

Timing: 1 to 4 hours

Level: Ages 15 and up

# Working with clients

## Activity Overview

In design and video production business world, students can expect to work with clients. These might be internal clients—another department needing materials designed—or external clients seeking an organization’s services. Use this activity to introduce best practices for working with clients to create projects that address client’s audience, purpose, and goals.

**Note:** Portions of this activity align to the Adobe Certified Associate objectives. Within the instruction steps and technical guides, the specific learning objectives for the exam(s) are referenced with the following format: <sup>1.1</sup>

## Activity Objectives

### Project management skills

- Designing for a client
- Identifying audience(s)
- Conducting review sessions
- Writing a summary of client needs

### Design skills

- Providing multiple design ideas
- Synthesizing information from design review meetings
- Creating designs that meet client requirements
- Executing a review and redesign cycle

### Research and communication skills

- Interviewing clients
- Communicating purpose and goal
- Communicating ideas clearly
- Communicating and presenting design decisions to a client
- Asking questions to focus and clarify
- Listening and interpreting feedback

- Taking notes on critique
- Understanding and addressing client design issues
- Planning strategies to guide inquiry
- Demonstrating personal responsibility by incorporating feedback
- Finalizing design with clients

## Project Assets

- *Guide:* Best practices for working with clients
- *Worksheet:* Client interview <sup>1.4, 1.4, 1.4, 1.6, 2.6, 2.6</sup>
- *Worksheet:* Design review
- *Worksheet:* Client debriefing <sup>1.4, 1.4, 1.4, 1.6, 2.6, 2.6</sup>

## Background preparation resources

[Technical and content information](#)

[ISTE NETS\\*S Standards for Students](#)

[Adobe Certified Associate objectives](#)

## Activity Steps

1. Explain that in the design and video production business world, students can expect to work with clients. These might be internal clients—another department needing materials designed—or external clients seeking an organization's services.
2. To simulate this experience, explain that as individuals or as teams students will work with a client to produce and deliver a project.  
**Note:** You might choose to limit the scope of these projects by being the client or by selecting a specific client in the school for each student group. Or you might choose to work with local businesses and organizations, depending on the level of your students. If necessary, see the extension activities to help create client profiles.
3. Introduce aspects of project management when working with clients. Suggested topics to cover include:
  - Identifying roles—especially the person who serves as the liaison between the client and the group.
  - Identifying the necessary project steps.
  - Creating a timeline with specific deliverables and due dates.
  - Understanding and clarifying client expectations.
  - Communication and dialog with a client—students are encouraged to use e-mail, web conferencing (such as Adobe Connect), Adobe Acrobat, and other online collaborative tools to review design with their client.
  - Identifying common problems and issues in project management.**Note:** It is recommended that students already be familiar with the *Understanding project planning and management* and *Working in teams* activities.

### Client interview

4. Using the *Best practices for working with clients* guide, explain to students that they will interview their client to learn about their client's needs. To help them prepare, discuss the following:
  - The kind of information they need from their clients about the clients' goals and target audience.
  - Identify criteria for determining whether content is relevant to the project goals and appropriate for the target audience.
  - The difference between creating a new project and redesigning an existing project and how the interview questions may be different.
5. In preparation for the client interview, ask the students to do the following:
  - Review and discuss the interview questions on the worksheet and add additional questions they feel might be necessary to build their understanding of their client's needs.
  - Research and gather information about the client, as well as, compelling examples of similar kinds of projects and/or clients.<sup>1.4, 1.4, 1.4, 1.6, 2.6, 2.6</sup>**Note:** Depending on the level of your students, you might want to review and approve the interview questions or ask students to practice interviewing to refine their interview style and questions. You might also choose to facilitate interviews that are conducted with clients outside the school.
6. Ask students to conduct an interview with their client, using the *Client interview worksheet*<sup>1.4, 1.4, 1.4, 1.6, 2.6, 2.6</sup> (or the *Design review* worksheet if this is a redesign project) to take notes. Explain that the interview is best if done in person; however, if that is not possible, students can conduct the interview by phone or web conferencing.

7. After the interview, have students review any recommendations made by the client (i.e. websites, commercials, brochures, and so on). As they review, encourage students to brainstorm design ideas and to collect potential assets.

### Client interaction

8. Explain that as students create design documents for their project (for example, wireframes, design comps, flowcharts, project plans, and so on) they should “pitch” their design ideas to their client in stages. To help them learn how to “pitch” to a client, explain that a presentation might include some or all of the following: [1.4, 1.4, 1.4, 1.6, 2.6, 2.6](#)

- How their design documents address the client’s goals, audience, and content requirements
- Samples of the color, font, and content, accompanied by the reasons for the design choices
- Question-and-answer session in which the client gives feedback

**Note:** You may want them practice “pitching” prior to meeting with the client.

9. Using the *Best practices for working with client* guide, explain that student should actively listen to the clients’ feedback by doing the following: [1.4, 1.4, 1.4, 1.6, 2.6, 2.6](#)

- Take notes during all client interactions.
- Summarize what they heard the clients say, based on their notes.
- Ask clarifying questions, such as the following:
  - Can you identify examples that solve this problem?
  - How would you solve this problem?
  - Would this solve the problem?

**Note:** As clients provide feedback, you may want to encourage them to give an assessment of how the information organization, visual placement, and project schedule meet their goals and address their target audience.

10. Have student revise their design documents, flowcharts, wireframes, and/or project plans in response to the client’s feedback, asking their client to select the designs they prefer, indicating any changes they believe should be made. If necessary, ask students to continue to engage in review and redesign cycles with their clients, until a final design is agreed on.<sup>1.3</sup>

**Note:** If a person from outside the classroom is acting as the client, the instructor might mediate the question-and-answer sessions to help student teams take note of the requested changes.

### Project presentation and delivery

11. Explain that the students must prepare the final project for the delivery specs of the client.
12. Once the project is ready, have students present their final project to the client (in person or online), explaining their design decisions.

### Client debrief

13. After the presentation, using the *Client debriefing* worksheet [1.4, 1.4, 1.4, 1.6, 2.6, 2.6](#), ask student to discuss their experience with their client. Some areas you might ask students to focus on include:

- Communication: Considering the different methods of communication (face-to-face meeting, phone, e-mail, web conference, etc.), which was the most effective? Was there enough communication during the project cycle? In what ways were communication challenges resolved? In what ways should communication with clients change (or not) for future projects?

- Deliverables: Was there a schedule of deliverables established? Did the client receive the expected deliverables on time? Were the deliverables the quality they expected? Were they in the expected format? Can the client suggest ways to improve the process of delivering materials?
- Feedback: Did the client feel they were given enough time and consideration for their feedback? Did the design team consider their feedback? How could the feedback process be improved?
- Final product: Does the final product address the target audience? Is the final project what the client expected? Why or why not?

## Assessment:

	<b>0 – Does not meet expectations</b>	<b>3 – Meets expectations</b>	<b>5 – Exceeds expectations</b>
<b>Client interview</b>	Absent or incomplete.	<p>The interview identifies the client’s goals, the target audience, and the intended purpose of the project.</p> <p>The interview identifies the content and information crucial to the project. The interview identifies the client’s preferred design requirements and includes any additional relevant questions.</p>	<p>The interview clearly identifies the client’s goals, the target audience, and the intended purpose of the project. The interview clearly identifies the content (both original and repurposed) and information crucial to the project. The interview identifies the client’s preferred design requirements and documents specific examples. The interview includes additional relevant and thorough questions to get or clarify specific information.</p>
<b>Client Debriefing</b>	Absent or incomplete.	<p>Teams debrief with the client to assess the level and degree of communication, the satisfaction with deliverables, the experience with feedback, and perceptions of the final product.</p>	<p>Teams debrief with client and access:</p> <ul style="list-style-type: none"> <li>• Effective forms and appropriate level of communication.</li> <li>• Communication challenges and ways to improve communication.</li> <li>• Schedule and expectation of deliverables.</li> <li>• Ways to improve deliverable process.</li> <li>• Time and ability to give and receive feedback.</li> <li>• Expectations of the final product.</li> </ul>

<b>Client presentation</b>	Absent or incomplete.	Students present the client their work, highlighting how it accomplishes the client goals, meets audience needs, and addresses any necessary client content and technical requirements.	Students present the project to the client, highlighting how the client site accomplishes the client goals, meets audience needs, and addresses any necessary client content and technical requirements. Students evaluate successful strategies employed during the design process and offer a plan for how the client can go forward with managing, maintaining and/or updating their project.
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**Background preparation resources:**

- For more teaching and learning resources on the topics in this project, search for resources from the community on the Adobe Education Exchange: <http://edex.adobe.com/>

**Clients**

- A resource for creative ways of finding clients for school classroom projects: <http://edex.adobe.com/resource/b6fde4a10e>
- A client survey you can download and use: <http://edex.adobe.com/resource/2314831d-50ba-4ba7-840f-2eb1b0300ec6>

**ISTE NETS\*S Standards for Students**

This project is aligned to the ISTE NETS\*S Technology Standards. Depending on the subject and content area the student selects you may research your own state content standards to see how this project aligns to your state requirements.

**ISTE NETS\*S: Curriculum and Content Area Standards – NETS for Students**

2. Communication and Collaboration
  - Students use digital media and environments to communicate and work collaboratively, including at a distance, to support individual learning and contribute to the learning of others. Students:
    - a. interact, collaborate, and publish with peers, experts or others employing a variety of digital environments and media.
    - b. communicate information and ideas effectively to multiple audiences using a variety of media and formats.
    - d. contribute to project teams to produce original works and solve problems.

3. Research and Information Fluency  
Students apply digital tools to gather, evaluate, and use information. Students:
  - a. plan strategies to guide inquiry.
  - c. evaluate and select information sources and digital tools based on the appropriateness to specific tasks.
4. Critical Thinking, Problem-Solving & Decision-Making  
Students use critical thinking skills to plan and conduct research, manage projects, solve problems and make informed decisions using appropriate digital tools and resources. Students:
  - a. identify and define authentic problems and significant questions for investigation.
  - b. plan and manage activities to develop a solution or complete a project.
  - d. use multiple processes and diverse perspectives to explore alternative solutions.
5. Digital Citizenship  
Students understand human, cultural, and societal issues related to technology and practice legal and ethical behavior. Students:
  - a. advocate and practice safe, legal, and responsible use of information and technology.

## Adobe Certified Associate Exam Objectives

### Adobe Certified Associate, Web Authoring objectives

2.6 Communicate with others (such as peers and clients) about design plans.

### Adobe Certified Associate, Visual Communication objectives

1.4 Communicate with others (such as peers and clients) about design plans.

### Adobe Certified Associate, Video Communication objectives

2.6 Communicate with others (such as peers and clients) about design and content plans.

### Adobe Certified Associate, Interactive Media objectives

1.6 Communicate with others (such as peers and clients) about design and content plans.

### Adobe Certified Associate, Graphic Design & Illustration objectives

1.4 Communicate with others (such as peers and clients) about design plans.

### Adobe Certified Associate, Print & Digital Media Publication objectives

1.4 Communicate with others (such as peers and clients) about design plans.

### For more information

Find more teaching materials for using Adobe software in your classroom on the Adobe Education Exchange: <http://edex.adobe.com/>.



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