



**PAUL BOAG**

# **CLIENT CENTRIC WEB DESIGN**

This book accompanies **season three** of the Boagworld Show

*My thanks to Chris Scott, Marcus Lillington  
and Charlie Allen, without whom I would have  
probably driven most of our clients away.*



# Client Centric Web Design

**How to make your clients happy, the websites you produce better and your life easier.**

Written by Paul Boag

# Introduction

I should begin by confessing that the motivation behind this book is one of frustration.

I feel so strongly that I am departing from my normal habit of writing for website owners. Instead this book is aimed at web designers and the web design community.

My frustration comes from a growing attitude among some web designers that client work is second rate.

Many are rejecting client work to embrace building web applications. This is not because they have a desperate desire to build applications, but rather as a way to avoid client work.

In itself I have no problem with this. If a web designer feels unable to have a good working relationship with clients and wants to work on web applications that is their decision. However, I do take issue when they imply that client work is in some way inferior.

I also take exception to web designers who treat clients as a cash cow there to fund application development.

I love working with clients. I find nothing more rewarding than the challenge of being dropped into a new organisation within an unfamiliar sector. I love working in a collaborative relationship to produce something with the potential to transform a business. I love solving real world business problems in a way that meets the needs of both client and target audience.

If you are not yet ready to give up on client work, then this is the book for you. In these pages I seek to inspire and equip you to turn client work from a job into a stimulating, exciting and rewarding path that will transform your career.



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## Chapter 1

# Client Centric Web Design

If I was to ask you what the most annoying aspect of working in web design is, what would you answer? If you are a web designer the chances are 'clients' would appear in the top two; probably alongside Internet Explorer. Equally, a client's answer may include grumpy and uncooperative web designers.

I'm surprised by how much resentment exists between web designers and their clients. In fact, there are entire websites dedicated to web designers ranting uncontrollably about clients from hell. This surprises me as my attitude towards clients is very different. For me, working with clients is the best part of my job. Although I do not get on with every one, I consider client work a pleasure and not a chore.

After speaking with many other web designers I've concluded that this difference is in how I work with clients. The approach we take at my web design agency is at odds with many of my peers.

The way we work with clients has evolved over our 11 years in business and more recently has coalesced into a specific method. It is this methodology (which I have come to call client centric web design) that I will share in this book.

1. The broken web design process
2. What is client centric web design?
3. Am I rejecting user centric design?
4. Creating better websites
5. Winning more work
6. Next Actions



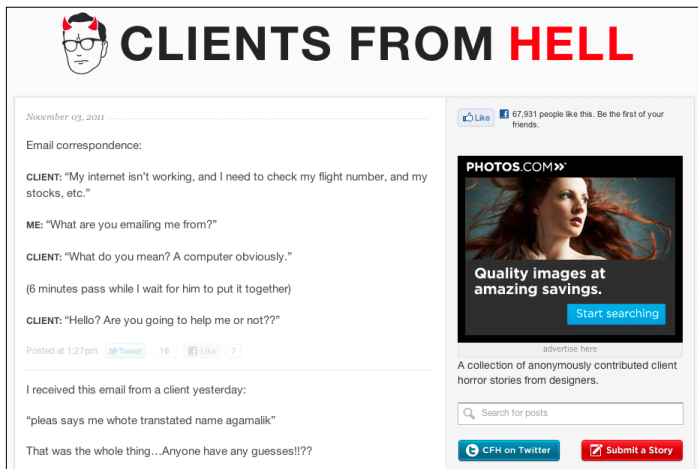
## The broken web design process

In the last few years I've seen a dramatic increase in the number of web designers abandoning client work to develop their own web applications. There are many more who would like to make this move, but fear losing the income of client work.

This tells us a lot about the current state of web design. Although some are developing web applications to create an ongoing revenue stream, many more simply cannot stand working with clients.

Things seem little better for the client. Most have a horror story of working with a web designer. Typically these highlight problems with attitude, communication and understanding of goals.

The unhappiness on both sides often comes from how organisations commission web projects.



The screenshot shows a website titled "CLIENTS FROM HELL" with a cartoon character icon. The page features a collection of client horror stories. The main content area displays an email correspondence between a client and a designer. The client's email is dated November 03, 2011, and contains the following text:

CLIENT: "My internet isn't working, and I need to check my flight number, and my stocks, etc."

ME: "What are you emailing me from?"

CLIENT: "What do you mean? A computer obviously."

(6 minutes pass while I wait for him to put it together)

CLIENT: "Hello? Are you going to help me or not?"

Posted at 1:27pm | 16 | 7

I received this email from a client yesterday:

"pleas says me whote transtated name agamalik"

That was the whole thing...Anyone have any guesses!??

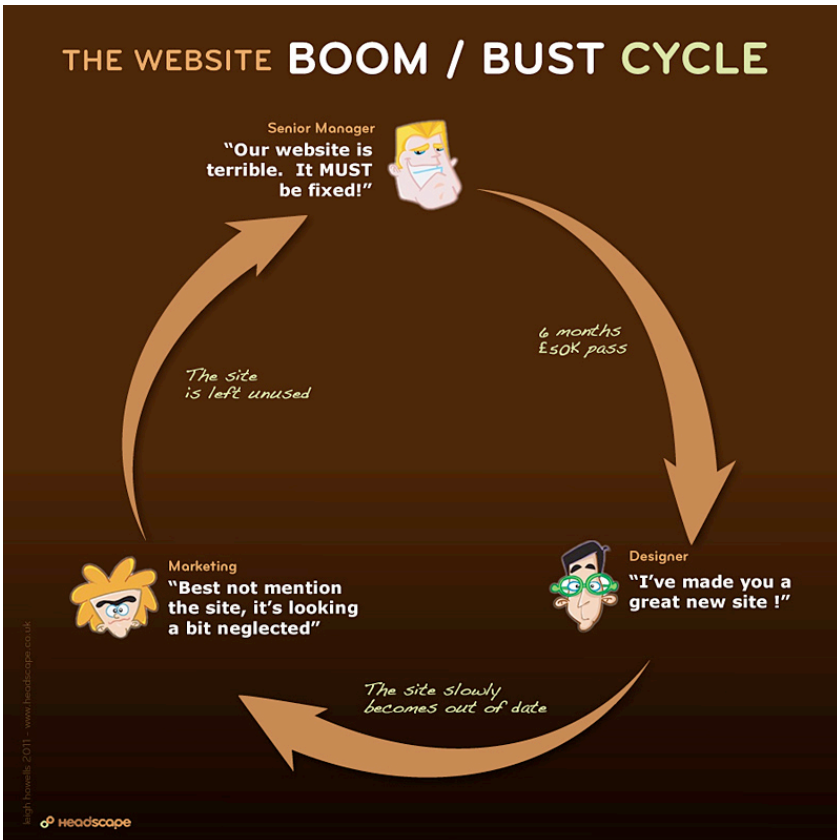
On the right side of the page, there is a social media share button for Facebook with 67,931 likes. Below this is an advertisement for PHOTOS.COM, which offers "Quality images at amazing savings" and includes a "Start searching" button. At the bottom of the page, there is a search bar and two buttons: "CPH on Twitter" and "Submit a Story".

*The relationship between client and designer is so badly damaged that there are numerous sites dedicated to the subject.*

## The danger of sporadic redesign

Most organisations take a boom/bust approach to managing their website. They lay out a large amount of capital every few years to redesign their site, and don't invest a lower-level of money on an ongoing basis.

This approach is damaging to the business and has a harmful effect on the working relationship between web designer and client.



*Sporadic redesigns are expensive and prevent a site from functioning at maximum efficiency.*



Because the client only periodically engages a web designer there is little opportunity for that relationship to mature and grow. Instead of partners working together there is a client/supplier relationship where the client commissions a web designer and that designer produces the work in isolation.

## The problem of working in isolation

A web designer working in isolation causes problems for a number of reasons:

- ▶ **There is little opportunity to fully understand the business** - without a close working relationship it's difficult (although not impossible) to get under the skin of a business and understand its requirements. This leads to client frustration because the designer doesn't seem to "get it".
- ▶ **There is a lack of regular, good quality communication** - this inevitably leads to misunderstandings and differing expectations. A designer can work on what he perceives as the right approach for some considerable time, before discovering when it is finally presented that it is not what the client wanted.
- ▶ **The lack of a working partnership leads to an unproductive and negative relationship** -the web designer often becomes a 'pixel pusher', who doesn't get to make recommendations. The web designer feels frustrated, while the client does not get the benefit of all the knowledge he is paying for.

## An unsolvable problem?

The resentment between client and web designer is neither party's fault. In an ideal world we would see a move away from the boom/bust model to an ongoing

*A web designer needs to work with a client, otherwise it can cause problems that have an impact on the project.*

investment in websites thereby ensuring a closer working relationship between client and agency.

Unfortunately, it is beyond the power of the web designer to make this change. And, most clients are unable to take this approach as ongoing expenditure is out of their control.

Despite not being able to ensure an ongoing relationship, we can still reduce the problem. That is where client centric web design comes in.

## What is client centric web design?

Client centric design allows web designers to redefine the relationship they have with their clients. It endeavours to break the preconception that clients are the enemy and instead create a harmonious working relationship.



*Many web designers see the client as the enemy.*

Many web designers try to exclude the client or produce a great website despite their supposed interference. Client centric web design rejects this approach instead placing the client at the heart of the web design process.

There are two principles that underly this approach that many web designers seem to reject.

First, it accepts that being a web designer is about providing a service to our customers as well as a website. This means a fundamental part of our job is ensuring clients go away happy.



*As web designers we could learn a lot from other service industries. You may go into a restaurant wanting good food, but if the service stinks it ruins the experience.*

Second, client centric web design works on the premise that the client is essential to producing a successful website. It argues that it is impossible to create a truly effective website without the client being fully engaged with the process.

While other web designers focus their attention on the end-user, client centric design (as the name implies) also focuses on the person who commissioned the website.



## Am I rejecting user centric design?

You may feel all this emphasis on the client is unhealthy. Instead, you may argue, users should be our focus and not the whims of the client. After all if you alienate the user, you undermine the effectiveness of the business. I agree, but the two are not mutually exclusive.

## The customer is not always right

Client centric web design is not about pandering to whatever the client says they want. This approach does not presume that the "customer is always right."

Client centric design is about engaging with the client to meet their business needs. Sometimes the client will suggest things that ultimately undermine their own business goals and it is your job as a web designer to educate them about the consequences of their ideas.



*Clients might not always be right, but that doesn't mean we should treat them like they are stupid.*

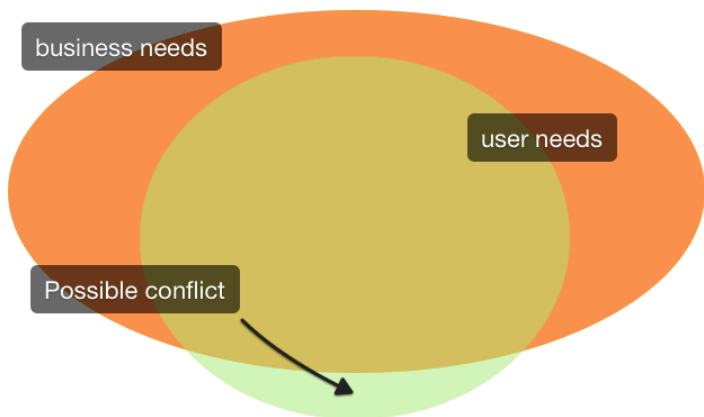
## Client centric supersedes user centric

I believe that although user centric design and client centric design are not mutually exclusive, the latter trumps the former. This may sound like heresy but please bear with me while I explain.

When we talk about user centric design we do so because treating users well will give business benefits. Our wish to be user centric is ultimately a desire to help the business.

Client centric web design is about fulfilling the client's ultimate aim, which is to create a website that provides business benefits.

Therefore user centric design is a subset of client centric design. In other words, meeting the needs of users is a way to meet the client's ultimate objective. That is why they are not mutually exclusive.



*When user needs lie outside of business objectives, the business objectives should take precedence.*

However, these two viewpoints sometimes come into conflict. This happens when the client wants to do something that provides business benefits at the cost of

alienating users. It is when these conflicts arise that it is important to understand that the business (and the client) should come first.

Many web designers argue that user needs come first because ignoring them will damage the business. However, think twice before taking the user side over that of your client. Often the client has a good reason that provides business benefits.



*Ecommerce stores have to balance user and business needs all the time. A user comes in looking for one thing but the store wants to 'up-sell' them other stuff too.*

## Business led design in action

Let me give you an example that illustrates my point. We once worked with a law firm made up of high-profile attorneys. Our analytics analysis, stakeholder interviews and user testing told us that the number one thing users wanted was quick access to attorney information. They wanted to see just how great the "star" attorneys were before hiring them.

From a user centric perspective the logical thing was to make it as easy as possible for the user to get access to this information. However, the client wanted the user to have to navigate via pages that outlined the broader capabilities of the organisation.

The reason the client wanted users to navigate via these pages was because attorneys regularly move between companies. The client wanted to make sure that prospective customers were hiring the company and not just an attorney who may leave.

In this situation client centric superseded user centric. The business needs outweighed the needs of the user.

This example also demonstrates the value of client centric web design. If it had not been for our close working relationship with the client we would not have picked up on this subtle distinction and dismissed the idea as shortsighted stupidity.

However, because we have learnt to respect the client and taken the time to understand their business, we knew there was probably a solid rationale behind what sounded like a silly decision. Our client centric approach ensured we took the time to investigate the issue properly and not dismiss it out of hand.

This is why in so many cases client centric web design leads to better websites.

## Creating better websites

As web designers we can be incredibly arrogant about our abilities. We believe ourselves capable of producing high-quality websites entirely in isolation. As I've already indicated, this is a delusion. We can design and code a great website, but a truly effective site requires knowledge only the client has.

### Your client knows his business

For example, no matter how thorough our research is we are never going to have the same level of understanding the client has about their business. They will have years of experience working within the organisation giving them a unique perspective we cannot hope to match. Although our outside perspective is incredibly valuable, that does not mean their internal perspective is invalid.

*It is arrogant to presume we know more about our clients' businesses than they do.*

### Your client knows his customers

The client's knowledge is also superior when it comes to their users. Too often as web designers we set ourselves up as the user's champion, but we need to understand that we have limited knowledge of those users. Admittedly we have a good understanding of how users interact with websites but we do not understand their specific motivations in the way the client does.

Most clients (although admittedly not all, especially in larger organisations) are constantly interacting with their customers. As a result they understand:

- ▶ What their customers are trying to do.
- ▶ What problems they experience.
- ▶ What kind of people they are and what motivates them.

Of course it is possible for us to discover these things for ourselves through user testing. However, the chances are, our level of knowledge will not be as comprehensive as the client's even after testing. It also strikes me as absurd that many web designers do not tap into the knowledge their clients already have.



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so says Mark Trammell of Digg.com | [Next testimonial >](#)

- 🔥 Capture screen activity
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- 🔥 Export to Quicktime

**Features in 2.0 include**

<b>Preview</b> Watch sessions within Silverback	<b>Batch Export</b> Save selected sessions, tasks, highlights or projects in one go
<b>Tasks &amp; Highlights</b> Set tasks and mark noteworthy moments within a session	<b>Performance</b> Faster export, better usability

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*Usability testing and tools (like Silverback) are great for understanding users better. However, they can never match the daily contact business owners have with their customers.*

## Your client has valuable advice to give

Not only will the client's knowledge of the business and customers improve your website, many also have other skills to bring to the table.

Many clients are experienced marketers, entrepreneurs or business strategists. Although we like to think of ourselves as having some knowledge in these areas, our knowledge probably is not as deep as theirs.

Most clients can make valuable contributions to the process, given a chance, that ultimately improves the website. The problem is not every suggestion will be

practical and many of us have had bad experiences dealing with impractical suggestions. This has made us hesitant about allowing the client too much control over the process. Unfortunately, this means we have missed out on many of the good contributions they can make.

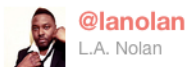
As web designers we need to work with clients in such a way that we can take the good and leave the bad. This is what we will be exploring in the rest of this book. If we can do this then the client's contribution is certain to improve the websites we produce.

Failure to do so damages the website and our relationship with the client which could have ramifications for future work.

## Winning more work

A good working relationship with your client is hugely beneficial to your business.

The most obvious benefit is that a happy client who has enjoyed working with you is much more likely to recommend you to others. Also if they feel a sense of ownership over the website (because they were personally involved in it) they will tell the world how great it is.



just seeing @boagworld 's new website...  
man, is it a beauty! going to grab a ton of  
"inspiration" from it! O:)

11 Nov via [TweetDeck](#)  [Buffer](#)

*Nothing beats word of mouth recommendation.*




As any marketer will tell you, this kind of word-of-mouth recommendation is better than anything you can do to promote your business. Those clients with whom you have a good working relationship become ambassadors for your company, promoting it at every opportunity.

Of course if the client likes you and enjoyed working with you, they are considerably more likely to want to repeat the experience.

## Repeat business

In my experience the clients with whom you have the best working relationship are those most likely to come back asking for more. This is partly because they enjoy working with you, but also because you have educated them about ways their site could be improved. As a client becomes more educated they inevitably see more of the potential the web offers. This is why client education is so important and why we tackle it in more depth later.



Hi, I am **Paul Boag**. I am a co-founder of web design agency Headscape and host of the boagworld podcast.

If you are looking for advice on designing, developing or running your website then you are in the right place.

**I recommend starting with:**

Design: **8 ways we increased ecommerce sales by 10,000%**

Discover how Headscape increased the sales of **Wiltshire Farm Foods** by 10,000% and how you can do the same for your site.

THE ESTIMATED TIME TO READ THIS ARTICLE IS 13 MINUTES Posted on: Sunday, November 29, 2009

A 10,000% increase in sales over 5 years. Sounds incredible doesn't it. Just to make that an even more incredible, **their average customer is in their 80s!** Who said the elderly don't use the internet.

When we started working with **Wiltshire Farm Foods** their monthly revenue was a 100th of what it is today.

Of course in reality that success was not down entirely to us. **Matt Curry**, our client at Wiltshire Farm Foods has put his heart and soul into that website and as I say in Chapter one of the Website Owners Manual, it is the site champion who makes or breaks a site.

*Repeat business with clients benefits both parties. We worked with one ecommerce website for over 5 years and increased their sales by 10,000%. That would have been impossible without an ongoing relationship.*

One of the biggest benefits of repeat business is the low-cost of sale. While there are many obstacles to winning new work, repeat business is easy to win. This leads to increased margins. Therefore repeat business doesn't just keep you busy, it also makes you more profit!

## **The benefit of ongoing development**

As the relationship develops and the benefits of your work becomes clear, you may also see a shift away from the boom/bust model to one of ongoing development. This will have a transformative effect on your business by providing an ongoing revenue stream, time and materials work and zero cost of sale.

However, this kind of working relationship is built on trust. The client has to trust you to do a good job and not abuse working on T&M. This trust will only exist if you work with and not against the client. There must be mutual respect, something that is too often lacking between designer and client.

*An ongoing  
relationship with  
your client is  
only possible if  
there is mutual  
trust and  
respect.*

# Next Actions

Working closely with clients can be beneficial for everyone. However, you probably still have doubts. You may be concerned that the client will abuse the relationship or that they won't respect you. These are things we will tackle later in the book. For now I would ask you to take the following steps.

## **Check your negativism**

Don't allow yourself to dwell on your clients' shortcomings, but instead focus on what they have to offer. A client will sense if you are unhappy with them and it will sour the relationship.

## **Adopt a service based business mentality**

Start thinking of yourself as offering a service to your clients. How does that change what you do? For example, does it change how you communicate? When shopping or in a restaurant look at the service you receive and ask yourself what you can learn from that.

## **Examine existing clients**

Look through your current client list. Ask yourself what makes each relationship a success or a failure. If you feel the client has damaged the relationship ask yourself why and whether you could have prevented it.

So far I have focused on your role in this new approach to web design. However, the client plays their part too. Unfortunately you cannot control what the client thinks, feels or says. What you can do is take steps to redefine the relationship. This is the subject of the next chapter.



## Chapter 2

# A partnership of experts

I know what you're thinking. Recognising the client's abilities and including them in the process is all well and good, but what if the client fails to recognise your experience?

This feeling of not being taken seriously lies at the heart of the tension between client and web designer. As web designers we are experts in our field and yet we are not always treated as such.

It is easy to blame the client for not respecting us. However, when the problem keeps occurring we have to ask why. Perhaps the old adage is true; respect is earned.

To be taken more seriously we must change the dynamics of the relationship. We need to set up a partnership of experts.

How then do we persuade our clients to see us as experts, rather than mere implementors?

1. Establishing yourself as an expert
2. Becoming Mister positive
3. Empathising with the client
4. Defining clear roles
5. Dealing with a damaged partnership
6. Next Actions

## Establishing yourself as an expert

Unfortunately, there are many experts that will never be recognised as such. There are physicists with more experience than Stephen Hawking and web designers with more talent than Paul Boag (shocking though that sounds).



*Being an expert is about more than just ability. It is also about perception. Since speaking at conferences people more readily refer to me as an expert.*

Becoming perceived as an expert is about more than ability. It is about presenting yourself in the right way. How then do you become perceived as an expert?

Begin by associating yourself with expert opinion.

### Expertise by association

When a client has no idea whether your opinion is credible, it is pointless relying on your own experience to justify your position. Instead you need to use sources that the client respects.

One option is to use statistics and research. There is a great deal of research on user behaviour and user interface design. For example I often refer to [ClickTales](#)

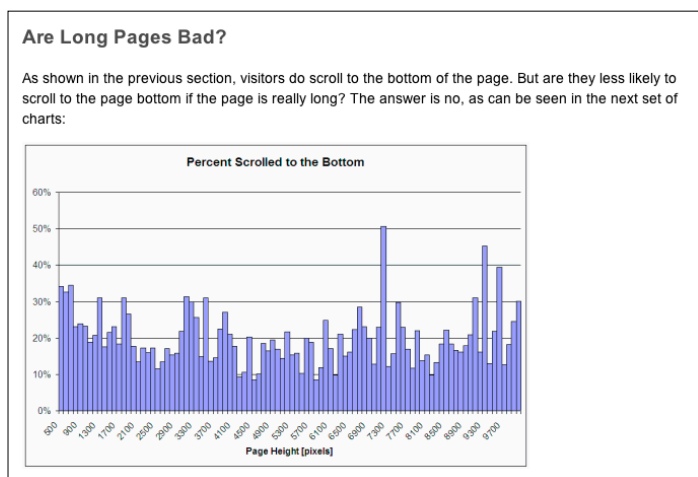


[research on scrolling](#) or studies by usability expert [Jakob Nielsen](#).

There are several benefits to using stats and studies:

- ▶ They prove you are well read and knowledgeable.
- ▶ They support your arguments by providing empirical evidence.
- ▶ They add to your credibility through association.

Note the last point. I have often discovered that if you quote an expert or site that the client has heard of this adds to your credibility in their eyes.



*Quoting research on a subject not only strengthens your arguments but also demonstrates your expertise.*

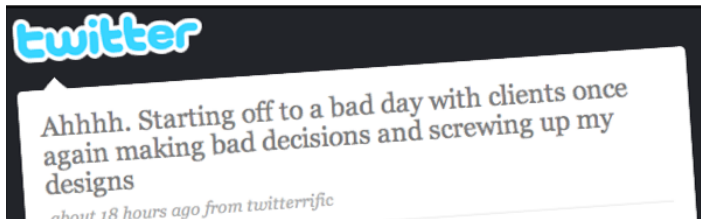
Expertise through association can work even better if you are publicly linked to an expert. One of the reasons I took up interviewing experts on [my podcast](#) was because it associated me with them. In some clients eyes this has added to my credibility.

This approach only works if the client acknowledges the ability of the person you are quoting. If the client is not aware of the expert it falls to you to enlighten them.

It may be that talking about your own ability could be construed as arrogance. However, it is perfectly acceptable to talk about the accomplishments of others. In other words you can go on endlessly about how great [Steve Krug](#) is but you cannot do the same about yourself.

That said, once you have established the expert's credibility, they are a useful tool in justifying your suggestions and may gain you some reflected glory in the eyes of your client.

Fortunately there are ways of directly establishing your own credibility without coming across as arrogant.



*Our frustrations can often come across as arrogant.*

## Speak with confidence

A client wants to know that you can deliver. They want to believe in your abilities. You must give them that confidence.

A big part of that is how we speak. If we speak with authority it will build a client's confidence in our abilities. However, speaking with confidence is harder than you think. It is easy for confidence to turn into arrogance.

Being an expert is not just about confidence in your opinions. It is also being willing to say you don't know or admit when you are wrong. True experts rarely feel the need to prove themselves and are willing to admit their weaknesses.

Think about the figures you respect in web design. Most are comfortable to admit limits in their knowledge and to say they are wrong.

In my experience a willingness to show weakness can go along way with clients. I often tell clients if their ideas are better than mine or if I need a second opinion on an issue I am not confident about. I don't believe this undermines my place as an expert. Instead it shows that I am confident in my own abilities and I know my limitations. It shows I have nothing to prove. Sometimes we try too hard to show our expertise. A quiet confidence is often more effective.

However, an expert is confident enough to make suggestions and propose alternative approaches. He views the relationship as peer-to-peer, rather than supplier and client. He will challenge a client, but does so with gentleness and tact. He doesn't need to force his point of view, allowing his experience to speak for itself.



*How do we reassure jittery clients without coming across as 'blowing our own trumpets'.*

## Letting your experience speak for itself

We have already established that it is damaging to blow one's own trumpet. How then do you let a jittery client at the beginning of a project know you can solve their problems? How do you show experience instead of talk about it?

You have three tools.

- ▶ Processes.
- ▶ Project history.
- ▶ Presentation.

Let's look at each in turn.

### Processes

Having a rock solid, clearly explained and proven process is one of the best ways of demonstrating your experience. This will instil confidence in your clients.

A process implies a well-considered approach used many times. Talking the client through your process from initial sketches to final website, makes it clear you have done this before and are confident you can apply your process to their project. Where they have no clue where to begin, you have experience.

### Project history

It is always good to mention other projects when working with a new client. For example when they express a concern over some aspect of the project, refer to earlier work where you solved a similar problem.

Referring to past projects reinforces your experience and makes it clear the challenges of this project are nothing new. This will give confidence in your ability to deliver despite it appearing daunting to them.

*By explaining your process from initial sketches to final website, you will instil confidence in your clients.*

## Presentation

The way you present solutions to client problems is crucial. Whether it is discussing the best approach to a specific call to action or presenting an initial design idea, the way you do this will influence how confident the client will be in your abilities.

Presenting design is something we will look at in chapter 5. For now it is enough to say that confident presentation gives the client an insight into the depth and breadth of your experience.

Confidence, experience and ability through association goes a long way to establishing you as an expert. However, being seen as the expert does not necessarily create a good partnership.

A client may respect your abilities, but not like working with you. Although there are many reasons for this, one problem may be your attitude.

## Becoming Mister positive

Like many other suppliers, web designers have a poor reputation. Like the proverbial builder sucking air over his teeth while shaking his head at your DIY, web designers are often seen as negative and critical.

To many, web designers are a necessary evil. Although website owners realise that they cannot build websites without us, they perceive us as a roadblock preventing them from achieving what they wish to. To them we are the people who tell them something cannot be done or that it is a bad idea.

Of course from our perspective this approach is entirely justified. Clients often ask for things that are not possible or that would negatively affect their website. Our somewhat negative and cautious attitude comes from bad experiences with past clients.

*Although our attitude is often justified it prevents a healthy relationship with our clients.*

Although our attitude is often justified it prevents a healthy relationship with our clients. If we are inflexible, negative and uncooperative then it is likely that our clients will be too.

Somebody needs to break this cycle. As we cannot force our clients to do it, it falls to us. We can start this process by saying yes to our clients.



*As web designers we are often perceived as a roadblock to getting things done.*

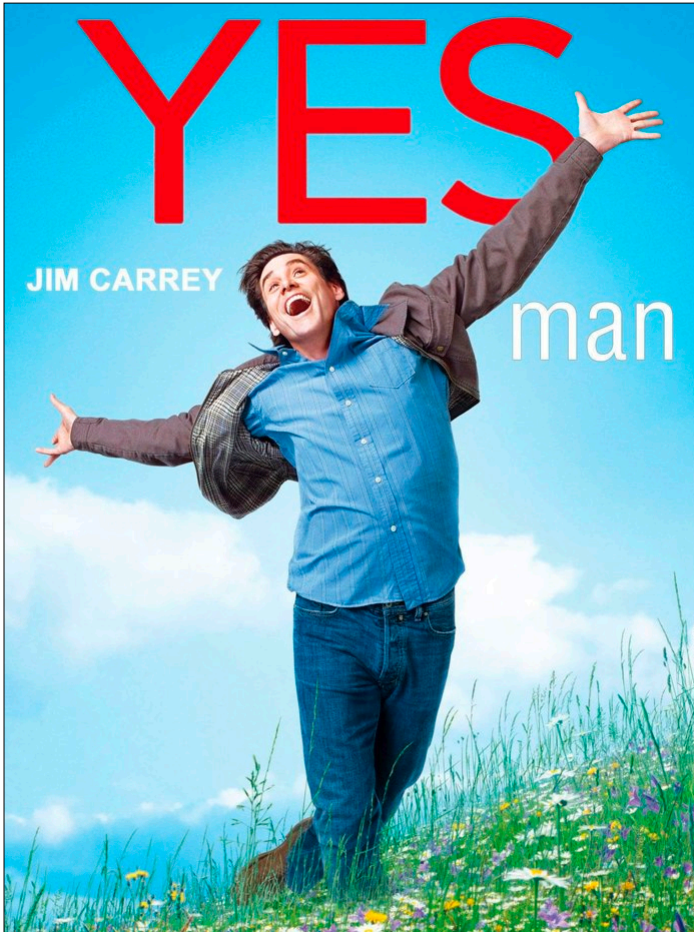
## Becoming a yes man

Whenever I suggest at conferences that we say yes to every client request, a ripple of horror runs through the room. As ridiculous as it sounds, I believe this is the best way of establishing a good working relationship with our clients.

Of course there are massive consequences to saying yes. The key to making this technique work is to clearly communicate what those consequences are. For example, if a client asks for a form that users complete before

viewing the site, you must explain that this will dramatically cut the number of visitors.

If you become adept at explaining the consequences of suggestions, you educate the client allowing them to spot the shortcomings in their own ideas.



*I am not suggesting that we should blindly say yes to every client request like Jim Carrey in the 'Yes Man'.*



If you seriously and honestly discuss each idea no matter how ridiculous, this approach has many advantages:

- ▶ The client feels that you are including them in the process and taking their contribution seriously.
- ▶ The client learns about some of the challenges involved in the web design process.
- ▶ The client feels in control and is the one making the final decisions.
- ▶ You are working with and not against the client.
- ▶ You are avoiding potential confrontations.

In some cases implementing a client's idea is not possible because of budget or timescales. Although these are more sensitive areas, we should apply the same principle of discussing consequences.

If implementing a client's idea will involve slipping the deadline you need to explain this. Equally if the suggestion is out of scope and chargeable, you must have an open and frank conversation.

Be careful how you present your objections and explain consequences. There is a danger that these turn into another way to say no. Instead, work with the client to find an alternative approach with less harmful effects. Often by working together a compromise is found. This is in stark contrast to simply saying no, which inevitably leads to confrontation.

Not that being positive is just about avoiding saying no. It is also about building the client up and having a positive attitude towards them.

## Praising the client

As I've already mentioned in chapter 1, the most damaging aspect of the relationship between client and designer is our negative perception of clients. Although we may think we hide this well it inevitably leaks through.

*Allow clients to realise the limitations of their own ideas by sensitively explaining the consequences.*

One way of overcoming this problem is to actively encourage clients throughout the web design process. I do this in 3 ways:

- ▶ I urge clients to express their ideas and make it clear that no idea is stupid.
- ▶ When a client has a good idea I embrace it wholeheartedly and make sure they receive the credit.
- ▶ When a client suggests an idea that is not so good, I avoid criticising and attempt to move the conversation on.

Although this may sound patronising, I've learnt this approach from raising my son. I praise him when he does well and play down his failures.



*With our children we create an environment where they are confident to express opinions and make mistakes. We need to create the same environment for our clients.*

Finally, positivity is about having fun!

## Making it fun

One of the best questions I have ever been asked when pitching for a project came from a senior manager. He said:

*"How are you going to make this project fun for my team?"*

We all want fun jobs and that includes our clients. Working on a website as part of a productive, positive team is hugely rewarding and enjoyable. As the web designer you can make that happen.

You can make any project fun by injecting some enthusiasm. If you're excited about the project then that excitement will be contagious. Admittedly, some projects are more exciting than others. However, it is always possible to find some aspect that excites. This may be designing for a new audience, working in a new sector or trying out new technology. Whatever the case, enthusiasm goes a long way.

Enthusiasm is also a good way to encourage a client down a specific route. I remember once suggesting an idea to a client and him replying:

*"How can I say no to you Paul? It would be like kicking an over excited puppy!"*

Always look for opportunities to extend your relationship with clients beyond work. Have fun with them, laugh with them and most importantly try to get to know them better.

*Whether it is a new audience, new technology or different sector. Every project has something to excite.*

## Empathising with the client

As web designers we pride ourselves on our ability to empathise and understand users. We carry out usability testing, read extensively on the subject and even create personas to help us get inside the heads of users.

As client centric web designers we need to put the same effort into understanding clients as we do users.

### Understanding client needs

A good starting point is to understand their needs. I don't mean the needs of the project but their personal needs. For example, will this project help them secure a promotion, does it solve a problem they have in their job or perhaps they are new to the company and need to make their mark. Understanding their needs will help you to offer a good service and present your suggestions in a way they will associate with.

As web designers we often talk in terms that don't resonate with our clients. We talk about optimising their site for future devices. Instead we should explain that if we build the site right, they won't need to ask their boss for more money when Apple releases a new iPhone.

However, it isn't just about their needs, it's also about who they are as people.

*To provide a good service you don't just need to understand business needs. You also need to understand the personal needs of your clients.*

### Understanding the person (and yourself)

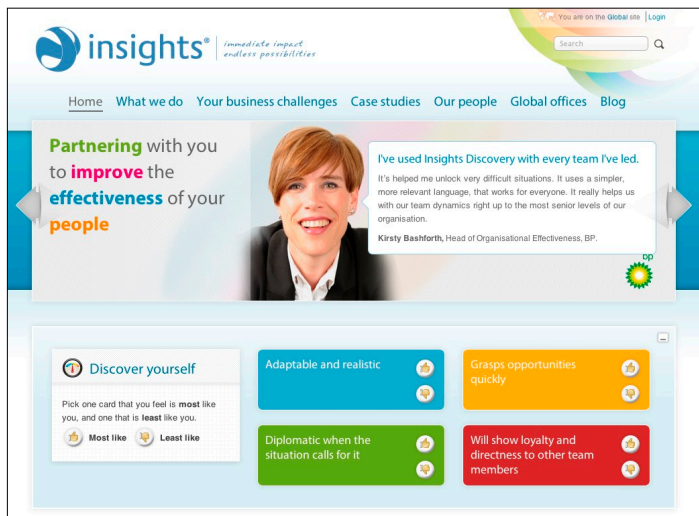
Not everybody approaches a project in the same way. Some are methodical planners, others believe in getting stuck in. Some worry obsessively, others are so laid back that progress is slow.

Stopping to think about who our clients are makes a huge difference. If our client worries, then we need to go

the extra mile to reassure them. If they are headstrong, we should avoid direct confrontation.

The trouble is that we are so focused on the production side of the project (building the website) that we don't dedicate thought to the service we are giving. This involves understanding the client.

Although understanding the client is important, you also need to understand your own makeup. Just as the client has his strengths and weaknesses, so do you. Admittedly this all sounds a bit 'touchy-feely,' but unless you understand yourself you could easily inadvertently wreck a project and clash with a client.



*While working with Insights (a company who provide personality profiling) I discovered things about my own character that have dramatically altered how I work with clients. Do you understand your own character?*

For example, I know I am a strong, opinionated character who tends to charge in with new ideas without fully thinking through the consequences. This is dangerous at the best of times. However, when working

with an introverted client who likes to plan, it can be disastrous!

Fortunately by knowing my traits and taking the time to understand the client I am able to adjust my behaviour and curb the characteristics that may irritate the client.

Problems don't just occur when working with your opposite (e.g. extrovert and introvert), it is just as dangerous working with somebody who is a lot like you. Two strongly opinionated characters can clash horribly. It falls to you to adjust your behaviour and avoid confrontation.

Finally, we need to take the time to understand our client's skills.

## Understanding the clients skills

As I said in chapter one we have a natural inclination to dismiss clients as stupid. They are not. We need to take time to understand their strengths and weaknesses. For our purposes these fall into two areas:

- ▶ Web skills
- ▶ Related skills (e.g. marketing, business analysis, etc.)

Understanding how knowledgeable a client is about the web design process is crucial. Have they run a web design project before? If so, did that experience give them a good understanding or a bad experience. If it was the latter you may have to give them a lot of support.

You also need to understand their knowledge about web design technology and terminology. A client may sit quietly while you talk about responsive design or database schemas and give no sign they don't understand. You need to check they are following what you are saying.

*We need to remember that our clients are experienced professionals in their own right. We must learn to utilise the skills they have.*

Finally, you need an understanding of their areas of expertise. Are they a manager, marketer or IT specialist? This will help you understand how they view the world and find contributions they can make to the process. For example a marketer will be invaluable in shaping the message of the site while a project manager can offer support in getting content from people.

That brings us nicely on to the subject of roles and responsibilities.

## Defining clear roles

One area of conflict relates to when a client treads on what the designer considers his 'turf.' Typically this manifests as the client micromanaging the design. This undermines the partnership and reduces the web designer to an unhappy pixel pusher.



*A lack of clearly defined roles has led to many clients micro managing the design process. This has become so common that entire websites are dedicated to lampooning the practice.*

Micromanaging occurs for a number of reasons. One of the more common is that the client doesn't know any better.

In many cases the client hasn't commissioned a website before and doesn't know how they should approach it. It is important that at project commencement you set the limits of the relationship. If you leave it until later, conflict will probably already have arisen.

So what exactly are the 'limits of the relationship?' I suggest they fall into two areas: responsibilities and focus.

## Responsibilities

Clients often believe that because they have commissioned you to build their website, they have no responsibilities in its production. It is important to dispel this myth at the outset.

As I have already made clear, client centric web design is about a collaboration between client and designer. This needs to be clearly communicated to the client. They need to understand that their role is crucial.

The role falls into 4 areas:

- ▶ **Establishing direction:** The client is key in establishing the direction for the web project. Why is the project being undertaken? What are its key goals? Who is it for? Although the client is not solely responsible for this, they are a key stakeholder.
- ▶ **Ongoing vision:** Unless the client has specified that you will have ongoing involvement in the site, it's important to stress that they need to think about the future. Many clients naively believe (due to the lack of being told otherwise) that their job is done once the site is live. You need to explain this isn't the case.


*Client centric design requires the client to play a crucial role. This needs to be clearly communicated at project commencement.*



- ▶ **Sign-off:** It falls to the client to approve or reject specifications of functionality, design direction and countless other decisions throughout the process. This needs to be done with the designer, but the final decision is theirs. What is more, it is their responsibility to make sure that this meets the approval of other stakeholders within the organisation. Too often a client approves a design and is then overruled higher in the company.
- ▶ **Content provision:** Content provision is often the key responsibility of clients and yet is consistently underestimated. You need to clearly communicate how much work this involves and it also includes other assets like imagery and style guides.

With these last two points (sign-off and content provision) it is important to stress availability. Projects often stall because the client is not available to sign-off a design or provide content. This can prove frustrating for the designer and client alike. Explaining to the client that they need to be available for certain milestones avoids finger-pointing if the project slips.

**From:** Paul Boag  
**Subject:** Out of the Office: Are you happy to sign off the design?  
**Date:** 1 December 2011 18:36:10 GMT  
**To:** Paul Boag <paul.boag@headscape.co.uk>

[Hide](#) 

[1 Duplicate](#)

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Thanks for your email. Unfortunately I am out of the office until the new year. I will not be checking email until my return.

Have a great Christmas and happy new year.

Thanks,  
Chris

On 1 Dec 2011, at 17:49, Paul Boag wrote:

Dear Chris,

In order to get the site live before the new year I really need you to approve the design as soon as possible. Do you have any comments for me? Have you received internal approval from all the key stakeholders.

If you could get back to me ASAP, that would be much appreciated.

Thanks,  
Paul

*Ensuring the client is available throughout the project is vital if deadlines are going to be met.*

Finally, it is important to explain your responsibilities to the client. For example, make it clear you are responsible for design direction. This will discourage them from over-managing the design. Also make it clear what you are not responsible for. Sometimes the client has unrealistic expectations of you. Outlining what is not included prevents misunderstandings.

Of course not everything falls into neat areas of responsibility. That is where focus comes in.

## Individual focus

Design is one area where both parties have responsibilities and so conflict can arise. The designer is responsible for producing the design, but the client signs-off that design. Although we will tackle design in more depth in chapter 4, it is worth pointing out that some clarification of focus can help reduce the likelihood of conflict.

Conflict arises over design when the client starts micromanaging the process. Classic comments like 'move it to the left', 'change this colour' or 'make my logo bigger' have become standing jokes among designers. It is frustrating when a client hires you for your design skills and then does the design himself.

The client often does not realise this is a bad way to work. When the designer does eventually explain this it is often too late as tempers have already flared. Outlining expectations at the outset avoids issues escalating later.

The best way of addressing this issue is to talk in terms of focus. The designer focuses on the details of a design while the client should have a broader outlook.

I urge clients to focus on the needs of the user and the business. I argue that the client understands their business requirements better than me and knows their

*Focus the client  
on business and  
user needs  
rather than  
letting them  
obsess over the  
details of design.*

customers more intimately. It makes sense that the client 'focuses' on these two areas.

Although as web designers we also have to consider these areas, it is worth focusing the client on them for two reasons. First, it discourages interference in the details of a design. Second, it makes them think beyond their own opinion and instead ask whether it fulfils business goals and satisfies users.

Finally, focus your clients on 'problems' and not 'solutions.' This sounds strange, but let me explain.

Clients have a habit of coming to designers with solutions. An example would be "change the blue to pink." Not only does this annoy most web designers (who are again reduced to pixel pushers) it also isn't helpful. Why is the client asking the colour to change? What is wrong with the blue?



*By focusing the client on the problem and not a possible solution you can make alternative suggestions.*

A better approach is for the client to explain the problem. In the example above the problem might be that blue feels too corporate for a pre-teen female

audience. Now the designer knows the underlying issue he can suggest a solution. This might be to make the design pink. However, it could equally be adding more unicorns and ponies (or whatever it is that pre-teen girls like)!

Focusing clients on problems and not solutions benefits everybody. The designer feels in control of his own design and the client benefits from the full range of the designers creative skills (which enable him to suggest alternative and potentially better solutions).

There is one hole in the advice I have given so far. On many occasions in this chapter I have talked about setting the extent of the relationship between client and designer 'up front' before conflict arises. What then do you do if the relationship is already damaged? Can a partnership of experts be established when a broken relationship already exists?



*What do you do when the relationship between client and designer is already damaged?*

## Dealing with a damaged partnership

Whether your client is a boss or a long-term client who treats you as a pixel pusher, it is often not possible to start a relationship from scratch. Even with new clients, things can get off on the wrong foot despite our best intentions.

Fortunately, it is possible to salvage a bad relationship with some determination and humility.

### Humility wins the war

*Don't allow your pride to get in the way of a healthy client relationship. Sometimes we will need to concede a point to get the client back onside.*

When things go wrong with a client, we rarely blame ourselves. We normally consider that it is the client who has been unreasonable and caused the relationship to collapse.

Occasionally this is true. However, in most cases there are two sides to the conflict. At the very least you need to remember that it is you who is the supplier and you that should go the extra mile.

Even if you are the wronged party, you cannot allow your emotions to colour the situation. Often our pride and a desire for 'justice' clouds our thinking, leading us into confrontations that damage the relationship, the website and our business.

To repair the relationship the client must win some arguments. We must stop digging our heels in because of pride. Not all disagreements are equal. Some issues you will feel passionate about, others less so. Allow the client to win over less important issues to prove that you consider them an equal partner.

However, humility is not enough. We need to also apply some of the lessons learnt earlier in the chapter, particularly that of being positive.

## Positivity heals all wounds

Nothing will go further in restoring a good working relationship than a transformation in your attitude. Being positive inevitably encourages others to respond in kind if applied with enough conviction and consistency.

Go the extra mile for your clients. Get excited about their ideas. Praise them for their contribution. Show you appreciate them.

Not only will the client think twice about their behaviour, it will also transform your attitude. To begin with you may have to force yourself to be positive. However, over time your actions will transform your thinking. Where once you struggled to be positive about the client, eventually you'll begin to truly appreciate their contribution to the project.

Changing attitude and behaviour is by far the most important step to take. However, a frank and honest conversation may help too.

*Forcing yourself  
to be positive  
about the  
client's  
contributions  
will eventually  
help you to see  
them in a new  
light.*

## Having a frank and honest conversation

When there is a damaged relationship it may be worthwhile discussing the problem with the client. Notice that I say it may be worthwhile. Depending on the client and your temperament, a change in behaviour may be more beneficial than a tense discussion.

That said, allowing the client to express their frustration is a good thing if you resist responding in kind.

For your part, the key is to acknowledge the clients feelings and if appropriate your own failings. Then put the past behind you and agree to start again.

Done right this kind of conversation can clear the air and allow a new beginning. However, continue with caution.

# Next actions

Establishing a good working relationship with clients is not always easy. Finding the middle way between an arrogant expert and sulky pixel pusher can be difficult. Begin by:

## Changing your own attitude

Become positive, keen to help and empathetic of the clients needs. Encourage your clients to contribute and wherever possible accommodate their ideas.

## Changing how your client perceives you

Use stats, expert opinion and processes to prove that you are a safe pair of hands who is an expert web designer.

## Establishing some ground rules

This may involve redefining existing relationships or kicking off new ones in the right way. Make it clear who is responsible for what, with the client focused on business goals, user needs and identifying problems.

With the right ground rules and attitude, projects will start on the right foot, with a solid working relationship. However, maintaining that relationship throughout the project can be tricky. For that you need some principles both parties work within. These are the principles of client centric web design.





## Chapter 3

# Principles of collaborations

My wife loves romantic comedies. This is unfortunate because, like all men, I despise them with a burning passion.

I hate the inevitable scene when the couple have a big bust up over a misunderstanding. I find myself screaming at the screen, my face red with fury and veins bulging on my temple. Why can't they just talk to one another? Why can't they show a modicum of respect or ounce of patience?

I experience similar thoughts when web designers moan about their clients.

There are many similarities between the designer / client relationship and that of a married couple.

To have a successful working relationship with our clients we need to show them respect, patience and we need to communicate well. It is these and other principles of client centric web design that I wish to explore in this chapter.

We begin this journey by looking at the bed rock of all good relationships and the source of most conflict in romantic comedies: communication.

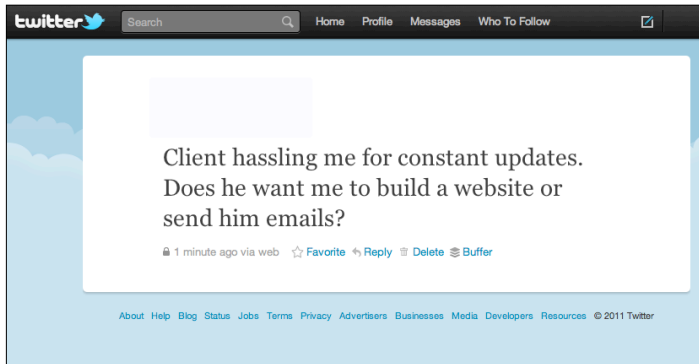
1. Creating constant communication
2. Building honesty and trust
3. Having healthy disagreements
4. Nurturing freedom
5. Learning together
6. Next Actions

## Creating constant communication

So far we have focused primarily on getting the first date. We have looked at seeing the best in our prospective partner and making ourselves look good.

Once the relationship begins, how we communicate will shape its evolution and whether it stands the test of time.

I once saw a tweet from an exasperated well known web designer who shall remain nameless. He wrote:



*Client hassling me for constant updates. Does he want me to build a website or send him emails?*

Although I can associate with this person's frustration, the reality is that his client justifiably wants both.

In chapter one I explained that we do more than build websites, we also offer a service. This means that regular communication with our clients is a fundamental part of the job.

Rather than just communicating more because that is what the client wants, let's take a moment to consider why the client is asking for updates.

## Why the client wants to be kept informed

Part of our problem is that we feel there is a lack of trust when the client asks for updates. Although there may be an element of truth in this (especially if it's a new client, who doesn't yet know us) it is not the only reason.

It is human nature to try to control what we do not understand. The less we know the more we want control. With many clients unfamiliar with the web design process, it is unsurprising they feel a need to be constantly updated.

It's important to remember that for most clients a website is a major investment. They are under considerable pressure to make sure it is delivered on time and in budget. Combined with a lack of control this creates significant anxiety.



*Anxiety is often caused by a lack of understanding and confidence. This can lead to micromanagement in an attempt to get a sense of control.*

## Communication combats micromanagement

As I have already explained, a lack of communication leads to anxiety and anxiety leads to a desire to control. This is where micromanagement comes from.

Many web designers mistake micromanagement as a character trait among clients. I don't believe that is the case. I believe micromanagement often arises because the client lacks confidence in our ability to deliver.

One way of giving the client the confidence is to establish yourself as the expert (as discussed in chapter 2). Another is to keep communicating with them. That way you demonstrate you are in control and that progress is being made. This will reduce their anxiety and their desire to micromanage.

Regular communication doesn't just prevent micromanagement. It also protects your profit margin.

## Communication protects profit

Clear and regular communication does two things. First, it avoids misunderstandings and second it prevents surprises. Both of these problems can have an impact on your profit.

Think about why you lose money on a project. It's either because there is a difference in expectation, or because the client didn't like what you produced and forced you to start again.

We like to take a brief away and work on a solution. Only once we have finished the work are we happy to reveal it to the client.

Unfortunately this approach dramatically increases the chances that we will either misunderstand the client's

*Keeping the client informed gives them confidence you are in control and allows them to relax.*

requirements or produce something that the client simply does not like.

By communicating with the client regularly we avoid these problems as I will demonstrate in chapter five.

I hope I have now convinced you of the importance of communication. However, before we move on let me share a couple of thoughts on the best ways to communicate.

## The best way to communicate

As web designers we are comfortable with online communication. We regularly communicate through email, twitter, IM, Facebook and binary (well, maybe not the last one).

Despite this we still misunderstand each other which often leads to “flame wars” and other online conflicts. Without tone of voice and body language, communication is difficult even with experienced users.

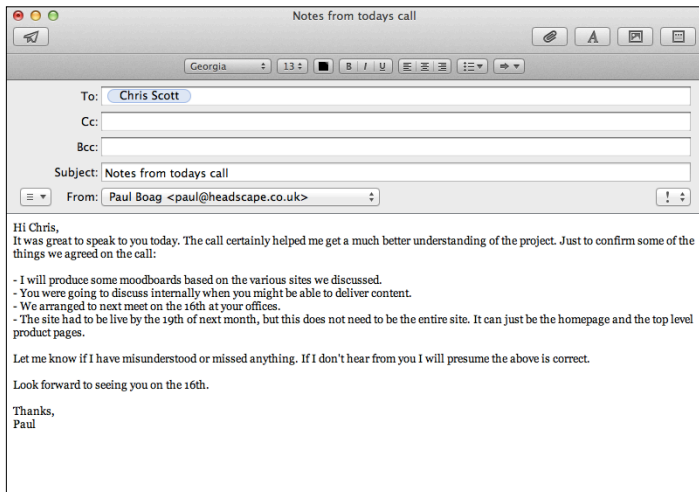
The screenshot displays the Basecamp web application. At the top is a navigation bar with links: Home, Tour, Our Customers, Mobile, Extras & Add-ons, Help/Support, Plans & Pricing, and Sign in. The user's name '37signals' is on the right. The main content area is divided into several sections:

- Take a tour of Basecamp:** A sidebar with icons and text for 'Communicate' (Post an idea, leave a comment), 'Share Files' (Attach files to messages), 'Deliver On-time' (Assign due dates), 'Reuse Templates' (Do a lot of similar projects), and 'Lots More' (Basecamp works in dozens of languages).
- Project Management is all about communication.** A large section with two overlapping speech bubbles (one blue, one green) and text stating: 'Projects go well when people talk to each other, discuss issues openly, and communicate clearly. Basecamp is focused on making this easy.'
- No more messy email threads. Post messages to Basecamp instead.** Text explaining that instead of scattering emails, users can use Basecamp message boards to keep discussions in one centralized location. It includes a link: 'Watch an overview of Messages'.
- Homepage proposal** (marked as 'New'). A message from 'Sam Stephenson' dated '29 May' about bicycle component distributors. It includes a 'Go to message' link and a '1 comment' link by 'Diane Peterson'.
- It's easy to respond to any message.** Text stating: 'Basecamp encourages team and client discussion. You can easily add your two cents to any message.'
- Message input area:** Shows a 'Leave a comment...' text box, a 'Bold' button, an 'Italic' button, a 'Bullets' button, and a 'Numbers' button. Below it is a text input with the value 'I love this idea'.

*Tools like email or [Basecamp](#) are great, but they do not aid clear and personal communication.*

That is why when it comes to communicating with clients (who are considerably less experienced in digital communication) we need to make the effort to meet face-to-face or speak over the phone.

That said, it is important to document conversations with clients. Following each phone call or meeting, email the client with the key points. This not only gives you a written record of what was agreed, it also helps flag potential misunderstandings.



*It is important to document anything agreed in meetings or on the phone.*

Although communication is without a doubt the single most important factor in any successful relationship, it is not the only one. A good relationship also needs to be built on trust and honesty.

## Building honesty and trust

For fear of over-stretching the relationship metaphor, just like some marriages, too many of our relationships as web designers suffer from a lack of trust.

This is born from bad experiences suffered by both parties. Clients have often endured web designers who have been less than honest, while web designers have been taken advantage of by previous clients.

One example of this lack of trust is design iterations. Many web designers limit the number of iterations. This is because they have been burnt by clients demanding change after change.

However, limiting iterations sets the wrong tone for the relationship. It says you don't trust the client to be reasonable. If the design process is handled sensitively there is no need for these restrictions.



*Many designers limit the number of design iterations because of bad experiences like this.*

Another area where trust and honesty can be lacking is in how we handle problems. When we come across a problem we tend to avoid discussing it with our clients.



I don't believe we are being deceptive. We hope that we can overcome the issue so that the client never needs to know. We think we might still make that deadline or fix that unexpected technical issue. We worry that admitting the problem may undermine our credibility and lead to conflict.

Although confronting problems can be painful, it is better to bring potential issues to the clients attention when they arise. Better to please a client by overcoming a potential problem you have warned them about than surprising them with a sudden crisis.

This also requires us to be honest with ourselves about potential issues. Often, web designers convince themselves that a project is possible because they want the work. How often have you agreed to an excessively tight timescale or squeezed pricing to fit a budget?



*How often have you convinced yourself you can meet unrealistic deadlines?*

Our tendency to deceive ourselves ultimately leads to us deceiving our clients and creating conflict and a lack of trust.

We need to have the courage of our convictions and talk honestly with our clients (or prospective clients) about what is possible. This might mean losing work, but sometimes things don't match up and we should walk away.

Building a client relationship on anything other than honesty and trust will inevitably lead to finger pointing. When things go wrong (which they will) there needs to be a safe environment for discussing the problems without threats or blame. If you are not honest from the outset that is never going to happen.

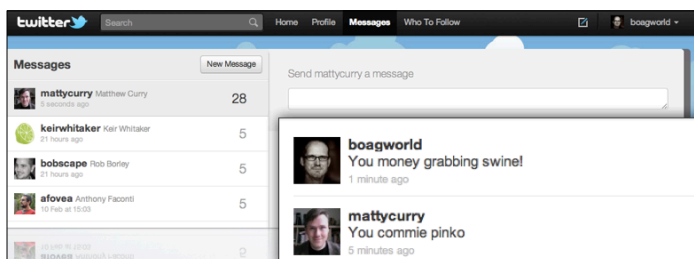
Not that I am suggesting there can never be disagreements. Part of being honest and trusting each other is that you can have healthy, passionate discussions.

## Having healthy disagreements

Often we can be afraid to disagree with our clients. However, as I have already said, being willing to challenge is a big part of the job.

A client has hired you for your expertise. They expect you to stop them going down the wrong road and suggest alternative approaches.

How you do this is crucial. I have already talked about the need to avoid confrontation. How then do you have a healthy discussion without it descending into an argument?



*Disagreements with clients do not need to descend into an argument.*

A big part of a healthy debate is that it requires give and take on both parts. As a result you cannot expect to

'win' every disagreement. Sometimes you have to 'lose a battle to win the war.'

There will be some issues that you feel passionately about and others less so. On the less important issues give ground so that they will know you are serious about the bigger ones.

Finally, when it comes to disagreements, I always give them the "I am the client" card. I make it clear that although I will present my viewpoint they are more than welcome to overrule me.



*Make sure the client knows they can overrule you and that you understand it is their website.*

Interestingly this rarely happens. Although the client likes to know that I consider them in control, they are also keen to have me on board and are willing to compromise to make that happen. Once a client views you as an expert they are unwilling to ignore your advice.

This leads to some interesting scenarios where the client is desperate to convince you of their position rather than play the "I am the client" card.

I think it is important to let the client know you recognise their right to do as they please with their own website. The client must feel free to make the final decision.

This sense of freedom is a crucial component of a successful working relationship.

## Nurturing freedom

Clients often find working with web designers a constraining experience. They feel they have great ideas but we keep telling them it is either not possible or falls out of scope.



*Clients often feel constrained by the limitations we put on them.*

How then can we give the client a sense of freedom without promising the impossible or blowing our profit margin?

A good starting point is to say up front that no idea is stupid and that you want clients to contribute to the project. Although we know that many of these ideas will

be impractical that doesn't mean they cannot be expressed and discussed.

When the client has an idea we must be careful not to criticise it. Just because the client has an idea does not mean it has to be implemented and so there is no reason to explain why it cannot be done. Instead consider running an ongoing wish list of ideas for later discussion.

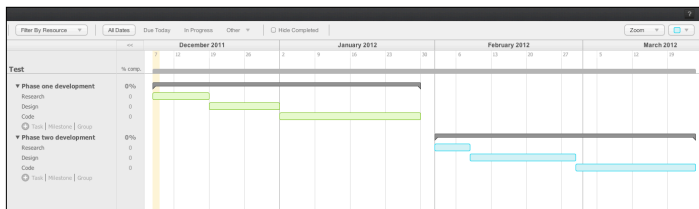
[Jim Coudal](#) talks about how his company has a book for new ideas. Whether an idea is good or bad it goes into the book. Many ideas never leave the book, but a few are developed further. This kind of free stream of ideas is to be encouraged and we should do likewise with our clients.

The ideas that end up on the wish list will fall into three categories:

- ▶ Great ideas that are easy to implement.
- ▶ Good ideas that lay out of scope.
- ▶ Impractical ideas.

Great ideas that are easy to implement should be rolled into the project. However, what about the other two options?

Many of the ideas suggested by clients are good, but ring alarm bells because of their affect on timelines and budget. In these situations talk about phasing the development of the site.



*Encourage the client to think in terms of phased development. This will prevent scope creep on the current development job.*

*Encourage the client to keep a wish list of improvements that could be made to the site and review at the end of the initial project.*

A phased approach is good for four reasons:

- ▶ Talking about phases makes it clear that a website is an ongoing commitment requiring regular development and investment. This is something that clients need to know.
- ▶ Having multiple phases allows you to plan the implementation of client ideas, without compromising the timescales and budgets of the current project.
- ▶ Suggesting that an idea is implemented in phase two is a gentler way of saying that the idea is good but is not covered by the current contract.
- ▶ Phased development helps generate repeat business without having to sell aggressively to the client.

Assigning client suggestions to future development phases demonstrates that you take the client seriously without undermining the current project.

Of course some ideas that clients suggest are completely impractical. In the short term these can be consigned to a wish list. However, ultimately they need addressing. This is where our next principle of good relationships come in: education.

## Learning together

A part of a web designers role is to educate the client. As I wrote in chapter one, our clients are not always right. They will make suggestions that are impractical or even down right stupid. It falls to us to educate them.

The best way to educate a client is to ask questions that prompts them to think through the consequences of their ideas.

For example, imagine a client who wants to make their logo bigger. One option would be to dismiss the idea as ridiculous. A better approach would be to ask a few

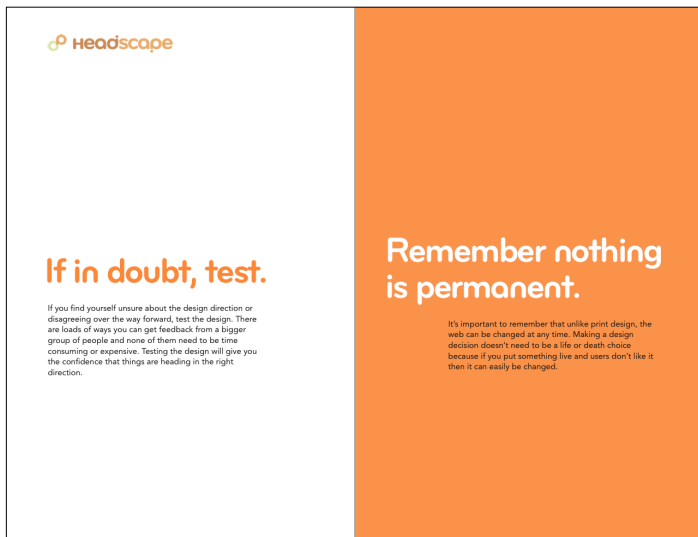
*A significant part of our role as web designers is to educate our clients about the possibilities and limitations of the web.*

questions to get the client to think through the consequences.

As I mentioned in chapter two, my first question would be 'why?'. This helps get at the underlying problem, rather than their solution of making the logo bigger.

I would also ask what elements should be removed to accommodate the bigger logo or what can be pushed further down the page. This will educate them about the consequences of their suggestions, but put them in control of the final decision.

Instead of it turning into a confrontation, you take on the role of an adviser helping them consider things from all angles.



*Consider producing a series of fact sheets to help educate your clients similar to the "[10 ways to ensure a better design for your site](#)" example above.*

It is worth noting that the education process is not one way and should not be presented as such. If it is all about

you educating the client this will come across as patronising.

You should be learning as much from the client as they are from you. The client will be teaching you about business objectives and target audiences. You must put as much effort into learning from them as you expect in return.

Be sure to give the client the opportunity to educate you about their thinking before you show them the error of their ways.

Finally when it comes to education, we must speak the client's language. Too often we fall back on acronyms and jargon. Instead of educating this leaves the client with the impression we are using technobabble to confuse them.



*If we wish to communicate clearly with our clients we need to refrain from using technobabble.*

If we want to explain to our clients why something is a bad idea, we need to do so in terms they understand. Instead of talking about technical and practical reasons, we need to focus on affect on business and users. This kind of language is more accessible to clients.



The education process is not something that happens overnight. However, given time a client can even become as knowledgeable as you about the web. That is why a long term relationship with clients is so beneficial.

## A long term relationship

There is a fundamental difference between working with a client for the first time and one that has grown into a long term relationship.

Things are much easier in a long term relationship. The client is not only better educated, there is also a more comfortable working relationship. They know how you work and you understand them. You understand their pain points, passions and concerns.

A long term relationship also benefits the website too. An ongoing programme of work means the site is being constantly improved and the boom / bust cycle is broken.

With that in mind it is important to establish that ongoing relationship. Talking about phased development is one approach. However at [Headscape](#) we have gone further. When we meet with prospective clients we make it clear that we prefer a long term relationship. If they do not want that then they are better off looking elsewhere.

For us a long term relationship is so important that we don't want to work with anybody who doesn't share that thinking. That is how fundamental we believe it is to client centric web design.

*Too many web projects are like a one night stand. Ultimately these are damaging for the client's site and the long term success of your business.*

# Next Actions

I began this chapter by flippantly comparing our client / designer relationship to a marriage.

A marriage has moved beyond the flush of first love and is maintained through partnership, communication and trust. With that in mind I would encourage you to:

## **Communicate regularly**

Embrace working with clients, rather than working around them. This means recognising that regular engaging communication is as important as coding and design.

## **Be open and honest**

Keep the client informed about any potential problems when they arise and openly discuss differences in opinion about the right approach.

## **Encourage the client to contribute**

Give the client the freedom to contribute ideas and don't criticise their participation. Add ideas to a wish list and introduce the idea of phased development.

Finally, remember that the entire relationship is built on a two-way education process. A big part of that is getting up to speed with the client's organisation. It is this that we are going to look at in the next chapter.

## Chapter 4

# A business embedded approach

A client centric approach to web design requires that you **really** understand their business.

That may sound obvious, but knowing something and doing it, are different things. I know this is true, because I was the worst culprit.

I would leap into projects full of ideas and suggestions, without listening to the client and their requirements. A mixture of arrogance and enthusiasm spurred me into action before I had the facts. I believed I knew enough to get started.

At face value projects can look like previous work. They might target a similar audience, use the same technology or be within a familiar sector. In reality every project is different and we must take time to understand the unique requirements. This is not a step in the process we can skip.

1. Gather requirements
2. Understand the fundamentals
3. Review what exists
4. Interview stakeholders
5. Maximise limited budgets
6. Next Actions

## Gather requirements

When budgets and timescales are tight there is a temptation to start development immediately.

Part of this temptation comes from a misunderstanding about the nature of the sites we build. To us they are websites; a way that users find information and complete tasks. However, they are much more.

## Websites are complex business tools

To our clients and their organisations a website is an essential business tool that is deeply integrated with business aims. It is a marketing channel, a recruitment tool, a customer support mechanism and more.



*A website is closely integrated with many different aspects of a business.*

Grasping that a website has ramifications across an organisation makes it obvious you must understand that organisation before building anything.

A website is a point of interaction between two parties. There is the organisation that owns the site and the user who interacts with it. For us to do our job properly we need to understand both sides of that conversation.

Most of us are good at understanding users and their needs. We understand that taking the time to do so informs our decisions. We need to do the same with our clients. Requirements gathering provides us with this knowledge. Without it, we only know half the story.

Requirements gathering doesn't just help us understand our clients' businesses. It also helps us understand our clients' motivations.

*As designers we take time to understand the user. It is just as important to understand the business and the client.*

## **Clients aren't always rational**

We like to think of ourselves as rational people. Unfortunately none of us are. All kinds of subtle nuances affect our decision-making.

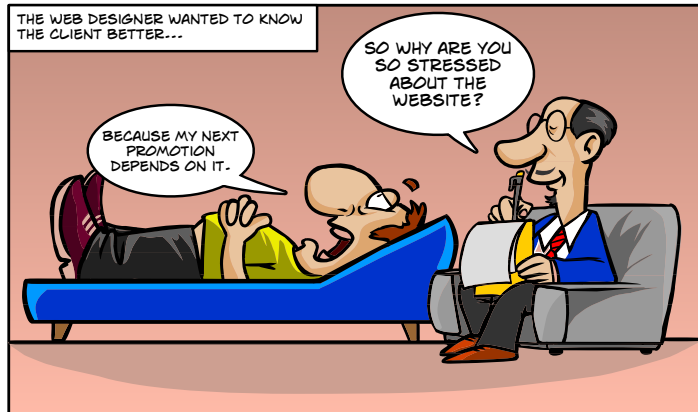
This is why clients often seem to make bad decisions. What on the surface seems obvious to us, is not to a client. This is because there are other factors influencing them.

By working through a requirements gathering phase with the client, we get an insight into their decision-making process, needs and motivation.

Remember, we offer a service. It matters if the clients job is on the line with this project, or if they need to accommodate comments from their boss. Ensuring the client is happy is important.

Despite what we may wish, office politics matter. A requirements gathering phase helps understand the

dynamics of an organisation and obstacles to the project's success. It will highlight problem people and the need to minimise the effect they have.



*A client's real motivation is not always immediately obvious. A requirements gathering phase helps discover the truth.*

Knowing what motivates your clients and getting insight into office politics will help get sign off.

## Requirements gathering aids sign off

Requirements gathering doesn't just help make decisions, it also justifies them.

If you understand business drivers, you can explain why your choices help meet organisational goals. The sign off process becomes based on evidence and not on subjective opinion.

Not that opinion is removed from the process. We know that politics and other non-project related factors influence decisions. However, requirements gathering provides enough knowledge to use these to our advantage.

For example, we may meet a person who is particularly influential, but also opinionated and difficult. As part of the requirements gathering phase we can interview that person. In that interview we will learn more about them, like the fact they are passionate about recruiting top quality people. With that knowledge we can focus our future presentations on the benefits to recruitment, so ensuring their support.

The lesson here is that requirement gathering can prove helpful when getting sign off, a subject we will cover in more depth in chapter 5.



*Car sales reps have long known that men and women look for different things in cars. They therefore adjust their approach. We too need to adjust how we present design based on who we are talking to and what motivates them.*

We now know how important requirements gathering is. The next question is; what process do we use?

There are several tools available to us for requirements gathering. You will not use all the tools on every project. However, you should ask some fundamental questions.



## Understand the fundamentals

*Some clients find it hard to articulate why they have a website and what they use to measure its success. We need to help them answer these fundamental questions.*

I am often surprised at the lack of basic information in your average request for proposal.

These documents cover branding, organisation history and functionality extensively. However, they fail to discuss fundamental questions such as:

- ▶ Why do we have a website?
- ▶ What do we want the website to do?
- ▶ How are we going to measure its success?
- ▶ What do we want users to do on our site?

As web designers we must extract this information from the client before beginning work and ideally before writing a proposal.

Unfortunately when asked, many clients struggle to articulate their answers. Therefore, the answers need to wait until you can work through the questions with them. Top of the list is business aims.

## Establishing business aims

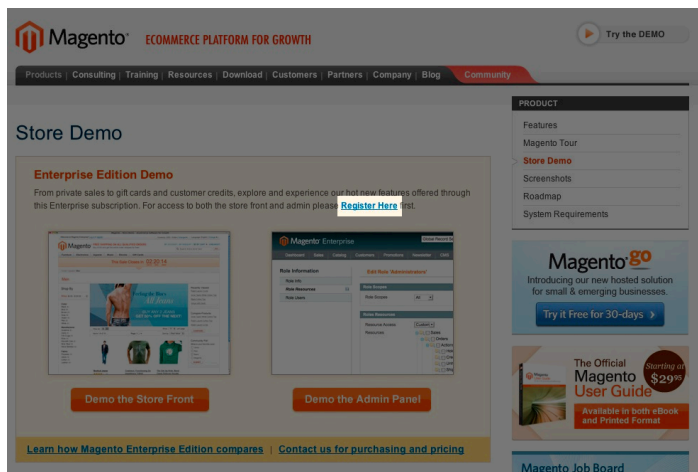
In the Website Owners Manual I wrote about how important business objectives are. The problem can often be getting the client to articulate them. In my experience asking a client why they have a website and what they want to do through it, leads to vague answers.

I resolve this problem through brainstorming. Together with the client and other stakeholders we discuss possible goals. These ideas are entirely uncensored and we do not judge their merits. Once we run out of ideas, we review the list. We combine some items and remove those that are inappropriate.

We refine the remaining items into specific goals. Making them specific is important as it can change your approach to designing the website.

For example, an objective to “increase sales leads” is different from “increase the number of quality sales leads”. One leads to email harvesting and automatic newsletter sign-up. The other qualifies the lead before handing it over to the sales team.

Next, we need to prioritise our goals. This is important as they sometimes clash and prioritisation resolves these conflicts. For example two goals such as “generate more sales leads” and “showcase products” could clash. It might be suggested that users register before being allowed to view a product. This would generate more sales leads but cut the number of people viewing a product.



*Forcing users to register before viewing a product demo may increase the number of sales leads but it will reduce their quality. This is why it is important to make sure our objectives are specific.*

Prioritisation also helps you as the web designer to focus on the top 3 or 4 goals, and not be overwhelmed by the entire list. This does not mean you should ignore lower ranked items. It just provides a focus to the design process.

Finally, highlight goals in your list that are section specific. A relatively minor goal might be particularly important within a specific section. For example an objective to “increase recruitment” may be low on your list but is important in the jobs section of the site.

Once you have your list of business aims you must make them measurable.

## Making objectives measurable

*Measurable goals can translate into calls to action. Together these make it easy to measure your return on investment.*

Having measurable goals is a key part in achieving one of the principles of client centric web design; establishing a long-term working relationship.

If you are to avoid the boom/bust cycle and work with a client long-term, you must prove to them that continual investment is worthwhile. This is only possible if you can measure the success of the site in meeting business goals.

A business aim to “increase sales leads” is not enough if you cannot measure whether the lead has come from the website. Instead change the goal to “increase the number of users completing a contact us form.”

Measurable goals can easily translate into calls to action. If your aim is to increase the number of users completing a contact us form, then the call to action is obvious.

Sometimes it helps to associate figures with goals. This helps calculate return on investment. For example, if it costs £5,000 to update a checkout process on an ecommerce site and their profit per sale is £5, they will need an extra 1000 sales to break-even.

Nothing encourages investment more than being able to demonstrate return on investment. For example, showing an increase in enquiries from a site by 500% in 6 months. To do that you need a baseline from which to work. This requires a review of existing site analytics.

## Review what exists

Most clients will come to you with a fairly rigid idea of what they want to build. This is unfortunate.

Sometimes their decisions aren't particularly well-informed. And, the client misses out on your ideas and experience.

I urge clients to pay for a review of their current online presence before settling on requirements. This process helps me to better understand their business and aims and gives me a chance to contribute.

*I urge clients  
to pay for a  
review of their  
current online  
presence before  
settling on  
requirements.*

These reviews are micro-projects before the main build. Clients usually like this because it provides an opportunity to work with me on a small piece of work without committing themselves to a larger project.

There are four different types of reviews we offer at Headscape. We may do just one of these or even all four. It depends on the client, their budget and time.

These reviews are:

- ▶ An expert review and strategy document
- ▶ A heuristic review
- ▶ A competitor analysis
- ▶ An analytics report

Let's address each in turn.

### An expert review and strategy document

An expert review consists of systematically assessing a site. As you navigate the site various issues arise. Many are obvious, such as poor navigation or verbose copy. Others are more subtle, such as no clear calls to action or inconsistent labelling.

Once you have reviewed the site, the findings are translated into a report. This document identifies flaws,

suggests solutions and educates stakeholders about web design best practice.

Each review will vary. Content might include sections on accessibility, usability, design, content, and social media. It will focus heavily on business aims, calls to action and measuring return on investment.



*An expert review does not just identify problems, it also makes recommendations.*

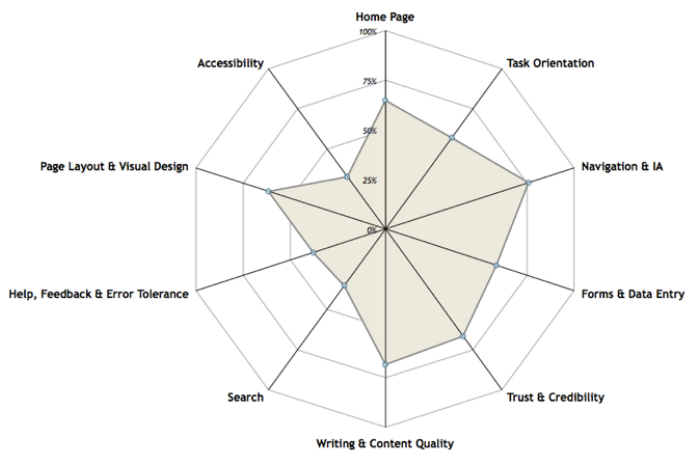
In many ways the expert review is similar to a heuristic review. The difference is that an expert review doesn't just observe, it also makes recommendations.

## A heuristic review

A heuristic review uses a standard set of criteria to measure the effectiveness of a website. As with an expert review these criteria include usability, accessibility, design, content and more.

Each criteria is measured on a 1 to 3 rating, with 1 being poor and 3 being good.

This type of review provides a more balanced analysis of the website because the reviewer is using a consistent set of criteria to rate its effectiveness. The numerical results are turned into diagrams that clearly represent the sites strengths and weaknesses, showing where extra work is required.



*The numerical results produced by heuristic reviews allow the creation of diagrams which clearly show a site strengths and weaknesses.*

The consistent set of criteria used in heuristic reviews make it easy to compare a site to its competition.

## A competitor analysis

The number of competitors will define the nature of this document. With only a small number, it is similar to a heuristic review. With a larger number, a more unstructured approach is preferred.

Whatever the nature of the report, the goals are the same. When a competitor is doing something well, learn

from that and improve upon it. Where mistakes are made, avoid them in your own site.

It is often beneficial to carry out usability testing on a competitor's website. It acts as a prototype for your own development project, helping avoid usability issues.

It is important to stress that looking solely to the competition for inspiration is a mistake. If you do not look outside of your sector you will always be one step behind the competition. To truly innovate you need to look further afield for inspiration.

The last part of the review process is an analytics review.

## An analytics report

Analytics are important to any web project. Without them it is impossible to judge whether new development generates a return on investment.

To carry out an analytics report, software such as Google Analytics must already be running. Usually organisations already have analytics installed, but they can be poor at monitoring and interpreting them.

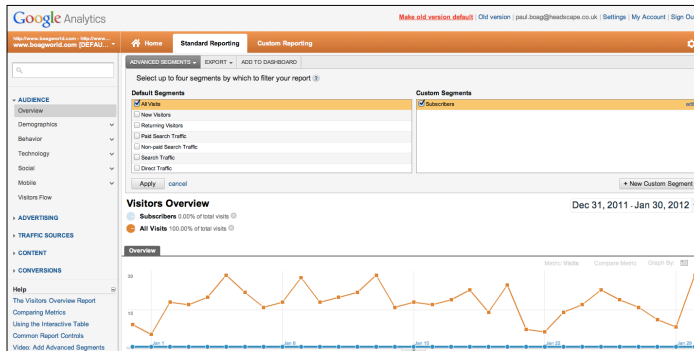
Where analytic software is not present, install it on the current site while development is underway. This will give some data on the existing site to act as a baseline for comparing the new work you do.

Existing analytics also provides an insight into the behaviour of users. By using techniques such as advanced segmentation it is possible to tell how different users behave.

For example, on a law firm website you could tell whether users who viewed attorney biographies were more likely to contact the organisation than those who visited the service pages. This type of information is invaluable when improving a website. If you know users

*Valuable lessons  
can be learnt  
from competitor  
websites. You  
can emulate  
what works  
well, while  
avoiding mistakes  
they make.*

are more likely to contact you after reading an attorney's biography, then design the website to funnel users to these pages.



*Advanced segmentation allows you to track the behaviour of different user groups.*

Reviewing an existing site will not give you the entire story. You will need to talk to stakeholders to discover the whole picture.

## Interview stakeholders

A stakeholder interview is a semi-structured discussion held with any person with an interest in the success of your web project. This includes those who work directly on the site (such as a content editor) or who rely on the website to meet their business goals (such as departmental heads).

Stakeholder interviews should not be limited to people within the organisation. They can also include prominent customers or suppliers who rely on the website to do business with your client.

These interviews usually last for about one hour and are held individually.



Although simple, they give valuable insights that inform your project.

## Why carry out stakeholder interviews

You could be forgiven for mistaking stakeholder interviews as a luxury that delays a project from starting.

Although not every project requires stakeholder interviews, they are particularly useful when working with large organisations with complex requirements.

In this type of situation they provide four benefits.

- ▶ **They bring the web design agency up to speed with organisational requirements.** Stakeholder interviews are a way of understanding complex projects in new sectors. Through speaking to stakeholders we learn about the sector and organisation, while also identifying how the website can meet business needs.
- ▶ **They offer a better perspective on the role of a project.** Most web projects within large organisations will affect many parts of the business. To understand the how the project will impact the entire organisation, discuss it with all parties. A single department often commissions a project and they have a particular perspective on its aims. By talking to other stakeholders you make sure the project helps everybody within the organisation.
- ▶ **They are politically advantageous.** Internal politics are a reality in large organisations. This means there are no shortage opinions about the website. Stakeholder interviews allow people to express those opinions and feel that they are engaged. This goes a long way to diffusing potential conflicts further down the line.
- ▶ **They provide access to the real decision makers.** On larger projects you will rarely deal with the real decision maker on a day-to-day basis. This can

*Stakeholder interviews are an essential component of working with larger organisations.*

prove problematic when that decision maker is behind the scenes with his or her own personal agenda. Stakeholder interviews allow you to talk to these people and better understand their aims and motivations.

*Stakeholder  
interviews  
provide access  
to the real  
decision makers  
in a project.*

Well-run stakeholder interviews make sure your web project has goals that benefit everybody in the organisation, while achieving agreement from all parties.

With so many benefits the next question becomes; how do you run a successful stakeholder interview?

## How to run a successful stakeholder interview

Although running a stakeholder interview is simple, getting the most out of one takes a degree of practice. Nevertheless there are things you can do to improve the results. A big part of that is to have the right questions.

### Your questions are important

Your questions need to fall into 3 categories.

- ▶ **Questions about the person.** These focus on the person's role, responsibilities and goals. They will find ways that the web project could help them.
- ▶ **Questions about the organisation.** These questions focus on company wide business aims and organisational culture. Knowing the organisation's business goals will help show you the focus of the project. Understanding the organisation's character will influence branding and aesthetics.
- ▶ **Questions about the website.** This is the opportunity for participants to express their feelings and frustrations about the website. They share things they do not like, and elements they would like to see on any future site.

Having a good set of questions is important, but do not be constrained by them.

## Allow tangents

Questions are only a starting point. Stakeholder interviews are a discussion, not a survey. The conversation needs to evolve naturally. This may mean setting aside the questions and following a particular train of thought.

This is important for two reasons. First, tangents lead to interesting insights that are often overlooked. Second, it is important that the stakeholders get to express their opinions. Their “pain points” often deserve particular attention and even when they do not, the stakeholders must feel that you have listened to them.



*A turning point in a stakeholder interview is when the interviewee closes the door to talk in confidence.*

Stakeholder interviews should be one-on-one so allowing everybody to fully express their opinion.

## Ensure they are one-to-one meetings

Stakeholder interviews are not a committee or focus group. Group meetings shift the dynamic as dominant people monopolise the conversation. This has two consequences.

First, the dominant person is often from senior management that other people will not disagree with. They then use the group 'consensus' to amplify their own opinion.

Second, quieter participants don't have the opportunity to express their opinion. You miss out on their contribution and they feel resentful that nobody listened to them.



*Group meetings are often dominated by one or two individuals. This means others don't have an opportunity to express their opinions.*

An added benefit of meeting with people individually is that you are the only person with the entire picture. This places you in control, allowing you to shape the way forward.

It is also worth noting that one-to-one meetings offer an opportunity for anonymity.

## Keep things anonymous

The turning point in many stakeholder interviews is when the person closes the office door and lowers their voice.

When the stakeholder shares information in confidence, it leads to revealing insights. These can dramatically change your perspective on the web project.

It is important to make sure the person sharing remains anonymous. Do not mention names in reports, although it is fine to share the opinions expressed.

For somebody to feel confident sharing sensitive information, they need to know you are truly listening.

## Balancing listening and speaking

It is important not to talk too much as the aim is to get the stakeholder talking. That said, engaging discussions encourage more creative thinking and great ideas.

The interviewer should act as a sounding board for the stakeholder. They should do most of the talking, but do not be afraid to express opinions or suggest ideas.

Stakeholder interviews are immensely valuable. However, they can be time-consuming and expensive. What then is possible with a limited budget?

## Maximise limited budgets

You could be forgiven for thinking that requirements gathering is a luxury only big budgets can afford. To some extent this is true. However, it is worth undertaking basic research even if the client is unwilling to pay.

Having a good understanding of the context for your web project ultimately saves you money. You are less likely to misunderstand requirements or meet objections

*Stakeholder interviews should be a discussion. However, it's important that the stakeholder does the majority of the talking.*

late in the development cycle. You will also find it considerably easier to justify decisions and get sign off.

I recommend that all projects, no matter their size, at least address the following areas:

- ▶ **Establish measurable business goals** - Any project that does not have clearly defined, measurable and prioritised goals will suffer. The likelihood of the web designer losing money on such projects is high.
- ▶ **Speak to the decision maker at least once** - If your client is not providing final sign-off or isn't in control of the budget, then you must speak to the 'real power'. If there is somebody controlling things behind the scene you need to understand what their personal goals are and convince them that you are a reliable expert.
- ▶ **Take a look at the analytics** - It doesn't take long to look at analytics, but doing so is useful for justifying decisions. When it turns out that the client is using IE6, you will be grateful you have statistics to prove he is the only one!
- ▶ **Discuss the existing website with the client** - Although an expert review may be excessive, you can at least discuss the existing site with the client. Establish its strengths and weaknesses and talk about ways it could be improved. Make this a part of the kick-off meeting.

# Next Actions

Knowing about the client, their business and their requirements, is crucial to client centric design. Without that knowledge there will be misunderstanding and conflict.

Make sure you take the following actions before your next project.

## **Include a meeting with key stakeholders in every proposal**

Depending on the budget this could be a part of the kick-off meeting or a series of stakeholder interviews. The aim is to talk to anybody who has a say in approving your work.

## **Have clearly defined business goals**

Don't start work until you have a list of prioritised business aims that are measured and translated into calls to action. The kick-off meeting is a good time to draw up this list.

## **Review the client's online presence**

Ideally this should cover their existing website, social networks, analytics and competition. However, where budgets are tight, spending an hour looking over their site will suffice.

You will not regret the time spent researching the background of the project. Nowhere will that information be more valuable than when getting sign-off. This is what we are going to discuss in the next chapter.





## Chapter 5

# Dealing with design

Have you ever watched one of those home improvement programmes where the designer talks to the home owner for 5 minutes before going away and redesigning their house? Inevitably, when the owner sees the result they are overjoyed.

I have never watched an episode where the home owner hates the result, which is surprising as some of the designs are hideous!

Our experience as web designers bears little resemblance to those TV shows. When we work on sites, the client is often critical and unwilling to leave the job in our hands.

The design process is can be painful, involving endless iterations, tweaks and micro-management from the client.

How can we take the pain out of design, both for ourselves and our clients? To answer that we must first identify where things are going wrong.

1. Why is design approval difficult?
2. Using a design methodology
3. Working on aesthetics
4. Collaborative wireframing
5. **Next Actions**

## Why is design approval difficult?

*Our problems with design approval are not isolated instances limited to the occasional difficult client.*

Our problems with design approval are not isolated instances limited to the occasional difficult client. The fact that we are regularly coming across issues is an indication that there is something fundamentally broken.

The majority of the reasons things go wrong are due to issues we have already discussed in this book. Reasons such as:

- ▶ **Lack of communication:** If we do not communicate regularly and clearly with our clients they become anxious and start micromanaging.
- ▶ **Relying on personal opinion:** Clients rely on personal opinions when asked to comment. This causes conflict as opinion is subjective. Also, both designer and client feel that their opinion should carry more weight. The client, because they are paying for the site. The designer, because of their experience and training.
- ▶ **Undefined roles:** Many clients lack experience of web projects so are unclear of their role. This can lead to them suggesting design solutions, rather than identifying problems that the designer can solve. This undermines the designer's role, causing conflict.
- ▶ **Failure to educate:** If the designer fails to communicate best practice in a way the client understands, it significantly reduces the chance of design sign-off.
- ▶ **No clearly defined objectives:** A design can go in the wrong direction if the designer doesn't have the same understanding of requirements as the client.
- ▶ **Scope creep:** Design approval is often delayed if the project is not clearly defined and there is no mechanism for handling client suggestions. This causes frustration for both parties.

Not all problems with design are directly related to the client. Some are down to our own psychology and way of working. One of the biggest problems is our own pride.

## Pride comes before a fall

As web designers we are rightly proud of what we do. We are experienced in building user interfaces, while our clients are generally not.

Despite that they feel justified in criticising our designs and overruling our decisions. This is hurtful and causes us to become defensive over even the smallest suggestion.

However, we must remember that we offer a service and pleasing our clients is a part of the job.

We get distracted by a desire to produce beautiful design to grace our portfolio and impress our peers.



*We must be careful not to put the approval of our peers above that of our clients.*

That should not be the objective. Our job is to create effective websites and to achieve that, the client has to

like it. If they do not, they will not invest and promote it. It will be abandoned and die.

We need to realign our thinking. Job satisfaction should come from producing design the client loves, not design we (or our peers) love.

I am not suggesting we cannot disagree with our clients. Sometimes the right way to ensure a client loves a design is to educate them so they change their minds about what they want.

To do that we need the right relationship and that isn't going to happen if we disagree with them over every little thing.

When our ego gets bruised by client criticism we can become confrontational. Once in that mindset we argue over every issue that arises, even when we don't feel that strongly about it.

We need to pick our battles. By only pushing back over things that are important we establish a healthier relationship with the client. The client will realise that when we do speak up it will be important. They will then be more willing to listen.

We cannot allow our pride to turn our relationships into confrontations.

Unfortunately the problem is compounded by bad experiences with previous clients.

## Do not learn from the past

It is said that we should learn from past mistakes. Unfortunately when it comes to working with clients we can learn the wrong lessons.

We have all worked on projects where the client has tweaked the design in an endless series of iterations. This is demoralising as the design is destroyed and profit margins are eroded.

*When our ego  
gets bruised by  
client criticism  
we can become  
confrontational.*

The common reaction to this experience is to exclude the client from the design process. Many web designers do this by limiting the number of iterations. Unfortunately this makes the problem worse.

## The dangers of limiting iterations

I outlined the damage limited iterations does to the client relationship in chapter 3. What I didn't say is that it also raises the stakes, making the client more anxious about the design. When they feel that they have to get the design right or miss their opportunity, they are more likely to fret and micromanage the process.

*Limiting the number of iterations makes the client more anxious about design.*

Instead, remove the constraints and minimise the need to approve design. Although some clients need guidance to stop continual tweaking, most will respond better without artificial constraints.

One way to prevent continual changes is to have a clearly defined, collaborative process.

## Stop working on design in secret

When we have bad experiences with clients, we shy away from collaboration preferring to work in isolation. This is particularly true for those who design instinctively rather than using a process.

We prefer to work in isolation because we lack confidence and find it hard to justify our work to our clients. We make design decisions on an instinctual level based on years of experience. However, we cannot explain why they are the right.

When a client challenges what we have done, we find it hard to provide a reasoned response and so prefer to limit their opportunities to contribute.

As I explained in chapter 1 this closed approach creates problems. It also fails to embrace the benefits of collaboration. If we don't collaborate with our clients, we cannot educate them about design best practice. We also miss the opportunity to give the client a sense of ownership over the design.



*We are not Apple. We do not benefit from secrecy.  
Rather it damages our business.*

When we design in isolation, the design is ours and not the clients. Therefore when we present the design, they feel no sense of loyalty towards it. However if we work closely with the client and involve them, then it is as much their design as ours. This makes them more likely to approve it and defend when reviewed by other stakeholders.

Having a structured, collaborative, design process provides other benefits too.

# Using a design methodology

A methodology can be defined as: a system of methods used in a particular area of study or activity.

In other words, design needs to be more than intuitive. It needs to be a series of methods and approaches, which comes together into a system with a proven track record of providing results.



There are many tools that help guide the client through the design process.

For example, my design methodology at Headscape includes tools such as:



- The business research tools discussed in chapter 4
- Discussion around personality and brand
- Reviewing design examples that express the organisation's brand and personality
- Moodboard generation
- Collaborative wireframing
- Card sorting
- Design concepts
- Interactive prototypes
- Design testing
- Usability testing

The list could go on. We don't use every tool on every project, but each one has a proven track record of helping to generate successful designs.

## The benefits of your design methodology

Instead of a client being confronted with a final design, a collaborative methodology provides a journey that educates them. They have confidence in the final design, as they understand it and have seen it grow.

A methodology gives a client confidence in your ability to deliver. By demonstrating a clear approach for reaching a final design, you show your expertise and experience. You come across as a safe pair of hands who has done this many times before. Another benefit of having a design methodology is that it puts you in control of what is discussed when. Without this the client dictates the agenda putting you on the defensive. Remember that a client has hired you for your ability to deliver great design. They only interfere when they lack confidence that you can deliver what they want. A methodology demonstrates your abilities and reassures them.

How then do you develop a design methodology that engages with the client while leaving you in control of the process?

*A methodology gives a client confidence in your ability to deliver. By demonstrating a clear approach for reaching a final design, you show your expertise and experience.*

# How to create a design methodology

The key to a successful design methodology is breaking the process into stages that the client can understand and contribute to.

I recommend splitting aesthetics from content and visual hierarchy. Doing so helps the client focus on what they are making a decision about.



moodboards deal with aesthetics

Wireframes tackle visual hierarchy and content

*Splitting aesthetics from content and visual hierarchy helps the client focus on what they are making decisions about.*

A client may reject a design because it displays the wrong content, even though they like the aesthetics. Equally a solid visual hierarchy, layout and information architecture can be cast aside because the client has a problem with the colour. Addressing these components individually prevents a design from being rejected for the wrong reasons.

Focusing the client on a specific aspect of the design also helps explain your decisions. When trying to explain an entire design it is easy to overwhelm the client.

Think for a moment about the decisions you have to make when producing a design. It is an overwhelming list:

- ▶ Colour

- Layout
- Whitespace
- Typography
- Imagery
- Styling
- Visual hierarchy
- Content

Within each of these areas there are hundreds of smaller choices to make. Entire books are written on each of these subjects.

By splitting the design into aesthetics and layout, it becomes easier to explain your decisions to the client and guide them through the process.

Finally, splitting the design process into aesthetics and layout keeps the discussion abstract. When presented with a final design we have an initial, emotional reaction to it. It is hard to think about the design rationally and move beyond that initial reaction. Viewing a moodboard or wireframe does not invoke the same reaction, because they are abstract and a long way from the final design.

When you do present the design the client will react differently because they have seen the separate elements first. The final design will not come as a surprise and so their reaction will be more measured.

With the reasons for the split now clear. Lets look at how you can create a site's aesthetics and layout without producing a final design.

## Working on aesthetics

Have you ever had a client ask for multiple designs? If so you have probably experienced what I refer to as 'Frankenstein design.'

Frankenstein design occurs when the client tries to combine multiple elements from different designs. For

*By splitting the design into aesthetics and layout, it becomes easier to explain your decisions to the client and guide them through the process.*

example the client may want the navigation from one design with the layout of another.

As web designers we know that you cannot simply lift design elements from one design and transpose it into another. Element styling clashes and the visual hierarchy falls apart.

Clients ask for multiple designs because they want choice and to be engaged in the process. It falls to us to provide that without producing multiple designs that leads to Frankenstein design.

It is possible to achieve this if we engage with the client at the very beginning when discussing brand and personality.

*One of the worst ways to establish a sites look and feel is to produce multiple designs.*

## Establishing brand and personality

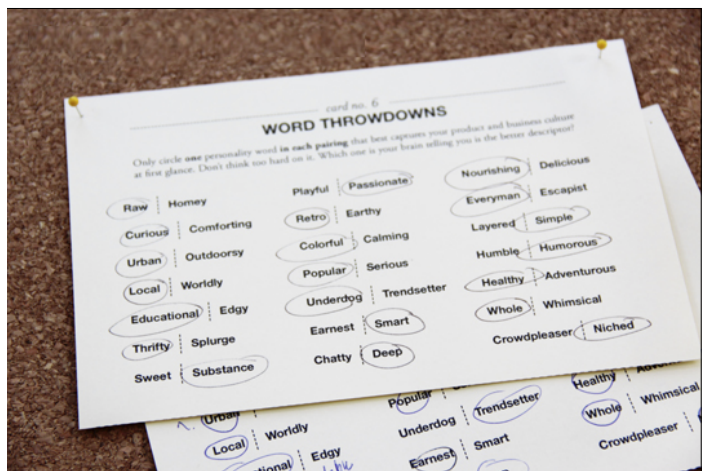
At the start of a new project I hold a kickoff meeting that includes a discussion about design. We look at their branding, print material and style guide. This discussion is important as it ensures their website will be consistent with their overall brand identity.

How their brand is currently represented should only be a starting point for discussion.

Many clients feel their brand no longer represents their organisation. This is either because the brand has been poorly implemented or the organisation has changed. Also, most brand guidelines focus on print and not the web. The brand may need to be adapted to work online. This might be for technical reasons, such as colours or fonts not appearing correctly. Alternatively the brand may need to be adjusted to strike a more friendly and personal tone. Computers tend to feel cold and unapproachable, so it is necessary to compensate for this. Therefore don't just talk about brand, also discuss tone and personality. I use two techniques to get a better feel

for the tone of voice a client wishes to demonstrate through their site.

One approach is to discuss personality using keywords. For example is their brand "friendly" or "formal"? Is it "irreverent" or "professional"? By establishing half a dozen keywords that represent the organisation, you get a better sense of the tone that should be struck by the site aesthetics.



*One way to establish a site's personality is through discussing representative keywords.*

Although this works well, I have found that there is an approach which creates a lot more discussion and engagement from the client. This involves asking a simple question:

"If your organisation was a famous person, who would it be?"

It's amazing how a simple question can generate such lively and good humoured debate. Best of all, the answer is massively useful in establishing a site's aesthetics and copy style.

By simply picturing a famous person (let's say Bono) you instantly have an image of how he looks, behaves and speaks. This is more powerful than any style guide or set of keywords. A person is tangible and personable, both qualities that the web lacks.



*If I was to suggest a website should reflect the personality of Bono, you could immediately imagine what the design and copy should be like.*

Designers will find it easier to design a site that represents the personality of Bono, than work to a brief for a site that is "cool, but politically active"! Its also helps copywriters. It is easier to write in the style of a person than to remember a set of copywriting guidelines.

The downside of this approach is that stakeholders struggle to settle on a single person. They are often torn

between a person they feel represents them now and one that they would like to become.

This is resolved by exploring each of these different personalities through a series of moodboards.

## Why produce moodboards?

*Moodboards have been an established part of the design process for years. They are used in everything from fashion design to advertising.*

Moodboards have been an established part of the design process for years. They are used in everything from fashion design to advertising. However, adoption in web design has been slow.

Moodboards are collections of imagery, typography, colour, textures and other design elements that set a particular mood (or tone). They have no structure and look more like a scrapbook than a final piece of design. Nevertheless they are a good starting point for the design process.

Moodboards are quick to produce and allow elements to be combined. It is possible to take the colour palette from one moodboard and combine it with the typography from another.

Because they are quick to produce, a designer can easily make multiple moodboards to show different personalities for the site. If one possible personality is Bono and another is Barak Obama, this can be demonstrated through multiple moodboards.

The speed with which they are produced also lends itself to multiple iterations based on client comments. This is great for collaboration and encourages the client to make alterations now rather than later when change is harder.

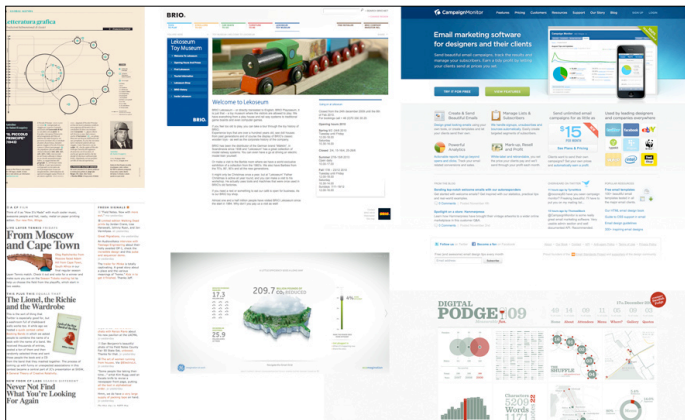
However, before producing moodboards there is another opportunity to engage with the client. The more we include the client the greater their sense of ownership. The greater their sense of ownership, the more likely they

are to approve the design and promote it to other stakeholders.

## Finding inspiration

Before you start producing moodboards, do some research into sites that have the personality you are looking for. If you are designing a site that reflects the character of Bono, look at the U2 site (although this fails to capture Bono's character in my opinion). For Barack Obama, look at the Whitehouse website or his re-election website.

Don't stop there. Look for other sites that have nothing to do with the person, but reflect the right tone.



*Collect sites that you feel represent the tone you are attempting to capture.*

Discuss these websites with the client. Get their comments and opinion, while explaining why you feel the sites strike the right tone. Is it the colour you like or the typography and imagery. These sources of inspiration can then be incorporated into your moodboards.

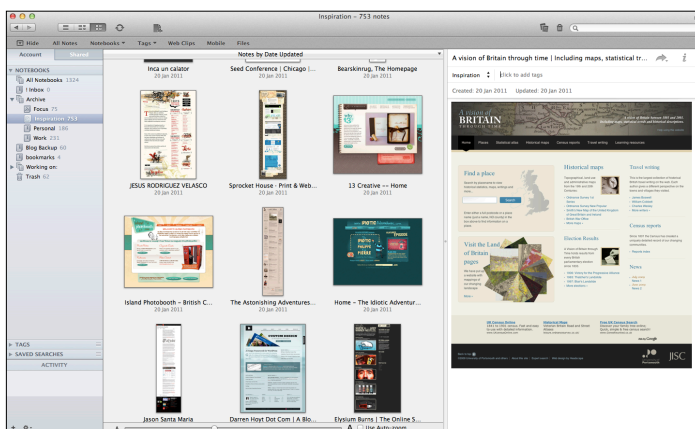


Finding these inspirational sites can be a challenge and prove time consuming. Keep a collection that you tag with certain personality traits. Whenever you find a site you like, add it to the collection for future reference.

I use Evernote for this purpose. It has great capture tools, you can tag images easily and share your inspiration library online.

In the meantime, visit Design Meltdown. This site has an extensive collection of sites organised based on everything from colour to website type.

Once you have selected and discussed your inspirational sites with the client, these should inform a series of moodboards.



*Evernote is an excellent tool for keeping a library of inspirational websites.*

## Creating your moodboards

If the client has a firm idea of who represents their brand and the selection of inspirational sites went well, you may only need to produce a single moodboard which is then iterated.

However, if the client is less sure and there are multiple personalities to explore, you will need to produce a number of boards.

Even with one personality such as Bono representing the brand, there are still multiple routes that could be taken. For example, do you place the emphasis on his charity and political work or on his rock star persona?

There is also a need to establish how far a client wants to push a particular approach. They might request a friendly site, but how friendly do they want it? In such cases take the “Goldilocks” approach. Do two versions at either extreme (too cold or too hot) and one that you feel is just right. Showing these to the client will clarify the level of friendliness they had in mind.

Don’t spend more than an hour or two on each moodboard. Anything more and they lose their disposable quality. You will become too attached to them and that will lead to conflict. You can still have a favourite. However, that should be because it has the right tone, not because you have agonised over it for hours.

You may feel that spending so little time on a moodboard will make it look unfinished and unprofessional (especially as the majority of that time will be spent looking through imagery and typefaces). It is actually important that the moodboards do not look too designed.

When we first adopted moodboards, they confused clients. They mistook them for the final design. It is therefore important that the moodboards don’t look too polished. They need to look more like a scrapbook than a website. Resist the temptation to over design them.

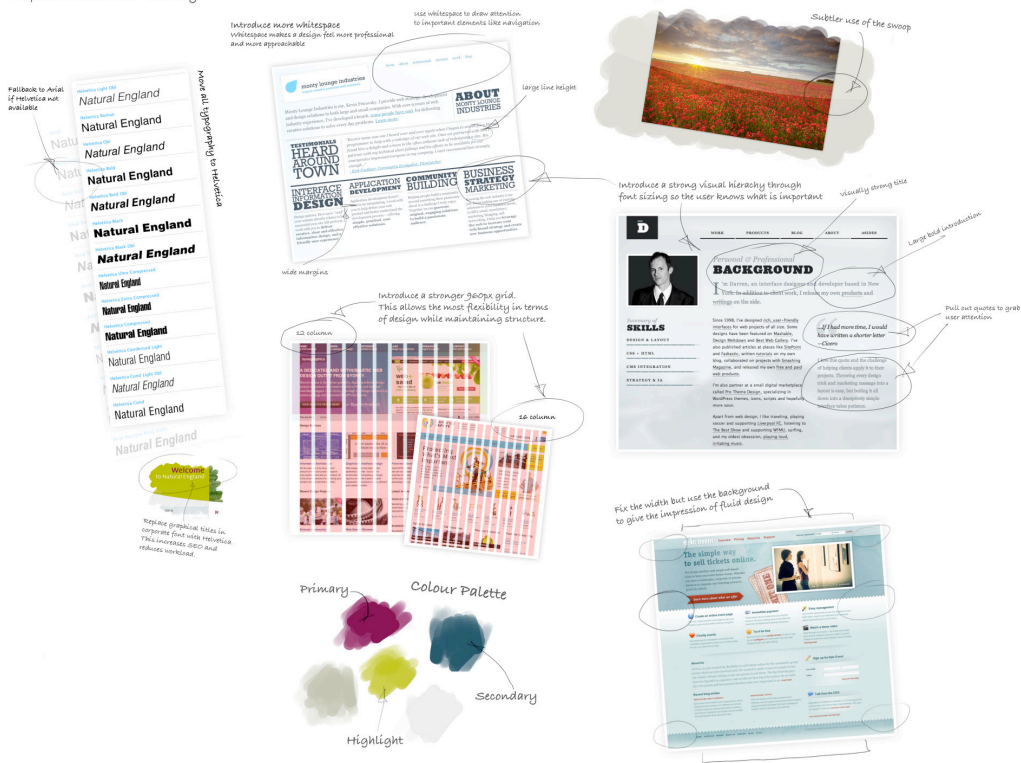
There are two things you can do to make moodboards feel more scrapbook-like and less designed.

First, do not constrain yourself to a specific canvas size. Because we are used to designing websites we tend to automatically start with a canvas that is suited to that

*Moodboards  
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this approach takes what currently exists and tweaks it to improve aesthetics and usability

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this approach is a more radical departure from the sites current look and feel. It is much more public focused in tone.

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job. Instead create an enormous canvas and drop elements randomly onto it. Once you have finished crop out the redundant space.

Second, add notes explaining elements. These notes serve two functions. They help the client understand your reasoning while also having the effect of making the moodboard look less like the design.

I go a step further and set my notes in a handwritten font. I even add hand drawn arrows and circles to make it look like I have annotated the moodboard by hand.



*To avoid confusion try creating physical moodboards rather than electronic versions.*

An alternative approach is to make a physical moodboard where elements have been printed and pasted to a board. That way you can annotate them by hand and dispel any misconceptions about their role.

The reason I don't take this approach is that moodboards are designed to be refined based on discussion. It is easier to do these refinements electronically rather than by hand. However, the choice is yours.

When refining moodboards don't constrain the number of iterations the client can make. Allow the client to get all of their ideas out of their head before things become harder to change.

*Remember moodboards are a tool. When they stop being useful, move on!*

That said, sometimes the iteration process stops being constructive. Some clients get hung up on a particular aspect of a moodboard and it might be better to move on. If you have a strong sense of the direction the client is looking for, it is unnecessary to iterate the moodboards until colours, imagery and typefaces are perfect.

When the moodboards stop being useful, you have a decision to make. In most cases the next step is to work on a final design. However, you could design a poster instead!

## **Why design a poster before the website?**

It may seem unnecessary, but designing a poster can be a good way of introducing content and visual hierarchy into what has been a discussion on pure aesthetics.

It also helps address the belief some clients have of websites as online books or repositories of information. This leads to verbose copy, overwhelming information and a lack of visual hierarchy.

Websites have a lot more in common with a poster than a book. Posters have to be:

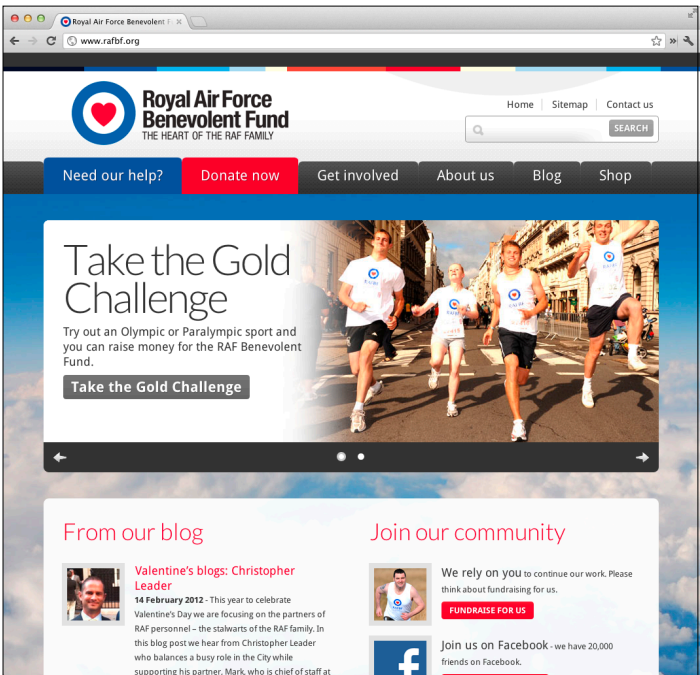
- Visually attractive to grab attention
- Easy to take in at a glance
- Provide more information and next steps for those interested

In other words they need to be:

- Engaging
- Usable
- Scannable
- Have a clear information hierarchy

Sound familiar? These are the same characteristics found in successful websites.

Designing a poster with a client provides an opportunity to explore site aesthetics more deeply, while introducing the concepts behind good web design.



*The RAFBF website was inspired by a poster design.*





*Before designing the RAFBF website, we first designed a poster.*

Admittedly demonstrating these factors could be done using the actual website. However, knowing the poster will not be used makes the client more relaxed and receptive to new ideas.

Designing a poster also benefits us. As Mike Kus (a very creative and talented web designer) points out, they

help us to break out of our constrained thinking about websites. When designing sites we are constrained by perceived convention and best practice (e.g. the position of navigation, search, etc.) This means we often fail to innovate. Designing a poster takes away these constraints and encourages us to "Think Different."

Whether you decide to work on a poster or not, eventually you have to address the most important parts of the design process, the visual hierarchy and content. This is done through wireframing.

## Collaborative wireframing

Wireframing is a crucial part of client centric web design. This is where the client contributes to the layout and visual hierarchy of key templates. They are also involved in establishing key messages for the site, ensuring users are catered for and deciding on how calls to action are implemented.

Alongside moodboards, an agreed set of wireframes reduces the chance of the design being rejected. After all it will be as much the client's design as yours.

You will go away from a wireframing workshop with a good understanding of what the final templates should look like. This will make the final designs quicker to produce and more likely to be approved.

That said, collaborative wireframing is not easy. Depending on the number of page types (templates) on the site, this can turn into an all day workshop.

To get the most from the day, some preparation is recommended.

*A wireframing workshop needs thought and preparation for success to be assured.*

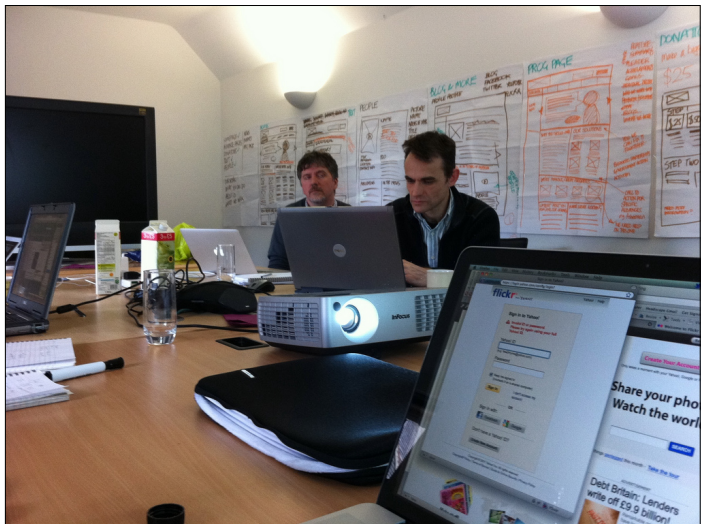


## Laying the groundwork

Before we look at the preparation for the day, let's address who should be there.

This will depend on the size of the project and organisation involved. If you are a freelancer who is working for a sole trader, it maybe just you and the client. However, for Headscape it is not unusual for over 10 people to attend.

Typically that includes our entire project team (designer, developer, project manager, UX consultant, etc.) This is because we believe everybody benefits from attending and has something to contribute.



*Collaborative wireframing is an excellent way of including the client in the web design process.*

It also includes our direct point of contact in the client organisation and other key stakeholders. In particular we want the decision makers to attend so we can engage

them in the process. However, it also includes “tame users” and other stakeholders.

The first thing to be said about a collaborative wireframing workshop is that it is hard work. However, with a bit of planning, things become less painful.

Put together an agenda including a schedule. Later I will give you a rough outline of the session and an indication of times. This will ensure that you don’t spend too long on early discussions and never get to wireframe that crucial template.

Draw up an initial list of templates to wireframe. This will cut down the amount of discussion before wireframing and allow you to plan the day better.

Getting the environment right is important too. A whole day stuck in a darkened, stuffy room is not conducive to creative thinking. Try to find a room with ample natural light and a big empty wall for pinning up ideas. Also plan sufficient breaks and provide plenty of food and drink.

These may seem like minor details but you do not want an uncomfortable and grumpy client. That does not help build a good working relationship!

Finally, know when to stop. If everybody is flagging, offer to finish the final few templates yourself. By that stage you will have a clear idea of what the client wants. For their part, they will better understand the process and will have learnt to trust your judgement.

There is no point in working late when everybody is exhausted. The client will start agreeing to things just to end the workshop. However, that will not stop them changing their mind later when they are less tired.

With these principles in place, let’s turn our attention to the tools you will need to wireframe.

*A wireframing workshop can last for a whole day so it is important that people are comfortable and enjoy it.*

## Tools for collaborative wireframing

When I run wireframing workshops, I keep the tools simple: a pile of paper, plenty of marker pens and bluetack for sticking ideas to the wall.



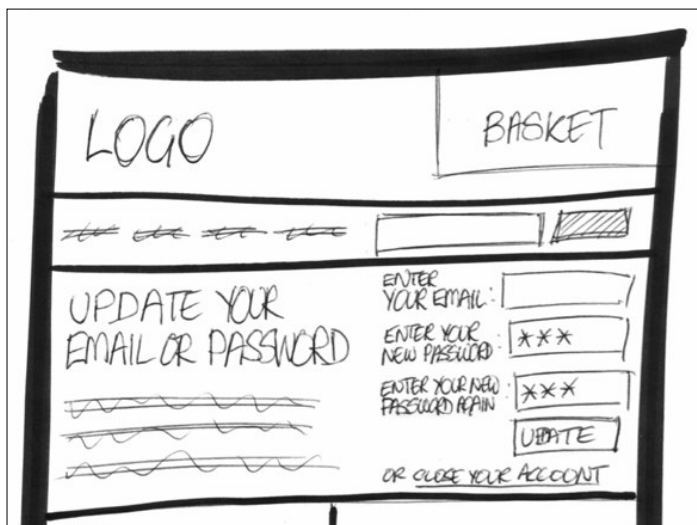
*The secret to collaborative wireframing is not expensive software. It's basic stationary!*

What I do not use is a laptop, projector or whiteboard. Although there are many approaches to wireframing, I feel these kinds of tools undermine collaboration. This is because they can only be used by one person at a time.

Although you need one person to facilitate the session, I encourage everybody to scribble possible layouts and approaches.

Some people will be reluctant because they cannot draw. However, you don't need to be able to draw to wireframe. Wireframing is not about making things look pretty. It is about drawing boxes. Anybody can do that.

If you are facilitating a wireframing meeting and you can draw, I would encourage you not to! Make sure your sketches are as basic as everybody else's in order not to intimidate.



*Wireframe sketches should not be works of art. If your sketches look too polished you will intimidate others.*

Pen and paper makes sketching ideas easy. Drawings are quick to produce and disposable. Expect to end the day with a big pile of screwed up bits of paper. That is a sign of a productive session.

With everything prepared, how does the actual wireframing session work?

## Running a wireframing session

Spend the first hour introducing the session and recapping the background to the project.

In this introduction stress that the wireframes produced will be a guide for the designer, not a definitive

structure. The wireframes produced in the workshop will need further refinement.

After the introduction, review two lists that were produced at the requirement gathering stage of the project. These are:

- ▶ A list of users in order of importance and their website tasks.
- ▶ A list of calls to action. This list should be prioritised and associated with business objectives.

These should be stuck on the wall for all to see. This might be the first time they have been seen by some participants, so it is important to leave time to discuss and amend them.

Next leave 30 minutes to review the list of page templates to be worked on in the session. Explain that it is unlikely the entire list will be covered. Get the group to identify templates they definitely want to cover and those they would be happy for you to work on later.

Once that is done, divide the remaining time between the templates to be produced. Expect to overrun on some templates and so fail to cover the whole list. However, dividing up the time will at least indicate how far from the schedule you have strayed.

Although the homepage will be near the top of everybody's list, I recommend waiting before tackling this due to its complexity. Begin with something easier and less controversial. A typical text template is a good start.

Give everybody 10 to 15 minutes to wireframe the template by themselves. Then come back together and let each person explain their approach. This allows people time to think about the page and gives them the opportunity to have their voice heard.

You need to be careful not to criticise people's approach. It will be hard to get people drawing anyway without adding a fear of criticism.

*Although the homepage will be near the top of everybody's list, I recommend waiting before tackling this due to its complexity.*

Once this initial round is over, get people to approach the template in different ways. The idea is to produce as many versions as possible. For example, ask some participants to wireframe the template for one audience, while others focus on a different group.

Try wireframing with an emphasis on different calls to action or for different use cases (e.g. how would the homepage change if it was designed as a shop front or a blog).

You will end up with a large number of approaches for any given template. These can then be discussed and refined into a final recommendation for the designer.

Some ideas will be dismissed, others will be combined and refined. However, be careful not to criticise. Focus on what works well, rather than highlight failure.

If people are tiring of working on one template, move on to the next. The aim is not to have a perfectly refined set of wireframes, but enough for you to go away and work with. Remember the objective is to collaborate and educate the client.

*The idea of the wireframing workshop is to produce as many different versions of a template as possible.*

## **Following up on your collaborative wireframing**

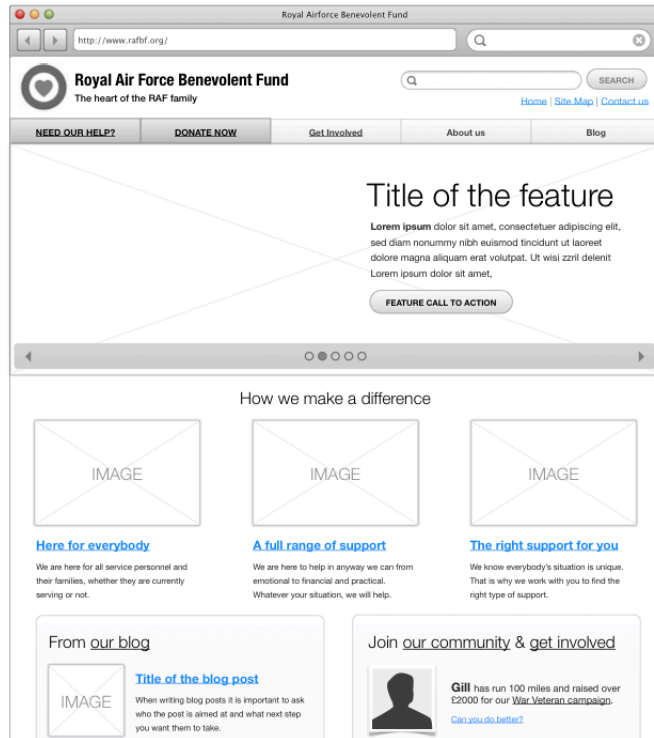
At the end of the workshop either scan or photograph the material produced, especially the preferred approach to each template.

You will need these for producing the final wireframes. It is also useful for reference when presenting to the client.

Now you must take those crude sketches and refine them into something understandable by all and with as little room for misinterpretation as possible.

What tool you use is up to you. However, I recommend accompanying the final set of wireframes with some

notes. These should refer to the original sketches and justify any changes you have made.



*Sketches produced in the workshop can be refined later. However, any changes from what was agreed will need to be justified.*

You will find that having collaborated on the wireframing process will significantly reduce the number of alterations required. The client is normally happy to approve these final wireframes with little fuss.

# Next Actions

In this chapter we have tackled design approval, the one subject that strains a client relationship more than any other. I have demonstrated that the answer does not lie in removing the client from the design process, but in collaborating with them. To make this happen you must:

## **Introduce a design methodology**

It is not enough to design instinctively. You must have a methodology that engages and educates the client.

## **Work with the client on brand**

Discuss personality with your clients and use tools like moodboards, inspiration libraries and posters to work with the client on aesthetics.

## **Run collaborative wireframing workshops**

Give your clients a sense of ownership in the design by engaging them in the wireframing process.

By taking these steps you ensure that when the client sees the final design it will not come as an unwelcome surprise. Instead it will be in line with their expectations and they will feel a sense of ownership over it.

Unfortunately despite this, things can still go wrong when you present the design and ask for comments. This is what I want to tackle in the final chapter of this book.



## Chapter 6

# Ensuring great feedback

Have you ever emailed a design to a client and asked what they think of it? No doubt you waited for their answer with a sense of dread.

The response is rarely good.

Even relatively minor tweaks are time consuming and can undermine the design. Major changes are catastrophic. Having a design **faxed** back covered with scribbles and amendments is soul destroying. Worse still, the design is sometimes rejected entirely forcing you to start again.

Although what I have covered so far will minimise these problems, how we request feedback is a big part of the solution.

It is not enough to ask a client "what they think," and you should never send designs by email. How you present design and request feedback makes a huge difference to the comments you receive.

1. The best way to present a design
2. Gathering the right feedback
3. Dealing with disagreements
4. Dodging design by committee
5. **Next Actions**

## The best way to present a design

Any new piece of design work whether a wireframe, moodboard or final design should always be presented.

It is not enough to send an email, upload to Basecamp or point the client at a web address. Design must be presented in a way that is both informative and engaging.

Think about how Steve Jobs announced new products. Before he revealed them he talked through their benefits and the process that went into their creation.



*Steve Jobs carefully explained his products before revealing them to the world.*

Imagine if he did it the other way around, presenting the product first. Nobody would remember anything else he said. They would see the product and make an instant judgement without hearing the thinking behind it.

That is why emailing a design is never a good idea. As soon as the email is opened the client sees the design and makes a judgement before reading your explanation.

Presenting a design is not about showmanship or sales. It's about explaining your approach to the client and reminding them of the journey you travelled together to reach the final design.

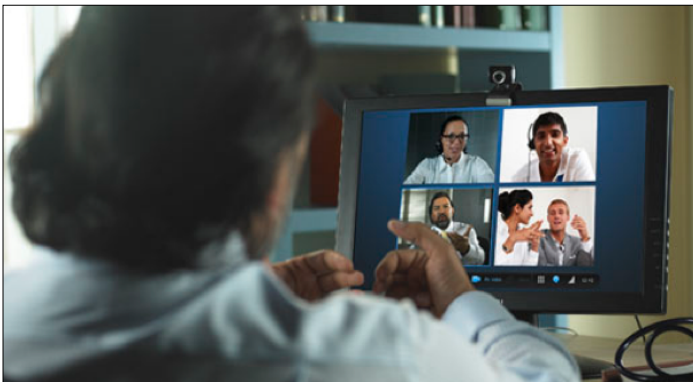
If a written presentation of a design is not the answer, what is?

## How to present a design

The best way to present a design is face to face. This allows you to see the clients responses to a design. Do they smile or screw up their nose?

It allows you to communicate your enthusiasm and passion for the design. This matters as people can get caught up in your excitement.

Unfortunately, a face to face meeting is not always possible. The alternative is a phone call. However, there are two things to be aware of when presenting over the phone.



*Although Skype is an excellent communication tool for working with clients, it cannot replace face to face meetings for presenting design.*

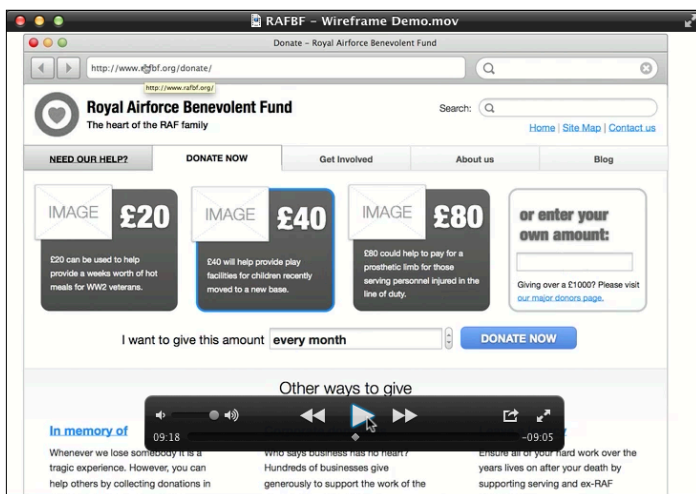
First, do not send a link to the design beforehand. Put the design online with an easy to type URL and share it with the client on the call. This ensures the client does not prejudge the design or fail to take in your presentation.

Second, use a landline and keep the number of participants to a minimum. The audio quality of Skype, voice over IP or conference call facilities is often poor. I have participated in too many disastrous design presentations because people have struggled to hear.

Unfortunately it is hard to limit the number of participants, as it is important those providing comments hear the presentation. If they do not they will be making uninformed decisions about the design based mainly on their personal opinion.

What then is the answer?

At Headscape we record videos of our design presentations and circulating them to all decision makers. We follow up with a phone call once they have had time to watch and digest the presentation. We use that call to gather their comments.



*Recording a video is an excellent way of presenting design.*

This approach has several advantages:

- ▶ **Presentation and design are inseparable.** Because the design is only viewable as part of the video it cannot be shown without the accompanying presentation. We therefore can guarantee people will have all the information they require to provide constructive criticism.
- ▶ **Call quality is not an issue.** Because the presentation is a video, the audio quality can be assured. Most video recording software allows for the presenter to appear in a small window. This better communicates our passion for the design than a phone call.
- ▶ **The presentation can be scripted.** Not everybody finds it easy to present. By recording a video you can script the presentation ensuring the quality.
- ▶ **All those providing comments see the presentation.** It is hard to arrange a meeting that all stakeholders can attend. A video allows people to view the presentation at their convenience.
- ▶ **The client has time to digest the presentation.** Because the client can watch the presentation at their leisure they have time to formulate their comments. Unlike a face to face presentation, they do not need to provide an immediate response.
- ▶ **It allows interaction.** Websites are becoming more dynamic with javascript elements and responsive design. A video allows you to demonstrate this kind of functionality without worrying about whether it will work on the client's computer.

*With a video the stakeholders cannot view the design without also hearing the thinking behind the approach.*

Whether you present using video or in person the most important part is what you say.

## What to include in a design presentation

When presenting a design (whether a moodboard, wireframe or design) show that it is a natural progression

of what has already been agreed. This will make the client more likely to accept it.

To achieve this, the presentation should heavily reference previous work and how that has influenced the design. For example, if you are presenting a moodboard you should explain how the personality agreed with the client is reflected in the design.

With wireframes, demonstrate how they reflect the sketches produced with the client. Also show how they accommodate calls to actions, business objectives and user tasks.

Finally, when presenting your proposed design, show the client how it brings together business objectives, moodboards and wireframes.



*Reference previous work when presenting design.*

Where the design deviates from what has been agreed or introduces new elements, present a strong case to back up these changes.

I endeavour to support my designs in three ways:

- ▶ **Testing:** If I am concerned the client will be unsure about my design choices, I will carry out testing to

justify my approach. Testing is something I will discuss later in the chapter.

- ▶ **Reference material:** As I wrote in chapter 4 referencing expert opinion, studies and statistics are all powerful ways of improving your credibility. They are also excellent for justifying design decisions. For example, if there are numerous studies and experts who dispel the myth of the fold, then that justifies a design which requires scrolling.
- ▶ **Show examples:** Nothing is more convincing than showing the client an example. If a major website like the BBC does something you are proposing for a design, it significantly strengthens your case.

The idea of showing clients an example is more powerful than you might think. Examples help explain complex interactions that the client might otherwise struggle to grasp.

As I have already pointed out, websites are becoming increasingly interactive and dynamic. CSS and Javascript enable us to do everything from image carousels to responsive sites.

As web designers we are familiar with these techniques. When I talk about a mega menu, you can visualise it. However, that is not always the case with clients. Even if they have seen the feature, they might not be aware it is called a mega menu.

With that in mind, it is better to show the client these interactions, rather than try to explain them.

Where possible show the client a working prototype. If the cost cannot be justified, find sites that offer similar functionality and discuss those with the client. It will help them picture how their own site will behave.

As well as showing the client examples of functionality, it is also worth preempting common objections in your presentation.

*With websites  
become ever  
more interactive  
and flexible it is  
often necessary  
to show clients  
a prototype.*



Our experience of working with clients gives us a good insight into what changes they are likely to request. These include areas such as the use of whitespace, choice of colour, content above the fold or size of the logo.

We avoid mentioning these issues hoping the client doesn't bring them up. However, it is more effective to preempt them by raising the subject yourself. There are two reasons for this.


First, it demonstrates that you have thought about these issues and are not just reacting to their criticism. This reinforces your experience and expertise.

Second, preempting issues has a psychological effect. Once we state a position (the logo needs to be bigger) we feel the need to be consistent and defend that position even in the face of evidence to the contrary.

The screenshot shows the boagworld website with a dark header containing navigation links: Podcast, Archive, Forum, Books & Talks, About me, and Hire me. Below the header is a search bar and a 'Subscribe Now' button. The main content area features a profile picture of Paul Boag and an article titled 'Design: Why whitespace matters'. The article includes a sub-header 'What do designers mean by whitespace?' and a brief introduction to the topic of whitespace in design.

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 **Hi I am Paul Boag** I am a co-founder of web design agency Headscape and host of the boagworld podcast.

If you are looking for advice on designing, developing or running your website then you are in the right place.

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- A guide for those new to the site.
- Searching for a specific topic.
- Following me on twitter.
- Subscribing to updates from me.
- Reading more about me!

**Design: Why whitespace matters**

Designers love it, website owners want to fill it. Whitespace seems to be one of the most controversial aspects of design. Why then is it so important and how can we ensure it is maintained?

THE ESTIMATED TIME TO READ THIS ARTICLE IS 7 MINUTES Posted on: Tuesday, February 15, 2011

Whitespace is a fundamental building block of good design. Its one of the first thing any visual designer is taught. However, to many website owners it is simply a waste of space that could be used to better promote their messages, services or products.

In this post I aim to explain why whitespace matters and how to keep whitespace in a design without compromising business objectives. However, before I can do that we need to be clear what we mean by whitespace.

**What do designers mean by whitespace?**

When designers talk about whitespace, they actually mean negative space. In other words the space between screen elements. That is not always 'white'. This space maybe a colour or texture but either way it is space within a design that does not include screen elements. Below you can see a couple of examples of 'whitespace' in on various websites.

*When a client worries about the amount of 'empty space' in their design I refer them to this post that I have already written on the subject.*

If we preempt the issue before the client raises their objection, they don't have to defend a position they may no longer be convinced by. Furthermore, clients feel foolish raising an issue which you have already tackled.

Finally, your presentation should suggest some guidelines for useful comments.

## Gathering the right feedback

At the beginning of this chapter I suggested that it is not enough to ask a client what they think of a design. In fact it is dangerous to do so.

Asking a client 'what *they* think' of a design focuses them on their personal opinion. As we discussed in the previous chapter, design is subjective so personal opinion is not always valid. Just because your client dislikes a design, does not make it wrong.

I worked on a university website when Myspace was popular. The target audience was undergraduate students so we produced a design that appealed to the Myspace generation. Both the client and I disliked the design. It was garish and busy, not at all what we looked for in a website. However, the design proved successful in testing. We had to set aside our personal opinions and implement what was right for the audience.

That is why we need to reconsider how we ask for feedback from clients. Instead of asking "what do you think" we need to ask "how will your users respond?"

By asking specific, structured questions, we focus the client's attention on criteria by which a design should be judged.

In chapter 2 I said we should urge our clients to focus on user needs and business objectives. Asking for feedback is a great time to make this happen.

Some example questions might be:

*We need to ask clients for structured comments rather than asking them what they think.*

- Do you believe the aesthetics will appeal to the target audience?
- Does the website help the business achieve its objectives?
- Will the target audience be able to easily complete their tasks?
- Are the calls to action clearly visible and do they encourage action?

Questions like this teach the client how to judge the effectiveness or otherwise of a design and discourages comments such as "I don't like the colour."



*The subjective and personal nature of design is perfectly summed up by the controversy surrounding every redesign of Facebook.*

You can also use structured questions to remind the client of what has been previously agreed. They can show how the design is the culmination of a collaborative process. For example you could ask:

- Is the design in line with the aesthetics established in the moodboards?
- Does the design communicate the brand values of your organisation?

- ▶ Does the design reflect what was agreed in the wireframes?
- ▶ Is the design consistent with the personality we chose for the site?

You will notice that these questions encourage a yes or no answer. If the answers are yes, then the client has little reason not to approve the design.

Of course they may personally not like the design. However, if you have warned them that their personal opinion could colour their judgement, most will be able to set those feelings aside if they can confidently answer yes to your questions.

If the client feels the design fails to meet the criteria outlined in your questions, things become more complicated and will require sensitive handling.

## Dealing with disagreements

Handling disagreements with your clients is a crucial skill. We must balance the client's happiness with producing the best website possible.

If we simply give the client whatever they ask for, we become demoralised and they do not receive our full expertise.

However, if we constantly argue with them they could end up with a website they do not like. If they do not like their site they will not invest in its long term future.

The answer to this problem is three fold:

- ▶ **Swallow your pride.** As I said in chapter 5, we need to accept that clients have good ideas and we must not reject them simply because we did not think of them.
- ▶ **Pick your battles.** It is fine to disagree with a client if you passionately believe in your position. However, on other occasions you will feel less

*We cannot afford to allow disagreements over design to become personal.*

strongly. When that happens, be willing to give their ideas a go.

- ▶ **Ask why.** If a client is unhappy with the design, it is important to understand why. For example, it is not enough for a client to say the design doesn't satisfy user needs. You need to understand exactly how they believe it is failing.

This last point is important.

## The power of why

Often clients will believe their opinion correct and yet struggle to articulate why. This makes it hard to fix the problem. Only when you understand why the client feels the design is failing can you address their concern.

Asking why will help the client to *really* think about their response. Sometimes when they look beyond their instinctive reaction, they realise there is no problem.

In chapter 2 I wrote about the importance of focusing the client on identifying problems rather than coming up with solutions. "Why" can achieve that.

When a client comes back with a solution, such as changing a colour, you can simply ask why. Along with a reminder that their role is to identify problems and not suggest solutions, this will focus them on identifying the underlying issue.

I have no problem with clients suggesting possible solutions, as long as they have also identified the problem. The designer is not the only person capable of finding a design solution. My point is that a suggested solution has no value without knowing the problem. The designer cannot judge the client's suggested solution without understanding the underlying issue.

That said, the client will sometimes see problems where, in your opinion, none exist. In such cases you need a way to break the stalemate. Testing is the solution.

*Asking why focuses the client on identifying problems rather than coming up with solutions.*

## Testing a design

Testing should be apart of any design process. It is particularly useful in resolving disagreements between designer and client.

The most well known form of testing is usability testing. Although this won't help resolve disagreements about aesthetics, it will help with issues of navigation, task completion and visual hierarchy.

User testing does not need to be expensive or time consuming. Steve Krug's books "Don't Make Me Think" and "Rocket Surgery Made Easy" both demonstrate how painlessly usability testing can be incorporated into the design process. Usability testing can give a definitive answer to many points of contention between designer and client.



*For more information on usability testing I highly recommend Steve Krug's book "Don't make me think."*

When it comes to aesthetics, a different approach is required. Although not as well known, Headscape uses a

process of design testing to bring clarity to the aesthetics of a site.

Imagine a scenario where a client doesn't feel the design is in line with the brand values they wish to communicate. This cannot be resolved in any way other than showing the design to real users and monitoring their reaction.

Design testing can be as simple as showing the design to 20 or more test subjects and asking them to rate it. For example, if a design should feel clean and the client thinks it busy, ask users to rate it between 1 and 6, where 1 is busy and 6 is clean.

Design testing can also be used to ease client concerns over key elements being seen. A common example would be a client requesting their logo to be made bigger. This 'solution' is born out of a 'problem' they perceive of users not seeing the logo. You may feel you have solved this problem by surrounding the logo with whitespace and positioning it prominently.

To test this hypothesis you can do a flash test. Users are shown the design for a few seconds and then asked to recall what they have seen. If the logo is mentioned, you can be sure it is prominent.

The downside of design testing is that to be sure of quality results you must test a larger sample of people who are representative of the target audience. Although the testing itself is lightweight and quick, recruitment is not.

Fortunately there are a number of online services that can help with this. There are web applications like [Ethnio](#) which allows you to question a subset of users who visit your site. If you choose to, it will even manage payments to users who participate.

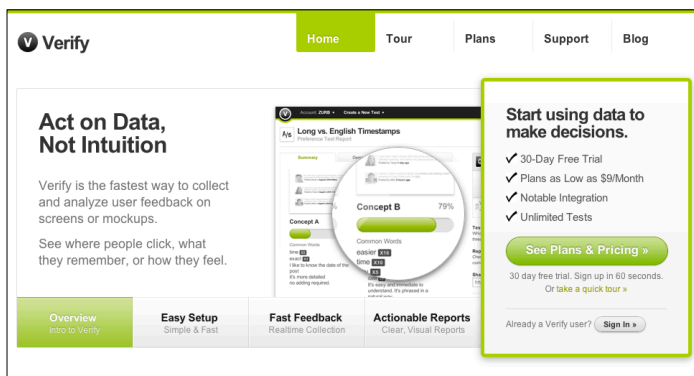
There are also a plethora of online survey applications including my personal favourite [Wufoo](#).

*Design testing is a valuable way of breaking disagreements over personal opinion.*

However, in my experience the best tool for online design testing is a web application called [Verify](#).

Users from your website can take one or more Verify tests. Tests include:

- ▶ **Click test:** See where users click based on a question.
- ▶ **Memory test:** Find out what people remember.
- ▶ **Mood test:** Learn how people feel about a screen.
- ▶ **Preference test:** Show two screens and ask users to choose.
- ▶ **Annotate test:** Let users put notes on your screenshot.
- ▶ **Label test:** Ask users what certain elements mean to them.
- ▶ **Multiple page click test:** See where users click in a sequence of screens.



*There are a number of services like Verify which help with the process of testing design.*

Together these tests will address most areas of disagreement. However, when it comes to differences over design, there is one more thing to consider.

I think part of the reason clients become so concerned about site design is because they are used to print.



In print design, when the client approves a design there is no turning back. If the client wants to change something or a mistake is made there is a substantial cost associated with a new print run.

As web designers we know that this constraint does not exist online. The client probably intellectually realises this as well. However, often they do not embrace the opportunities this provides.

Often the best solution to a disagreement over design is to trial it on the live site. Run with your version of the design and see if users respond badly. If they do, fix it for free. That way the client loses nothing. If you are right, there will be no additional cost to you because the design won't need to be fixed.

If there is room in the budget an even better solution is to A/B test various approaches to find the most effective. Tools like [Google Website Optimiser](#) make it easy to show users different versions of the design and monitor which performs best. This kind of hard data will resolve almost all disagreements over design.

So far the approaches I have outlined for dealing with feedback have focused primarily on the interaction between a designer and single client. What happens when there is a committee involved?

## Dodging design by committee

As web designers we know that committees can be the death of good design. They do not even need to be formal committees. The more people who look and comment on a design, the greater the chance that it will become bland and uninspiring.

How then do you deal with a client who wants to get comments from others before committing to a design direction? To answer this we first need to understand why too many cooks spoil the broth.

*The best way to test a website is to put it live and monitor how users interact with it. There is no reason why adjustments cannot be made post launch.*

## The problem with design by committee

Why do committees have such a detrimental effect on design? If anything, one would think that more heads would lead to a more creative solution.

The problem lies in the subjective nature of design. Because we all have different definitions of what good design is, committees tend to pull it in different directions.



*We all know design by committee is bad. However, we cannot overcome it until we understand why it's bad.*

The problem is made worse by our desire to find consensus. When confronted with multiple conflicting opinions we try to find a compromise that is tolerable to all. This leads to uninspiring design that may well not offend anybody but equally inspires nobody. The design effectively becomes invisible having neither a positive or negative effect.

This is in stark contrast to good design, which makes a statement and is born out of a strong vision of one or two

individuals. Apple is a good example of this where design direction was clearly led by Steve Jobs and Johnny Ives.

Not that good design always results from a strong individual with a vision. If that individual does not have a good understanding of design and the design process, they can be even more dangerous.

Dominant individuals are even worse if part of a committee. As I wrote in chapter 4 when discussing stakeholder interviews, they bounce other committee members into supporting them and use the group 'consensus' to force through their vision. This can be damaging to quieter members of the committee who go away feeling ignored. You miss out on their comments and the chance of them coming back later to sabotage the design increases.

There is nothing wrong with multiple stakeholders commenting on a design. Feedback is never a bad thing. The problem with committees is how they are handled.

## The answer to design by committee

If the problem with committees is that they lack a single coherent design vision and favour the opinions of the dominant, then there is only one solution.

One person needs to individually collect comments from all stakeholders and make decisions about which comments need to be acted upon.

This role should belong to the designer. The designer is best placed to collate design comments and make recommendations based on those comments.

Approach each stakeholder individually and encourage them to provide comments directly to you. This can be done using the phone, email or questionnaire. I prefer the latter because it makes collating the results easier and focuses comments on specific questions as I discussed earlier.

*Getting the opinions of others about a design is not bad per se. The problem comes when those opinions become dictats.*

Once you have gathered all the comments, you are in a unique position. You are the only person who knows everything that has been said. This means you can be selective over what comments you adopt and share with the group.

You can incorporate comments that will enhance the design and quietly ignore the rest. When you present the amended design you should justify the new approach using comments provided by stakeholders.

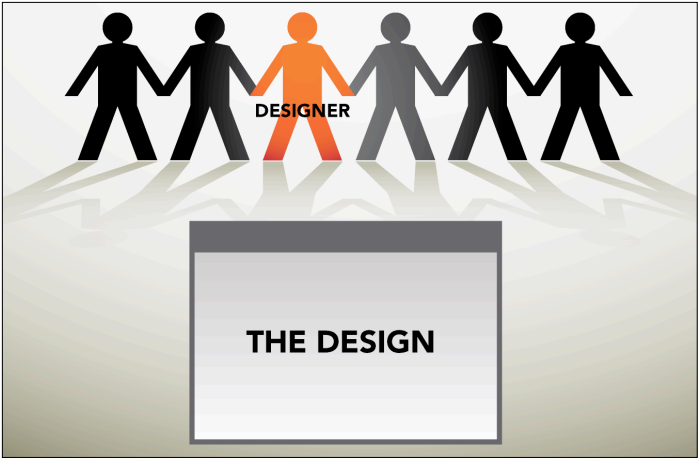
Your primary point of contact (the client) may want to see all the comments gathered. This would be understandable and shouldn't be resisted. Although this reduces your level of control, it is still better than allowing the whole committee to discuss every comment.

This approach also allows you to have further contact with key influencers in design approval. As with stakeholder interviews, this is valuable for gaining their support.

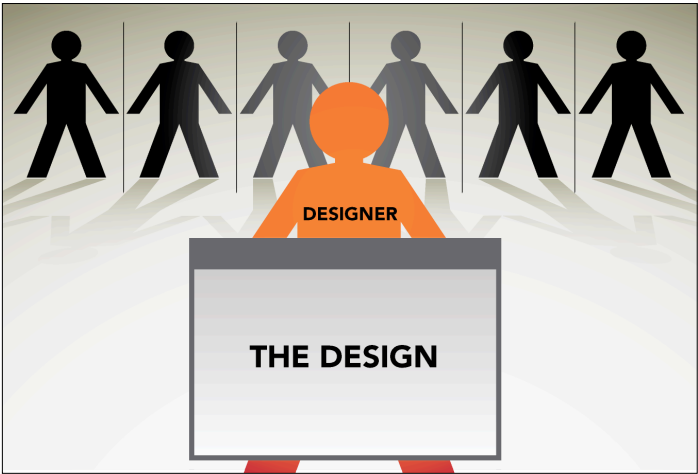
This approach is not 100% successful. Sometimes the culture of an organisation is so committee led that you simply cannot break out of it. In such cases there is one other option: design by community.

Design by community appeals to organisations that value consultation when making a decision. These are typically the same organisations that favour committees. Instead of consulting a small committee, design by community asks for comments from as large a group as possible. For example, you may show everybody in the organisation the proposed design or make it publicly available on the website.

*By stakeholders  
providing  
comments to  
you rather than  
to the  
committee you  
can maintain the  
vision for the  
design.*



*When the designer is just one voice in the committee, the design lacks direction and vision.*



*If all comments from individual community members comes directly to the designer a single vision is maintained.*

Although this may sound like insanity, it makes perfect sense.

When consulting with a committee you are dealing with a relatively small number of personal opinions that often conflict. One person can dominate the direction or bad design is born out of the inevitable compromise.

With design by community the scale removes these problems. An individual voice is drowned out by the numbers and it becomes about trends instead. Equally with so many participants you cannot hope to please every individual, so compromise is no longer an option.

By canvassing large numbers of people using a survey or poll, you gain a sense of what is working without getting bogged down in politics or opinion.

# Next Actions

I have demonstrated how client centric design leads to better websites, happier clients and an easier life for you. Managing comments is a key component in that. Before you close this book, make some small, yet significant, changes to how you present design and gathering comments. These are:

## Record your presentations

Video presentations have transformed how we present work at Headscape. It has led to better presentations, improved comments and it always impresses the client.

## Prepare the ground

Suggest the type of comment you want. Place the emphasis on identifying problems not finding solutions. Finally, deal with problems such as whitespace, colour and branding before they become an issue.

## Provide structured questions

Stop asking open questions such as “what do you think of the design” and start leading the client through the feedback process.

I am aware this book may have challenged your preconceptions. I have suggested that your role is not just to produce websites, but to offer a service. You may feel this is not what you signed up for. However, I want to ensure you that, done right, client work can be both rewarding and satisfying. You get to build lasting, collaborative, relationships with people working across a range of disciplines and sectors. Client work is never dull and you will always be learning. Embrace the role and enjoy one hell of a ride. I know I have.





## About the author

Paul Boag is a website strategist and a director at [Headscape](#), a web design agency based in the south of England. He started designing websites while working for IBM back in 1994. This was in the days when designing for the web was considerably easier. Since then he has ridden the dot com bubble and co-founded his own web design agency.

Today he can be found advising clients on how to better utilise the web, speaking around the world and hosting the award winning [boagworld.com](#) web design podcast. He also writes for his own blog and numerous other publications.

At the time of writing he is [addicted to Twitter](#). He is hoping the obsession will pass but he is beginning to doubt it.