Best practices for working with clients

When working with clients on design projects, it is important to keep in mind the following best practices to ensure a smooth, productive, and long-lasting client relationship.

Client interviews

- Discuss the interview questions you create with your team or with your instructor (including from the client interview worksheet). Add other questions you feel might be necessary to build your understanding of your client's needs.

- Prior to the interview, research and gather information about the client, as well as compelling examples of similar kinds of projects and/or clients.

- During the interview you should take notes summarizing the client's audience, purpose, and goals.

- A client interview is best done in person. However, if that is not possible, you can conduct the interview by phone or web conferencing.

- After the interview, review any recommendations made by the client (i.e. websites, commercials, brochures, and so on).

- Brainstorm design ideas and collect potential assets as you review your client recommendations.

Client communication

- As you create design documents for a client project (for example, wireframes, design comps, flowcharts, project plans, and so on) show them to the client.

- You may want to practice prior to meeting with the client. A "pitch presentation" might include some or all of the following:

  ◦ How your wireframes and design comps address the client's goals, audience, and content requirements

  ◦ Samples of the color, font, and content, accompanied by the reasons for the design, layout, and navigation choices

  ◦ Question-and-answer session in which the client gives feedback

Client feedback

- When a client is giving you feedback on any and all design documents or presentations you should do the following:

  ◦ Actively listen

  ◦ Take notes during all client interactions.

  ◦ Summarize what you heard the client say, based on your notes.

  ◦ Ask clarifying questions, such as: Can you identify examples that solve this problem?; How would you solve this problem?; and Would this solve the problem?