



CHECKLISTS
SELF-REVIEW GUIDES

CHOOSE A DESIGNER WHO...

- Adapts the process and language to you
- Speaks with sincerity and care
- Earns your trust and respect
- Wants to work with your organization
- Follows a professional code of conduct
- Obeys copyright regulations
- Provides relevant case studies with successful outcomes
- Possesses capabilities that match your needs and aspirations
- Offers a working style appropriate to the size and nature of your organization
- Surprises you with ideas and questions you hadn't considered before
- Clearly articulates how their work contributes to client strategies
- Shows the potential for innovative yet functional ideas
- Offers professional and client references/testimonials that check out
- Presents options that match your environmental and ethical criteria

QUESTIONS FOR DESIGNERS

- How do you define the value of design?
- How does your fee structure work?
- What opportunities do you see in my organization for design to play a role?
- What ethical and environmental principles do you believe in?
- What is your design process?
How do you adapt it to your clients?
- What kind of clients do you work with?
How large are their organization's?
- How do you test and validate the outcomes of your projects?
- What differentiates you from your other designers/design firms?
- What research strategies and resources do you use?
- Who would work on the project?
What is their background?
- What types of projects would you/your firm like to work on in the future?
- What professional organizations, business networks or strategic alliances are you a part of?

- Clear statement of objectives, with priorities
- Strategic relationship of objectives to company positioning
- Project evaluation standards
- Project time-frame/schedule
- Procedural/bid requirements
- Marketing considerations and goals
- Challenges to be aware of
- Internal approval process
- Life-span of project outcome/product
- Level of desired risk-taking/innovation
- Any specific reasons for choosing me
- Contact information
- Budget and financial considerations
- Legal, confidentiality and/or ethical issues and guidelines
- Audience perception-changing research and goals
- Defined, characterized, and prioritized target audience(s)

2 DISCOVERY & ANALYSIS

- Relevant internal resources for research: people, documents, data etc.
- Relevant external resources such as industry networks, journals, literature
- Any changes/issues arising from the design brief or preliminary meetings
- Ideas from different industries, fields, formats, countries, etc.
- Seemingly un-related but striking personal and/or organizational insights
- Internal historical sources and examples
- Competitor research and evaluation
- Inspirational sources and examples
- Anticipated/forecast/planned trends
- Relation of project to long-term context
- Useful unexplored research avenues
- Reflection on long-held assumptions
- Experts, consultants and assistants
- System-based analysis
- Internal suggestions and problems
- Audience/user feedback

3 IDEATION & ITERATION

- Reaction to emerging phase 2
- Feedback from within your organization
- Newly identified directions or insights
- Text or data corrections
- Signing authority for proofs
- What is working well, and what isn't?
- What is your emotional reaction?
- Do the concepts strategically fit organizational goals?
- Guidance for sub-contracted work or any additional resources needed/costs
- Internal and external production/ deployment issues
- Do the messages complement organizational communication strategy?
- Are the concepts superior to your competition's? If not, how?
- Do you feel these concepts would be effective for your audience/users?
- Can you envision how these concepts would be developed or deployed?

4 TESTING & VALIDATION

- Is the audience/user sample actually representative of the target?
- How has the audience/user sample reacted to the prototype?
- Has the prototype successfully changed perceptions if necessary?
- What is the most successful aspect?
The least? Why?
- What difficulties or bottlenecks have they encountered?
- How are differences in the audience/
user make-up affecting usage?
- How have these results changed with
the time spent with the prototype?
- What suggestions has the audience/
user sample made?
- How have these results changed your
organization's ideas?
- What do you think is a way of dealing
with these results?
- Is the prototype memorable?
- What are the priorities?

- Has any time-sensitive data changed?
- Is reproducibility a requirement?
- What is the quality assurance process?
- Have the proofs been reviewed by someone with 'fresh eyes'?
- Have all copyright issues been completely and properly settled?
- Have you ensured that final proofs meet with all required internal approval?
- Which production companies have you successfully worked with in the past?
- Based on experience, what production challenges and 'tricks' exist?
- What production techniques does your competition successfully employ?
- Are there confidentiality/security arrangements that need to be made?
- What quantities need to be produced?
- Will production take place simultaneously at different locations?
- Are there governmental standards or testing processes to be aware of?

- How will the process function?
- What will the application/deployment schedule be?
- What internal system will ensure and monitor compliance? How?
- What application/deployment issues must be taken into consideration?
- What internal or external political issues are involved/affected?
- What internal or external systems or groups will this affect or inconvenience?
- How may suggestions and difficulties be recorded and addressed?
- Which users/audiences will benefit the most or the fastest?
- What international timing/roll-out issues or plans exist?
- How may your competition react to this? What plans have you made as a result?
- What internal or external systems or groups will this affect or inconvenience?
- What legal or political challenges to the application may be encountered?

6 GROWTH & MAINTENANCE

- How is the system evolving?
- What has been most/least successful?
- Has the original integrity been enhanced or weakened over time?
- What lessons have been learned from the process/project?
- What are the satisfaction levels among users/audiences?
- Has the project achieved the original goals and aided long-term strategy?
- How has the project affected internal practices, policies or trends?
- Has a long-term commitment to the project emerged or is it obsolete?
- What emerging or unforeseen needs now exist for the project?
- Have the aesthetic qualities remained attractive or grown stale?
- Is the project still noticeable or memorable among its users/audiences?
- How do you envision the project could be enhanced or grow?