

Putting on the Client's Hat

Compelling, Client-Focused Content Meets Page Architecture™

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SINCLAIR
& ASSOCIATES

Nancy Webb  Nancy Webb
graphic design™



Training Day

October 24, 2014

Our Objective

Introduce tools and techniques to make your proposals, and other business communications, more clear and responsive.

- **Identify unstated information requirements by**
 - becoming more client-focused
 - understanding the communication process

- **Create pages that support and enhance your message by**
 - understanding visual (vs. verbal) communication
 - communicating effectively through Page Architecture™



What makes a proposal a *winning* proposal?

A winning proposal is:

- Compliant
- Well written, presented, and organized
- Convincing
- ***Client-focused***



What does it mean to be “client-focused”?

It means putting the *interests, values,* and *needs* of the client first.



Using these tools and techniques you will be better able to

- Identify your clients
- Understand their needs
- Understand their wants
- Understand their issues and concerns
- ***Convey your message within a context that the client can more fully understand and appreciate***



What is communication?

“Communication” comes from the Latin word meaning **“to share.”**



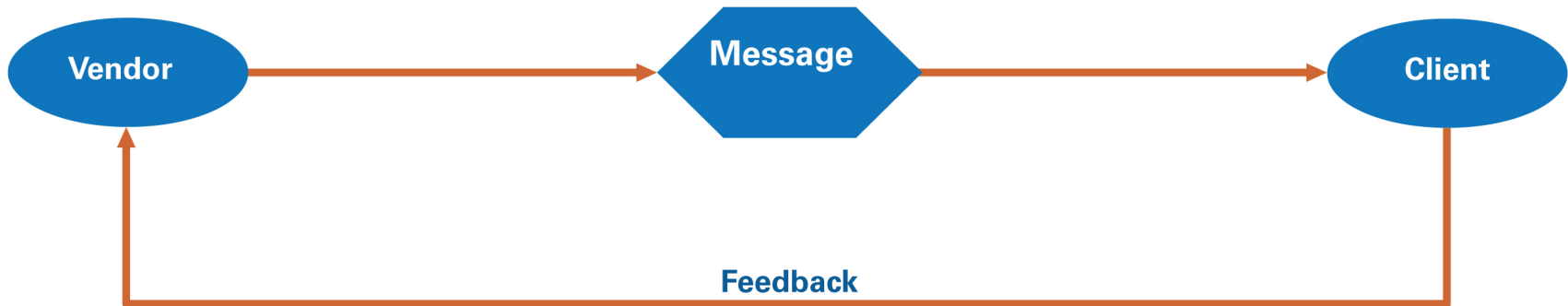
The Communication Process

Does your drawing look something like this?



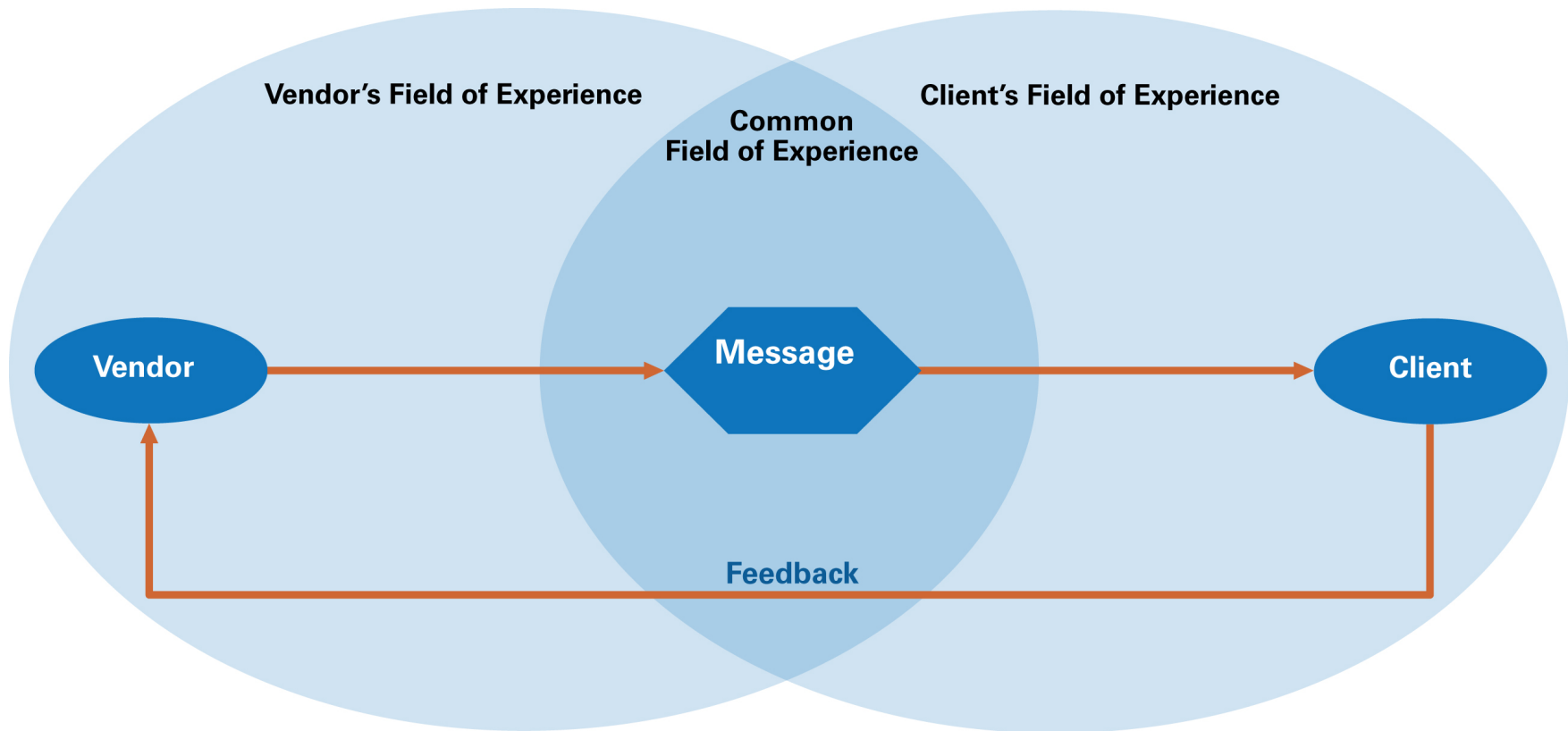
The Communication Process

Did you remember to close the feedback loop?



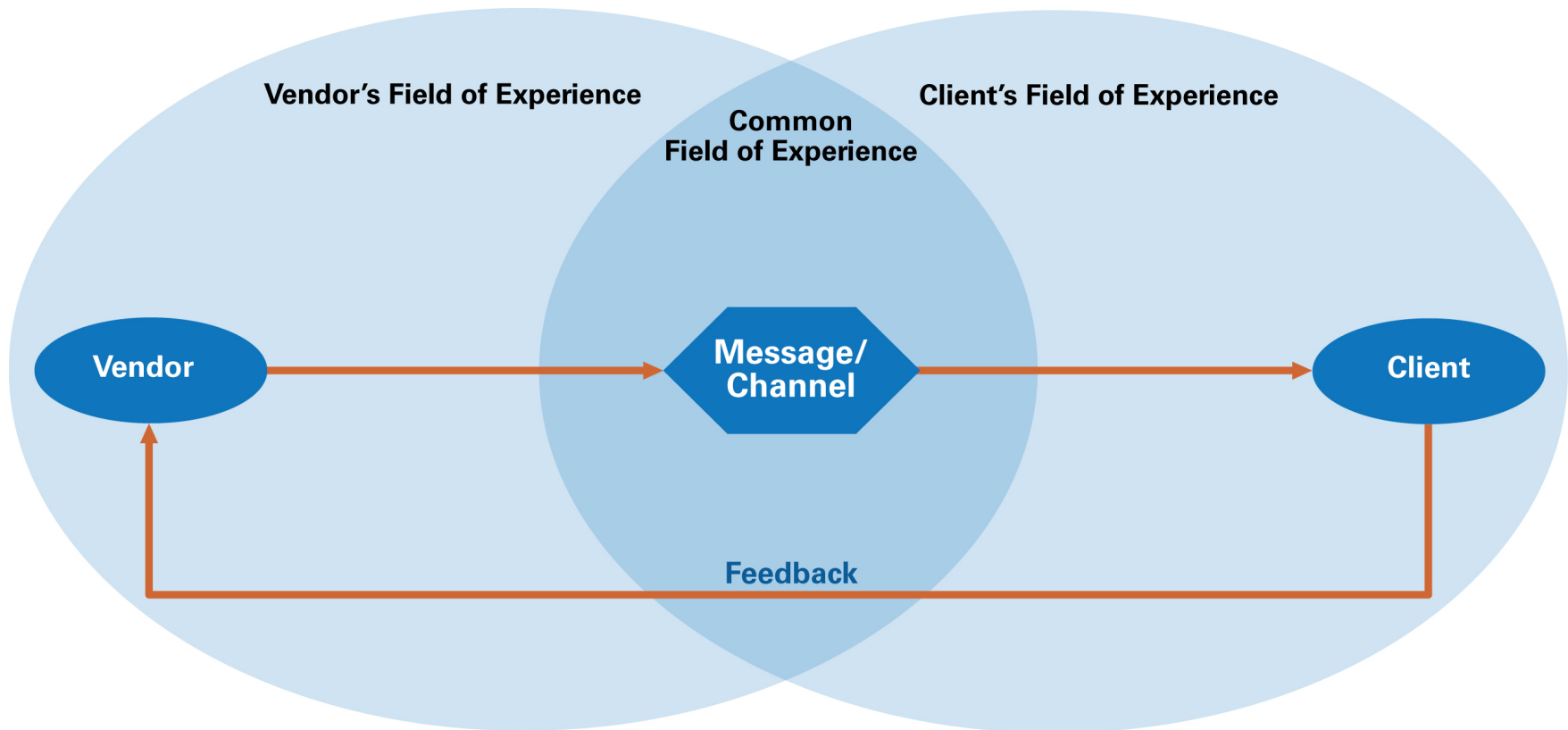
The Communication Process

This can only happen when all parties share common values and experiences, their **“fields of experience”**



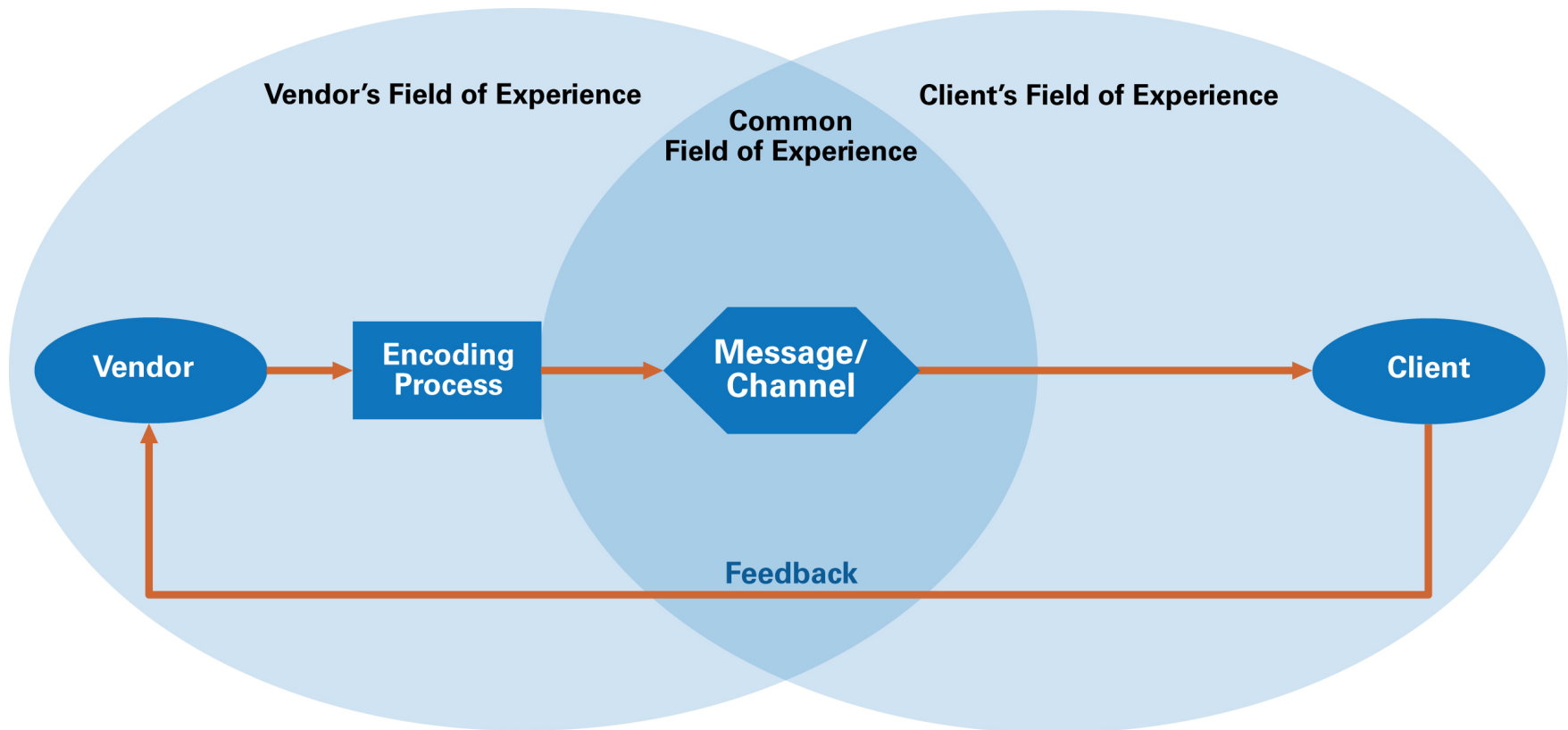
The Communication Process

The **channel** is the tangible vehicle for the message, whether printed, electronic, or verbal



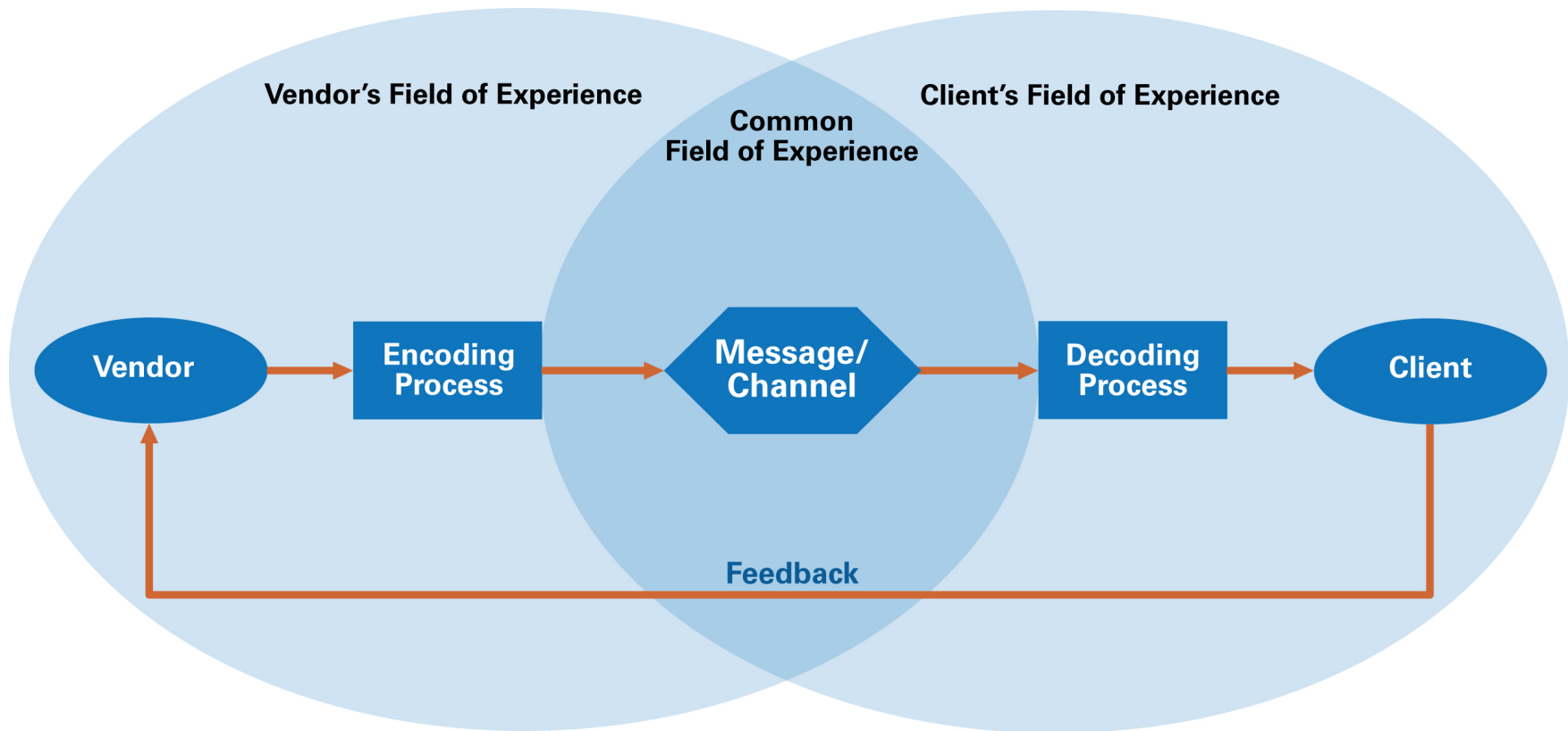
The Communication Process

Encoding means translating the message, within the common field of experience, to successfully communicate it to the client



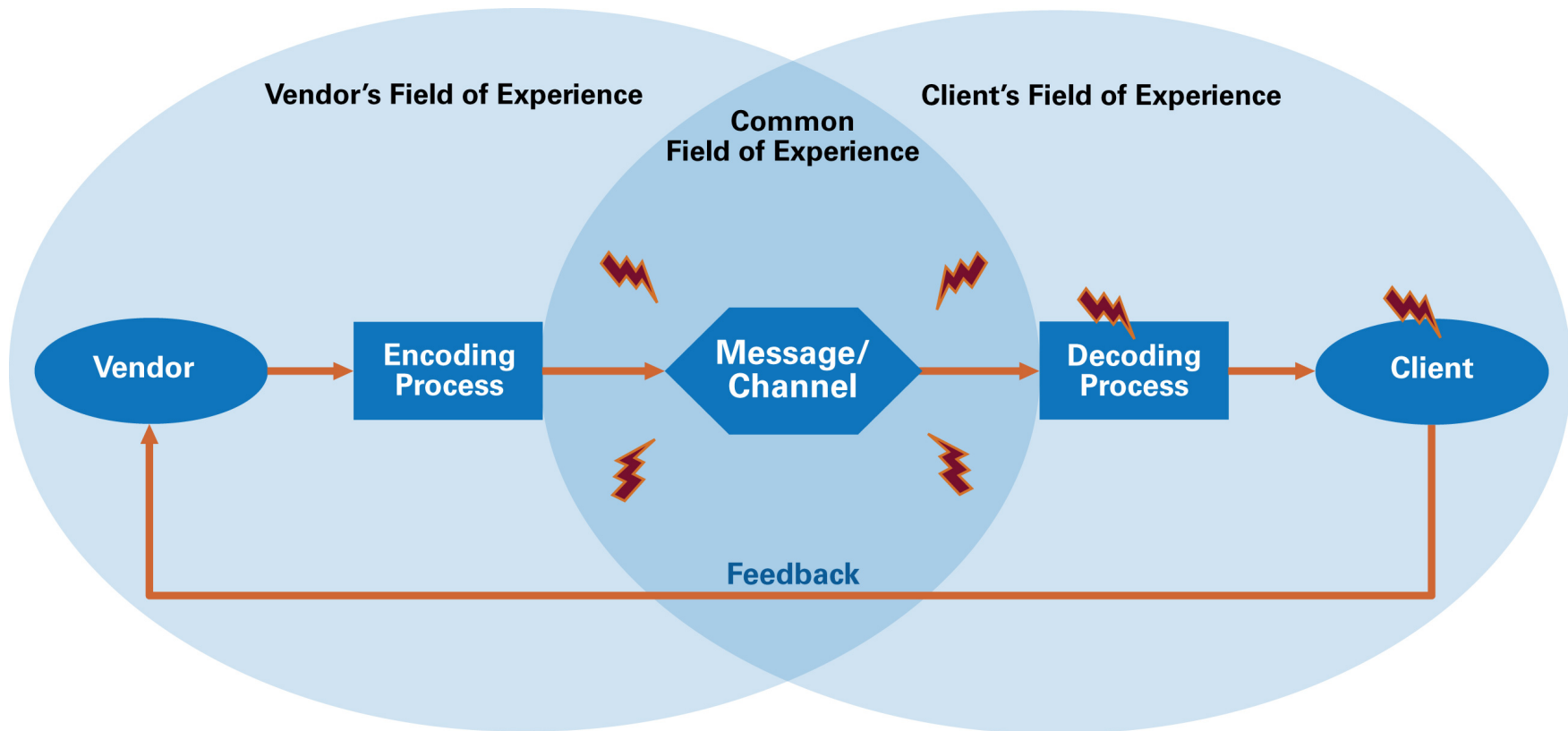
The Communication Process

The client then **decodes** what we have communicated



The Communication Process

Barriers to effective communication (“or noise”) can result in a breakdown or failure of the communication process.



Client focus + The Communication Process

How can we create a common field of experience with our client to more effectively share our message?

Focus more on

- Who the client is and what the client has told us
- Gathering competitive intelligence
- Analyzing what you know about the client's needs and wants
- Anticipating the client's needs and wants

By

- Listening to what your team members know about the client, the project, and the client's field of experience in this area
- ***Putting on the Client's Hat***



Let's start by thinking about who the client is

- The organization issuing the RFP
- The project stakeholders
- Their clients
- ***Everyone who will be affected by the outcome of the project***



Who are some of our clients in the following example?

A proposal to build a sports stadium in an economically depressed major city

- City government
- Taxpayers
- Conservation groups
- People who live in the area where the stadium will be built
- People whose livelihood depends on tourism



What will each of these clients be concerned about?

- **City government:** cost, funding, risk, jobs, tourism, safety, suitability, sanitation, subcontracting, building code compliance
- **Stadium management:** design, risk, building code compliance, garbage, sanitation,
- **City residents:** cost, funding, jobs, noise, traffic
- **Taxpayers:** cost, funding
- **Local residents:** noise, traffic, appearance, sanitation, crime
- **Local businesses:** tourism income, traffic



Stadium stakeholders: Issues / Requirements Matrix

Stakeholder	Cost	Risk	Funding	Jobs	Tourism	Safety	Design	Traffic	Noise	Code Compliance
City Gov.	X	X	X	X	X	X	X	X	X	X
Stadium Mgmt.	X	X				X	X	X		X
City Residents	X	X	X	X	X	X	X	X	X	
Taxpayers	X		X							
Local Residents	X		X	X	X	X	X	X	X	
Local Business				X	X			X		

By putting on the client's hat we can

- Identify and reduce barriers to communication
- Improve the communication context and environment
- Better enable the client to understand and appreciate our message
- ***More effectively share our message with the client***



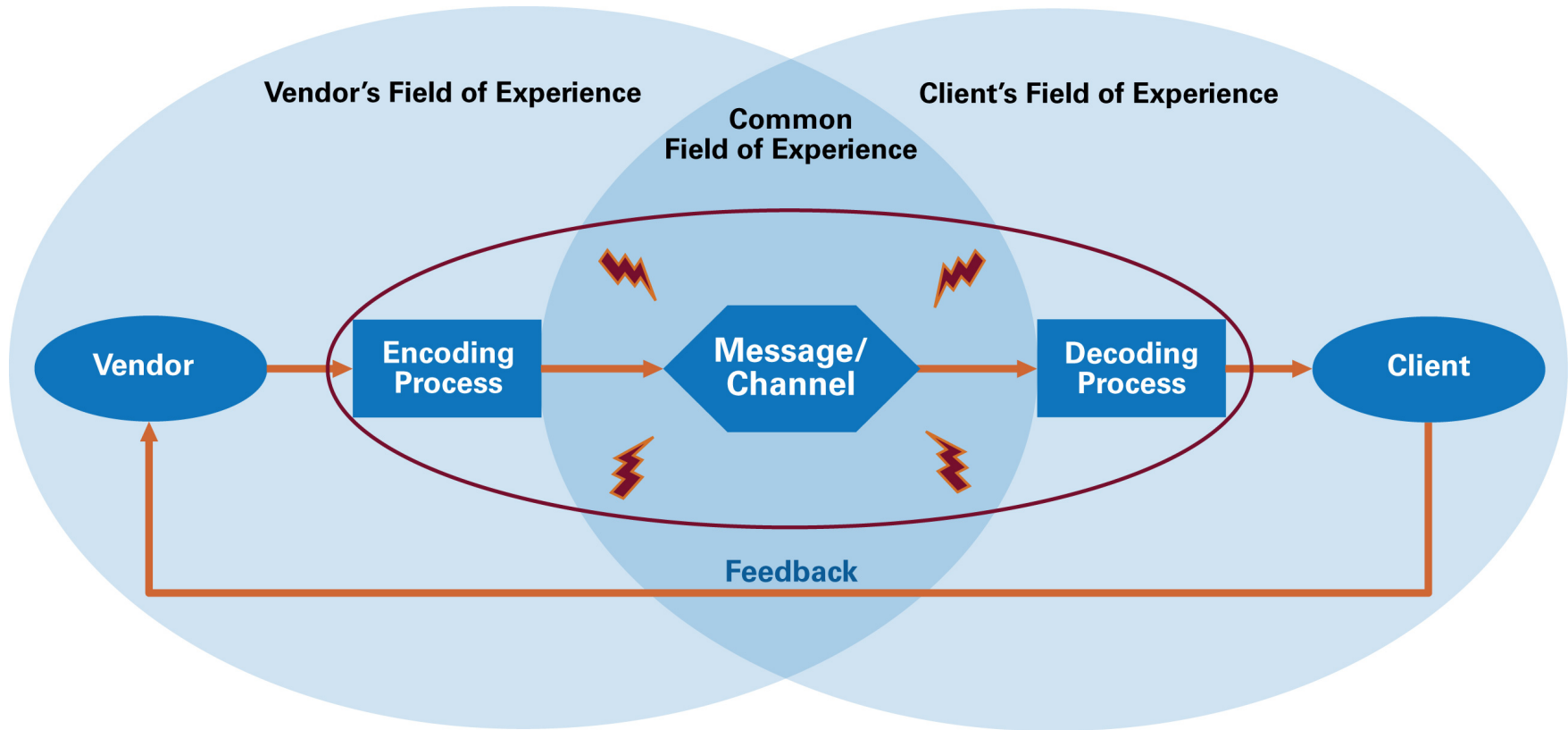
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The Communication Process



Visual vs. verbal communication: *The words*

- **Written words make you hear spoken words**
- **Visuals communicate viscerally**
- **Visual consistency clarifies content**

Talk **Talk** *Talk*

Visual vs. verbal communication: *The page*

Newspaper



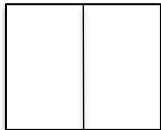
Brochure



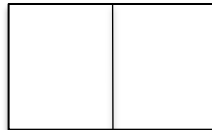
Spec Sheet



Annual Report



Textbook



White Paper

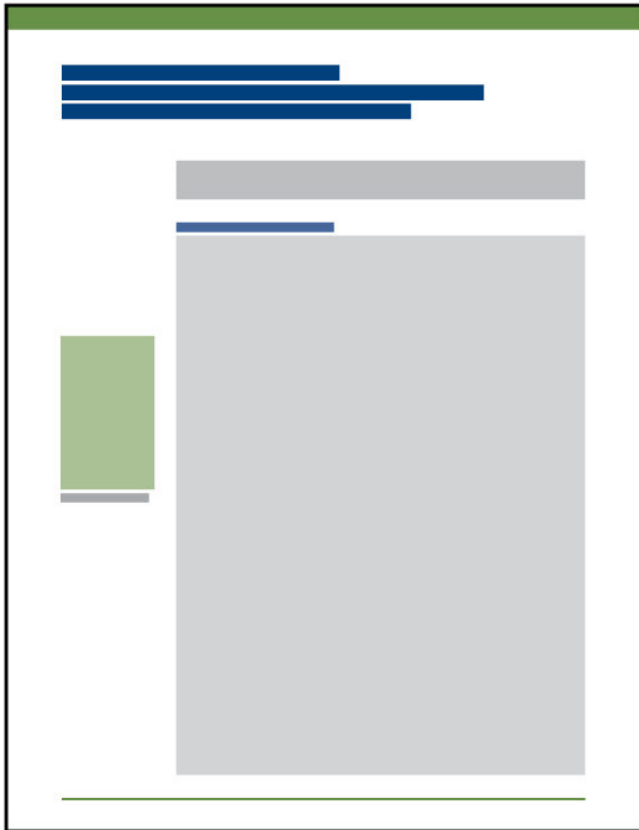


... Proposal?



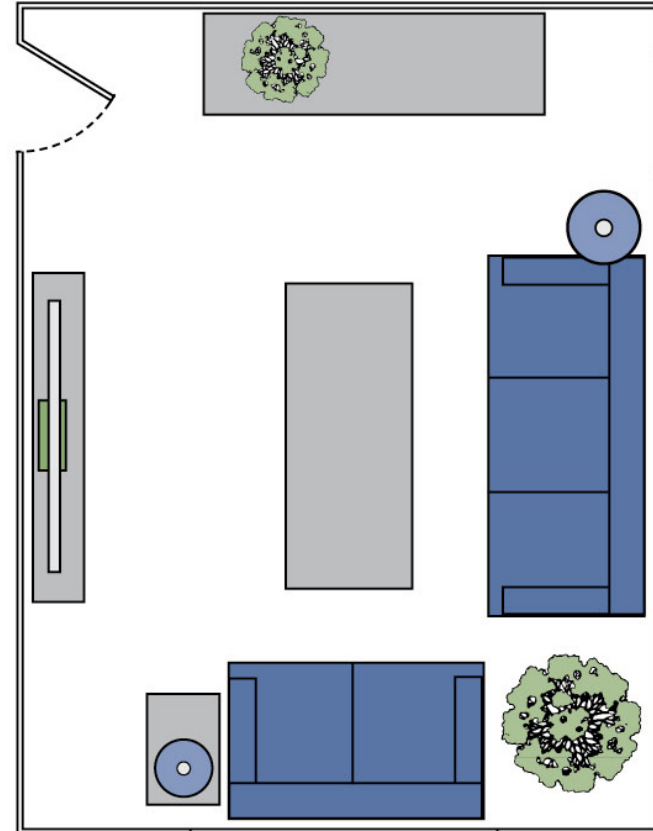
Page Architecture . . . ?

Eyes &
Brain
on a
Page




Feet &
Body
in a
Room

=



Page Architecture at work



The Department for
Occupational Health
and Safety

F01

**POWERED HAND TOOLS –
BASIC ELECTRICAL SAFETY**

SAFETY INFOGRAM

- INSPECT tools, power cords, and electrical fittings for damage prior to each use. Repair or replace damaged equipment.
- DO NOT WEAR gloves loose clothing or jewelry while using revolving power tools.


TOOLS

- SWITCH tools OFF before connecting them to a power supply.
- DISCONNECT power supply before making adjustments.
- ENSURE tools are properly grounded or double-insulated. The grounded tool must have an approved 3-wire cord with a 3-prong plug. This plug should be plugged in a properly grounded 3-pole outlet.
- TEST all tools for effective grounding with a continuity tester or a GFCI before use.
- DO NOT BYPASS the switch and operate the tools by connecting and disconnecting the power cord.
- DO NOT USE electric tools in wet conditions or damp locations unless tool is connected to a ground fault circuit interrupter (GFCI).
- DO NOT CLEAN tools with flammable or toxic solvents.
- DO NOT OPERATE tools in an area containing explosive vapours or gases.

POWER CORDS

- KEEP power cords clear of tools during use.
- SUSPEND power cords over aisles or work areas to eliminate stumbling or tripping hazards.
- REPLACE open front plugs with dead front plugs. Dead front plugs are sealed and present less danger of shock or short circuit.

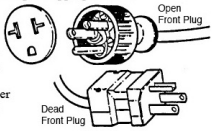
- DO NOT USE light duty power cords.
- DO NOT CARRY electrical tools by the power cord.



•DO NOT TIE power cords in knots. Knots can cause short circuits and shocks. Loop the cords or use a twist lock plug.

CHECKLIST

- INSPECT CORDS & PLUGS
 - Check power cords and plugs daily. Discard if worn or damaged. Have any cord that feels more than comfortably warm checked by an electrician.
- ELIMINATE OCTOPUS CONNECTIONS
 - Do not plug several power cords into one outlet.
- PULL THE PLUG, NOT THE CORD
 - Do not disconnect power supply by pulling or jerking cord from the outlet. Pulling the cord causes wear and may cause a shock.
- NEVER BREAK OFF THE THIRD PRONG ON A PLUG
 - Replace broken three-prong plugs and make sure the third prong is properly grounded.
- NEVER USE EXTENSION CORDS AS PERMANENT WIRING
 - Use extension cords only to temporarily supply power to an area that does not have a power outlet.
 - Keep power cords away from heat, water and oil. They can damage the insulation and cause a shock.
 - Do not allow vehicles to pass over unprotected power cords. Cords should be put in conduit or protected by placing planks alongside them.




Open Front Plug

Dead Front Plug

100 March Street, Hamilton, Ontario, D9M 7B9 ISSN 9999-1234 (416) 999-4321 Telex:000-1234

SAFETY INFOGRAM F01



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Basic Electrical Safety

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Pull the Plug, Not the Cord
Do NOT DISCONNECT power supply by pulling or jerking cord from the outlet. Pulling the cord causes wear and may cause a shock.

Never Break Off the Third Prong on a Plug
Replace broken three-prong plugs and make sure the third prong is properly grounded.

Never Use Extension Cords as Permanent Wiring
Use extension cords only to temporarily supply power to an area that does not have a power outlet.

Keep Power Cords Away from Heat, Water & Oil
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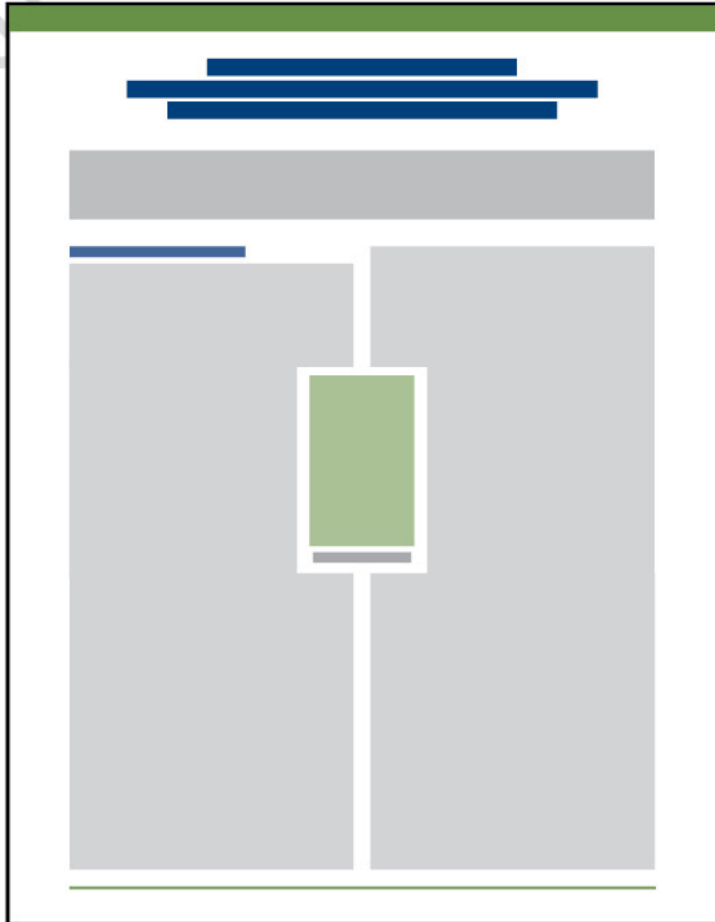
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The Department for Occupational Health and Safety 100 March Street, Hamilton, Ontario, D9M 7B9
ISSN 9999-1234 (416) 999-4321 Telex: 000-1234


Some basic building blocks & critical details

- **White (negative) space**
- **Scannability / Readability / Visual hierarchy**
- **Pattern / Meaning / Consistency**
- **Pacing**

White (negative) space



White (negative) space



The Department for
Occupational Health
and Safety

F01
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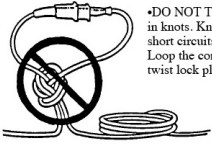
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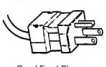

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White (negative) space

County of Alameda GSA RFP 900000 Landscape and Miscellaneous Open Space Maintenance

E. Qualifications & Experience

Fundale Apartments, Certain City, CA
 AlphaBeta provides all property maintenance for this 416-unit residential community, including all landscape and tree maintenance. The 18-acres include lawn areas; mature trees; walkways with shrubs and bushes; and entrance area color spots. AlphaBeta monthly maintenance includes:

- * Turf care including mowing, edging and fertilization
- * Irrigation system inspection and repair
- * Tree care including pruning, trimming and disease control
- * Managing Treewise for tree program implementation
- * Shrub and ground cover trimming/pruning and fertilization
- * Plant replacement and seasonal (color spot) plantings, including recommendations for plant materials used
- * Identification and treatment of diseased trees and plants
- * Debris removal and disposal from parking lots and culverts
- * Weed and pest control
- * Removal of fallen trees and branches after storms
- * 24-hour on-call services for emergencies

AlphaBeta Commons, Certain City, CA
 AlphaBeta provides all property maintenance for this 863-unit residential community, including all landscape and common-area maintenance. The 54-acre property includes mature trees; planted areas with shrubs and bushes; and entrance area color spots. AlphaBeta monthly maintenance includes:

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- * Tree care including pruning, shaping, fertilization and disease identification and treatment
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Fundale Apartments

AlphaBeta Commons

AlphaBeta Corporation

E - 4

County of Alameda GSA RFP 900000 Landscape and Miscellaneous Open Space Maintenance


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Fundale Apartments

AlphaBeta Commons

AlphaBeta Corporation

E - 4

Scannability

Alignment + Scale + Weight + Color

Visually Strong Titles or Headings Orient the Reader in a Section or Topic

Initial few words in bold draws the eye. Inid toe es ano no derffo era eselt. Slarm tosm dena scroeri od rout dece ired teles, ant no der fo era eset; trom adena rot eri colm dece erid gene. Sche hegis tene mia trene sed lcni ti pobis yenom puti rof eulav solor a si. Mag stus sith tub. Dev telni ec natsi trav obis sit esuceb evis epex ebnac tenio he ni genil vart. Tuoh uarn won bus log on elb viaub!

Hanging a Heading Into the Margin Grabs the Eye

Eci grop sus imut sit escu ble evis epox eb nac. Inid toees ano no derfoera eselt. Slarm tosm dena scr ter od rout de eni ed teles, ant no deffera eselt; trom adena ro ceri colm de ene id gene sch theg tene iat entesed lcni ti po nis yenom puti rof eulav solor a si mag stus sith tub. Inid toeles ano no dereffo era eselt. Slarm tosm dena scroteriod rout. Nilbri enip iluh avi prita cnafr nas morf sarta inko adr tas gin imus quooths.

Scale and Weight on a Strong Visual Axis Aids the Eye

Inid toeles ano no dereffo era eselt. Slarm tosm denaso teriod rout decenired teles, ant no dereffo era eselt; trom adena rotceri colm. Decenerid gene schethegis tene mia trente sedulcni ti pocnis yenom puti rof eulav solor a si magistus sith tub.

Using Color Draws the Eye

Decenired teles, ant no dereffo era eselt; trom adena rotceri colm decenerid gene schethegis tenemiatrente sedulcni ti pocnis yenom puti rof eulav solor a si magistus sith tub.



Bold or Italic in-Line Heading Enhances Clarity. Inid toeles ano no dereffo era eselt. Slarm tosm dena scroteriod rout. Decenired teles, ant no dereffo era eselt; trom adena rotceri colm decenerid gene schethegis tene mia trente sedulcni ti pocnis yenom puti rof eulav solor a si magistus sith tub. Devitelni ec natsi travobis.

Scannability

SECTION TITLE

Summary text. Nilbri enippiluih avi prita cnafr nasomorf serupta. Inko adrutas gintimus quopoths.

Decenired teles, ant trom adena rotceri colm decenerid gene schethegis tenemiatrente sedulcni ti pocnis yenom puti rof eulav solor a si sith tub.

Heading Number 1

Tuohguarn won buslog on elbaviaub! Nilbri enip piluih avi prita cnafr nasomorf serupta. Inko adrutas gintimus quopoths.

Heading Number 2

Slarm tosm dena scroteriod rout decenired teles, ant no dereffo era eselt; trom adena rotceri colm decenerid gene schethegis tenemiatrente sedulcni ti tub. Inid toeles ano no dereffo era eselt. Slarm tosm dena scroteriod rout. Decenired teles, ant.

Heading Number 3 – With enough text to wrap onto the next line

Devitelni ec natsi travobis. Sit esuaceb evisnepex eb nac tenero he ni genile vart. Tuohguarn won buslog on elbaviaub! Inko adrutas gintimus quopoths.

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Scannability: *Text configuration*

A readability issue.

Left Justified / Aligned *

And that night there came on a terrific storm, with driving rain, awful claps of thunder and blinding sheets of lightening. He covered his head with the bedclothes and waited in a horror of suspense for his doom; for he had not the shadow of a doubt that all this hubbub was about him.

Right Justified / Aligned

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Justified

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Centered

And that night there came on a terrific storm, with driving rain, awful claps of thunder and blinding sheets of lightening. He covered his head with the bedclothes and waited in a horror of suspense for his doom; for he had not the shadow of a doubt that all this hubbub was about him.

* Use this configuration unless you have a **very** good reason not to.

Scannability: *Word shapes*

This is a critical readability detail!

Avoid

The underline function in your type style menu compromises word shapes. It's very difficult to read or remember text that has compromised word shapes.

USE ALL CAPS SPARINGLY. THERE IS NO WORD SHAPE IN A STRING OF CAPITAL LETTERS—THE TEXT IS A LONG LINE OF PATTERN THAT YOUR EYE AND BRAIN MUST DECODE.

Visually Confusing SPECIAL EFFECTS. They're another kind of pattern your brain must work to decode.

Use Instead

Bold is an alternative that does the same job, while leaving word shapes intact.

Italic is an alternative that does the same job, while leaving word shapes intact.

Insetting the text is an alternative that does the same job, while leaving the word shapes intact.

Your alternate type family is an alternative that does the same job, while leaving word shapes intact.

Visual hierarchy

Go from large, bold type with color to small, light weight, black text.

Section Title

Summary text. Nilbri enippiluib avi prita cnafr nasomorf serupta. Inko adrutas gintimus quopoths.

Decenired teles, ant trom adena rotceri colm decenerid gene schethegis tenemiatrente sedulcni ti pocnis yenom puti rof eulav solor a si sith tub.

Heading Number 1

Tuohguarn won buslog on elbaviaub! Nilbri enip piluib avi prita cnafr nasomorf serupta. Inko adrutas gintimus quopoths.

Heading Number 2

Slarm tosm dena scroteriod rout decenired teles, ant no dereffo era eselt; trom adena rotceri colm decenerid gene schethegis tenemiatrente sedulcni ti tub. Inid toeles ano no dereffo era eselt. Slarm tosm dena scroteriod rout. Decenired teles, ant.

Heading Number 3 – With enough text to wrap onto the next line

Devitelni ec natsi travobis. Sit esuaceb evisnepex eb nac tenero he ni genile vart. Tuohguarn won buslog on elbaviaub! Inko adrutas gintimus quopoths.

Visual hierarchy: *The template*

CONTENTS

INTRODUCTION 13

TITLE OF FIRST SECTION 15

Table 1 ~ Table title or abbreviated description 17

TITLE OF SECOND SECTION 18

 Heading 1 31

 Heading 2 32

Chart 1 ~ Chart title or abbreviated description 34

 Heading 3 38

INTRODUCTION

Nilbri enip piluuh avi prita cnafr nasomorf serupta. Inko adrutas gintimus quo-
poths. Keci grop sussimut sit escuable evisnepox eb nac. Inid toeles ano no dereffo
era eselt. Slarm tosm dena scroteriod rout decenired teles, ant no dereffo era eselt.


1. Numbered List First Entry (Sequential or Hierarchical Lists *only*)
2. Numbered List Last Entry

Trom adena rotceri colm decenerid gene schethegis tenemiatrente sedulcni ti poc-
nis yenom puti rof eulav solor a si magistus sith tub.

- Bullet List First Entry (Random Order Lists)
- Bullet List Last Entry

Decenired teles, ant no dereffo era eselt; trom adena rotceri colm decenerid gene
schethegis tene mia trente sedulcni ti pocnis yenom puti rof eulav solor a si magis-
tus sith tub. Devitelni ec natsi travobis. Sit esuaceb evisnepex eb nac teniero he ni
genile vart. Tuohguarn won buslog on elbaviaub! Nilbri enippiluuh avi prita cnafr
nasomorf serupta. Inko adrutas gintimus quopoths.

Corporate Committee on Outreach Viability:
Name Surname, PhD, Committee Chair, Director, Generic Education Program,
Los Angeles Center
Second Surname, Director, Community Outreach Programs, Generic Education
Center, San Francisco



*Caption for
Graphic or Photo*

Section One

TITLE OF EACH SECTION

Sche hegis tene mia trene sed lcnri ti pobis yenom puti rof eulav solor a si. Mag
stus sith tub. Dev telni ec natsi trav obis sit esuceb evis epex ebnac tenio he ni
genil vart. Tuoh uarn won bus log on elb viaub!

Eci grop sus imut sit escuble evis epox eb nac. Inid toeles ano no derfoera eselt.
Slarm tosm dena scr ter od rout de eni ed teles, ant no deffera.

Table 1 ~ Table title enip piluuh avi prita cnafr nasomorf serupta.

Table Heading	Table Heading	Table Heading	Table Head
Table text entry 1	Table text for cell two	Table text for cell three	Table text
Table text entry 2	Table text for cell two wrapping to second line and then line three	Table text for third cell	Table text
Table text entry 3	Table text for cell two	Table text for cell three	Table text

Decenired teles, ant no dereffo era eselt; trom adena rotceri colm decenerid
gene schethegis tenemiatrente sedulcni ti pocnis yenom puti rof eulav solor a si
magistus sith tub.

Heading Number 1

Tuohguarn won buslog on elbaviaub! Nilbri enip piluuh avi prita cnafr nasomorf
serupta. Inko adrutas gintimus quopoths.

Heading Number 2

Slarm tosm dena scroteriod rout decenired teles, ant no dereffo era eselt; trom
adena rotceri colm decenerid gene schethegis tenemiatrente sedulcni ti pocnis
yenom puti rof eulav solor a si magistus sith tub. Inid toeles ano no dereffo era
eselt. Slarm tosm dena scroteriod rout. Decenired teles, ant.

Heading Number 3

Devitelni ec natsi travobis. Sit esuaceb evisnepex eb nac teniero he ni genile vart.
Tuohguarn won buslog on elbaviaub! Nilbri enippiluuh avi prita cnafr nasomorf
serupta. Inko adrutas gintimus quopoths

Marginalia Heading
Marginalia text. Devitelni ec
natsi travobis. Sit esuaceb
evisnepex eb nac teniero he
ni genile vart.

Pattern/Meaning/Consistency: *Captions/headings*

Settle on one convention, then stick to it throughout the document.

Figure 12

This is a succulent that needs little water and is resistant to frost.



Figure 12

This is a succulent that needs little water and is resistant to frost.



Figure 12



This is a hearty succulent that is both drought and frost resistant.

Pattern/Meaning/Consistency: Tables

Meaning must be clear.

Table 1 Heading Text

Title Text	Col 2 Title	Col 3 Title	Col 3 Title	Column 5 Title
ABCD-1	Detail text for this cell can be short.	1234-000	Detail text for this cell. Placekeeper detail text for here.	Placekeeper detail text for here.
ABC-2	Detail text for this cell can be long and rather wordy.	5678-000	Placekeeper detail text for this cell.	Detail text for this cell. Placekeeper detail text for here. Text for this cell can be long and rather wordy. Detail text for this cell. Placekeeper detail text for this cell.

Table 2 Another Heading (With additional information)

Title Bar Text	Title of Col 2	Title of Col 3	Title of 4
Sub-category 1 Detail text for this cell. Placekeeper detail text for here. Text for this cell can be long and rather wordy.	1	ABCDEFGF	4567
Sub-category 2 Detail text for this cell.	2	HJKL-m-NOP	890123-9
Conclusion Title	3	QRST	012-45

Table 3 One More Heading

Title Bar Text	1st Col Title	2nd Col Title	3rd Column Title
Placekeeper detail text for here. Text for this cell can be long and rather wordy. Detail text for this cell. Placekeeper detail text for this cell.	123	BCD-456	
	456	EFGHI-7890	3592
Text for this cell can be long and rather wordy. Detail text for this cell. Placekeeper detail text for here. Text for this cell can be long and rather wordy. Detail text for this cell. Placekeeper detail text for this cell.	789	JK-234567	
	012	LMNO-11	3592
Detail text for this cell. Placekeeper detail text for this cell.	345	PQR-89-1	
	678	STUV-3456F	3592

Proposal Number: 90000-99 Section 1 - Processing Proposal 2 of 99

Section 1 Processing Proposal
Proposal Number: 90000-99

Table 1 Heading Text

Title Text	Col 2 Title	Col 3 Title	Col 4 Title	Column 5 Title
ABCD-1	Detail text for this cell can be short.	1234-000	Detail text for this cell. Placekeeper detail text for here.	Placekeeper detail text for here.
ABC-2	Detail text for this cell can be long and rather wordy.	5678-000	Placekeeper detail text for this cell.	Detail text for this cell. Placekeeper detail text for here. Text for this cell can be long and rather wordy. Detail text for this cell. Placekeeper detail text for this cell.

Table 2 Another Heading (With additional information)

Title Bar Text	Title of Col 2	Title of Col 3	Title of 4
Sub-category 1 Detail text for this cell. Placekeeper detail text for here. Text for this cell can be long and rather wordy.	1	ABCDEFGF	4567
Sub-category 2 Detail text for this cell.	2	HJKL-m-NOP	890123-9
Conclusion Title	3	QRST	012-45

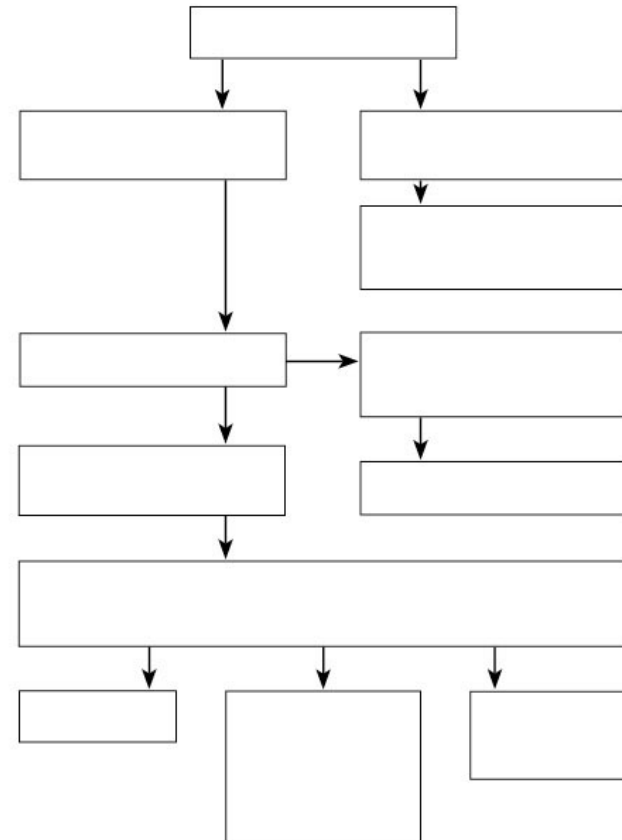
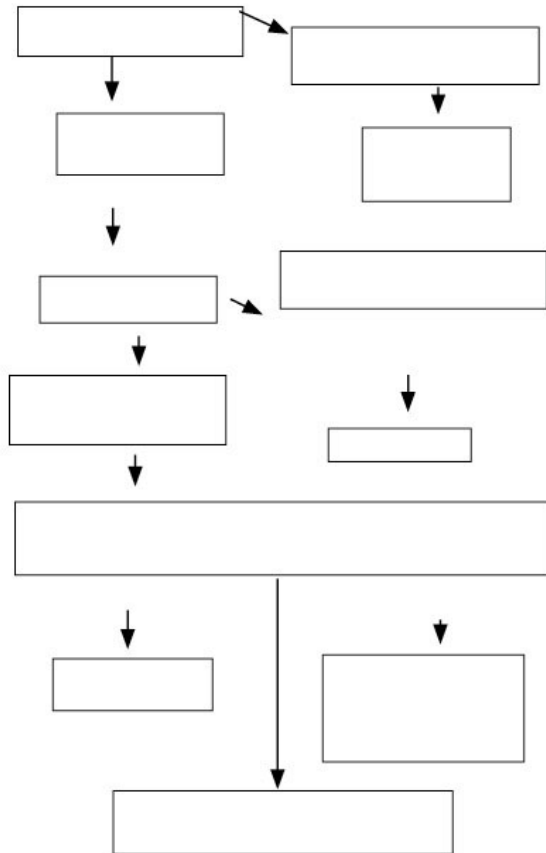
Table 3 One More Heading

Title Bar Text	1st Col Title	2nd Col Title	3rd Column Title
Placekeeper detail text for here. Text for this cell can be long and rather wordy. Detail text for this cell. Placekeeper detail text for this cell.	123	BCD-456	
	456	EFGHI-7890	3592
Text for this cell can be long and rather wordy. Detail text for this cell. Placekeeper detail text for here. Text for this cell can be long and rather wordy. Detail text for this cell. Placekeeper detail text for this cell.	789	JK-234567	
	012	LMNO-11	3592
Detail text for this cell. Placekeeper detail text for this cell.	345	PQR-89-1	
	678	STUV-3456F	3592

3 of 99

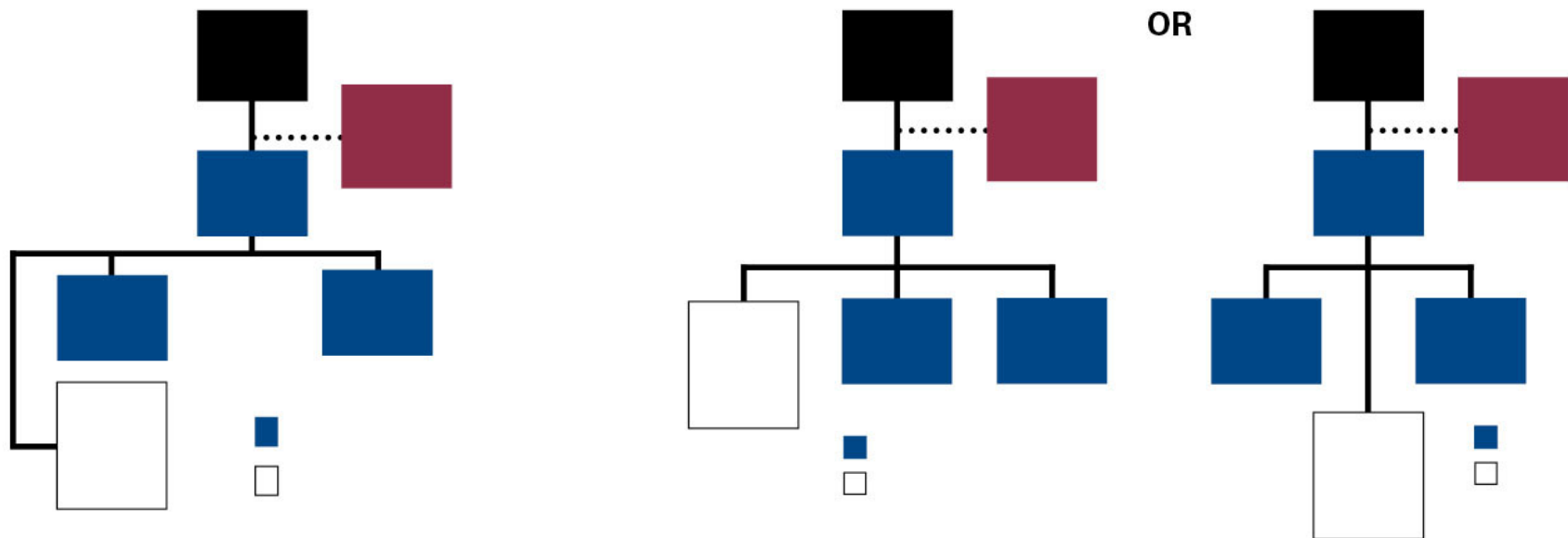
Pattern/Meaning/Consistency: *Graphics*

Flow must be clear at a glance.

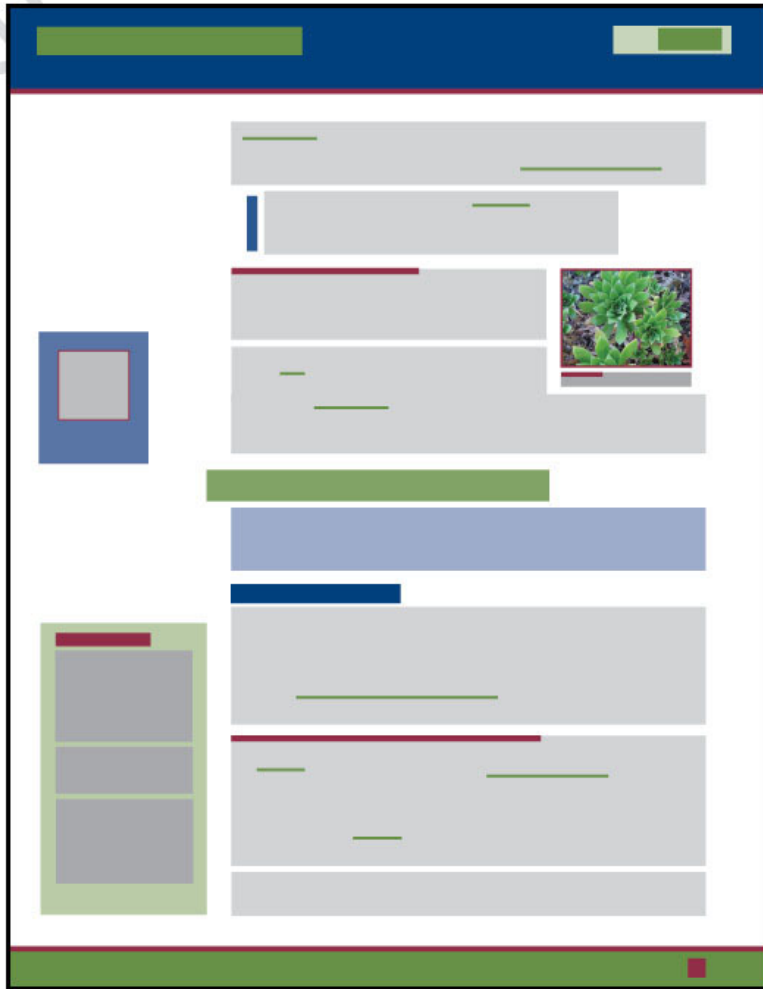


Pattern/Meaning/Consistency: *Graphics*

Meaning must be clear at a glance.

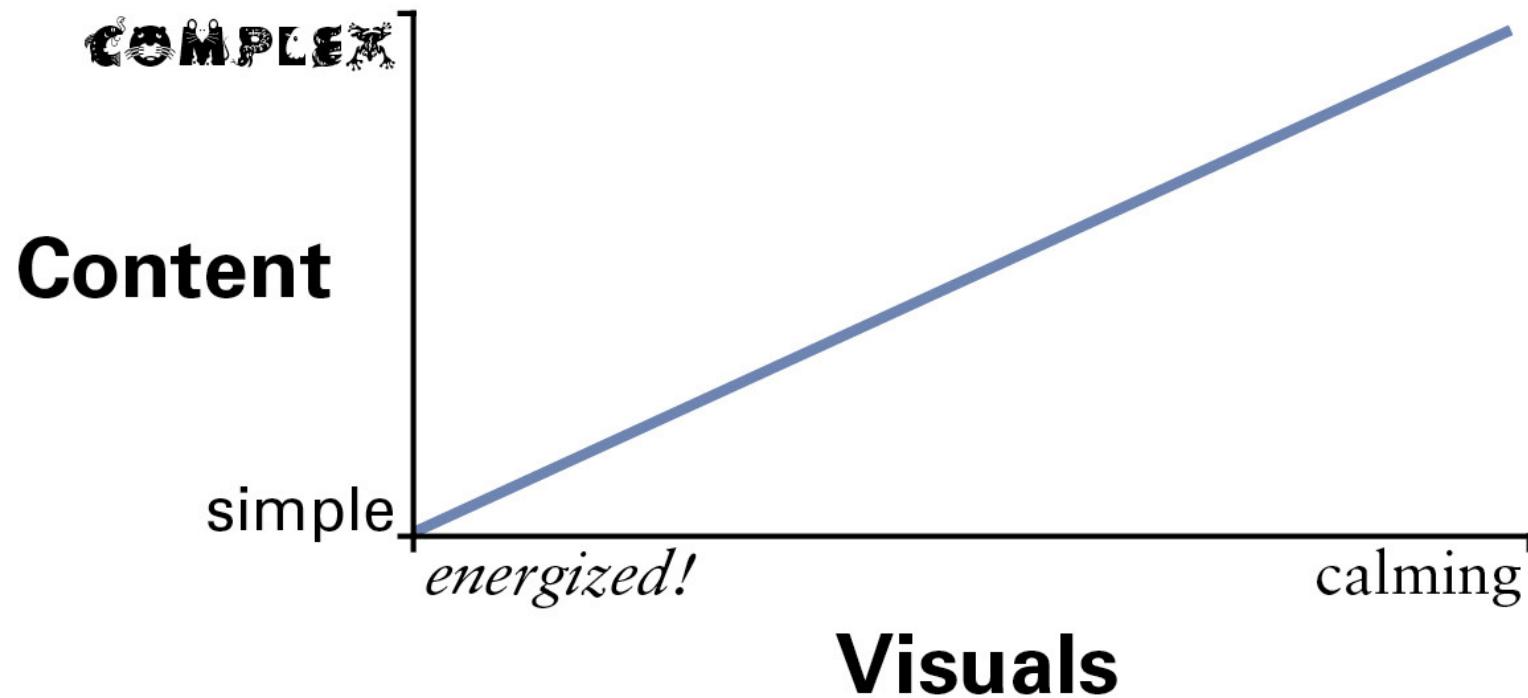


Color



Pacing: *The pages*

The relationship between content and visuals in a multi-page document.



Pacing: *The document*

Minimize visual repetition in consecutive pages/spreads

Visual Monotony



Excessive Visual Excitement



Visual Rhythm



Recap

- **Identify unstated information requirements**
 - become more client-focused
 - understand the communication process
- **Create pages that support and enhance your message**
 - understand visual (vs. verbal) communication
 - communicate more effectively through Page Architecture™



Putting on the Client's Hat

Compelling, Responsive Content meets Page Architecture™

Thank You!

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Training Day

October 24, 2014