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**CHECKLIST FOR INITIAL  
CLIENT MEETING**

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**PROJECT**

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**Project Name**

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**Measurable Objectives** (benchmarks to measure progress towards goals, e.g. increase membership by 20% each year or media coverage.)

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**Other Objectives**

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**Deliverables Needed** (Deliverables can change during the creative process, i.e. the graphic designer might suggest that a blog, rather than an e-newsletter, will do more to address your goals.)

Pay attention to details, such as whether client just needs brochures, or brochures stuffed into envelopes.

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**Ancillary items** (Clarify where copy, images, logos, etc. will come from and who will pay for each.)

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**AUDIENCE**

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User demographic information if available; or specific attribute such as "people who don't brush their teeth."  
Discuss a typical audience member or two and profile including occupation, age range, gender, what her day looks like, etc.)

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How will your audiences use this material?

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What should be avoided in talking to these audiences?

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Tone and Image (Funny, casual, formal, factual, etc.)

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What do the audiences believe or think, before you start communicating with them?

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Specific visual goals?

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Messages: Features, Benefits and Values

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Top features and/or facts about the value to target audiences . Client's value in relation to competition.

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One-sentence summary of benefits

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**BUDGET AND SCHEDULE**

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**How much** and has this been approved?

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**What** is the due date for each deliverable?

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**How** do deadlines relate to important events (meetings, other marketing campaigns, trade shows, etc.)?

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**Payment method** (does designer need to pay vendors or can client be billed)

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**Who** is the contact person?

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**What** is the internal review and approval process?

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**Who** needs to sign off on final execution?

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**How many** rounds of revisions should the designer include in her bid for the job?

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Adapted from Nancy E. Schwartz

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Date to receive all copy, images, etc.

“ ” provide design to client for initial approvals

“ ” provide final artwork for final approvals

“ ” release files to printer, programmer, etc.

“ ” work completed and delivered, goes live, etc.

S	M	T	W	Th	F	S