

# STICKING TO YOUR PROCESS

A WHILE BACK we were contacted about a project. A nice one; high-profile client, good budget, realistic timeline. We wanted it. We had an initial phone call with the principals and got even more excited about it. They were smart. Asked us really good questions, we gave really good answers. They told us us they were talking to a few different agencies, which never scares us. All-around good first impression.

A few days later the client told us they were asking the candidates to sketch some concepts for the proposed site to help them make their decision. And get this! They even offered to pay for it. Not bad, right?

We said no.

We told them that in order to design the right site we'd have to do our research. We'd have to talk to them about their goals, their content, their brand, how they made their money—all that stuff. And we'd have to talk to their intended audience. We'd have to take a look at the competition. Technical constraints, editorial process, content strategy, etc., etc. We needed to understand and define the problem we were

being asked to solve. Then, and only then, would we propose a solution.

We told them that our process was why our work succeeded enough times that they'd heard of us. Sure, our sites are pretty, but more importantly, they work pretty well. They meet goals. And hopefully people enjoy using them as they work toward their goals, be it a customer's goal of completing a task, or the site owner's goal of getting you to register.

We told them that if we were just to do some quick sketches, without the benefit of discussion and research, the ideas would inevitably be wrong. We'd never be able to guess what was in the clients' heads. And we wouldn't put ourselves in a position where we'd be judged on our mind-reading prowess.

And as I'm telling them all this, I'm kissing the job goodbye. Which sucks, because it was a really good job, and I really wanted to do it. But the only way I could do it was if they understood and respected our process. And if you think it took guts to tell someone this, then I wish I'd had them that day, because I was totally freaked out and scared. But you have to do the right thing because it's the right thing, scared or not.

“That all makes a lot of sense. You’re hired.”

*Thunk.*

And the next time I had that same conversation with a client it was just a little less scary.

Your process is what enables you to do good work. You'll develop and tweak it throughout your entire career. Sometimes because you've learned something new, sometimes because the industry evolves and you need to reflect as much. But it will be the framework you will use to do your work.

As we tell potential clients when they ask us what their site will look like: “Oh, we have no damn idea. But we know what the process is for finding out.”

## WHY YOU NEED TO STICK TO YOUR PROCESS

People get to where they are in life by following a process, whether they're conscious of it or not. Successful people, like you, will be conscious of it. You'll also look for opportunities

to improve it. Mind you, waking up every morning, going to a job you hate, and crying in a bathroom stall before lunch is also a process. But much like the best umbrella is the umbrella you have on you, the best process is always the one you're having success with. Don't fall for trendy processes. If the one you're using works for you, go with it.

Your successful process has also led you to enough good work that people want to keep hiring you to do more work. So, why is it that the first thing a client does upon hiring you is attempt to break the process that got them to hire you in the first place? We'll get to that in a second, but first let's discuss why you're not going to let them anymore.

I started this chapter with a story about a client who attempted to break our process. Which would have resulted in the exact opposite of what they were trying to achieve. Their goal was to ensure that they got good work. And they came up with a plan they felt did that. It's important to separate their goal from their plan because clients' goals are generally worthwhile. At least clients you've allowed to get this far into the conversation. Their plans, however, are a whole other matter.

Planning how to achieve a goal needs to be something you take charge of. That's *your* job. And unless you show the client that you are taking charge of that you're going to have a very hard time getting anything done during the project.

In this particular case, I addressed the client's goal by ensuring that they'd get good work because we had a process for getting good work done. I addressed their actual concern. And presented my own plan. And they were open-minded enough to listen to it, and I managed to convince them their goals would be better met with my plan than theirs. Just as importantly, I followed up by achieving that goal.

Now should a client immediately step off the minute you announce you have a process? I'd be surprised if they did. You need to sell. When a client hires you they are hiring your process as well, but you need to sell them on that process as the reason you do good work. And that needs to be done as part of the hiring process, not after.

"If we're going to work together, here's how it's going to work."

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You're not going to ask for permission to do things your way. You're going to convince clients that your way works by showing them how you will use your process to meet their goals. And you'll back this up by showing them how many times it's worked in the past. And every time you manage to do this you'll have yet one more example to make your case. Making the next time you have to do this that much less scary.

Our process works. So will yours. If you stick to it. And fight for it.

## WHY COMPANIES ATTEMPT TO BREAK YOUR PROCESS

Companies love talking a studio out of the process that got them to hire them. Which is akin to signing Roy Halladay and then asking him to play the outfield. (Yes, it's a baseball metaphor—I'll walk you through it.) Roy Halladay is possibly the greatest pitcher of his generation. He'd be a terrible outfielder. But imagine some VP in the organization decided that since they'd just sunk a lot of money into signing him, they'd better get the most use out of him. So they should put him at a position that plays every day, instead of having him pitch. (Starting pitchers go once every five days.) In this metaphor baseball is standing in for design and the stupid VP is still the stupid VP.

So why would someone do this? Anxiety. Anxiety about having spent the money. Anxiety about needing to see what they perceive as “results” as soon as possible. Anxiety at having made the wrong decision. And ultimately, anxiety about their own job security should they have made the wrong decision in hiring you.

When people get anxious they fall back into the terrible habits that make up their comfort places. And, by definition, problem solving and innovation don't happen in our comfort places.

Throughout a project you may have to remind a client multiple times that they agreed to follow your process. And throughout a project you will have to convince a client that

your process is actually on target to get them the results they need.

There will be hand-holding. There will be tough love. But above all, you will have to stand your ground and stick to what you know works. You will also need to be flexible enough to alleviate a client's anxiety without putting the project in jeopardy. A good process, like a building built on a fault line (like the one I'm writing in right now!) is built to give enough so that it doesn't break.

## HOW COMPANIES ATTEMPT TO BREAK YOUR PROCESS

A short selection of popular favorites.

### **Start drawing (solving) before you fully understand the problem**

This is a no. The anxiety here comes from a basic misunderstanding that they hired you to design and design is pictures. They're not sure why you're doing this other stuff. And if you've ever walked into a visual presentation and said, "Today we're finally going to look at design!" you're part of the reason this problem exists, so stop blaming your clients. You need to start every project with an explanation of what designing something looks like. And how all the pieces fit together. And the minute you start putting "pictures" in front of people, you're going to have to address their reactions to those pictures. Don't put yourself in a position where you have to defend either your own work or their reaction to it before you have the research to know whether it's right or wrong.

### **Work out of order**

You know what the least important page of a website is? The home page. More likely than not it's a one-off template, it doesn't expose enough of the navigational system, and quite often it's more controlled by the needs of marketing than the

site's users. Yet this is the page clients want to see the most. I often describe it as building the roof of the house first and then letting it sit until we go back and build the walls.

I hate starting with the home page. However, I've found that until clients see it we can't get their attention on anything else. So, we give them a home page. And while they debate its merits we get cranking on the rest of the site. We bend, but we don't break.

### Try to do your work for you

The most common instance of this, by far, is "We've already done a lot of research. So we can just hand it to you and skip that whole phase." And yes, seeing that research will be helpful, but it doesn't take the place of us having to do our own. The point isn't to do research—it's to understand. It's not a checklist item that we're happy to allow someone else to cross off.

The second most common instance is clients developing competing visuals. That's a deal breaker. Never put yourself in a situation where you're competing to solve a problem you've been entrusted to solve. Plus, you need the room to try things that may or may not be right without the cavalry being called in.

I love competing to get work, but once I get it, it's mine. The competition is over.

### Control or block your access to people

Welcome to the world of internal dysfunction. Bob is your client and Bob is in a power struggle with Mary, but you need to get information from Mary to do the job, but Bob doesn't want you to talk to Mary because he's afraid he'll look weak, or he doesn't want Mary to know what's going on. There's no way this ends well. Have a talk with Bob before the project starts. Make sure he knows that you will need direct access to people to do the project. If he hesitates, figure out what the problem is; perhaps Bob just wants to make sure he's in the room when you talk to certain people.

But if Bob isn't willing to give you access to other people in the company, that's usually a sign of a bigger problem. Like perhaps the project isn't really that important to the company, or he doesn't have the support he needs to carry the project to fruition.

## Rush

I love having a sense of urgency around a project. But certain things will take the time they will take. The popular saying is that you can't throw nine women at a baby and get it in a month. (I have tried this, and it is true!) Rushing leads to stupid mistakes, like launching a site filled with lorem ipsum (not that anyone's ever done that of course). What's worth doing is worth doing well, and even while working in an urgent manner, details must be looked after and quality needs to stay at a high level.

And I guarantee you that the client who wants to rush the most is the same one that spent a month or more waffling to sign the job.

## Waffle over decisions

Nothing derails a project faster than waffling over decisions, whether it's taking too long to make a decision, or revisiting decisions that have already been acted on. You either have a team sitting on their hands waiting, or a team working backward to unravel what they've made.

You can protect yourself against this by making sure your client understands the repercussions of waffling. Everything on a project has a cost associated with it. Be it time or money or both. Clients hate wasting time and money, and in many cases don't have the resources or authority to get more of either. So when asking them to make a decision, make sure to also tell them the cost associated with it.

"If we get an answer to this by Wednesday, then we can move forward and meet the Friday deadline. But anything beyond a decision by 6 p.m. will push us to Monday, and move

all the subsequent deadlines out as well. Which means we'll need budget for an extra four days of work."

Obviously, you want to tailor that statement to the situation. Don't pull out a battle ax when a reassuring tap on the shoulder is enough. Just make sure your client understands that there's no magic trick that allows for 120 hours of work on the last week of the project.

You can do a lot to show a client how valuable time is in how you comport yourself throughout the project. Run your meetings and work sessions efficiently. Come in prepared. Don't run over. Don't hang out. Don't train clients to think you've got extra time on your hands. As far as they're concerned, you scoped twelve weeks for this project, there was one right before it, and there's another one right after it.

Waffling endangers that valuable precious resource.

### **Ignore project goals in favor of organizational politics**

"Because the CEO said so." Every project is subject to one or two peccadilloes from a higher up that make absolutely no sense to anyone. This is a matter of picking your battles. Some of their requests will have absolutely no effect on the overall experience or success of the site. Some of them can be devastating. One CEO demanded that the site contain a photo of a particular local landmark so users knew where they were located. This was of utmost importance to him, and relatively easy to accommodate. (It's on his bio page, by the way.)

A lot of organizational politics are a consequence of people not feeling heard. This is why you should aim to include as many people as possible in kickoff meetings. Even if they're ultimately not part of the project team, give them an opportunity to be heard. You'll find out useful information that your main contact might have assumed you didn't need to know. You can also learn a lot from who your contact attempts to omit from such meetings.

Ultimately your client may ask you to do something on the project that's detrimental to the project's goal because they've been told to do it, and they're understandably unwilling to defy a higher up's request. You need to be willing to take that

bullet. After all, you don't have to work with these people beyond the project. You can push them a little harder. And you need to be willing to have difficult conversations within the organization that your main client may be unwilling or unable to have.

### Try a new trendy way of doing things

As a designer it's your job to differentiate between innovation and a trend. And to get your client to strive for the former while ignoring the latter. You can usually do this by pointing them to the last big trend that's just started backfiring and enjoying a moment of awkward laughter together.

And please, let's all stop with those ridiculous wrap-around banners. Enough already.

## HOW YOU CAN ASSURE YOUR CLIENT THINGS ARE GOING WELL

At the risk of sounding like a broken record (ask your parents), stay in good communication with your clients at all times. They will accept your process as long as you are showing them results. Make sure to set their expectations correctly as to what is happening when. And once they happen let them know you're on track.

Should they get off track make sure to communicate that as well. How you handle the communication of something going badly and how quickly you can implement a plan for getting back on track is ultimately more important than going off track to begin with.

A good client will trust your process as long as they have transparency into it, can see results, and you're willing to bend a little here and there. Without breaking.