based on the answers to our questions, we determine that the new feature is a symptom of competitors taking 10% of their market share this year.”

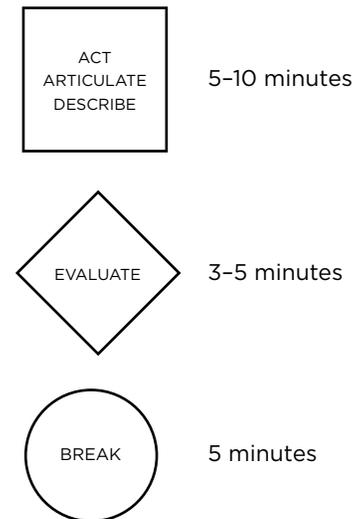
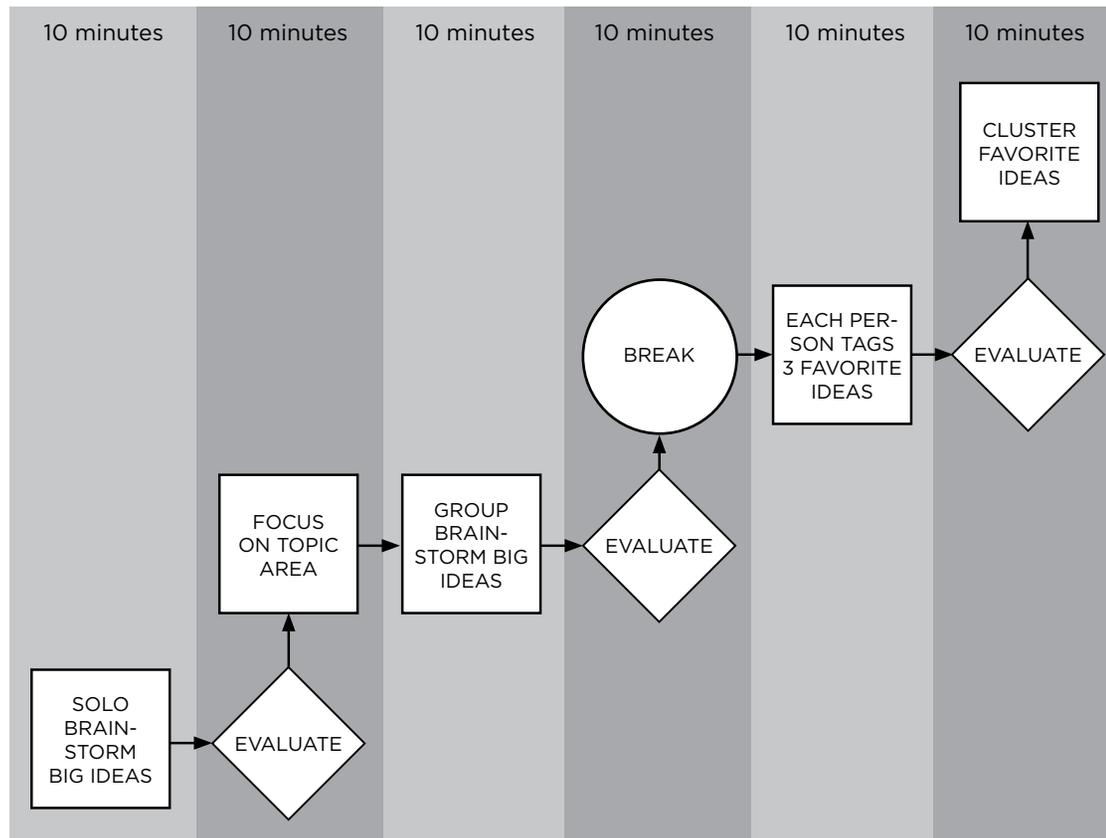
“There seem to be a range of possible strategies, which include:

- **Identifying** new revenue sources
- **Extending** into new platforms
- **Creating** new ad opportunities
- **Reclaiming** market share head-to-head

Can our teams work together to determine this opportunity?
Can we do it as a day-long collaboration session?”

PLAN YOUR DAY BY USING TIMEBOXING

A well-structured client/designer collaboration bounces between taking an **action**, such as brainstorming or refining ideas, **evaluating** what you've created, and **articulating or further describing** potential directions that will be addressed in a future timebox. Try to never let a timebox go longer than 10 minutes, and build in breaks for decompression.



Sketch out a quick plan of how you're going to use your time for each exercise. It's okay if the plan changes as you go, but keep your desired end goal firmly in mind. Any changes should support filling existing gaps in knowledge or reaching your desired goal for the end of the day.

EXPLOIT GROUP DYNAMICS

Experiment and find your team's sweet spot. Using different brainstorming methods with your team will have an impact on the quantity of material that you generate, as well as how long it will take to debrief regarding what ideas were generated. Ideas that emerge from role playing may be more useful for, say, future-forward interactive projects, comparative to the other methods.



BRAINSTORMING INDIVIDUALLY

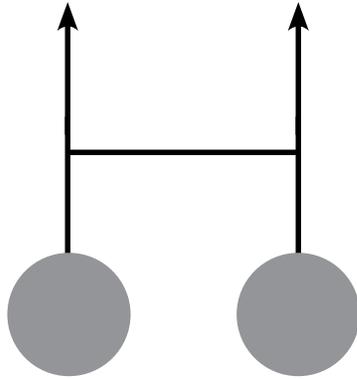
VOLUME OF IDEAS

GOOD

TIME REQUIRED TO PREPARE



TIME REQUIRED TO DEBRIEF



BRAINSTORMING IN PARALLEL

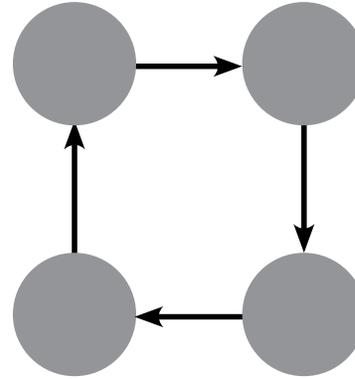
VOLUME OF IDEAS

GREAT

TIME REQUIRED TO PREPARE



TIME REQUIRED TO DEBRIEF



BRAINSTORMING IN THE ROUND

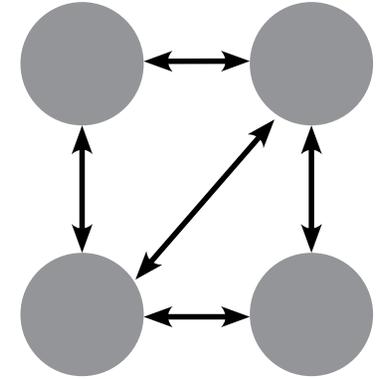
VOLUME OF IDEAS

GOOD

TIME REQUIRED TO PREPARE



TIME REQUIRED TO DEBRIEF



BRAINSTORMING VIA ROLE-PLAYING

VOLUME OF IDEAS

LESS (BUT APPROPRIATE)

TIME REQUIRED TO PREPARE

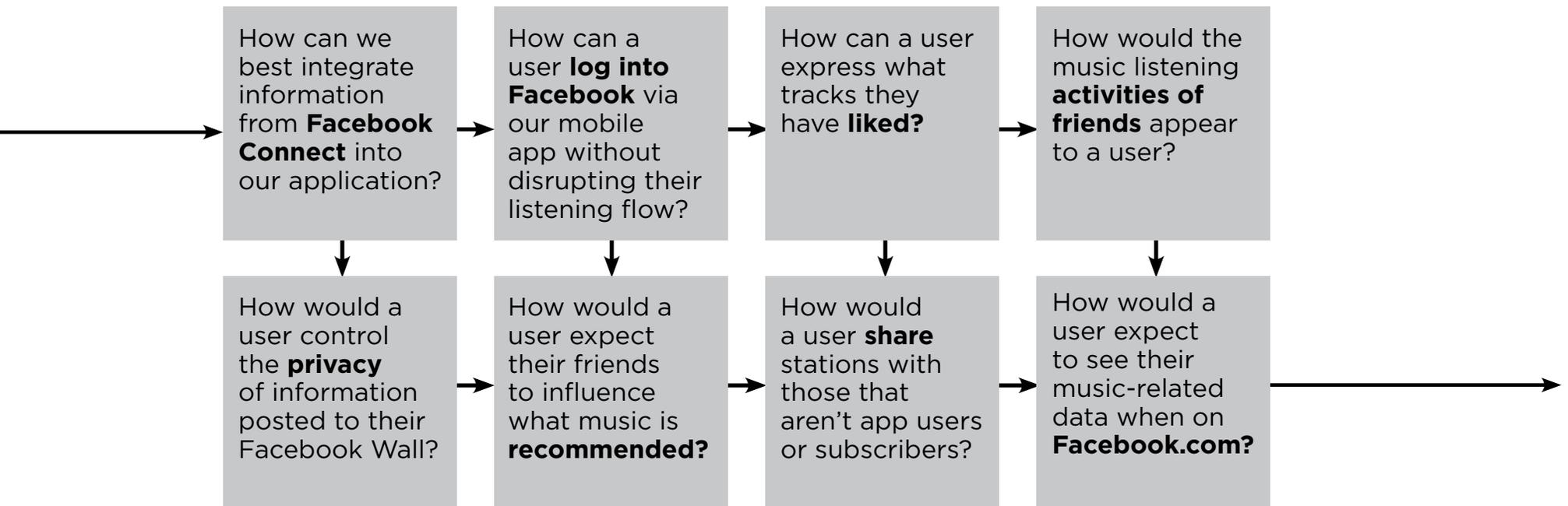


TIME REQUIRED TO DEBRIEF



USE IDEATION QUESTIONS

Focus areas for group ideation are best stated as questions. Ideation questions are restatements of issues that form the basis of a design problem. When collaborating with a goal of generating design ideas, jot down some ideation questions in advance or formulate them with your client as part of an activity building up to the design efforts.



Ideation questions can address both functional and aesthetic areas that you're seeking to explore. A well-articulated design problem immediately suggests a range of potential solutions.

EXERCISES FOR ALIGNMENT & GOAL-SETTING

PHOTO COLLAGE

Provide a pile of magazines, scissors, and tape to your clients and design team. Individually or in small groups, make collages meant to illustrate feelings or relationships regarding product, brand, and so forth. Have them present their collage for 30 seconds to a minute to the entire room. Then have everyone place a small sticky note or dot on the images that resonate most with them. The most flagged items are then discussed.

WORST FEARS

Ask everyone in the room to spend 5 minutes writing on sticky notes what they feel could go wrong on the project you're about to embark upon. Then, have everyone post up their notes on a whiteboard in a round-robin style, reading out one sticky note to the room at a time. After all are posted, facilitate an open discussion where you cluster the notes into themes. Based on themes, assign them to groups. Each group then draws up plans of action so their fears won't come to pass.

100 USES

Choose a random, bland object. At the start of a full-day collaboration session, ask everyone in the room to collectively come up with 100 uses for it. As an example: You bring into the room an empty fishbowl. By the end of 20 minutes, there must be 100 unique ideas as to how it can be used. This is a "proof of creativity" exercise, especially if your team can demonstrate outlandish or lateral ideas.

GOAL SHARING

Much like "Worst Fears," have each person write their goals for a project at its inception. Then categorize the goals into appropriate categories: goals for the project, goals for the company, goals for team contributors, goals for individual clients, etc. Cluster these goals into themes that can be carried forward for all involved in the project. Return to these goals at regular intervals in the project, to gauge how they are being fulfilled. (Source: Matt Conway)

PRESS RELEASE

Split the room into groups. Each group must write a brief press release stating what the company will announce when your project is fulfilled. Completed press releases are then read out to the entire room. When all are shared, they are discussed as a whole for a set period of time. Variations include writing a press release from the competition positioned against your effort, what a columnist at the New York Times might say, what a Gizmodo blogger might say, etc.

WHAT CUSTOMER?

Create Mad Libs meant to describe the audience for your project. Hand out sheets to individuals or groups, then ask them to determine what nouns, verbs, and adjectives that best describe their target customer. (Including a name, age, hometown, and face is also critical.) Use this as a hypothesis to validate through research and testing, or as a way to get on the table how different client groups may perceive their target customer in different ways.

BRAND THERMOMETER

Create a large collage of imagery that represents what your client is doing in market: public-facing marketing, advertising, product use, lifestyle messaging, reviews, and so forth. Post it in the room you are collaborating in. Then, everyone is provided green, yellow, and red sticky dots. For 2 minutes: everyone places 3 green dots on things they believe are spot-on for where their brand sits. 2 minutes: yellow dots on what may change. 2 minutes: red dots on what is counter to their brand direction. Then discuss where the focus of positive and negative attention seems to be.

SCAVENGER HUNT

This is a good way to generate empathy for customers. Recreate a few key things that you know your customers/target audience may do in their lives that relates to what you're seeking to design. Plan out a "scavenger hunt" where groups of 3-4 people carry out those tasks, looking through the lens of a provided persona or customer archetype. Teams must capture their experiences with photographs and video. At the end of the scavenger hunt, have each of the teams provide a ten-minute presentation where they share some of their photos and videos in the context of their customer.

EXERCISES FOR COLLABORATIVE IDEATION

EXAGGERATION

Focus in on one attribute of your current design or ideation question and blow it way out of proportion. As an example—you've been asked to create a novel, yet simple interface idea for a streaming music app. So ask: "What would this streaming music app look like if there was only a giant play button on the screen?" Work through the logic of fulfilling this outlandish scenario, capturing new and interesting ideas as you go. (Source: Edward de Bono.)

FANTASY

Removing reality constraints from a project completely can inspire a wide range of new ideas. This isn't just about unicorns and endless streams of chocolate, however. For this method to work, consider how you would fulfill the stated question or task: "How can we integrate location-based services into our mobile music application?" Well, you wouldn't need location-based services, because your phone always knows where you are, all the time. What ideas are inspired by this dream scenario? (Source: Edward de Bono.)

REVERSAL

Take the primary elements in the ideation question you're considering and state them in reverse. For example: You're designing an interface for people to play their favorite songs from a streaming radio service. Possible reversals could be: "What if people had to perform the songs they selected in the interface?" All sorts of unusual ideas will come to mind. Capture them, and see how they fold into the project you're designing. (Source: Edward de Bono.)

FUTURE-CASTING

Don't worry about what needs to be created for today. Individually, imagine what your stated design solutions could be if they were projected five to ten years into the future. When time is up, share your ideas in a round-robin style (one idea per person at a time). If any new ideas come to mind based on what ideas other people share, draw them during this period and add them to the pile. Do this two to three times for different focus areas, then let each person put a star on the 2-3 ideas they like best.

30 DAYS IN 30 MINUTES

Bring together teams of three to four people, and provide them with a design problem that they must fully solve in 30 (or fewer) minutes. The time is divided up in the following manner: 8 minutes: Each team reaches a goal that is set by the leader. 2 minutes: The leader serves as the client, providing quick feedback to the teams and providing the next milestone. This is then repeated until time runs out, with the fidelity of the idea increasing every 10 minutes by an order of magnitude.

INTERFACE BINGO

Create a blank interface for whatever site or app you've been tasked in creating. If you're feeling spry, also print out little modules for specific features or requirements. Print out a copy for each member of the brainstorm. Each person is allowed to add one feature at a time, then passes their interface on to the person at their right. This continues until there is no room left for features. Interfaces are then shared out to the group, one at a time. Everyone is asked to create sketches and ideas based on the interfaces.



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