

ELEMENTS OF CREATING EFFECTIVE PRESENTATIONS

CREATE THE STORY

~ RELATE YOUR WORK TO THEIR BUSINESS~

INTRODUCTION

~ BE CONFIDENT ~

~ CONVEY ENTHUSIASM ~

REVIEW CREATIVE BRIEF

~ REHEARSE ~

~ IT'S NOT ABOUT YOU ~

~ BE HUMBLE~

~ PRACTICE ~

SET EXPECTATIONS

~ REAL WORDS~

~ STAY UNOFFENDED ~

~ BE ON TIME ~

SHOW & TELL [BENEFITS]

~ TAKE NOTES ~

~ BE PROACTIVE~

~ YOU ARE THE EXPERT ~

~ ANTICIPATE ISSUES ~

SOLICIT FEEDBACK

~ BE OPEN~

~ PREPARE EQUIPMENT~

TEST UNDERSTANDING

~ SPELL CHECK~

CONCLUSION

~ MATCH DESIGN WITH CLIENT GOALS~

NEXT STEPS

THE KEY TO MAINTAINING GOOD DESIGN
AND NOT HAVE YOUR CLIENT WRECK IT
IS IN HOW YOU PRESENT AND
COMMUNICATE YOUR WORK.

HOW DO YOU TALK THROUGH YOUR
DECISIONS EFFECTIVELY AND STEER CLEAR
THOSE AWKWARD FEEDBACK CLICHES?

YOU SIMPLY NEED TO PRESENT YOUR
WORK IN A CLEAR AND EFFECTIVE WAY

EFFECTIVE PRESENTATIONS, EVEN CASUAL DESIGN REVIEWS,

● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●
● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●
● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●
● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●

SHOULD BE A STORY

You need to take your audience through your design journey, and touch upon some of the highs & lows of what made your work what it is today

SO, WHETHER IT'S A CASUAL PITCH TO
YOUR BOSS, OR A BIG PRESENTATION TO
YOUR CLIENT — HERE ARE SOME TIPS TO
MAKING A GREAT PRESENTATION

1

**You're in charge
of this meeting,
don't forget it.**

INTRODUCE YOUR PRESENTATION

**Never start out a
presentation with
an apology!**

- START THE MEETING BY THANKING YOUR CLIENT FOR THEIR TIME
- SET EXPECTATIONS
 - *Set the stage properly – let the audience know they are an important part of the conversation.*
 - *Define the goal of the meeting – why they are there.*
 - *Explain what your audience is about to see.*
 - *What they've seen before ...*
 - *What you hope to get out of the presentation.*

1

A GOOD IDEA ...
*Start with the last
design they saw,
or the existing
product.*

INTRODUCE YOUR PRESENTATION

- LET YOUR CLIENT KNOW WHAT STAGE OF THE PROJECT YOU'RE IN
- GIVE A SHORT (30 SEC) RECAP
 - *A quick reminder about the project brief.*
 - *How you approached the problem.*

2

**A lot of creatives
aren't great
public speakers.**

HAVE CONFIDENCE

**And it can seem
like a nightmare.**

- CONFIDENCE ...
- *Refers to having confidence in the work you are presenting.*
- *If you have confidence that your designs are answering the brief – Your clients will too!*
- *Chances are nobody understands the creative brief as well as you do, so it is important for you to communicate that to your audience.*

“ Your confidence will reassure your client that what they’re seeing isn’t guesswork, instead, it’s the product of a considered professional approach. ”

3

— *Response Example* —
**THIS IS THE KIND OF
FEEDBACK I AM
LOOKING FOR TODAY!**

— *Feedback ? Example* —
**DOES THIS
REFLECT YOUR
BRAND?**

EXPECT FEEDBACK

— *Feedback ? Example* —
**DOES THIS REFLECT YOUR
CUSTOMER'S NEEDS?**

- GUIDE THE FEEDBACK LOOP
- *Most clients have absolutely no idea what kind of feedback you're looking for – And there's no reason why they would.*
- *They do not do this every day. They don't have the training that you do. Nor do they need it, because guiding them towards the right type of feedback is part of your job.*
- *(Anything that helps you do your job is part of your job.)*
- *Know what you want before you call the meeting, and then guide the meeting toward that goal.*

3

**A GOOD
PRESENTATION IS
A TWO-WAY
CONVERSATION.**

EXPECT FEEDBACK

**YOU SHOULD
EXPECT IMMEDIATE
FEEDBACK.**

- THE KEY TO HANDLING FEEDBACK IS ...
 - *Be proactive – expect awkward feedback.*
 - *Anticipate issues that keep coming up in reviews. (such as “Why is the logo so small?”)*
 - *Address potential feedback head on – before they ask it.*

— *Response Example to Logo Question* —

“ We started out by making the logo nice and big. Admittedly it looked cool — but after a bit of back and forth, it became apparent that a big logo made the navigation almost impossible to read. So, we kept it as big as possible without compromising accessibility. ”

If you are honest, confident and assure your client their opinion has been deeply considered, you are far less likely to be immediately shot-down.



WHEN PRESENTING YOUR WORK,
TALK ABOUT IT IN TERMS THAT
RELATE TO THEIR BUSINESS.

Of course, your feedback loop is only complete if you actually discuss or cover the issue in your presentation.

TALK ABOUT HOW THE DECISIONS YOU
MADE AS THE DESIGN EXPERT MATCH
UP TO THE GOALS OF THE PROJECT.

4

DON'T GET DEFENSIVE

**There's a difference
between defending
the work and
getting defensive.**

- YOU ARE NOT YOUR WORK.
- AND YOUR WORK IS NOT YOU.
- IT IS NOT AN EXTENSION OF YOU.
- AND IT IS NOT YOUR PERSONAL EXPRESSION.
- IT IS WORK PRODUCED TO MEET A CLIENT'S GOALS.

4

DON'T GET DEFENSIVE

There's a difference
between defending
the work and
getting defensive.

- WHEN THE CLIENT STARTS TO CRITICIZE YOUR WORK:
 - *Listen to what they are saying.*
 - *Don't feel you have to defend ALL their decisions right in the presentation.*
 - *You need not promise them anything right then – It's perfectly fine to say, "That's interesting feedback. Let me think about it."*

5

USE REAL WORDS

DON'T AIM TO
IMPRESS WITH DESIGN
TERMINOLOGY THAT
ONLY WILL CONFUSE.

— “Word Salad” Example —

“We wanted to encourage advocacy and activate the audience by giving them a compelling social experience.”

— Clear Specific Example —

“We wanted a way to give visitors an easy way to share your content, so we made the social sharing tools, like Twitter and Facebook really prominent.”

5

**FIND THE STORY
AND TELL IT.**

USE REAL WORDS

**PEOPLE BASE THEIR
CHOICES ON
STORIES. IT'S NOT
ALWAYS RATIONAL.**

- *Avoid design jargon and buzzwords. It can confuse your client.*
- *Keep it simple.*
- *Keep it understandable.*
- *Don't put your audience to sleep with too many technical details. When their eyes glaze over, or they start to look at their watch or text on their phone, they aren't engaged.*
- *Paint the picture of how your solution matches the project goals – talk about the benefits!*

6

**ADMIT IF YOU
DON'T KNOW.**

KNOW WHY

**YOUR CHOICES
SHOULD NOT BE
RANDOM.**

- HAVE ANSWERS FOR WHY YOUR DESIGNS LOOK THE WAY THEY DO – SUCH AS:
 - *Choice of typeface*
 - *Color palate*
 - *Always explain the motivation for your choices.*
- IN EARLY DEVELOPMENT WORK:
 - *Often you may not have an answer yet.*
 - *This is an opportunity to discuss solutions.*

7

CONCLUDE YOUR PRESENTATION

- THE END OF YOUR PRESENTATION IS THE SEGWAY INTO THE NEXT STEP IN THE PROJECT
- WHEN YOUR LAST DESIGN IS DISCUSSED:
 - *Give a quick summary highlighting the key points – bullet point style.*
 - *Summarize the feedback given in the presentation.*
 - *Explain what you are going to do next.*
 - *This reassures your client you've been listening and you will keep your momentum. It sets the expectation for your next presentation.*



**RESIST ANY URGE TO
SIMPLY EMAIL YOUR
PRESENTATION
TO YOUR CLIENTS**

**THE WORSE THING
YOU CAN DO IS TO
ALLOW YOUR CLIENT
TO SEE YOUR DESIGNS
ON THEIR OWN**

- *When your work is presented without your guidance, it is out of context and the feedback is largely going to be aesthetic and based on your client's own personal preference.*
- *Clients aren't stupid, but most likely they are not designers either.*
- *They won't immediately understand the hierarchy and page structure in relationship to their logo, or particular color preferences etc.*

THINGS TO
CONSIDER

DO MORE THAN JUST
DELIVERING VISUALS

— *Example* —

Find the Intangible Motivations Why to Buy

“Imagine you are designing a concert hall website. What this website needs to communicate is not only timetables, locations, wayfinding or agenda. This site is also meant to convey the feeling that people will have a good time with artists they like.”

**Don't be afraid to show
one option if others
are weak.**

THINGS TO CONSIDER

**The value of your
work is its quality,
not its quantity.**

- YOUR JOB IS TO FIND THE BEST SOLUTION TO A GIVEN PROBLEM
- THE CLIENT HIRED YOU TO MAKE THE TOUGH CHOICES
 - *If you have more than one good solution, go for it – sometimes you risk ending up with a blend – so plan for defending each concept as a stand-alone.*
 - *If you decide to present only one option, it doesn't mean you didn't explore other options, it means you've chosen the most appropriate solution – the one you really believe in.*

LEARN TO SAY NO.

THINGS TO CONSIDER

**DON'T BECOME A
"PRIMA DONNA."
NOBODY LIKES TO WORK
WITH BIG EGOS – STAY
OPEN AND HUMBLE.**

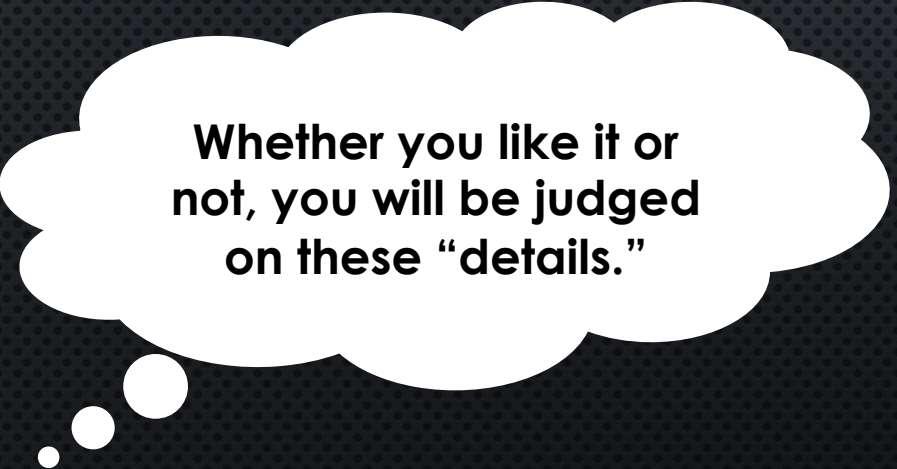
- THE MAXIM ... "THE CLIENT IS ALWAYS RIGHT" IS AN OUTDATED MOTTO.
- THE CLIENT IS NOT ALWAYS RIGHT.
- YOU'RE NOT EITHER!
 - *When asked to do something that will decrease the quality of the project, politely explain why it's a bad idea and why you don't want to do it.*
 - *Your goal is to make the project work for the target audience.*

BE DEMANDING ON YOURSELF

Whether you like it or not, you will be judged on these “details.”

- BE ON TIME – ALWAYS.
- PROOF-READ YOUR TEXTS.
- TAKE CARE OF YOUR APPEARANCE.
- PRACTICE & TIME YOUR PRESENTATION.
- SPEAK WITH ENTHUSIASM AND PROJECT YOUR VOICE.
 - *A monotone voice will put your audience to sleep fast.*
 - *Build excitement and build crescendo.*
 - *Show your passion for your design.*

PLAN AHEAD



Whether you like it or not, you will be judged on these “details.”

- MAKE SURE YOU HAVE ALL YOUR EQUIPMENT!
 - *USB cables, power supplies, video cables, etc.*
 - *If you are using some else’s computer, remember fonts don’t always render the same on foreign computers.*
- IF POSSIBLE, HAVE A COLLEAGUE TAKE NOTES.
 - *Post your notes for the client to review after the meeting to test the understanding of what was discussed.*

ORGANIZING CREATIVE



**Build Intentionally
Designed Slides to
Support the Story**

- INTRODUCE DESIGN SPECIFICATIONS. (A.K.A. BRAND BOARD)
- GROUP SIMILAR ITEMS.
- ALWAYS USE HIGH-RES IMAGES.
- SHOW DIGITAL PROTOTYPES.
- CONVEY YOUR DESIGN RATIONAL IN RELATION TO HOW IT WILL EMOTIONALLY APPEAL TO THEIR CUSTOMERS.

ORGANIZING CREATIVE

- IF THIS IS A RE-BRAND: SHOW WHAT THE PRODUCT OR PACKAGING LOOKED LIKE BEFORE.
- CONTRAST THAT WITH DIGITAL PROTOTYPES OF YOUR PROPOSED DESIGN.
- SHOW PRODUCT GROUPING OR A COMPOSITE OF ALL PROPOSED DESIGNS IN ONE PANEL TO SHOW THE STRENGTH OF THE NEW BRAND IDENTITY.
- IF YOU HAVE OTHER IDEAS FOR MERCHANDISING SHOW THOSE IDEAS.

STYLING YOUR PRESENTATION

- CUSTOMIZE YOUR POWERPOINT DECK TO REFLECT & COMPLEMENT THE BRAND IMAGE .
(EX. COLORS, FONT, TEXTURES)
- USE ANIMATIONS WHERE IT WOULD HELP HIGHLIGHT IMPORTANT ASPECTS OF YOUR DESIGN.
- USE SLIDE TRANSITIONS – MINIMALLY BUT EFFECTIVELY.
- LAYOUT YOUR SLIDES UNIFORMLY.
- ELIMINATE ANY WIDOWS!
(A BIG ISSUES WITH POWERPOINT–USE SOFT RETURNS)
- SPELLCHECK.

STYLING YOUR PRESENTATION

- INCLUDE A TITLE SLIDE:
TITLE, NAME, ORGANIZATION, DATE OF PRESENTATION
- INCLUDE A HIGH-LEVEL BULLETED LIST OF WHAT YOU ARE GOING TO SHOW & TELL.
- USE CHARTS AND OR INFO GRAPHS IF IT HELPS TO COMMUNICATE IMPORTANT DATA THAT SUPPORTS YOUR BRAND STRATEGY.
- CONSIDER USING SECTION SLIDES.
- INCLUDE AN END SLIDE.

TALK ABOUT THE STORY OF YOUR DESIGN



**Build Intentionally
Designed Slides to
Support the Story**

- TELL YOUR BRAND STORY IN RELATION TO THE VALUES THE CLIENT'S BUSINESS EVOKES AND HOW YOUR DESIGN WILL MEET THE GOALS OF THEIR BUSINESS OBJECTIVES OUTLINED IN THE DESIGN BRIEF.
- SHARE HOW YOUR DESIGN CHOICES HELPED DEVELOP THE BRAND DURING THE DESIGN PROCESS.
- CONVEY YOUR DESIGN RATIONAL IN RELATION TO HOW IT WILL EMOTIONALLY APPEAL TO THEIR CUSTOMERS.

TALK ABOUT THE STORY OF YOUR DESIGN

Tell the story with digital prototypes and prepare the narrative that reflects the intention of your design

- ANTICIPATE QUESTIONS AND PREPARE RESPONSES FOR COMMON QUESTIONS SUCH AS “WHY DID YOU PICK A PARTICULAR COLOR?” — “WHY IS THE LOGO SO SMALL?”
- SHARE HOW YOUR DESIGN CHOICES HELPED DEVELOP THE BRAND DURING THE DESIGN PROCESS.
- CONVEY YOUR DESIGN RATIONAL IN RELATION TO HOW IT WILL EMOTIONALLY APPEAL TO THEIR CUSTOMERS.
- TALK ABOUT HOW THE ENTIRE BRANDING TOGETHER WILL MAKE AN IMPACT.

5 TIPS ON HOW TO PREPARE A PRESENTATION TO A POTENTIAL CLIENT

1. DESIGN WITH QUESTIONS IN MIND

- *Every design decision you make has to be driven by rationale — and reasons to support it.*
- *When you approach design projects this way, you solve two important problems: 1) Your designs become functional, not just eye pleasing; 2) You have an answer ready when your client pops the question.*

2. SHOW YOUR STORY

- *It's important to show your effort by presenting snapshots of your work in various stages, from initial sketches to final designs, before showing the final design solution.*

3. CREATE REALISTIC 3D MOCKUPS

- *3-dimensional graphics help us believe something is live, tangible, already there, even when we know it's only an image on our screen.*

4. EXPLAIN YOUR DESIGN

- *Clients love to hear designer's thought process, or why things were made a certain way.*
- *Keep it short, to the point and avoid stating the obvious.*

5. LISTEN CAREFULLY

- *Be attentive and consider all questions, comments and concerns carefully and with an open mind.*

5 TIPS ON PRESENTING YOUR DESIGN TO A POTENTIAL CLIENT

1. DESCRIBE THE CHALLENGE

- *What was the initial objective?
What about this brand was in need of a design solution?
Stating these goals, even if known to the client,
frames your work in a problem-solving context.*

2. DOCUMENT THE PROCESS

- *What were some of the decisions you made that were second nature to you but impacted the end result nonetheless? Stop, think about how you're thinking, and document it. Here are some ideas about the process you might want to share:*
 - Competitors you audited.
 - Customer insights you considered. Share direct quotes whenever possible.
 - Mood boards you put together – no matter how rough.
 - Sketches you went through –even if low fidelity.
 - Aesthetic or material culture references.
- *Start seeing yourself as a visual storyteller and find the narrative in your work. Give voice to the quieter parts of your process; those that often go unmentioned.*

5 TIPS ON PRESENTING YOUR DESIGN TO A POTENTIAL CLIENT

3. USE ENGAGING VISUALS

- *Context is the name of the game. How can you best help your client visualize what this concept can do for their brand? Realistic scenarios tell the customer “what’s in it for them”, going beyond flat artwork and into the realm of market applications.*
- *Static and animated mockup templates can save you time when designing compelling visuals. They allow you to place your artwork in realistic scenes by editing Photoshop Smart Objects.*

4. MAKE IT MEMORABLE

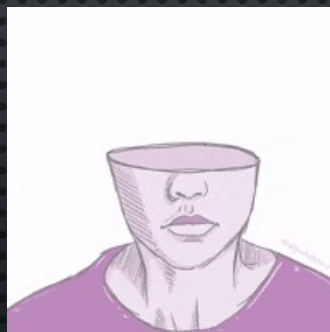
- *Designer Louise Filli says she serves gelato when clients come in for an initial design review. She claims ...
“It never fails to put everyone in an extremely good humor.”*
- *Even if you don’t get a chance to meet in person, think of your “gelato effect”. What is that unexpected little treat that will get attendees in the right mood? Even remotely, physical artifacts are not out of the question. Could you mail them in advance?*

5. BE DILIGENT ABOUT FEEDBACK

- *Sharing work with clients shouldn’t feel like a monologue – active listening goes a long way in persuading them about your concept. This seemingly small act shows your audience that you care about their feedback.*
- *When and/or if there’s a refined version of the concept to submit, including insights from these notes is key to effective client-designer communication.*

FINI

*This presentation is over...
but your journey is just beginning.*





RESOURCES

[HTTPS://MONTEIRO.MEDIUM.COM/13-WAYS-DESIGNERS-SCREW-UP-CLIENT-PRESENTATIONS-51AAEE11E28C](https://monteiro.medium.com/13-ways-designers-screw-up-client-presentations-51AAEE11E28C)

[HTTPS://MEDIUM.COM/@BUZZUSBORNE/A-DESIGNER-S-GUIDE-TO-GREAT-CLIENT-PRESENTATIONS-3FDB9871696B](https://medium.com/@buzzusborne/a-designer-s-guide-to-great-client-presentations-3fdb9871696b)

[HTTPS://MEDIUM.COM/@LORISKUMO/THE-ART-OF-CLIENT-PRESENTATIONS-5DA87DCA25EC](https://medium.com/@loriskumo/the-art-of-client-presentations-5da87dca25ec)

[HTTPS://99DESIGNS.COM/BLOG/TIPS/5-TIPS-ON-HOW-TO-PREPARE-A-DESIGN-PRESENTATION/](https://99designs.com/blog/tips/5-tips-on-how-to-prepare-a-design-presentation/)