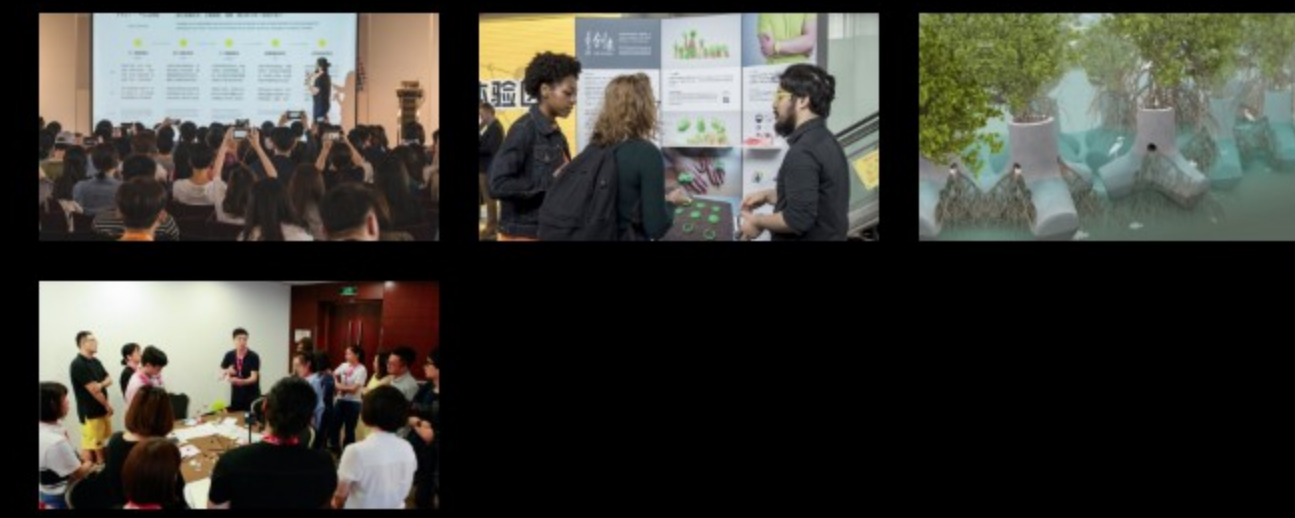# A Preliminary Discussion on What Makes a Good Design Consultant?

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In my student days, I've been taught and I believe I always thought I was going to be a designer, but after graduation I stumbled into the design consultancy industry by accident. And it's been four years now. Since then, I have been thinking about the juggling of roles between designers and design consultants, a topic I have discussed with lots of people, including my colleagues, challenges, students and many of my fellow practitioners. This article is my attempt to share and rethink what I have gathered along the way, which would also contain some ideas and suggestions from celebrated designers. What follows may not necessarily be the most correct point of view, but it is definitely based on my very own experience.

I. The Differences between Designers and Design Consultants

The phrase "design consultants" denotes a well-balanced combination of roles or capabilities as both designers and consultants. But unlike traditional managing consultants, design consultants are required to take a design-driven approach to the process of decision-making and overall execution. In other words, while a designer may need to concern himself mainly with the design or the problem-solving process itself, that is, to come up with a proper answer within a relatively certain scope, a design consultant has to consider whether the definition of the problem early on in the design phase is truly appropriate, whether the client has good execution, whether the design deliverable is aligned with the client's ability, how to follow up after the project is completed, and so on. This comparison is not to suggest that designers solve a lesser problem, but simply that design consultants need to be designers and consultants at the same time.

Some people can deliver great design projects befitting their status as established designers; some people can work as good consultants with an excellent understanding of client needs. But design consultants need more than a good understanding of design and an empathy for their clients, but should be able to juggle the two roles of designers and consultants. The differences between designers and design consultants are most prominent in their mentality. It is all very well for designers to put up a threshold of expertise, close the door, set to work, and produce something good at the end of the day. As an industrial designer, I myself have developed the habit of "hiding" in the corner and immersing myself in my design world from time to time. Design consultants, however, don't work behind a closed door; on the contrary, they need to maintain constant communication with their clients and users so that they can truly understand what challenges and pain points they face. But whatever the role, the ultimate goal is to train to be a better design leader. Design leaders are not only about guiding clients and leading design teams; the more important part is to understand real-world user needs so that every stakeholder can be steered in the right direction to solve the real user pain points.

II. Always Keep Framework in Mind

Design consultants should often ask themselves questions that are important to their clients: "Why do I do this? What is the rationale? What is the why?" The design product produced at a later stage of a design project is just what we call the what—a feasible format out of countless others. Before that, however, it is necessary to find out the why in order for the project to move ahead. I think of the design framework as one of the ways to connect the why and what, and help clients and users to communicate with design teams.

The framework can serve as an aid to the entire design process. At the earlier stage where a lot of ideation happens, the framework can help clients to identify their value propositions, challenges to address, and how to write proper "how might we" sentences, etc., which can take the form of a simple X-Y chart (often known as 2 by 2), or a few touch-point keywords extracted from the experience flow. (See figure 1 – Using basic design frameworks to help guide design projects. Photo courtesy of MIX) It can also lay the foundation for early design of experience and services, e.g. for mapping out main touch points in the user journey, the moments and ways to engage with users, behaviors, etc. On top of that, the framework can help design consultants later on. For example, we can use the road map to understand the short-, medium-, and long-term goals of clients. We can also use it to design indicators for evaluating design results, such as user pain points, design proposal sequencing, and possible challenges during execution, to help collect client feedback in a constructive way.

Design is a discipline, not a science. As such, the design framework is not a panacea. Design consultants shouldn't use the framework indiscriminately, but should tailor it to the specific situation and constraints according to the client's requirements. In many cases, they need to customize and improve the framework based on their experience and communication with their clients. A framework should always be kept in mind in the hope that it can guide the way the what (design result) and why (design purpose) complement and reinforce each other, so that each decision made along the way can produce meaningful results (what) and satisfy the core (why) demand.

III. Compelling Storytelling

The word "storytelling" is naturally associated with the acts of presenting and performing in design projects. We all know the importance of storytelling to such actions. But what I want to emphasize is rather the adjective "compelling", which, for design consultants, can be construed as "participatory" storytelling. Design consultants need to regard the whole project as part of storytelling, so that clients and users can get deeply involved in discussions, problem defining, co-designing, and other processes. Only when clients and users are deeply involved will they feel ownership of the design project, process and results, so as to create a strong appeal. (See Figure 2 – Giving participants the opportunity to be part of the storytelling. Photo courtesy of Sheng-Hung Lee)

It is not only when design consultants hand over project deliverables to clients that ownership is helpful. What's more important is that ownership will increase the appeal and impact of such deliverables after the clients' core teams bring them back to share with the rest of the companies. In the past, most designers used to finish off their design projects by conveying deliverables to their clients via traditional one-way communication and presentations. In recent years, however, a great many more design consultants have adopted two-way participatory communication methods to achieve desired goals. Storytelling is a natural way of communication. I still remember how we loved to listen to the bedside stories our parents told to go to sleep when we were little. We all like to hear stories, and will automatically record the bits and pieces of what we hear. What design consultants need to develop is the ability to tell stories in an honest and logical way, just like that an article should be well organized and written with emotion, and make the content of the stories sound unexpected but inevitable.

IV. Professional development

Design consultants will come across a wide range of projects, many of which are the very first attempts of both design consultants and their clients. A professional team of design consultants should thus bring in talent with different academic backgrounds. For example, a team can have an architect design consultant, a design research expert with a psychology background, and an interaction designer major in sociology. That said, a versatile design team is not necessarily the best team. Whenever a design consultant encounters a new challenge, he needs to learn and adapt fast to understand and help clients fulfill their needs. It is thus very important for design consultants to upskill themselves in and beyond their areas of expertise by extending the depth and width of their know-how and skill sets like T-shaped professionals.

Both designers and design consultants should "read" extensively, which is a value I hold dearly. I remember particularly in my college years the fierce debate about "whether to learn design requires no reading". Proponents argue that since our college classes teach design skills and communication methods, what is the point of studying liberal arts and sciences like languages, general physics and calculus that are good for nothing in design communication? Opponents hold that design theories and methodology lie at the core of the art of design; design theories encompass a broad range of areas, from physical science, mechanical science, ergonomics to design methodology, and design expressions and techniques are both manifestations of design theories. Both sides have a point, as their arguments, whether from the lens of design communication methods or design theories, are aimed at taking design to a higher level and solving more complex and systemic problems. As for professional development, there are myriad ways to do it, but reading is perhaps one of the most efficient ways to obtain knowledge. Writers condense their own experience into a book or an article, from which readers can distil valuable wisdom and thus learn from their mistakes. I believe there are other ways to hone our skills, such as participating in design forums, international seminars, workshops, design reading sessions, and further education. The key is to keep your design expertise constantly updated and spruced up as you continue to learn and provide clients with better professional advice.

Take the example of one of my design projects TetraPOT and the professional challenges I have encountered. Tetrapods, also known as wave breakers, are large four-legged, concrete-filled stones placed along coastlines that are about 1.5 meters long in each side and can weigh up to two tons. (See figure 3 – TetraPOT conceptual design. Photo courtesy of Sheng-Hung Lee)
Our idea is that the interiors of tetrapods can provide space for coastal vegetation such as mangroves to take root, leading to the reforestation of the coastlines. The whole design process, however, is not without its setbacks. While this project combines design with ecology, I haven't any knowledge in botany, coastal science, civil engineering, or any multi-disciplinary expertise. I have no such knowledge base whatsoever, but as a professional design consultant, I need to know how to use such expertise to solve problems with the help of teamwork and experts. The ability to solve problems stems from professional readiness; and professional readiness and confidence are the result of professional development.

V. From I Want to Learn to I Want to Experience

I think this applies not only to a design consultant, but to most professions. "Design service" is not something to be learned, but since design consultants are often tasked with designing user experience services, they need to gain personal insights from their experience and develop sensitivity for "design services". If design consultants do not have a variety of life experiences to fall back on and haven't experienced the perfect services of ACE HOTEL, TSUTAYA BOOKSSTORE and Eslite Bookstore, they will find it very difficult to ideate better solutions than what they have now. The premise of designing the most proper user experience is to transition from a learning mindset to an experience mindset. Learning begins with an individual's active imitation and attempting, which is much driven by one-way initiative, while experience is about how to explore and grow under a curated context and driven more by two-way interactivity. (See Figure 4 – Hands-on modeling of community-based libraries for parent-child groups, allowing participants to experience the design process in workshops. Photo courtesy of Sheng-Hung Lee)

As the saying goes: "It is better to travel thousands of miles than to read thousands of books." The emphasis on travelling points to the importance of personal experience. To design often requires extensive prototyping that allows designers to fully experience the design process. Things scribbled on the screen is anything but the real experience, and only when the CAD is turned into a physical thing that can be held in hands can any appropriate design feedback be given. To design a world-class chair is not to simply follow in design masters' footsteps and deliver the design artwork, but to continuously prototype and experience the beauty of each line of the product in the process of creation, or the use of each chair structure in the design process. Such experience will also constantly strengthen our design consciousness of every single detail of the product. And without knowing it, we will improve the product, and, by extension, the services and experience.

VI. The Fallacy of Equating Design Process with Deliverables

Most design consultancy or design companies use design thinking as the overarching project methodology. Design thinking can be roughly divided into six steps: inspiration, user interview, brainstorming, conceptual design, prototyping and testing, correction and improvement, which should be iterated constantly until the final design deliverables come out. Innovative methods are critical to fostering customer participation in the design experience, which requires design teams to fully communicate with clients. And since clients also expect a lot from design methods, design teams should use innovative design methods to produce some pleasant surprises that meet such expectations. For design consultants, every project is a challenge. I don't think there is anything in the design field that is absolute: innovative methods will absolutely produce innovative results, or innovative results are absolutely the result of innovative methods. Design consultants and clients must understand that innovation happens only under the right conditions and that they can work with their clients to create the right environment for innovation. For example, clients' innovation capability, the feasibility of future technologies, and business sustainability are all important factors for bringing innovation to fruition. Therefore, when design teams discuss the design process and expected results of their projects with clients, they should first ask themselves: "Do we have the right condition for innovation?"

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