ACME Company

Design Brief
Total Redesign of Company Portfolio

Project Overview and Background

The current company portfolio reflects a series of different visual treatments that were created at various points in time to fulfill various business objectives and strategies. As a result, the portfolio lacks visual cohesiveness and clarity. This exacerbates target audience confusion within the complicated and already cluttered global marketplace for these products. In order to achieve clarity and cohesiveness, and to shorten the sales cycle, increase competitive advantage, improve market share, and thus enhance the bottom line, the entire portfolio must be redesigned at one time, utilizing an umbrella strategy. Design principles and strategy for future new products must also be established within this umbrella strategy.

The ultimate design solution will consistently incorporate company branding elements, achieve a cohesive visual appearance across the line, and clearly distinguish the different products within this umbrella strategy.

In order to most efficiently execute this project, the redesign will be conducted in eight phases:

- *Phase 1*–Complete visual audit of existing company portfolio as well as a visual audit of the top three competitors' portfolios.
- *Phase 2*–Develop a maximum of six creative design concepts that meet project business objectives.
- *Phase 3*–Test all concepts with target audiences.
- *Phase 4*–Select three concepts and further refine each. Retest all three with target audience.
- *Phase 5*–Select one concept, fully develop it, and perform final testing.

ACME Company

Design Brief
Total Redesign of Company Portfolio

Project Overview and Background

The current company portfolio reflects a series of different visual treatments that were created at various points in time to fulfill various business objectives and strategies. As a result, the portfolio lacks visual cohesiveness and clarity. This exacerbates target audience confusion within the complicated and already cluttered global marketplace for these products. In order to achieve clarity and cohesiveness, and to shorten the sales cycle, increase competitive advantage, improve market share, and thus enhance the bottom line, the entire portfolio must be redesigned at one time, utilizing an umbrella strategy. Design principles and strategy for future new products must also be established within this umbrella strategy.

The ultimate design solution will consistently incorporate company branding elements, achieve a cohesive visual appearance across the line, and clearly distinguish the different products within this umbrella strategy.

In order to most efficiently execute this project, the redesign will be conducted in eight phases:

- *Phase 1*–Complete visual audit of existing company portfolio as well as a visual audit of the top three competitors' portfolios.
- *Phase 2*–Develop a maximum of six creative design concepts that meet project business objectives.
- *Phase 3*–Test all concepts with target audiences.
- *Phase 4*–Select three concepts and further refine each. Retest all three with target audience.
- *Phase 5*–Select one concept, fully develop it, and perform final testing.

- *Phase 6*–Develop approval presentation.
- *Phase 7*–Implement approved design solution.
- *Phase 8*–Develop measurement metrics.

The project is scheduled to be completed by (date). The budget for this project has been set at (amount).

Project owners shall be (name), vice president of marketing, and (name), strategic design director.

Design brief project team members will include: (list of names/titles of each team member)

Note: The only changes I have made to the presentation of this portion of the example design brief in chapter 3 is to add the last phases, as I discussed earlier. As mentioned before, this section also serves as the executive summary of the project.

Category Review

The ABC category is a $60 billion industry worldwide. Although there are more than 125 brands competing in this category, only four brands are considered market leaders. These four brands collectively account for 65 percent of the total market.

Brand X is the current market leader, with a 25.5 percent share of the market. Brand X was the third company to enter this category when the category was developed forty-seven years ago. Within seven years, Brand X had acquired the first two competitors to enter the market, making Brand X the dominant brand worldwide. Within five years of Brand X's initial acquisitions, more than thirty other companies entered the rapidly growing category. Demand for these new products by consumers more than doubled each year for the first decade. Brand X had achieved dominance primarily because it was one of the original brands in the category; it had the widest distribution system, which ensured their products were available virtually everywhere; and it had very high brand recognition and recall by the target audience.

Brand Y is the second largest competitor, with a 15.5 percent total share of the current market. Brand Y has achieved its current position primarily through very aggressive marketing and promotion techniques. Brand Y utilizes extensive couponing and discounting programs worldwide, making their offerings appear somewhat less expensive than the others.

Brand Z and our company, ACME, are tied for third place, with a market share of 12 percent each. Brand Z is somewhat older than the number two brand, Y. Brand Z has been in the market for twenty-eight years, and Brand Y has been in the market for twenty years. Brand Z has wide distribution, primarily through mass market discount chains worldwide. Brand Z's product line is considered less expensive than the other leading brands. Brand Z competes primarily on price considerations.

ACME Company is sixteen years old. Our company has achieved its number three position largely through aggressive marketing and advertising focusing on superior quality and craftsmanship. ACME has not traditionally offered deep discounting and does not use coupons in the marketplace. ACME products are priced at parity with Brands X and Y.

The balance of the competitors in the marketplace have generally existed less than ten years as a brand, and most of them tend to be more regional than national or global.

Although demand for these products grew rapidly for nearly twenty years, the market is now declining slightly. This is primarily due to a weak economy in most parts of the world, and shifting consumer needs.

Industry business analysts predict that many competitors will gradually drop out of the market over the next five years. Some brands will be acquired by the top three brands, and others will simply cease doing business. Analysts predict that no more than twelve brands will ultimately survive in the marketplace.

It is incumbent on the top four brands, including ACME Company, to ensure their continued presence in the marketplace by strengthening their positions through product improvements and more compelling "reasons to purchase."

Note: More than likely, the content of this section has come from a market research group or other marketing function within the company. So just why is this category review description helpful to designers? Primarily because it is a brief summary of what has happened as well as what is happening right now in the category. One of the important points that a designer or design team could take away from this particular example is that the market is quite large—$60 billion. This is particularly significant because it means the category has major visibility in the consumer marketplace. Obviously people are looking for these products worldwide.

A designer should also recognize that with 125 brands competing, there must be a great deal of visual clutter in this space, and that means the design must be visually prominent, distinctive, and "different" from all of these competitors. However, we learn that there are only four major brands. And we learn that ACME is tied for number three in total market share. This signals that ACME primarily needs to study these four brands very carefully in their visual audit.

It should also be significant to designers that the category is nearly a half-century old. The category leader is forty-seven years old. This means that it has considerable brand equity in its visual appearance and might encounter difficulties if it tried to come up with a "whole new look." ACME also has this problem. ACME is a quarter of a century old, and also enjoys strong visual equity in its brand. Translation: ACME needs to proceed with caution if it tries to stray too far from its established brand identification.

Another critical area to designers in this category review is that the vast majority of competitors are relatively new, and therefore not as well known as the leaders. They would have considerably more freedom than the current category leaders in presenting themselves as highly contemporary, forward-thinking, leading-edge, and even "experimental."

We also learn that the number one brand in the category has traditionally been very aggressive in the marketplace. It has bought out the early market leaders to eliminate that competition. It is constantly promoting with discount offers. This means it is trying to maintain its position by a reduced price strategy. It is also everywhere! Its superior distribution system ensures that no matter what store a consumer goes into, that brand is always available. Therefore, it is easy to find and easy to purchase. ACME has followed a business strategy of not discounting in favor of a message that it is the

highest-quality producer, and therefore worth the premium price of the product. As ACME designers begin to develop concepts for redesigning the whole portfolio, this fact will be critical. Their new designs will have to carry through this theme of "superior quality."

Finally, the category has flattened out. It is more than likely that there will not be many new brands entering the market; in fact, many current brands may cease to exist in a few years. ACME Company will most likely survive, so it needs to be sure to consider some classical, more timeless design concepts. While newer companies can explore highly contemporary design treatments, ACME will need to ensure its new design concepts are not trendy or fads of the moment. In 2015, ACME cannot afford to have people saying that ACME looks like a 2003 brand, or that ACME is old-fashioned. On the other hand, ACME does want to make its visual image more contemporary, while still communicating that it is are well established and has been around for a very long time.

All of these points, and possibly others, will need to be discussed by the design team prior to exploring concept development. The category is complex. ACME will need to look fresh and up-to-date, but not trendy. The message of superior quality will have to come through loud and clear in all treatments. ACME will need to leverage its heritage, but at the same time update its image. Obviously, all of this creates a major design challenge. The category review is well worth the time it will take to discuss in-depth!

Most likely, your company's market research group or marketing group will provide most of this category review for you. It is then up to the design brief project team, as well as the design team, to analyze the category review for clues that will help them develop initial concepts.

Target Audience Review

ACME Company's product line is considered a basic necessity for the care and maintenance of living quarters. Nearly every apartment, private home, hotel, inn, etc. will have one or more of these devices. For this reason, the target audience does not include young children or individuals living in someone else's home. Generally, the youngest male or female who would purchase or use one of these

products is college-age (eighteen years plus) and occupying his or her first living space away from home. These younger individuals tend to purchase our lower-priced models, which are very basic devices. As the target audience, consisting of both males and females, sets up more permanent housekeeping, this audience tends to look for either our mid-priced models, or possibly our most expensive models. The average age of consumers in this latter category is twenty-four to thirty years old. As our target audience matures, it will tend to give more consideration to our more expensive models, which have a variety of options available. The average age of individuals who consider this type of upgrade is forty to sixty years. While the primary purchase decision maker was female twenty or more years ago, today both sexes can be considered primary decision makers.

The degree of sophistication and education of those who purchase our product is important. Our superior models, with a wide array of options, tend to be purchased by individuals with college degrees beyond the bachelor's level. The basic models, purchased by all age groups, are more likely to be purchased by individuals who want simplicity of operation, basic performance, and low cost.

Specialized versions of our product line, especially the very small handheld units, have more appeal to individuals who live in motor homes, or for use on boats. These handheld models are also popular with college students who live in dormitory rooms or studio-sized apartments.

Another category of the target audience that must be considered is professionals who are hired to maintain larger living spaces or office buildings. This category prefers the larger, more "industrial strength" models, regardless of initial cost.

Our product line is considered a consumer durable product; therefore, individuals only purchase an average of four units in their lifetime. The market trend is for people to initially purchase a basic, low-cost model, and then upgrade two or three times to the more advanced models. Income levels of the target audience tend to increase in ten-year intervals, beginning at the lower end of age twenty to thirty, advancing each subsequent decade, and leveling off

at approximately age sixty. Elderly people (ages seventy plus) often return to the basic models because of their ease of use and low cost.

For all segments of the target audience, consumers are most interested in: ease of use, durability, overall performance, cost, warranty, readily available repair service, and functionality.

The younger consumers (eighteen to thirty) are most interested in sporting events, social events with peers, watching videos, popular music, and domestic travel. Our target audience in the age group between thirty and fifty report that its primary interests include: foreign travel, outdoor events including skiing, aquatic sports, boating, reading, attending cultural events such as the theater, and home improvement projects. Consumers over the age of fifty tend to spend more time at home (or in a vacation home), watching television, reading, and participating in community activities.

Note: This section also provides a great deal of useful information for the design team. ACME Company has several tiers of its basic product, from low-end models to "industrial strength" and luxury models. The typical ages, income, interests, and level of education and sophistication are described for each tier of the product line. It is always important to remember that this kind of audience description is always based on averages from market research. It can never be absolute. It is meant more as a guideline. For example, there could very well be a young consumer who wants, and can afford, the most luxurious model of the product, even for his dorm room at college.

However, for a project such as this one, it is necessary for the designers to discuss each of the types of audience described as typical for a particular product. For example, how would—or should—package design differ for each group in the target audience? What are the implications from the comment that both males and females buy the product? Does this mean graphic concepts should be gender neutral? Why or why not?

Another interesting point for discussion that could be extracted from this target audience review is that the basic models appeal primarily to very young consumers who are entering the market for the first time, as well as to the very elderly consumer who is no stranger to the market and has used the product for years. What does this mean to a design team? Should the various design elements of the product (the product itself, the packaging, the sales

collateral material, etc.) be geared more toward one age group than the other? How can the design become appealing to both groups? How big an issue is this anyway? What are we going to do about it? How should we approach this issue?

These design concept discussions have to come from the material supplied largely by marketing people who did not have design specifically in mind when they did their research. This becomes another added value of a strategic design function—to take largely marketing-driven research and extract design strategy from what is available. As I mentioned in chapter 3, this is why a short phrase in response to target audience description, such as "women twenty to fifty," isn't useful to a design team. There just isn't any jumping-off place for meaningful, strategic design discussion.

Company Portfolio

The entire ACME Company portfolio consists of 100 discrete stock keeping units (SKUs). This project will not involve the redesign of any product. Rather, the redesign project will focus only on packaging, collateral sales literature, retail in-store display items, catalogs, and owners' manuals. The 100 SKUs include:

- **Basic Line:** One full-size unit, one handheld unit, one commercial full-size unit, and one commercial handheld unit, for a total of four discrete products. These are well-engineered basic units with no frills, accessories, or other options.

  They are the lowest-cost units, with a suggested retail price of $40 for the basic full-size unit, $30 for the basic handheld unit, $65 for the heavy-duty full-size basic commercial unit, and $55 for the commercial handheld unit.

- **Mid-price Line:** One full-size unit, one handheld unit, one commercial full-size unit, and one commercial handheld unit, for a total of four discrete products. In addition, each of these four mid-price units are available with up to five optional attachments, each sold and priced separately. Including the optional

attachments, the mid-price line includes a total of twenty-four SKUs. The entire mid-price line has slightly better engineering of components. The optional attachments are not compatible with any product in the basic line.

The mid-price line suggested retail price is $125 for the full-size unit, and $175 for the commercial full-size unit. Handheld versions are priced at $100 and $140 for the commercial unit. The five optional accessories for each of these products are priced from $30 to $80 each, depending upon the functionality of the accessory.

- **Luxury Line:** One full-size unit, one handheld unit, one commercial full-size unit, and one commercial handheld unit, for a total of four discrete products in the luxury line. In addition, each of the standard items in the line are available with up to five optional attachments, each priced separately. The luxury line also includes three color options: white, gray, and blue. The color options are available for both the main unit as well as the optional accessories. The luxury line consists of seventy-two SKUs, including accessory options and color options.

The luxury line suggested retail price is $430 for the main unit and $550 for the commercial version. The handheld units retail for $375 and $500 for the commercial version. Accessories range in price from $80 to $250, depending on the accessory. There is no additional charge for choice of color. The luxury line features state-of-the-art engineering, highest-quality components, a lifetime warranty for parts and labor for any component that fails due to manufacturing defects, and a standard leather storage bag for both the main product as well as the accessories.

ACME Company utilizes a monolithic brand strategy with all products employing the ACME brand. ACME is not involved with any other type of product. ACME Company is publicly held, and governed by a board of directors elected by shareholders. Stock prices have risen to a high of $93 over the past year. Current stock price for the last quarter is $57.

ACME's primary competitors offer essentially the same range of products and accessories. Brand X, the market leader, does offer limited accessories for its basic line of products. Brand X also heavily promotes its commercial line of products to noncommercial consumers. Brand Y does not offer accessories for its basic line of products; Brand Y often offers one or more free accessories for its mid-price and luxury lines during special product promotion periods. Brand Z occasionally offers deep discounts for short periods, such as just prior to the Christmas holidays. Brand Z never offers free accessories and does not even offer accessories for its basic line of products.

ACME is currently tied for the number three position in the marketplace with Brand Z. Each company has a 12 percent share of the market. (Pease refer to the category review section for more details on the leading four competitors.)

ACME Company's business strategy is to compete in the market by offering the highest degree of quality, value, and craftsmanship. The company does not compete on price considerations. The business strategy is based on the assumption that consumers will pay a higher price for superior quality. ACME Company is sixteen years old. The first decade was a period of growth beginning with the basic unit and expanding through three tiers to the luxury unit. Accessories and color choices were introduced seven years ago.

The period of rapid expansion of product offerings has ended for the immediate future. Corporate management has made a decision to end expansion of the product line and to focus on improving quality, craftsmanship, and reliability of ACME's products. This decision is in keeping with the overall business philosophy of competing in the marketplace solely on the basis of superior quality and value to the consumer.

ACME's products are sold worldwide. Minor variations to the design of the products themselves, as well as to the design the sales collateral materials, in-store display items, catalogs, and owners' manuals, have been made to satisfy various geographical requirements.

Market research has demonstrated that the ACME product line not always perceived clearly by the consumer. During the product e's period of rapid expansion, particularly with the introduction of e luxury line, color choices, and accessories—the visual manifestion of the master brand—ACME was diluted and fragmented. ome consumers have complained that as they wish to add optional ccessories, the packaging confuses them. They are not always sure that a particular accessory is compatible with their standard unit and its particular model year. ACME's three prime competitors make a claim that their accessories are compatible with—and superior to—ACME's accessories. These competitors often use the ACME name on their accessory packaging with a disclaimer, "Compatible with all ACME brand products." These competitors' accessories are priced much lower than ACME's accessories. In an attempt to alleviate this confusion, senior management at ACME Company has directed that the entire portfolio of product literature, packaging, in-store display units, and catalogs be redesigned to allow consumers to quickly and readily identify a "genuine ACME Company product." The ultimate goal is to ensure that the ACME brand is instantly identifiable by consumers, and that the business philosophy of ensuring the highest quality and value is clear to the various target audiences worldwide.

Note: The company portfolio section is most valuable because it clearly defines the breadth of the project. In this example, the design team is able to succinctly convey what artifacts are to be redesigned, a description of each product, competitive product line components, and marketing and promotion techniques utilized by ACME and its competitors. This section also further explains ACME's management philosophy and business strategy.

A design team that is meeting to discuss this brief would undoubtedly want to make a large chart. Across the top, horizontally, I would suggest listing the components of the redesign: sales literature, in-store display, catalogs, packaging, and owners' manuals. Down the vertical axis, I would list each of the 100 SKUs described. The task would then be to discuss each item on the chart. If the first SKU listed in the vertical column was the full-size basic unit, and the first column in the horizontal unit was headlined "Sales Literature," an area of focus for discussion. I would list the sales

Market research has demonstrated that the ACME product line is not always perceived clearly by the consumer. During the product line's period of rapid expansion, particularly with the introduction of the luxury line, color choices, and accessories—the visual manifestation of the master brand—ACME was diluted and fragmented. Some consumers have complained that as they wish to add optional accessories, the packaging confuses them. They are not always sure that a particular accessory is compatible with their standard unit and its particular model year. ACME's three prime competitors make a claim that their accessories are compatible with—and superior to—ACME's accessories. These competitors often use the ACME name on their accessory packaging with a disclaimer, "Compatible with all ACME brand products." These competitors' accessories are priced much lower than ACME's accessories. In an attempt to alleviate this confusion, senior management at ACME Company has directed that the entire portfolio of product literature, packaging, in-store display units, and catalogs be redesigned to allow consumers to quickly and readily identify a "genuine ACME Company product." The ultimate goal is to ensure that the ACME brand is instantly identifiable by consumers, and that the business philosophy of ensuring the highest quality and value is clear to the various target audiences worldwide.

Note: The company portfolio section is most valuable because it clearly defines the breadth of the project. In this example, the design team is able to succinctly convey what artifacts are to be redesigned, a description of each product, competitive product line components, and marketing and promotion techniques utilized by ACME and its competitors. This section also further explains ACME's management philosophy and business strategy.

A design team that is meeting to discuss this brief would undoubtedly want to make a large chart. Across the top, horizontally, I would suggest listing the components of the redesign: sales literature, in-store display, catalogs, packaging, and owners' manuals. Down the vertical axis, I would list each of the 100 SKUs described. The task would then be to discuss each item on the chart. If the first SKU listed in the vertical column was the full-size basic unit, and the first column in the horizontal unit was headlined "Sales Literature," team would now have an area of focus for discussion. I would list the sales

literature currently available for the full-size basic unit from ACME Company, then list the sales literature available from the other three competitors for their basic units. I would proceed in the same way for each SKU and each category in the redesign project. You can see this will be time-consuming—but at the same time, critical!

The result will be a giant matrix that will clearly show the overall scope of the work, the materials you will need to assemble for a visual audit, and the company's areas of strength and vulnerability. You will really need to do some exercise like this one prior to considering your overall design strategy. The project could be thought of as a giant jigsaw puzzle. You will need to assemble all of the pieces, then attempt to solve the puzzle in a coherent and logical manner.

This type of process will also be critical to creating detail for the description, time line, and budget for each phase.

If this particular project had been described only as a redesign of one tier, say, the luxury tier of products, you would probably want to do this complete exercise anyway. It does not make sense to redesign just one product, or one group of products, without understanding how these products fit with the rest of the company portfolio.

Now for some good news! Why not start right now to develop your own design group company portfolio chart? Why wait for a project to come along? I am aware of design groups in several companies that have done this as a matter of routine. These design groups tell me that just designing this company portfolio chart, and keeping it updated as new products are introduced and others are eliminated, has made an enormous difference in all of their design work.

One Fortune 50 company I have worked with constructed a special room for this kind of activity. Whole walls were covered with examples or photographs of each of their products, and the visual support materials for each product. Prime competitive material was integrated with their own materials. This had been the design group's idea and was primarily created as a design resource. However, as word about this room spread, people from just about every function in the company came to visit the display. Both marketing and sales said that it was the most useful company presentation they had ever seen. The CEO was ecstatic. Not a bad way to get positive recognition for design within the company, and save yourself an awful lot of time developing design brief content!

Business Objectives and Design Strategy

Business Objectives	Design Strategy
Restore visual cohesiveness and clarity to company portfolio of products in order to strengthen brand recognition among consumers.	Develop a unique grid system which will be used consistently with every application across all three tiers.
	Develop a standard typographic system that will be used consistently with every application.
	Develop a color palette that will be used consistently for all products. Explore concepts that will utilize specific color coding for each tier of products.
	Explore concepts that will utilize various forms of imagery to define products (e.g. photography, illustration, and image concepts that include people using the product, as well as concepts that feature the product only).
Ensure that ACME Company's products are clearly differentiated, visually, from all competitors.	Audit all major competitors for use of specific visual elements and style.
	Develop design concepts that are uniquely different from all competitors' while still communicating "superior quality."
Improve market share and the bottom line.	Develop design concepts which have the key objectives of making all products instantly recognizable as ACME brand products, make each tier attractive to the specific target audience for the particular tier, and powerfully reinforce the primary messages of superior quality and value.
Enhance equity in the ACME brand by maintaining corporate brand identity standards.	Develop design concepts that display the corporate logo prominently and consistently across the entire product line.

Business Objectives and Design Strategy

Business Objectives	Design Strategy
Restore visual cohesiveness and clarity to company portfolio of products in order to strengthen brand recognition among consumers.	Develop a unique grid system which will be used consistently with every application across all three tiers.
	Develop a standard typographic system that will be used consistently with every application.
	Develop a color palette that will be used consistently for all products. Explore concepts that will utilize specific color coding for each tier of products.
	Explore concepts that will utilize various forms of imagery to define products (e.g. photography, illustration, and image concepts that include people using the product, as well as concepts that feature the product only).
nsure that ACME ompany's products are early differentiated, sually, from all competitors.	Audit all major competitors for use of specific visual elements and style.
	Develop design concepts that are uniquely different from all competitors' while still communicating "superior quality."
nprove market share and e bottom line.	Develop design concepts which have the key objectives of making all products instantly recognizable as ACME brand products, make each tier attractive to the specific target audience for the particular tier, and powerfully reinforce the primary messages of superior quality and value.
ce equity in the ACME . by maintaining corpo- brand identity standards.	Develop design concepts that display the corporate logo prominently and consistently across the entire product line.

Business Objectives	Design Strategy
	Build on brand heritage by not altering the brand logo in any way, but also allowing the brand to appear more contemporary by utilizing the brand logo in more contemporary physical environments.
Establish design guidelines for the possibility of future new products being added to the company portfolio when the market recovers.	Develop design concepts that are representative of current fads or trends in design. Pursue design concepts that are more "classical" in approach without appearing "old-fashioned" or dated.
	Determine what types of new products might be anticipated, and what the target audience for these new products might be.
	Develop a design house style guide which could endure for at least ten years.
Clearly distinguish each value tier: • Basic • Basic commercial/low end • Mid-price • Luxury models	Develop concepts that maintain a cohesive visual appearance of the brand across the entire company portfolio but still allowing for use of various individual graphic devices for each value tier.

Note: The design strategies listed do not specifically describe any particular design element or concept. Rather, this section simply lists those business objectives that the company feels are critical to the outcomes of this project and ensures that there is an agreed to design strategy for each one. As mentioned in chapter 3, these design strategies may be changed as work begins on concept development. That's okay. This is simply a jumping-off point. The business objectives may also change. Usually, this takes the form of adding more business objectives, not deleting them. If a business objective is added, it will more than likely alter some of the initial design strategies.

However, the goal is to minimize the number of changes, or—hopefully—to eliminate them altogether. The design strategies should be discussed with the design team prior to including them in the first draft of the design brief. As a possible exercise in your own design group, try taking the business objectives outlined in this list and seeing what design strategies your own group might come up with. More than likely, they will be different from the ones used in this example!

Project Scope, Time Line, and Budget

Note: In the following example, the design group is presumed to be an in-house corporate design group that is centrally funded by the corporation. All design staff are salaried employees; therefore, no budget has been assigned to this project for design staff labor (time). Salaried employees are generally not eligible for overtime pay. In most instances, the centrally funded group's employee salary and benefit overhead is not charged back to specific design projects. If this project were to be executed by an external design firm, or an in-house group that operates on a charge-back system for staff time, employee overhead would have to be calculated into the project cost. Obviously, this would make the budget for the specific project a great deal higher.

- *Phase 1—Comprehensive visual audit of existing company portfolio, as well as a visual audit of the top three competitors' portfolios.* This phase will include:

  - Assembling one copy of each ACME Company catalog, unit of sales collateral literature, current in-store display unit, package, owner's manual, and product.
  - Assembling one copy of each of the above for Brands X, Y, and Z. (Note: The corporate strategic design group already has all of this material from ACME Company and the competitors as it is gathered on a routine basis. Therefore, very little time will be required to assemble this material.)
  - Design team to conduct a visual audit of all material listed. Time frame for this activity will be five full business d

(forty hours). The strategic design manager and the four designers (names should be listed) will conduct this initial audit. Because of our funding structure, and because all materials are currently available, there is no direct cost to the project for this activity.

- The strategic design group shall prepare a written report of the findings from this audit. In particular, this report shall contain detailed information about how the audit results relate to the stated business objectives of this project, as well as the apparent strengths and weaknesses of the design elements utilized by Brands X, Y, and Z.

  The design audit results document shall be prepared by the strategic design manager, (name), and the lead designer of the design project team, (name). This audit report will require three business days to prepare. There is no cost to the project for development of this report, as the design function is centrally funded.

- Both hard copies and electronic copies of this report shall be distributed to the entire design team, the design brief project team, all previously identified project stakeholders, and all approvers who will be listed for each phase of the project. The completed visual audit report shall also become a part of the appendix of this design brief.

  Materials used for the visual audit shall be maintained by the strategic design group and made available to anyone within the company who wishes to review the material on his or her own. The cost of duplication, distribution (postage and handling by a document distribution company contracted by ACME Company), and storage of the materials will be $600. The report distribution company will require two business days for copying and distribution.

- The visual audit report will be reviewed by (name), co-owner/partner of the project (previously identified as the

project team. A meeting of this entire team will be scheduled to review their comments and concerns six business days after the distribution of the report. At the conclusion of this meeting, the design brief project team will approve the visual audit document.

- The total time frame for this phase shall be seventeen business days (including the six business days for individual review by key stakeholders). The total cost for this phase will be $600.

- *Phase 2–Develop a maximum of six creative design concepts that meet business objectives.* Working as a team, four designers from the strategic design group, under the overall direction of the strategic design manager, will develop a maximum of six creative concepts for presentation to the design brief project team for approval. More than six creative design concepts will be explored, but only six will be selected for presentation. The selected concepts will all address the business objectives, the design strategy, and the results of the visual audit.

The development and refinement of six design concepts for presentation will require six weeks of time by the design team. Expenses for external vendors of supplies and materials for this concept development project will not exceed $50,000. Typical examples of these external expenses include, photography, model-making (for in-store display units), supplies for graphic design work, and some travel, lodging, and per diem out-of-pocket expense reimbursements for the design staff, who may have to engage in some limited travel.

Key stakeholders who will be routinely consulted during this concept development process include representatives from sales, marketing, law, the various global geographies, market research, external vendors for printing, display fabrication, package engineering and manufacturing.

At the conclusion of this initial concept development phase, the design team shall present the six concepts to the entire design brief project team for discussion and approval. Once the

design brief project team has granted approval, we will proceed to the next phase.

Phase 2 will require six weeks of concept development time and one week for design brief project team discussion and approval. The total time for phase 2 is seven weeks. The total budget for phase 2 is $50,000.

- *Phase 3–Test all concepts with target audiences.* PDF files of the six approved design concepts will be sent to sales and marketing executives in all regions and geographies. When practical, models of display units will also be sent to these representatives. Each representative will be asked to show all six concepts to at least five people from the target audience for each tier. No information shall be given to the members of the target audience. They will only be asked, "Could you please give me your immediate reaction to each of these design treatments?"

  Verbal responses are all that is required. These should be recorded on audiotape for each interview. Target audience interviews should take no more than fifteen to twenty minutes for each person interviewed. The objective is to obtain top-of-mind immediate responses to each design concept from the target audience. Written and audiotape recorded responses should be sent to the strategic design director at (name and address). Company representatives shall have three weeks to complete these interviews. Transcripts of these test results will be added to the appendix of this design brief.

  The total time allotted to phase 3 is four weeks: one week for distribution of materials and three weeks for interviews. The budget for phase 3, including duplication and distribution of the materials, is $5,000.

- *Phase 4–Select three concepts and further refine each. Retest all three with target audience.* Based upon worldwide target audience testing of the initial six design concepts, the design brief project team, in collaboration with the design team, will select three design concepts for further refinement. The design team w

require three weeks for this refinement process. The cost of this further refinement process will be $35,000. This budget will cover the same categories of items as described in phase 2.

Upon refining three of the original design concepts, all three will be tested in an identical manner as described in phase 3. Once again, the testing process will require four weeks and an expenditure of $5,000 of the total budget. These test result transcripts will also be added to the appendix of this design brief.

The total time for phase 4 will be seven weeks, and the total budget for phase 4 will be $40,000.

- *Phase 5—Select one concept, fully develop it, and perform final testing.* The results of the phase 4 design concept testing will be analyzed and discussed by the design brief project team and the design team. One concept will be approved for final development and ultimate presentation to senior management for approval. The four members of the design team shall collaborate producing comprehensives and models for this design solution.

  Key stakeholders who will be involved in this phase 5 work other than the design brief team include:

  - The law department for final legal review
  - A representative from marketing from each major geography worldwide
  - A representative from procurement
  - All external vendors who will manufacture or produce the components of the project
  - A representative from sales for all major geographies
  - A representative from the corporate distribution function
  - A representative from the finance function, who shall produce a final accounting analysis for the project

  In addition to fully developing the selected design concept each key stakeholder will be accountable

- Sales and marketing will develop internal and external communication plans
- Procurement will begin the process of preparing vendor bids and awarding contracts
- The law department will prepare a written opinion concerning any legal issues
- Distribution will prepare a definitive plan for replacing existing materials in the distribution system with the new materials once they are available
- Finance will prepare a full financial report for the project, to be available at the time of presentation to senior management for final approval

Phase 5 will require eight weeks to complete. The final design development process has been budgeted at $100,000. At the conclusion of the final development of a design solution, an external testing agency will be engaged to professionally test the solution with the target audience worldwide. The testing agency will be given four weeks for testing and preparing a report on the test results. The budget for external testing has been set at $100,000. The total time frame for phase 5 is twelve weeks. The total budget, including the cost of testing, has been set at $200,000. The external agency test result summaries will be added to the appendix of this design brief.

At the conclusion of phase 5, the design team, the external testing agency, and the entire design brief project team shall meet to formally approve the design solution. This meeting will be scheduled as a full-day meeting. One week prior to this meeting, all members of the design brief project team shall be sent PDF files of the design solution, the test results, and all formal written plans produced by additional key stakeholders. This will allow the design brief project team to attend the final approval meeting with substantive knowledge of the entire plan, as well as the business rationale for the approval of the final design solution that the team previously selected.

- *Phase 6–Develop approval presentation.* The co-owners of the project shall be accountable for preparing a senior management approval presentation and for making this presentation to (name) on (date and time). The design team shall prepare all visual artifacts for this approval presentation. The final approver will be sent all materials, including the design brief and all reports from key stakeholders, one week prior to the final approval presentation.

  The co-owners of the project will require two weeks for preparation of this approval presentation. The budget for the development and production of the approval presentation is $8,000.

- *Phase 7–Implement approved design solution.* In order to implement the approved new design concept for the entire project line in a short period of time, a subcommittee of the design brief project team shall be formed to develop an implementation plan.

  This plan shall include specific instructions for rapid liquidation of current supplies of printed collateral sales literature, catalogs, owners' manuals, and packaging. Additionally, this plan will include the consumer communications plan and a new sales and marketing plan for the rollout, in addition to describing any variations required by different geographies. The implementation plan shall become an integral part of the senior management's final approval presentation. This detailed implementation plan will be developed during the same time period as the final approval presentation as described in phase 6 (total time two weeks). Since each of the corporate functions will develop its portion of the implementation plan individually, no budget has been assigned to this activity.

  The goal is to achieve full worldwide implementation of the new company portfolio design within one business quarter (three months). Manufacturing and distribution of the new as disposal of the current manifestations of all