Creating Cohesive Visual Design

Information Design For Non-Professionals

The Discovery Process

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The Discovery Process

Having a plan often means the difference between struggling or getting off to a running start.

WELCOME

The purpose of this workbook is to gain insight into your business and creative goals — to not only determine a direction that fits your company, but more importantly — to speak directly to your customers. To think about *what your organization is really about* — and all the ways you serve the needs of your market.

This process is also about helping you determine what part of the process you can or want to manage. With the proliferation of the internet and computers, it has gotten easier for small businesses and organizations to take over sending mailings, creating graphics, updating websites and more. Unfortunately, it is also often done the wrong way and comes across as amateurish. We want to evaluate what parts you can easily take over now - or perhaps could with a little guidance. We know that not everything needs to be managed by a marketing firm - and that a little training goes a long way.

Whether you handle your own marketing or have a professional manage it, *the most important point is to understand that every decision made should always be seen from your client's perspective*. It is not about your personal preferences or skill levels, but should be completely about them, and anticipating their needs. The more you demonstrate how you are the answer to their problems, the better. This attitude and brand approach will help to win you deep loyalty because your customers will feel respected and understood.

So—get started—take a look! You can skip any questions that do not pertain to your needs, but please answer as many questions as possible. Remember—this is a creative process! Allow yourself room for imagination and the "what if's" to determine what is working for you and what needs to be worked on! :)

Terry Laslo
Creating Cohesive Visual Design

An Observation

As a designer working with small businesses and non-profits for over 15 years, it has been my experience that once a web site or graphics package has been created and turned over to the user, there are two paths the project can take.

- When the client successfully understands and manages the assets and tools delivered, the business communicates more professionally and will thrive.
- When the client lacks necessary skills, believes it is too time consuming, or feels frustration from lack of support, then enthusiasm dies and the project stalls.

It can be especially daunting for those that need to present professionally while operating within a minimal to non-existent budget. The goal of this booklet is to gather information about what knowledge and skills you already possess, in order to reduce costs and eliminate frustration. It will also explore how you can work best with a professional designer to get your brand started on the right foot.

Most small to mid-size businesses, non-profits, and individuals experience similar challenges when working with visual and digital mediums. There are, however, unique issues specific to different organization types.

Non-Profit Challenges

Non-profits typically start up because there is passion for a cause—some issue close to the heart that has moved an individual or group to take action. Unfortunately, the passion doesn't always match the (wo)manpower and it can be daunting to keep things moving forward.

Additionally, delays in decision making are common. Non-profits tend to move slower because decisions need to wait for approval at

monthly board member meetings. Also, many newer non-profits must focus on raising money which competes for precious time. If possible, start with a professional designer to help with planning and creating a visual digital branding package that includes assets such as a web site, business cards, logo, brochures, and more. Doing so will help volunteers focus on the cause.

● Artist Challenges

Artists often have hundreds of image files and it can get messy quickly if the work is not organized. When sorting, think about how you want to show your art; is it by medium, topics, color, or something else?

If scanning, keep artwork file sizes large — at least 300 pixels per inch (ppi). These high resolution files are needed for print. It is always possible to downsize, but remember, you can't increase an image's size without losing quality.

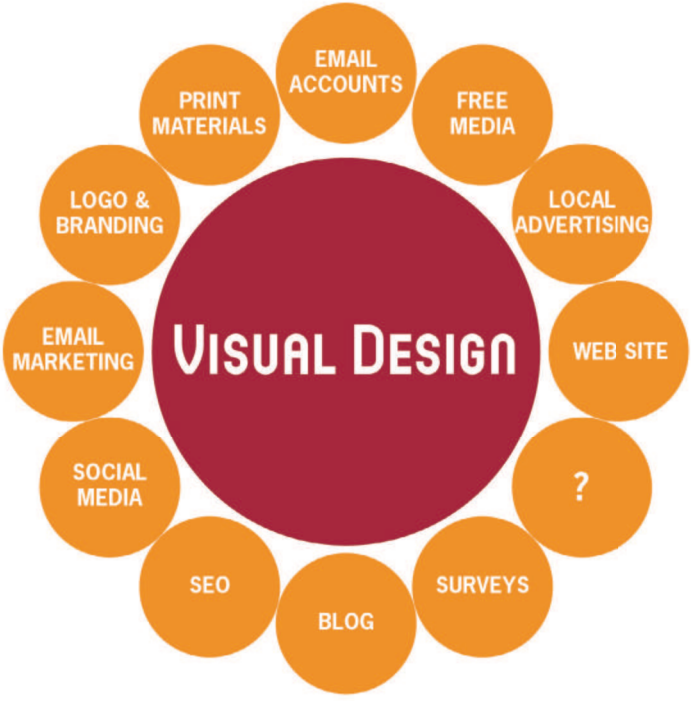
While you are organizing images, create a spreadsheet or word document that catalogs the work, medium, size, etc. This is very helpful - especially if you are organizing for a web site gallery. You will be able to easily title your gallery images with the appropriate information. If you have a designer doing the web work - they will love you for it - and it will cost you less in the long run.

● For-Profit Challenges

Decision makers responsible for visual design and marketing are still responsible for their day-to-day operation and business responsibilities. Working with visual design/marketing can be stressful because it is typically added on top of their usual workload.

Additionally, until there is a proven return on investment, management often isn't motivated to commit additional time and resources to plan and maintain a regular schedule of communication.

WHAT MATTERS MOST?



Who Are You?

1. What is your organization's name?

2. What type of organization is it? Non-profit, small business, artist, other?

3. Do you/organization have a mission statement? Does it effectively communicate the intended message?

4. Who is your organization's primary contact(s) that has final approval on projects? List name, title and contact information.

5. What product or services does your organization provide?

6. Is there a current problem you would like to address? If so, what are the details?

7. Describe your organization in one sentence? What is your 10 second 'elevator-pitch'?

8. Describe your organization in two words (one if possible):

What Do You Already Have?

1. Do you have branding? A current look?

2. If so, how important is it to maintain your established look?

3. If you have worked on your branding prior to now, what in hindsight, what would have been helpful for you to know prior to starting?

4. Are there tools you use successfully now? Which ones?

5. Are you frequently frustrated with any of these tools? If so, which ones?

6. What skill set do you have? Are you willing to learn?

7. Do you use any of the tools on the next page?

What do you use? How do you use it? Check all that apply.

TOOLS	WORKS WELL	NEED HELP	USE OFTEN
Web site			
Blog			
Logo			
Web URL address			
E-mail marketing			
Print materials			
Social media			
E-mail accounts			
Event marketing			
Surveys			
Search engine help			
Free media			
Local advertising			

Are You Comfortable With Digital Assets?

If you do work with files or make changes frequently, are you comfortable working with digital assets? These include

- ☐ Photographs (raster)
- ☐ Illustrations (vector)
- ☐ Audio
- ☐ Video
- ☐ Fonts
- ☐ Web files
- ☐ File Sharing
- ☐ Other_____

What is Important to Your Communications?

- ☐ Writing
- ☐ Working with graphics
- ☐ Social media
- ☐ Web content and management
- ☐ Search engine optimization (SEO)
- ☐ E-mail accounts
- ☐ E-mail marketing
- ☐ Working or creating print pieces
- ☐ Other _____

How Often Do You Need Visual Design?

1. How often does your organization update or edit your web site or marketing materials?

2. Do you feel your organization would benefit from more frequent updates? If so, what is preventing it?

3. Do you frequently need printed materials, fliers, graphics, social media posts, e-mail marketing blasts and web site updates throughout the year?

Libraries & File Sharing Tools

1. Do you personally use a platform for file-sharing such as Google Drive or Dropbox?

2. Does your organization use the same file-sharing platform? Are all team members involved in this project working with this platform?

3. Do you/team members understand file size resolution(for web and print)?

4. Does your organization use any stock photos/asset libraries?

5. Do you maintain a library of images, templates, and graphics?

Web Site Reach

1. **Who is your target audience/typical website visitor?** Give basic demographics: age, gender, education level, occupation, income, etc. Use as much detail as possible in profiling your target user. Profile more than one type if appropriate.

2. **What is the primary action the visitor should take when visiting your web site?** Search for information, make a purchase, become a member.?

3. **What are the key reasons the target audience chooses your company's products or services?** (Cost, value, service?)

4. **Do you know how many people visit your web site on a daily, weekly, or monthly basis?** How do you measure usage?

5. **Do you have something that your clients will appreciate receiving/seeing from your company, either on your website, print-materials or messaging?** Some ideas are free information reports, free downloads, helpful resource links, or free consultations. What would make them respond?

Notes