A Collaboration of Cultures–Designers and Clients Learning Together

by David Whitemyer

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Last autumn, during an end-of-the-semester chat session with my class, one student noted, "It seems like you're just trying to teach us to be good clients." The course I teach for Johns Hopkins University's Museum Studies program provides a real-world snapshot of taking an exhibition concept through the nuts and bolts of a museum installation from design through documentation and construction. The comment caught me by surprise. I hadn't thought of that before, but after a moment I responded, "Yes, that's exactly what I'm trying to do."

I hope that my course provides students with a framework and some tools for understanding the full breadth of an exhibition design and fabrication process, so if one day they're "the Client," they'll already have some positive experience. But what I've also told my students is that I usually learn more from them than they learn from me.

When a museum doesn't have an in-house exhibits department, or when a project is particularly large or complex, design firms and fabrication companies are sometimes hired by the institution—the Client—to develop, build, and install the work. Successful projects are born from more than just good designers. They also benefit from experienced and knowledgeable clients, organizational leaders who understand the design process, who provide clear direction and make confident decisions, who know what everyone's role is, and who take risks. Many clients have this experience, but those who do not may need to rely on the skill and practice of their hired designer.

Exhibit designers are in a perfect position not only to design exhibits, but also to assist clients through the process. In fact, it's our responsibility. In many cases, designers have been involved in a significant number of projects, each with its own unique size, complexity, content, and set of constraints. We have an opportunity to impart what we've learned—the good and the bad—sharing the fruits of our experience with each subsequent client.

Some clients are rookies to the process, or perhaps they've been burned in the past. They may be leading the charge on a brand new museum. They may be coming to the process guarded and trying to protect their assets. They deserve to feel safe in their investment in the designer. Fully informing the client about what each step of an exhibition project entails helps to empower him/her to lead and succeed; and bonds him/her to the designer, creating a truly collaborative partnership. And this process is a two-way street. There are always significant opportunities for the designer to learn from the client's experience.

The First Step

Ideally, designers can begin assisting clients through the steps of a project before it even begins, during interviews and marketing presentations, or even in helping them to craft the RFP. But it's at the project kickoff meeting where this is a must. You're kicking off a relationship, not just a project. You'll be working together for months or even years, and so you should start with an open conversation about exactly what is going to happen during each phase of the project, what everyone's responsibilities are, and what the key schedule milestones

will be. This discussion and related clarifications will help mitigate the potential for future conflict.

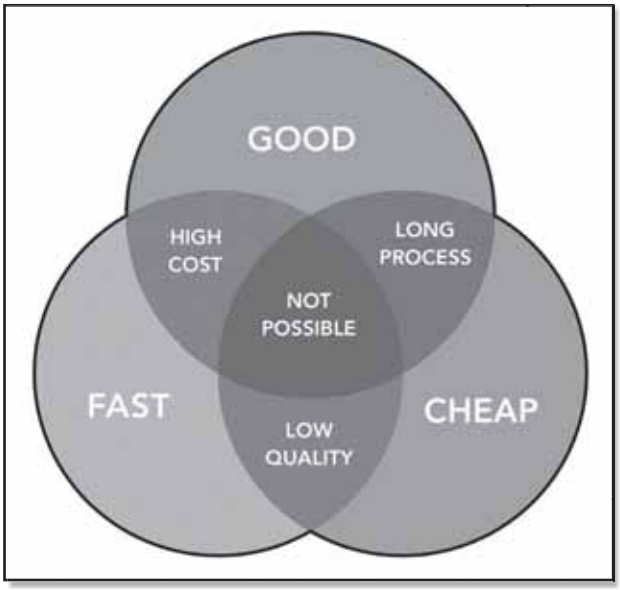
I sometimes share the kitchen remodeling analogy with clients. Most people can relate to that stressful, yet joyful, experience. We talk about the fun creative process, the budget realization, the excitement and terror of demolition work, the finger pointing, and the stage when the contractor calls every five minutes with questions. And when everything is done, it's wonderful.

During the kickoff meeting I also like to acknowledge to clients that mistakes are a normal part of the process. I share the story of a national museum I once worked on where all label copy was reviewed and approved by members of both the designer's and museum's team. Somehow, despite all quality control procedures, the term "gorilla warfare," rather than "guerrilla warfare," made it through design, production, and final installation before anyone noticed. It happens!

- ***Review the scope and contract.*** Once the contract is signed, don't hide it in a drawer. With all stakeholders in attendance, walk through the project's scope of work and list of deliverables.

- ***Examine the schedule.*** Schedules are tools. Involve the client in the development of the project timeline, and revisit it frequently throughout the process.

- ***Be honest.*** Don't sugarcoat the process. Advocate transparency, and admit that problems and unexpected challenges will arise, but that you'll work together to resolve them.



Both clients and designers must be familiar with the GOOD-FAST-CHEAP diagram. On any given project, only two are possible. Illustration by the author.

Clarifying the Project Goals

The most challenging aspect to any exhibition project isn't keeping it on schedule or on budget, but rather maintaining client/designer collaboration and shared vision and expectation of the process and final product. I begin each semester of my course with a weeklong discussion about project constraints. Constraints are the realities that will shape expectations; they include everything from budget and schedule, to unique aspects of the project such as the museum governance structure, to the size of the exhibit gallery doorway. Developing a list of constraints with the client is part of the collaboration process.

All clients and designers should be familiar with the Good-Fast-Cheap diagram. Out of these three desired outcomes, projects can fulfill only two at a time. It's hard to tell a client that he/she can't afford something, or that his/her project is not going to be completed as quickly as hoped, but that's the designer's job, and it informs the client about the realities of the process.

- ***Create the criteria.*** In concert with the client, define the exhibition's audience, and discuss expectations

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for adherence to universal design, levels of interactivity, and conservation.

- ***Put it in writing.*** With the client, document the project's goals and constraints. Discuss which of these will be most challenging and/or important.

- ***Show examples.*** Don't expect everyone to simply imagine what will be provided at each formal deliverable. Show them! Provide examples from past projects.

- ***Repeat it.*** Over the course of a long-term project, periodically revisit the realities of the project's constraints.

Establishing and maintaining expectations requires remembering that exhibition design and fabrication is a business. Although exhibit professionals love their craft and want to give clients stellar results, labor, travel, and materials are not free. It's the service provider's responsibility to educate the client about what things cost, along with their pros and cons and relative values.

Speaking the Same Language

My financial planner talks at lighting speed, using terms like "asset class diversification," "large-cap funds," and "variable annuity." Embarrassingly, I don't know what any of it means, and it's overwhelming. I just want him to understand my financial goals and risk aversion, and then to figure out the rest for me.

Designers and fabricators need to keep in mind that this is often how clients and their stakeholders feel. Years ago I was giving a presentation to a group of museum fundraisers. After speaking for two hours about floor plans, elevations, and exhibit messages, someone in the room raised their hand and asked, "What's an elevation?" I should've asked earlier if I was making sense.

We speak different languages. The 3D design industry has its own lexicon, so when phrases like "Gobo projectors," "schematic design," and "image acquisition" are tossed around, it's reasonable for those unfamiliar with the exhibit design process to feel like I do when chatting with my financial planner.

- ***Develop a glossary.*** In your kit of tools, include definitions of common terms that will be used throughout the process.

- ***Check in.*** Don't talk endlessly during presentations. Pause, periodically, and ask if there are questions.

- ***Be specific.*** Eschew using vague words like "preliminary," "conceptual," and "placeholder." Different people will interpret these to mean different things.

Hindsight is 20/20

"Experience is simply the name we give our mistakes," wrote Oscar Wilde. Every exhibition project that a museum professional works on during his/her career will include errors, big and small. And although it's cliché, it's also true that these mistakes and their solutions increase and improve the knowledge base that exhibit designers bring to each subsequent project—and to their clients!

The most valuable meeting I've ever

The exhibition design and fabrication world is littered with its own terminology. Not everyone speaks this language. Illustration by the author.

participated in was hosted by a museum Director who invited the design and fabrication teams back to the facility three months after the grand opening. It was an opportunity for the development team to hear the museum's perspective about the successes and struggles during the design and construction process. We heard from the museum educators and volunteers, who had spent the last twelve weeks watching visitors, herding field trips, and working within the galleries. This meeting was an education for everyone involved in the project, and it has had a positive effect on every project I've worked on since.

- ***Perform an internal debrief.*** As soon as possible after completing a project, convene a team meeting to discuss what worked, and what didn't; with no finger pointing!

- ***Ask for a client debrief.*** Request a meeting with appropriate museum staff 3-6 months after project completion. Make sure it includes people who work "on the floor."

- ***List action items.*** Don't allow what is learned from these debriefs to dissipate. Develop a list of to-dos, identifying who is responsible for each, and see it through.

The Customer is Always Right

Learning about the design process and clarifying all expectations before and during projects is a two-way street. Successful projects come from clients who are familiar and comfortable with the process, but designers and fabricators also have a responsibility to learn about the client: their needs, expectations, internal procedures, and culture.

If a client veers off the intended course, whether through a schedule revision or a change of heart about a design concept, the designer's responsibility has to remain on serving the client. Instead of hashing over what should've been, designers owe it to their clients to help them through the steps required to follow this new path.

When designers create a culture of collaborative learning and provide tutorials throughout the project process, we do so in effort to streamline the services for which they are paying us. It is done in respect to both the client and the process—and it always benefits the project!

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