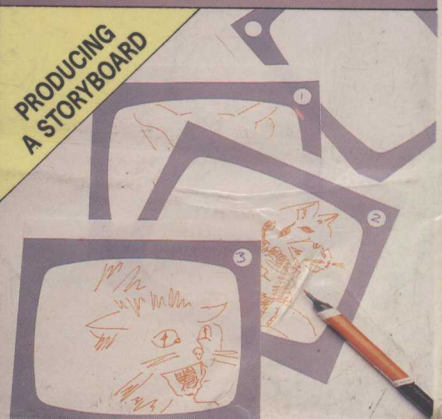
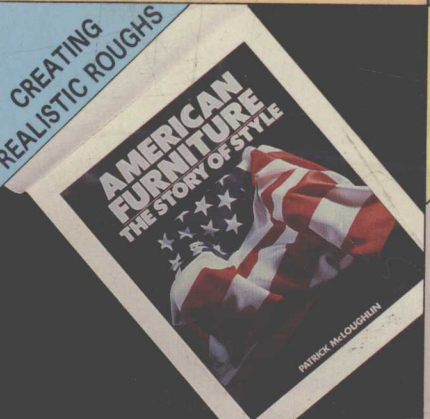
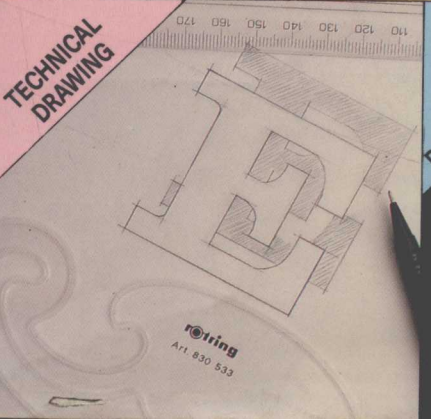
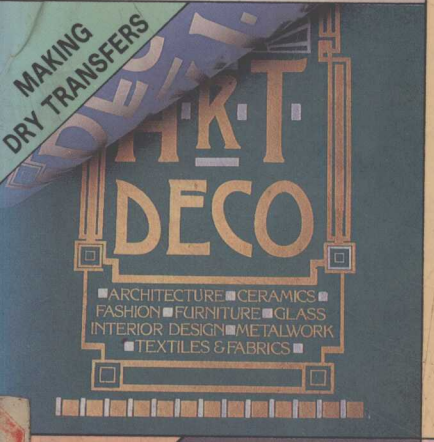
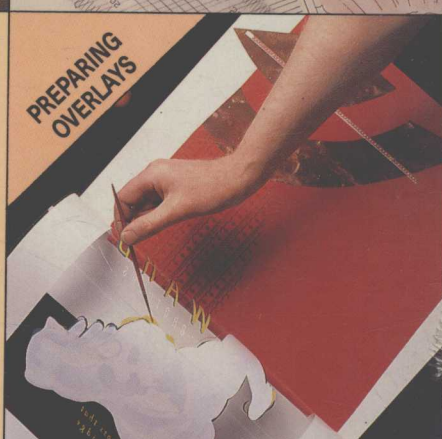


# PRESENTATION TECHNIQUES FOR THE GRAPHIC ARTIST

HOW TO SELL YOUR IDEAS EFFECTIVELY

BY JENNY MULHERIN



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Cincinnati, Ohio

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**Senior Editor** Maria Pal  
**Art Editors** Ursula Dawson, Rita Wuethrich

**Editors** John Clark, Ricki Ostrov, Ursula Wulfekamp  
**Technical Consultant** Christopher Lumgair

**Designer** Peter Bridgewater

**Picture Researcher** Penny Grant

**Art Director** Moira Clinch  
**Editorial Director** Carolyn King

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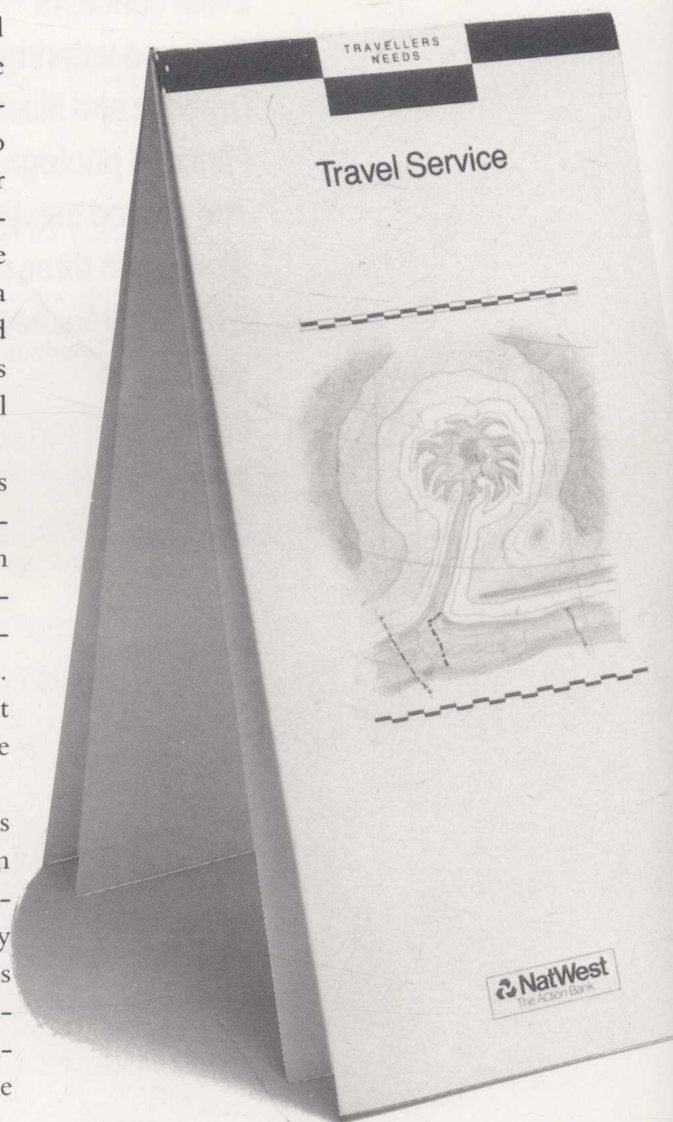
# INTRODUCTION

■ **Right** The initial concept for some travel information packs was liked sufficiently by the client to be taken to a more highly-finished rough, with few changes made before the job was finally printed.

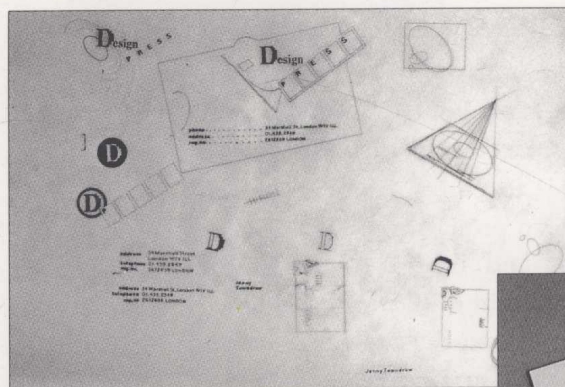
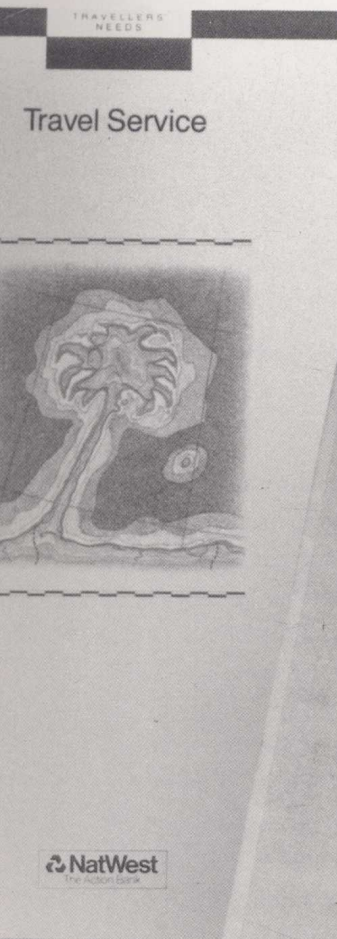
IN THE COMPETITIVE WORLD of graphic design, it is not enough merely to have confidence in your skills and ability: you must impress potential clients that you are not only good, but also the right person for the job they want to commission. This means that you need to know how to sell yourself or your company with enough flair to gain the client's confidence – and more specifically to maintain that confidence through the presentation of appropriate ideas and visuals for a particular job. Only after your ideas are accepted – the result usually of a number of presentations to the client – can you start work on the final product.

Oddly, the specific skills and techniques needed for presentation visuals have been somewhat overlooked by teachers and other experts in the field – largely because it is assumed, erroneously, that the skills required for graphic design are the same as those that “sell” design ideas. Yet the fact is that however original and brilliant a design, it will fail unless it is presented to the client in an attractive, well thought out way.

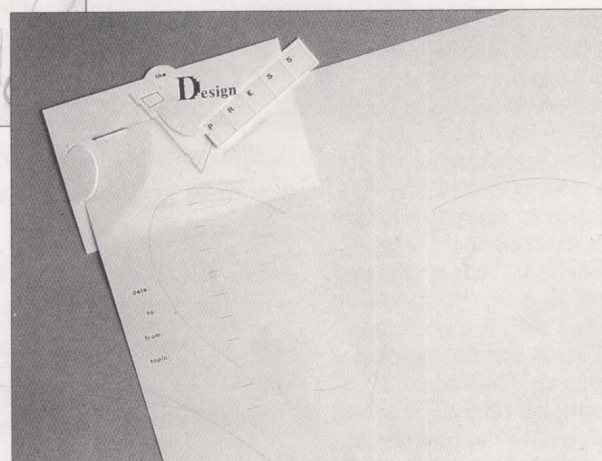
This book redresses that imbalance. It shows you how to present design ideas with maximum clarity and efficiency. It takes you through presentation stages from rudimentary to highly finished roughs and outlines the techniques needed, for example, to simulate lettering, illustrative styles and even specialized printing techniques. Easy step-by-step guides demonstrate how to cut corners – and costs – to achieve high-







■ **Left and Below** A number of ideas for a letterhead were drawn roughly and discussed between the client and the designer before more finished visuals were made.



ly professional results with one-off presentations as well as more finished visuals.

The best preparation in the world, however, may well be worthless unless you have a proper brief and have precisely established the client's needs and market. This is not always as simple as it seems. Some clients cannot easily define what they want in design terms, although they know what they "like." In this instance, your first presentation should consist of a selection of rough visuals so that you can gauge the client's response to specific styles. Helping the client to clarify his or her ideas in such a positive way is the first step toward a satisfactory working relationship. Make notes at your initial meeting, listen carefully to what the client says, noting any preferences about, say, colors or typographic styles. Never be afraid to ask questions about points you do not understand or about things that have



All the examples on these pages show how varied the styles and ways of presenting roughs can be and why there is a need for studios and illustrators to specialize in specific areas.

■ **Right** This presentation gave the client a choice of ideas for a book jacket on watercolor. For speed the artist simulated the technique by using water-soluble crayons.

■ **Opposite, right and top** These two roughs were part of a series of presentation boards for a corporate identity for the Rockefeller Center, New York. The brief stipulated that the design would have to adapt easily to a whole range of items, from letterheads to uniforms. These particular examples, cut out from colored papers, were incorporated into banners.

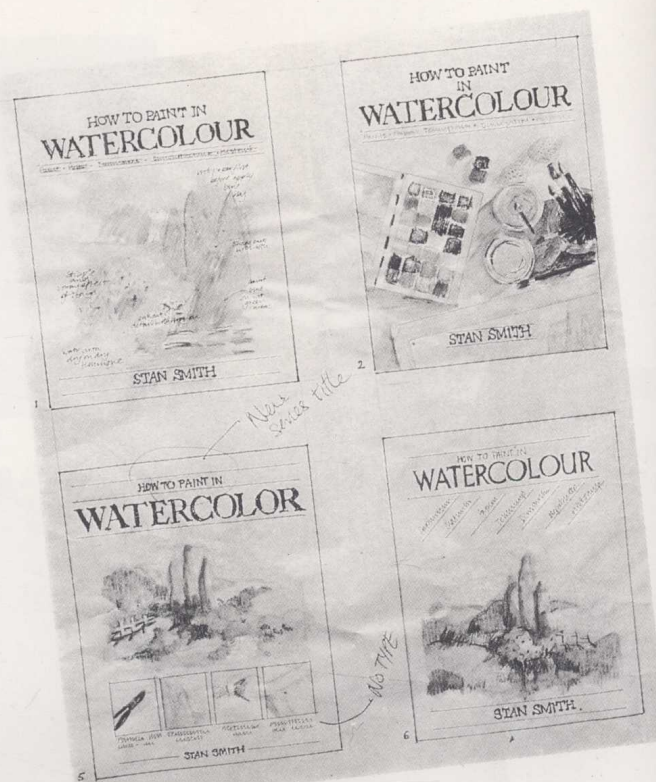
■ **Opposite, below right** This car-care kit was initially drawn using markers and stuck onto an existing tin. Although the original idea was used, note how the style has completely changed for the finished article.

not been covered in the brief. Many designers find it useful to draw up a checklist not only of *what* is to be presented but, just as important, *how* it is to be presented. This can range from an informal one-to-one meeting to a group presentation using overhead projection or a slide show to take the client and his or her colleagues through the development of the design idea.

All this initial groundwork is, nevertheless, no guarantee that you will arrive at the appropriate design solution first off. You must expect your design to go through one or two modifications – and sometimes more – before it is finalized. That, after all, is what presentations are for and why the pointers in this book will prove invaluable in reaching an agreed solution with your client.

At the outset of a job, you will work on rudimentary roughs. Frequently, this involves the exploration of a number of different design ideas before one is selected above others – and then worked up into a preliminary rough to show to the client. If the client likes to be closely involved with the job, use these rudimentary roughs as an informal talking point, explaining how and why you arrived at your preferred choice. It is not worth your while to produce highly detailed visuals at this stage and it can also be counter-productive, because it might suggest to the client a rigidity of approach. Take note of all the client's comments and modify your design accordingly. If there are valid aesthetic reasons for rejecting some of his suggestions, say so, and be prepared to demonstrate your point of view if necessary with appropriate roughs.

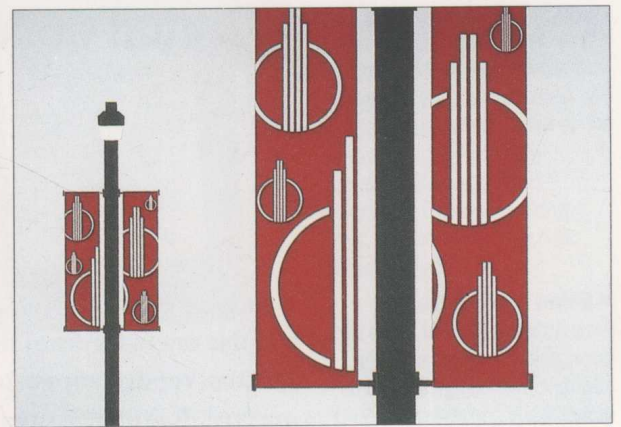
Once preliminary roughs have been approved, you will be obliged, in most instances, to produce more finished visuals. Agree with the client precisely how finished these roughs should be



and to whom they are being shown. For many highly finished roughs you will need to employ the services of a specialist – for example, a professional lettering artist, illustrator or photographer. Make sure your budget covers these kinds of costs and be prepared to brief these specialists accurately, using the tips given within these pages, so that you get exactly what you want.

The formal presentation of finished roughs to, frequently, the client's directors and sales managers can seem a daunting experience but if you have worked closely with the client through all the presentation stages, are confident that your design is right for the job and have produced visuals to a high standard, then you have little to fear. Following the advice given in this book, you can not only produce outstanding presentation visuals but also manage the presentation itself with all the expertise in the world.







# Initial concepts

■ **Below** Although the preliminary roughs for these two book jackets are loosely done, freehand, the design styles are quite clearly conveyed. Colored pencils have been used to color in the images and different typographic styles have been explored by the designer. In both examples alternative ideas are included, a sensible notion at this initial stage of client presentation.

EVERY DESIGN JOB starts with a brief from the client and this can range from the most informal chat to a written report supported by detailed research material. It doesn't matter how you get the brief so long as you make sure you know *everything* you need to do the job *before* you start.

Whatever the nature of the brief, you must understand and establish at this stage who the job is to appeal to and exactly what it is supposed to communicate. Markets are people: try and imagine who each job is for and what your design must do to excite them. Never be afraid to ask the client as many questions as are necessary to determine what the client's market is.

It goes without saying that money and time determine the type of design solution arrived at and affect the method of presentation. Inexperienced designers particularly should be aware of these constraints from the outset, bearing in mind that a low-budget job should never affect the quality of the presentation but merely its nature.

The scale of the job, its budget and the actual conditions of presentation determine the method of presentation as well as the type and number of roughs presented. Ask if the client needs to show the material to other people. Is the chairman of the company attending the presentation session?



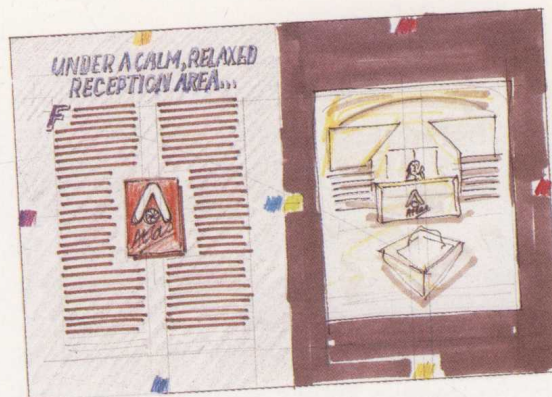
■ **Left** These initial roughs for a desk diary are rendered in colored pencils. Not only are the visuals and type areas roughed in but the designer shows his "thinking through" processes in the notes and queries written on the roughs. He suggests, for example, tear-off calendar folios and perhaps a border with soft, crayoned motifs. These ideas will be explored in consultation with the client.



If so, you may need to make the presentation more formal. Discuss the physical conditions under which the presentation will be made and agree with the client on the method of presentation as well as the number of roughs he – or his colleagues – might expect to see for that job. In this way presentations that are too sophisticated or simply inappropriate can be avoided.

#### ROUGHS AND THUMBNAIL SKETCHES

After the graphic artist has been briefed by the client, the in-house art director or design head, his initial task is to produce first roughs. Essentially, these are ideas for the design put down on paper in the form of quick sketches and drawings. Generally first roughs are drawn with pencils or felt-tipped pens, but almost anything can be used, depending on the artist's preference.



■ **Left** Marker rendering has been used on these brochure roughs. Note how the type is roughly indicated with drop caps and parallel lines while the headings quite carefully simulate the suggested typeface. Of the two designs, one is quite formal, the other more lively.



■ **Right** For these five alternative logo roughs, markers have been used to produce distinctly different designs. It is to the designer's credit that these look like first roughs rather than working drawings and his skill as a freehand lettering artist is obvious. The beginner can, of course, achieve the same standard by tracing the letters from a type book. Note that the center design is a photocopy of hand-rendered type.





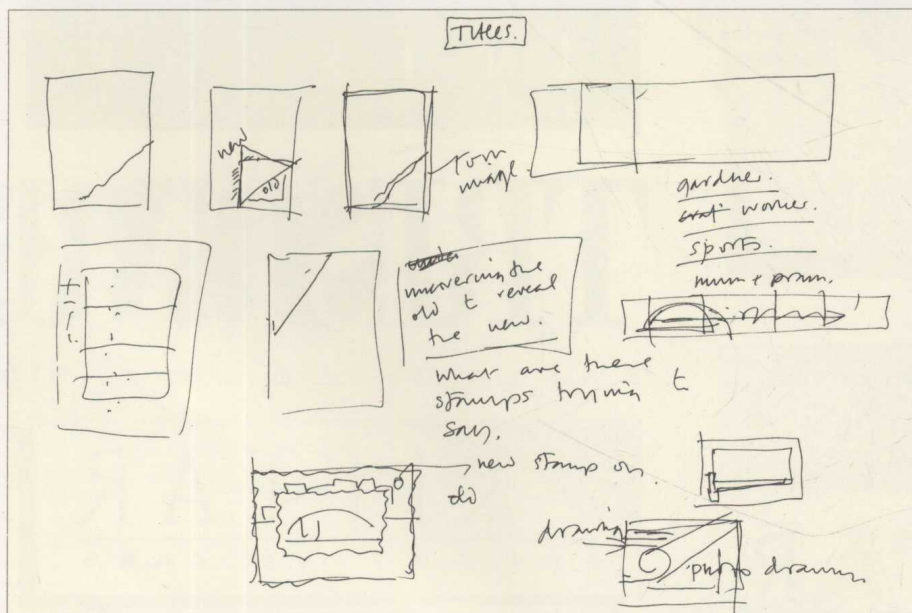
The aim of first roughs is to explore and evaluate ideas in a variety of ways within the limits of the brief. In most cases, preliminary roughs are meant to be talking points that will be amended, re-thought or discarded according to the client's comments. Only then is an acceptable creative idea decided upon.

Many designers do a series of miniature sketches or doodles known as thumbnails – and as the saying goes, some of the most brilliant designs have been scribbled on the back of an envelope. Do use thumbnail sketches if they communicate your ideas better than full-scale roughs, but make sure that your client or art director will accept this form of initial presentation. More often, thumbnail sketches are used to try out ideas and narrow the artist's range of acceptable designs before presentation first roughs are made. However, they can also be a useful means of “note-taking” or of expanding ideas on the spot when discussing an idea with a client.

However loosely your preliminary rough is drawn, it must follow basic design principles and correspond to the client's brief. If the subject is to be treated typographically, the heading and other type should have the correct weight, emphasis and visual appeal and be laid out appropriately on an area or page of the right shape. If, for example, a visual image is to be used either alone or in conjunction with type, the artist must decide what type of image to use and, in the latter case, how type and image should be related. Even with a very rough design, it must be obvious at a glance what you are trying to communicate.

The standard of roughs depends on the person you are presenting the roughs to. An in-house art director is unlikely to want detailed roughs; a sales manager, on the other hand, who can perhaps evaluate only what he actually sees, might want more precise sketches. Clients also vary enormously in their visual appreciation. Many prefer freely-drawn roughs or even on-the-spot thumbnail sketches, because they then feel that they are actively involved in the design process. Others need relatively finished roughs, which can be time-consuming for the designer, in order to make a decision. It is advisable to establish at the first briefing how many roughs,

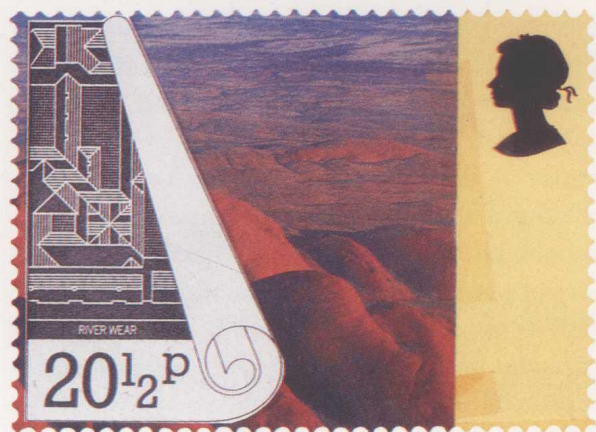
■ **Left** Shown here are the types of doodles produced by a designer when thinking through the client's brief. This is really a form of visual note-taking and is often done at the briefing session or as soon as possible after, as a kind of memory aid.





and to what standard, the client deems necessary to agree on a final design. In this way, the time and material costs involved in a number of roughs or finished roughs can be incorporated in your costings for the job.

It is of course important that the roughs, whatever type you produce, should be presented professionally and in a style that can be understood and appreciated by the client. His confidence in your creative abilities must be assured – after all, he is paying good money for your ideas.



■ **Left** The doodles opposite formed the starting point for these stamp designs on the theme of urban renewal. The designer first explored the simple idea of random but thematically-linked objects held together by a title. These were most effectively visualized in preliminary roughs using markers (left and below). The client, however, preferred a photographic image with graphics overlaid on acetate for the presentations (below left and bottom left). He finally opted for the scroll design, an initial idea sketched on the doodle.





#### SIMPLE MOCK-UPS

A simple mock-up is a rough, three-dimensional model, for example of a packaging design, showing size, shape, color and design of the finished product. Essentially it serves the same purpose as a flat rough, and is presented as a preliminary design concept.

A simple mock-up is necessary for an initial presentation only when the design deals with a three-dimensional product such as a pack or point-of-sale container. Usually, the mock-up follows the approval of a presentation rough in which the container's shape and size, and the colors and graphics for its surface have been suggested. A flat rough can often be misleading, especially for a client not used to dealing with visuals. Therefore a mock-up is produced, showing how the pack actually looks in three dimensions, giving an idea of its scale, bulk and eventual appearance.

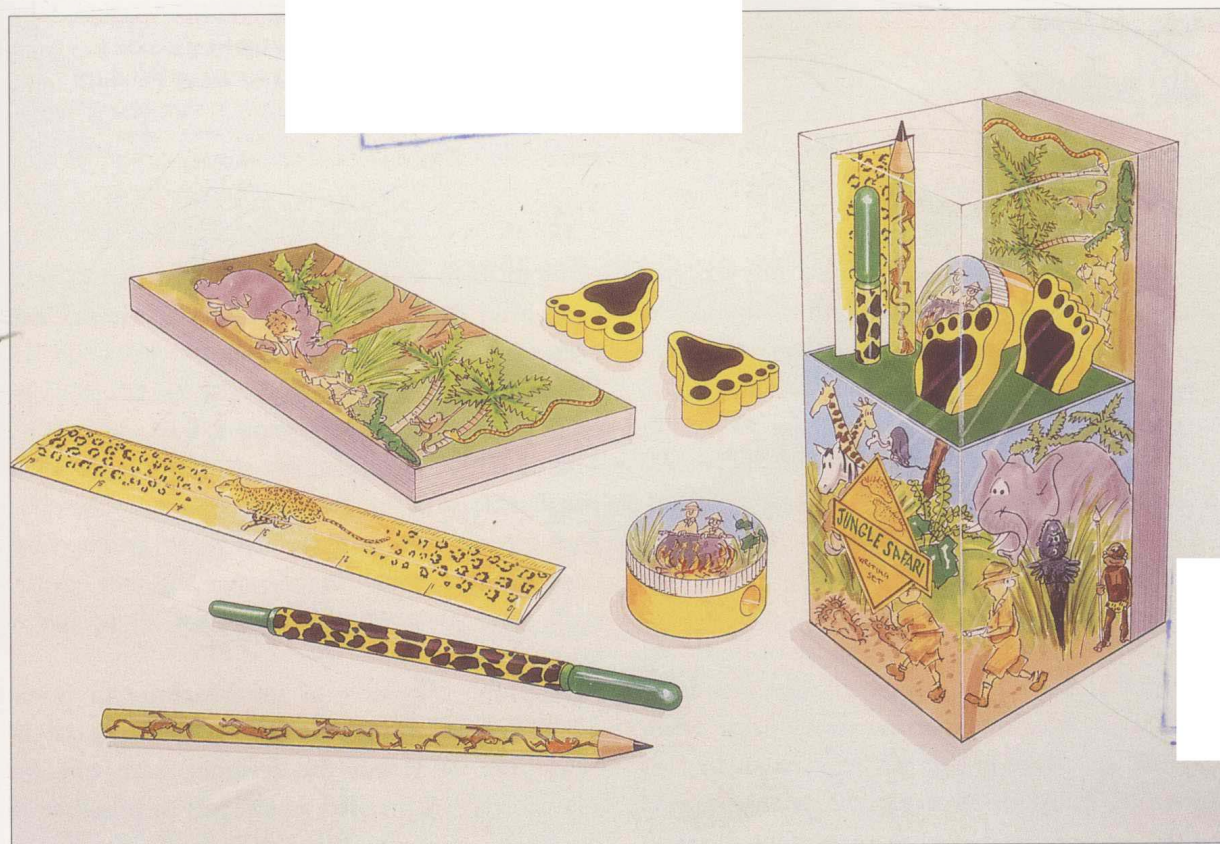
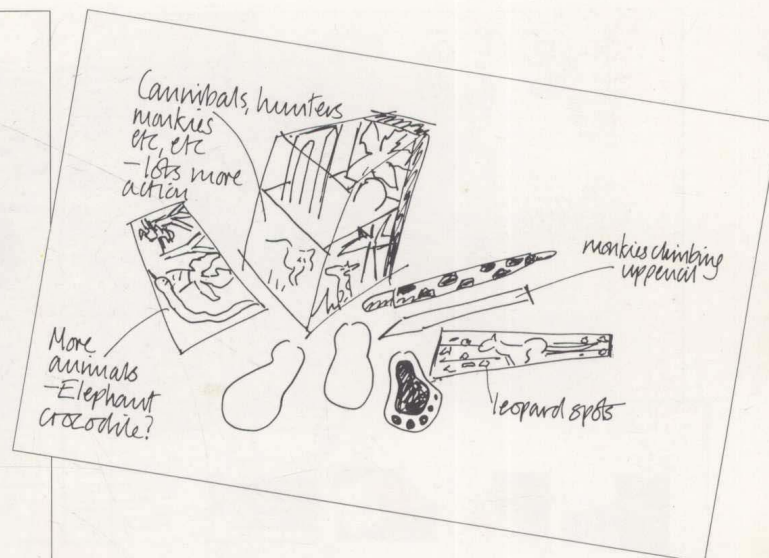
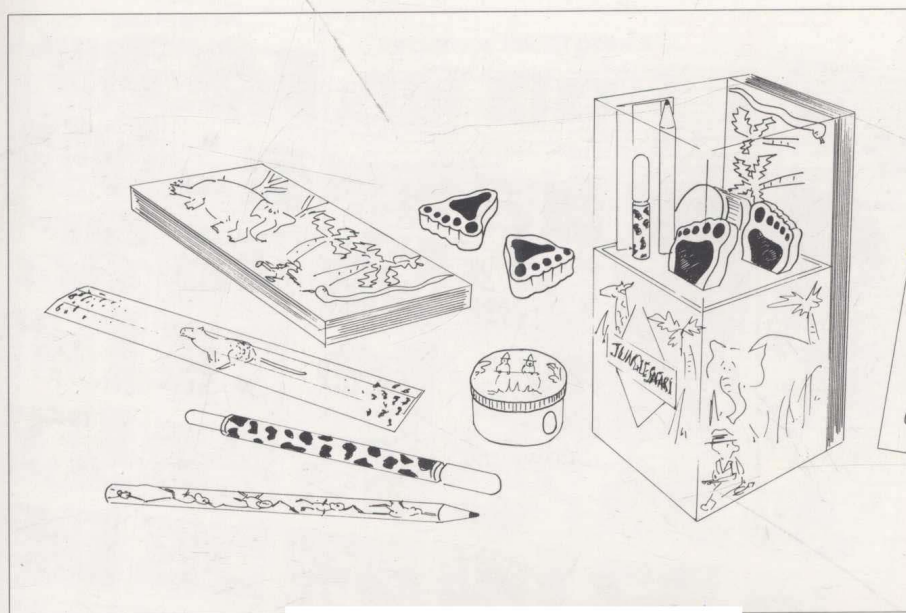
It is important to remember that the simple mock-up is the same as a preliminary rough. It is not meant to be a detailed or finished model such as those produced by architects, engineers and industrial designers; in the graphic design presentation that comes at a later stage. As an initial presentation technique, a mock-up is only practical if it can be constructed readily from cardboard or plastic or sculpted into the appropriate shape or size from an easily workable material such as polystyrene. As with first roughs, neither too much time, money nor effort should be put into simple mock-ups – unless these factors have been budgeted for.

The mock-up should, of course, be well-executed in that it is full size or proportionately scaled, but the rendering of the design should be fairly broad. The advantage of a mock-up over a rough is that it offers the chance to evaluate the



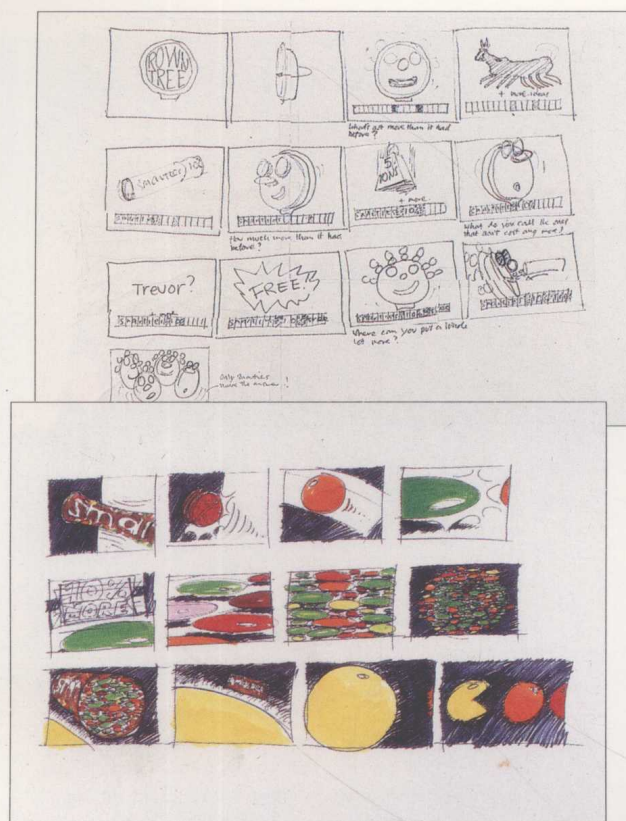
■ **Above** These roughs for a package design were simply wrapped around a cookie canister and attached with low-tack adhesive for easy removal. The design consultancy wanted the gift packs to look like a series of books so all packs were designed to look like "pages" and "spines." The presentation was made in marker pens on layout paper.





■ **Above and Left** In consultation with the client, the designer chose a safari theme for the initial concept for a writing set. The first rough, rendered in pen and ink, was worked up into a more finished rough that incorporated the client's written suggestions, before the presentation itself was completed using marker colors that reflected the original idea.





■ **Above** Flat plans are mapped out for TV story boards, as well as books and brochures. A fine-tipped black marker was used for the preliminary rough of a TV advertisement. Colored markers were used to visualize an alternative rough for the same story board.



■ **Above** This detailed flat plan for a child safety book was produced with a drafting pen. Note the rendering of type with parallel lines. A flat plan with

this degree of detail is usually only necessary when the client needs to show the presentation to marketing or other colleagues.

approved design more accurately in terms of volume and scale and the relationship of the graphics to these qualities. Amendments and alterations are not infrequent at this stage, because the transition from two- to three-dimensional images can subtly alter the perceived effectiveness of the design.

#### FLAT PLANS

A flat plan is produced whenever the design project involves a booklet, brochure or book. At the initial stages of the design, the flat plan is an essential guide to whether the idea works, given practical considerations such as page size or format, the number of pages, the extent of color and the desired number of pictures, plus the ratio

of pictures to text. As most of these things will have been discussed at the brief, the initial flat plan explores the possibilities of an idea within the limits imposed. Basically, the flat plan shows what will appear on each page of the publication. This is done very roughly, page by page, on a small-scale plan of the entire book or booklet, with picture areas indicated by boxes and text by lines. Covers, preliminary pages and end matter such as glossaries and index must all be taken into account.

The subject matter of the brochure or book obviously dictates the way the flat plan is structured, so before the designer starts out, he should have as detailed a synopsis as possible of the book's contents. It is also important to know