



Questions to ask before booking a design project: **Lists for clients and designers**

Asking good questions before a project starts can head off misunderstandings down the road. This script can help clients and designers decide if they're a good match.

A word to clients

Hiring a designer can feel like a gamble, even when you admire someone's portfolio. Hedge fund managers are required to state on reports, "Past performance is no guarantee of future results." It can feel the same way in design. You can be pretty confident a person with a good body of work will make you something terrific, but there's still uncertainty. Every project is different, and creativity isn't a simple math problem with a single right answer. Your task is to minimize your risk as much as you can, balanced with what your budget will allow.

When you contact a designer, they should be able to guide the conversation to get from you the answers they need. Having your information at the ready, plus some good questions of your own, will result in an efficient fit call.

A word to designers

It can be exciting when a client comes knocking. It feels like a validation of your skills! When I started out, I'd agree to anything a client asked without many questions. One, I didn't know there was much more to talk about. If I knew they wanted a logo – what else is there to know? Two, I figured it was best to close the deal as soon as possible. Asking too many questions up front might scare them away, and I didn't want to seem difficult.

Over time, I learned that asking good questions is valuable for everyone. It gives you the information you need, and helps the client make sure they're clear on their project for best results.

I keep a list of questions handy as I'm heading into a chat with a potential client. That way I won't forget to ask something important. Naturally, information will emerge without prompting as we talk. But if you're the type to get a little nervous on phone calls, having a script to glance at is helpful.

A word to everybody

The goal is to see if you're a good match for each other. Trust your gut. If it doesn't seem like a good partnership, that's okay. A better fit awaits you elsewhere.



Questions designers should ask clients

“ In this conversation, I’d like to learn about the possible scope, budget, and timeline for your project, and get some background on your company. You probably have questions for me, too, that will help you decide who you’d like to work with.

1. Where are you located?

2. How did you hear about me?

3. What is your company’s background and history, briefly?

4. What size is the company? (e.g. Number of employees, locations, annual revenue)

5. What is your role?

6. How long have you been in that role?

7. Are you the point person on this project?

If this fits your process, it’s a good time to explain that throughout the project, the point person will gather internal discussion into actionable feedback and deliver it. Rather than many different people sending their feedback to you.

8. Who are the decision-makers who will need to approve the work?

For design presentations, ideally the key decision-maker(s) should be present in person or via screenshare so they can hear the rationale. Or, you can make a pre-recorded screenshare video that the point person can show to their team.

9. What is the scope of the project you have in mind?

10. What is it about your existing *[thing they want you to do for them]* that might not be working?

11. What would success look like for this project?

Are there tangible business goals they're hoping to reach?

12. Why is now the time to do this project?

What would be the impact on the business if they didn't do this for a couple years?

13. When does this work need to be finished?

Is there a particular deadline driving this?

14. What is the budget you have in mind?

If they're unable to give one, you might help them and "anchor" a good price by suggesting a number first. For example, "A project like this, done by a person or agency like X, that could give you those results, might have a value of \$X. Would that sound reasonable?"

15. What do you think your company's approach would be to this project?

Some clients:

- Have time, enjoy learning about design, and like being very involved in the details at each step.
- Appreciate good design but don't have time to be involved in the details. They want a professional to make good decisions for them.

Find out their style so you can do the project accordingly.

16. Do you have any past experience working with a designer on a project like this? How did it go?

17. Who on your end will be working with the design files after our project is done?

What kind of files can they work with?

18. Do you have any concerns heading into the project?

List examples of things they might be worried about. Are they new in their role and need to make a good impression? Have they seen projects fail before? Are there colleagues who aren't on board? Get the worries out on the table so you can address them.

19. Here's my process for a project like this.

Explain your approach so they understand you have a plan, and can ask any questions. Examples of what to cover:

- Steps to complete the project
- How revisions work
- How long it will take
- When and how payment is made

20. What questions do you have for me?



Questions clients should ask designers

“ 1. What kind of projects are your specialty?
It's ideal to hire someone who loves the exact thing you need.

2. Have you worked on projects in our industry before?

This is definitely not necessary, but having some familiarity with your industry is a nice bonus.

3. A couple relevant projects from your portfolio that we liked are [mention what they are]. What was your role on those projects?

Often multiple people work on a project—e.g. creative director, illustrator, photographer, lettering artist, copywriter, UX designer—so make sure the parts you like were done by the designer you're interviewing, if it's not clear.

4. Tell me more about one of the projects. How did you arrive at this outcome?

5. Does the work we're asking for sound like it will solve our problem, or do you have a different suggestion for us?

A creative professional may know of a more effective way to accomplish your goal.

6. What is your process for working through a project?

7. What methods of communication do you prefer, and how will you present your work to us?

8. What is a typical timeframe for a project like this?

9. What would the final deliverables be?

10. What should we budget for a project like this? (Or, we've budgeted X—could that work?)

11. (Optional) Do you have any clients we could contact for a reference?

Sometimes happy former clients offer to be references for new clients. If you want to hear from people who have worked with this designer, it's fair to ask for names.

12. What questions do you have for me?