



Cadi

**Design as a  
Strategic  
tool.  
Checklist and  
recommendations.**

## **Design as a strategic tool. Checklist and recommendations**

### **PRIOR CONSIDERATIONS**

#### **1. Strategy**

- 1.1. Do I have a clear idea of my company's strategy?
  - Have mission, vision and values been defined?
  - Have I defined a business model and/or a strategic plan for the short, medium and long term...?
  - Have they been formally established in writing?
- 1.2. What role has been assigned to design in the strategy?
- 1.3. Have design processes and their integration within the organization been defined to some extent? And the person/persons who are going to be in charge of design? Has the need for internal and, if necessary, external resources been evaluated?

**i**

**I**t is essential to have a clear idea of the strategy to follow: who you are, what you do or what your raison d'être is, your target audience, what you want to achieve with your business, where you want to go and which principles you want to follow to achieve it - this is the first level in defining a strategy. In addition, and more specifically, it is necessary to determine your value proposition, which customers you are going to offer it to and in what way, using which marketing channels and the partners who are going to support you; the resources you are going to need, and your foreseeable revenues ... The Canvas Model is an excellent guide to building your business model but it is also a good idea to document, as far as possible, the steps that you are going to take, the stages to be followed depending on the different scenarios and the targets at each given time ..., i.e. to come up with a plan to determine how you intend to bring to fruition the statements of intent you have made.

Before approaching the design process it is important at least to be clear about the values and the philosophy that define a company or its brands and its products or services, and that are going to govern its actions. Without this, it is impossible to undertake the design of a graphic and communicative proposition, as it must transmit a correct image of the company to the market and key audiences and relay its differentiating aspects.

Furthermore, it is useful to reflect on the role that design will have within the life of the organization and to determine whether the design activity is going to be limited to something occasional, dependent on needs that are detected from time to time or if it is going to be a systematised activity that will have to be organised, and its areas of action determined.

Depending on this, in the second step of the process, it is necessary to define how design tasks are to be approached in the different areas (brand and identity, product, service); who is/are going to be in charge of them and in which stages (also defining, if applicable, the processes to be followed); how all of this can be integrated into the established strategy and its development.

## **AREAS OF DESIGN**



### **2. Identity - Communication**

#### **2.1 Corporate identity, brand identity**

- 2.1.1. Have I already decided on a brand structure?
- 2.1.2. Have I got a visual corporate and/or brand identity that defines me?
  - Does the company logo and/or the brand logo of my products/services as well as the rest of elements that make up the visual identity (typography, colour/s, symbol, applications, ...) represent me?

Is the logo and/or symbol easy to read and reproduce in any size, one-colour printing...?

- 2.1.3. Have I chosen a name or names?
  - Are they resounding, memorable, simple, durable?...; could they pose problems in other languages?; do they reasonably cover the current activities of the company and those that may be carried out in the future?
- 2.1.4. Can both, the name and the visual identity be protected?  
Is it possible to register an Internet domain with that name/s?
- 2.1.5. Do I have a manual of corporate and brand identity or a document that expresses and formalises the way that general identity or the identity of the brand/s

are to be applied in different media: on letters, cards, envelopes and other stationery, signs, vehicles, advertising, e-mail, web, social networks ...?

- 2.1.6. Are there more specific guidelines for communication? Do you have a communication strategy?
- 2.1.7. Am I sure that my values and corporate philosophy and, if appropriate, brand philosophy are correctly perceived by my key audiences via all of the above?

## i

Sometimes a company structures its identity by separating that of the company and that of its brands. If this is the case, each brand is based on its own values and each identity or brand will have its own graphic application manual. However, it must be taken into account that a multi-brand structure or diversified structure is more complicated and more expensive to manage than a single-brand structure (branding, i.e. the brand strategy, actions and care, including communication for its proper positioning with respect to the target audiences, is more complex the more complicated the brand structure is.)

However this may be, it is important to devote time to this aspect and to follow a process and a methodology, both when choosing the name and designing the logo, as well as selecting the elements that are going to form the visual identity. During this process it is fundamental not to lose sight of who you are and how you want to be perceived; you need to investigate, know what others are doing, what the trends are, who your competitors are ... Then there is a process of generating ideas using creativity techniques; check if what you are doing is effective (readability, harmony, balance, easy to reproduce in two and three dimensions ...); test if the results you are obtaining communicate in a coherent way; modify or develop the idea, re-test ...; do it in an iterative way that gradually leads you to the solution.

The visual, graphic, corporate and/or brand identity must be capable of being strictly applied in each of the media used by the company to ensure coherency and that the company's values are transmitted in a uniform, homogeneous way. You have to decide what is going to be done to supervise the correct application of the corporate and brand identity manual. This may involve a person dedicated to this task or it could be carried out by those in charge of communications in general. It would be a mistake to design a brand and not control and monitor its use.

But communication is not only a matter of correct or incorrect use of a logo, it is important to go beyond this and to clearly define a communication strategy that establishes how you are going to help position the brand and the channels to follow. This strategy should include not only the quantitative targets and descriptions of the actions, means and tools to be used, but should also develop a series of communication guidelines that inspire all actions (for example: "communication shall be warm...." or ...; "in addition to the corporate colours, a

range of colours that ... shall be used"; or ... "when using photographs care should be taken that ...", or "graphic materials at the points of sale shall respect ...; "

## 2. Identity - Communication

### 2.2. External and internal communication

- 2.2.1. Do your brochures, catalogues, and other traditional or digital communication elements convey your message properly?
  - Are formats, layouts, compositions, ..., in line with the visual identity you have defined?
  - Are they suited to the strategy and/or communication guidelines adopted?
  - Do key audiences perceive in them the company values you want to communicate?
- 2.2.2. If the company has a point of sale in which it markets a given product or provides a service:
  - Does the space convey the values of the company, the brand and/or the product/service, and does it fulfil the communication requirements that have been established?
  - Does it display the product suitably, to facilitate its effective impact? Does it help people understand the nature of the service?
  - Does it facilitate communication and relationships between workers and customers?
  - Do the offices or the factory, along with other physical spaces, also convey the company values?
- 2.2.3. In the digital area, virtual spaces, social networks included:
  - Do the virtual spaces chosen match the company's needs? Do they facilitate awareness of the company/product? Do they help to attract new customers? Do they allow sales to be carried out?
  - Is the information contained in them and its structure and layout suited to the requirements of the different devices with which customers and/or users interact: mobile phone, tablet, computer? Is the user experience more user-friendly?
  - Is there a real flow of information and communication with key audiences? Do they stimulate participation or interaction with users/customers? Are they, or do they provide a tool to work together with key audiences?

- Is there a specific communication strategy in this area? Is the visual configuration adopted consistent with the general graphic identity?
- 2.2.4. Is there key audience/customer service protocol?
  - Is there a description of how to welcome users to your service? And what about suppliers ...?. Is there a protocol for after-sales service, telephone assistance, mail preparation, letter writing...?
- 2.2.5. At in-company level: Is there an internal protocol for actions or a routine or scheduled activity to bring workers update on knowing how to act in activities involving communications with customers, users or other key audiences? Have responsibilities been assigned in this area? ...

## i

**V**isual identity is not the only vehicle for conveying company values and philosophy, there are also all the physical elements and actions through which a relationship between the company and its target audience is established (brochures, catalogues, advertising activities, sponsorship events or other collaborations, physical spaces: shops, service points, offices, warehouses, factories ... virtual spaces: website, mobile applications, social networks ...; telephone/mail assistance ...). But, as mentioned, it is not only a question of communicating values, there must be a communication strategy, which while guaranteeing coherency also allows specific uses of the defined visual identity, setting the guidelines to be followed when developing each specific element or medium, both externally and internally.

The spaces in which the company carries out its activity are one of the main points of contact with users and customers and they are fundamental for the image projected by the company. The physical space in which you display/sell your products, render a service to your customers, etc. must transmit the same values conveyed by the corporate or brand identity and should, indeed, be an extension of these; but not only its values, these spaces should help people to understand the activity carried out (and help it to be carried out correctly), doing so a way that attracts attention and motivates, thus favouring the relationship between the service providers or the product sellers and the customers or potential buyers to achieve the best possible experience.

The aforementioned also applies to the digital environment and to the virtual spaces in which you display/sell your product or deal with your customers. If the level of requirement in the physical sphere is high, it is even more demanding in the virtual sphere: your target audience is always only one click away from exiting your virtual media. And this not only depends on the aesthetic or visual aspects you use to communicate with, but also on the accessibility and logics of the contents shown and by their operability. In other words, there must be good interaction with your media to provide a satisfactory experience for your

virtual users. As far as social networks are concerned, if you decide to use them then you must bear in mind that inconsistency can be a penalising factor and that on top of that, you can be judged in them even if you do not use them as a vehicle for communication.

Last but not least, it is important to dedicate time and resources to encouraging the correct attitude among the people in your organization. This is crucial in communicating your values and your products and services. Their conduct can ruin all your good intentions and plans. Internal communication (manuals or guides to procedures, protocols ...) is vital to achieve workers' commitment to act in a certain way in order to project a common image.

### 3. Product - Service

#### 3.1. Packaging

- 3.1.1. Is it necessary to sell or to offer the product or the result of the service in a package or packaging?
  - Is it strong enough to be transported? Is it suitable for the means of transport used? Does it provide adequate protection for contents from knocks, the sun, and inclement weather? Is it appropriate for its context of use?
  - Is it easy and intuitive to use? And if not, is there a risk of the product being damaged or destroyed due to improper handling? Are any accessories needed to open it? ...
  - Does it facilitate preservation of the product once it is begun to be consumed and until it is used up?
  - Will it serve as an element for communication? Is it going to have graphics? Will it transmit the attributes of the product/service and those of the brand? Is it consistent with the communication strategy?

i

The packaging of a product is its business card. Frequently we take a product off the shelves because it makes an impact and captures our attention or because its box offers a better explanation of its function/s and benefits than that of others. Packaging must also convey the values of the product and be an extension of the formal values of the product itself and/or of the brand and communication strategies. Thus there are various issues in this specific area of communication that have to be solved, such as whether to use photographs or illustrations or not to use any, the communicative value of the material itself, the finishes, possibilities of customizing ...

The design of packaging also has to comply with a series of functional requirements, not only in terms of graphic art, legibility, legal information ..., but also as a product that has to perform the functions of containing, protecting and preserving, and one with which the user is going to interact.

Sometimes the packaging may be a container that can be kept or that has secondary functions that make it a valuable object.

It may be an element to make a service tangible; in this case it becomes a reminder of the service. It should serve to convey the strengths of the service and allow users to recall the experience they have had.

### 3. Product - Service

#### 3.2. Product

- 3.2.1. What does the product you sell or which is part of the service you offer transmit?:
  - Is it in line with the brand and/or company values?
  - Does it communicate the values of novelty, technology, reliability,... you want to transmit?
- 3.2.2. Is the product compatible with the characteristics of the target market and of the channel of distribution (impulse buying, assisted sale, online sale, small retail, large retail outlets ...) degree of saturation and maturity; characteristics of competitors; prices...?
- 3.2.3. Does it form part of a product range or a product line? What are its main features? Does it have to be consistent with the rest of the products in the catalogue?
- 3.2.4. Is the product functional?:
  - Can its main function be improved? Is it possible to add secondary functions that will differentiate it from others in the market?
  - Is it ergonomic?
  - How is it used? Does the form you have given it transmit an idea on how it should be used, stored, cleaned, etc.? Is interaction with the product intuitive and suitable for users of any age and ability?
  - Does it adapt to different types of users: beneficiaries, buyers, opinion leaders, transporters, fitters, maintenance, etc.?
  - Does it take into account the occasions on which it is consumed/used, and the situations and environments of use? And moments, circumstances and contexts while product is waiting for a new use?
  - ?

- Does it take into account the user's emotional satisfaction?
- 3.2.5. Is it technologically advanced? Does it comply with the regulations? ...
- 3.2.6. How long is its useful life? Does it minimize consumption and reduce environmental impacts? Is it easily recyclable, reusable, etc.? Is it biodegradable?
- 3.2.7. Can its functionality be extended to the digital technology service area?
  - Does it enable information on its operation, use, etc... to be compiled? Is it linked to an IT/ telecommunication app enabling this data to be used and/or allowing interaction with users? Is it connectable to other products? ...
- 3.2.8. Can you protect by means of a patent or any other type of industrial property rights?

## i

The product you sell or which forms part of the service you offer must have formal and functional values that make it consistent and aligned with the values that define you as a company and as a brand. It must also be able to adapt to the user by offering him/her a good experience of its use, to develop its functionality including possible additional secondary functions that make it a better product - a more attractive, differentiated and innovative one.

The design process to achieve this is similar to that described for the design of the elements of the visual identity and is applicable to both product design and packaging design. It is essential to prepare suitable and adequate specifications and to do so you must have a good understanding of the context of the project: the company objectives, how they fit into the strategy, the role the product will play in the catalogue or portfolio of products and brands of the company depending on market attractiveness and other parameters of product portfolio management (profitability, market share, position in the life cycle ...), the marketing plan, own capabilities, etc... In order to do this, alongside a process of internal reflection, it will be necessary to carry out market research to find out as much as possible about the ecosystem in which the product will be situated, to analyze competitors - your potentialities and weaknesses, the costs and prices, the regulations ...; users and key audiences will also have to be studied.

Research on users (group dynamics, surveys, usability labs, observation ...) and on their experiences will be decisive in correctly orienting the project. This information must be suitably condensed and followed by an idea generation phase, and its rendering, applying creativity techniques, lateral thinking ..., visual techniques (sketches, renders, 2D and 3D software, preliminary mock-ups, etc...).

Check if what you are doing is consistent, if it meets the particular specifications you have defined, and if it is viable and affordable taking into account the capabilities and means available to the company; make models and rapid prototypes and test them in an iterative way, to gradually come up with a solution; then carry out the technical development; pre-

series; etc. And lastly, remember to protect the industrial property rights of what you have achieved according to the degree of novelty (industrial design, utility model or patent).

## Digital environment

In a context of increasing digitalization of economic and industrial activities, product design is conditioned by the need to provide new developments with added functionalities favoured by ICTs, that contribute to erasing the boundaries between the 'physical' benefits of a product and an enhanced intangibility of a service, if not directly enabling the generation of new product/service concepts and/or specific business areas.

Many examples can already be found of products that, while integrating attributes of functionality usual in their category, are also configured as a set (function + sensors and/or digital technology) that allows the user to discover numerous aspects of the usage experience that the product can offer, or even directly provide a differential and innovative experience.

These possibilities, which grow alongside the storage and computing services facilitated by Internet, in what has been termed connectivity or the Internet of things, bring product design closer to considering not only the product itself but the system in which it will be integrated.



- 3.3.1. What kind of a journey does your customer have in his experience of your service?
  - What are the **stages** of the journey, not only during provision of the service, but also before, and after? (discovery of the service, trying it out, etc...)
  - What are the **actions** that take place in these stages (search for information, booking or registration, access to the service, payment ...)?
  - What are the **tasks** that he performs to carry out the actions? (downloading of an application, browsing the Website, filling out a form, ...)
  - What are the **contact points** \* at which company-customer interaction occurs during the performance of the tasks, that is to say, at which moments and through which means or performances is this interaction present, or in which elements or places does the contact occur (a brochure, a response

mail, information by phone, an advertisement, a computer application, the Website, welcome to the service, the point of sale ...)?

- What are the impressions or opinions on the performance of the tasks to be carried out and on the contact points through which a reply to the needs to be satisfied with each action is received? Can you measure those impressions or opinions that ultimately rate the experience?
  - What are the **critical points** in the 'journey' that this service involves? What are the main weaknesses?
- 3.3.2. What are the back office requirements to meet the needs of each of these actions? What are the means, resources and organisation required?
  - 3.3.3. What is the cost of all this?
  - 3.3.4. What can you do to provide greater satisfaction for your customers/users, to improve their experience and to build their loyalty? How can you do it? How can you generate new proposals?
  - 3.3.5. What is the value proposition and expected revenues?

### **Points of Contact \***

Detailed analyses should be carried out for each point of contact, examining actions and tasks, and each proof of contact (specific format, medium, or place). For example, at the point of sale or at the point of service provision:

What happens and how exactly do things occur at the point of sale?

Is the space adapted to the target audience: users, buyers, potential customers, but also specifiers or sellers, service performers ... and to the actions and tasks that each of them carries out at this point of contact?

Is an optimal and controlled flow of people, materials and products? This involves carrying out a comprehensive analysis, starting with signposting the space externally, so that it can be located, the way to access it, how customers are attended upon entry, what happens if there are other customers (i), why there may be a waiting time, whether facilitate or not that employees may be aware of how customers experience is being in those different situations,...

- (i)      Although the main goal should be to reduce waiting times or eliminate them if possible:

Has it been studied how to make waiting times at the premises more pleasant? (Is the customer informed about the reasons for waiting, the expected waiting time, the number of people who are before him/her, etc.)?

Has it been possible to make these times a pleasant experience? (Are the acoustics and lighting of the waiting area adequate, does waiting take place in comfortable surroundings, are collective or individual entertainment means offered?...)

.....?

Of course, provision of the service at the point of sale must be carried out in optimum conditions:

Is it necessary to provide spaces to keep the user's clothes or accessories? Are these tasks performed in convenient conditions?

Is the specific area in which the service is rendered ergonomically designed so that the service is comfortable and encourages precision and efficiency of the service provider?

What happens at the end of the service?

...?

All of this, while trying to measure the impressions that the actions and tasks cause in users, their emotional state when performing or receiving them; their opinion and how they rate them.

## i

The service you offer can also be designed just like a product. As occurs when you design a product, studying the behaviour of the user to analyse the degree of satisfaction and/or the efficacy in providing the service is essential and being aware of user's real motivations and expectations in the context of his interaction with the actions and tasks involved in performing the service is of vital importance for its design.

There are several techniques for observing and/or understanding the behaviour of users:

**shadowing**: the investigator becomes the user's 'shadow' during the interaction process;

**usability laboratories** and/or use experiences sessions with groups of users; **mystery shopper**:

a mystery customer who goes shopping, asks for information, analyses staff behaviour ...; **safari**: the investigator undergoes the experience in person; **surveys; in depth interviews**; office documents analysis (studies, public reports...); ...

To carry out a thorough analysis of all the information collected there are tools to help you to summarise or condense it: create a **profile** of the average persons in your key audiences and their motivations; use techniques or tools to depict the customer's journey while the service is being provided and to portray his/her experience – a **journey map**, relating customer-company points of contact or interaction during the main stages of the journey (before, during and after the service) to the needs unveiled during the journey and a portrayal of the emotions or opinions of customers; describing the customer's experience as if it were a comic strip or story - **story telling/story board**; or drafting a **blue print** that represents the stages or actions involved in the service, the tasks the user must carry out, the points of contact, the processes that make up the service, both those carried out in front of the customer, and those that take place behind (the non-visible ones), the media requirements these processes may need and, where applicable, the critical points and/or the costs or the cost-effectiveness ...

We must analyze the points of contact of the user with our service; detect weaknesses or improvements that will build a more satisfactory experience for the user. Everything surrounding the service must be coherent and adapted to our user and must facilitate interaction as much as possible to obtain the results sought: Website, app, customer service, store or point of sale, brochures, communication elements, the products to which it relates, the protocol for the people dealing with the user, etc.

In the process of studying users/point of contact/area of improvement or improvement challenge, the most important thing is to discover relevant information (insights: a significant aspect in which an imaginative solution can lead to a differential advantage) that can guide the subsequent design process as part of the challenge of improving.

Idea generation (proposals for improvement or new actions) through creative methods, when possible with the collaboration and/or the integration of users, and the development of

prototypes that allow informal testing with users, are different phases of an iterative process that allows you to generate, evaluate and compare the proposals being created in order to find ways of improving experiences in target areas or challenges.

The blue print is a tool that stands out from all the rest it comes to describing the idea of a new service or a proposal to improve an existing service. It will help you define how the interactions between the company and the user will occur at each point of contact, in addition to establishing the way in which the systems and activities carried out on the other side of the service interface (the back office, the 'backroom') will support these interactions, for the new actions proposed.

Finally, all of the attributes, features and/or new functions of the service provided by design should be compatible with the cost and price targets.

Everything mentioned in relation to digitalization at the end of section 3.2 can be extrapolated to service design.

## **DESIGN AREAS:**

**Graphic design:** design of identity, brand, publications, identity applications, static website templates.

**Interior design and industrial design:** design of spaces, offices, factories, shops, points of sale.

**Industrial design and graphic design:** packaging design: containers and packing material. The graphic designer is responsible for creating applied graphics and the global image of packaging and for selecting standard market container elements. The industrial designer's task is to define the container and the packaging for mass production: dies, moulds, etc.

**Interaction design (digital environment):** information design, usability and visual design for websites and mobile devices and social networks.

**Industrial design:** design or re-design of products, packaging, short-lived exhibitions, museums, user interfaces.

**Design of services:** design or re-design of a service.

Some of the tasks, such as packaging design, require the work of professionals and experts in different areas.

## **+ INFORMATION:**

### **The Industrial Design Centre of Aragon (CADI)**

Calle Monasterio de Samos s/n  
50013 Zaragoza

**Telephone:** 976 79 65 81

**Fax:** 976 79 65 82

**Website:** <http://www.aragon.es/cadi>

**E-mail:** [cadi@aragon.es](mailto:cadi@aragon.es)

**Twitter:** [http://twitter.com/#!/Cadi\\_Aragon](http://twitter.com/#!/Cadi_Aragon)