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PRODUCTS
NA
BRAND
RESEARCH
DEVELOPMENT

STEP UP

SMALL BUSINESS
DESIGN MANAGEMENT
TOOLKIT

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USING THIS TOOLKIT

At PDR we've worked with hundreds of small businesses to help them with their design issues. So, in this toolkit we've pulled together the diagrams, lists and explanations we use most often and find most helpful.

This document is aimed at the owner or manager of a small business – the person who makes the decisions about the future of the company. But it might also be given to a 'design champion' in the team – someone who is keen to push the business to develop new products and services and help it grow.

After you've read or skimmed through the whole thing (we've tried to keep it short!) you might use just one of the diagrams or you can work through them one-by-one over a period of time.

As with all tools, they work best when you use them rather than just look at them. This is why we've also provided some of the tools as large-format sheets that you can download, print, stick on a wall and use to involve your whole team.

www.pdronline.co.uk/designmanagement

SECTION 1: BEFORE YOU START

DESIGN MANAGEMENT?

You are most likely to find people with the job title of 'Design Manager' in a large company or a big design agency. These professionals work with design everyday. They co-ordinate multiple strategic design projects (Level 3, see next page), they encourage creativity and design-thinking culture across the whole company (Level 4). They report at the Board-level, using design to drive and develop the business.

Design-led companies are more successful, more innovative and more competitive. But when most people think of 'design-led' businesses they think of Apple, Nike, IKEA – global companies, with big budgets and access to top-level design professionals.

In the majority of small businesses the situation is very different and so the need for design management is different. Most will not even be aware of 'design management' and have never used a professional designer (Level 1). Others might have been involved in a few design projects when they commissioned a freelance designer or agency to help them with a logo, some packaging or some product designs (Level 2) but they may or may not have been successful.

This toolkit is aimed at businesses at Level 1 and those that are new to Level 2. It's a 'beginners guide to design management'. Some of it you may already know, some of it will be new. We've tried to keep everything simple and practical because we know that in small businesses budgets are small, time is tight and people are busy with the day-to-day pressures of delivery and survival.

Although design management for most small businesses is used on a project-by-project basis, it still provides significant benefits. By using design and designers more strategically you can reduce your risks, be more competitive and grow your business.



PUT SIMPLY,

by using design and designers more strategically you can reduce your risks, be more competitive and grow your business.

THE DESIGN MANAGEMENT STAIRCASE

The Design Management Staircase model sets out the typical characteristics of businesses and how they use design at four levels. The level classification ranges from the lowest level “No Design Management” to the highest level where Design Management is used strategically and is part of the business culture.

Businesses do not necessarily have to strive for the highest level, as various factors determine the particular needs of each company. The aim is to use design in the most effective way according to the circumstances and level of ambition.

LEVEL 1: NO DESIGN MANAGEMENT

Design is used on an ad-hoc basis with no strategic aims. There is little knowledge or experience to handle design activities. Design plays no role in the company's attempts to differentiate itself from its competitors. Design activities will be unpredictable and inconsistent because of the absence of a clearly defined process.

1

LEVEL 2: DESIGN MANAGEMENT AS PROJECT

Design is used for style changes or product improvement projects, primarily as a marketing tool. Design is not used to create new products or services. Design projects are managed by a few specific employees. As a result, design is not integrated into other business processes and there is often little collaboration between departments.

2

LEVEL 3: DESIGN MANAGEMENT AS FUNCTION

Design is used proactively and companies start linking design to innovation and new product development. A dedicated employee or department will have responsibility for handling the design process and will co-ordinate with other specialists and departments. A good quality and efficient process ensures the company keeps up with the competition.

3

LEVEL 4: DESIGN MANAGEMENT AS CULTURE

Companies at this level are design-driven and market-leaders. Innovation comes through new products or services and new market propositions. In order to excel, senior management and different departments are closely involved, with design embedded in the main business processes. These companies instill the importance of design across the whole team.

4

IS DESIGN WORKING FOR YOU?

Design is good for business. There are lots of case studies, books and research papers that explain why using design in a business is good for innovation, competitiveness and increased sales. But unfortunately there are also a lot of businesses (particularly small businesses) that have tried working with designers or design agencies and it was not successful. Looking into these situations more deeply there are common themes – there was no written brief; nobody took the time to step back and review all the options before a solution was decided; the designer involved was either the first one that came along or was a friend-of-a-friend; there was no agreed budget so a decision was made on the cheapest price; and no one knew how long it would take or what exactly would be involved.

These problems are not about the shapes and styles of how things looked, they are about the way the project was (or wasn't) prepared, managed and measured – this is Design Management and what is often missing.

Design is not just about looking good. Good design is about getting results that work for your business – that might be through websites that increase online orders, packaging that has impact on-shelf, products that outperform the competition or services that delight your customers and keep them coming back. To get these results a business needs to understand what it wants to achieve and which design services would be the best route to success.

Doing the right design project, with the right designers at the right time is vital to success. But achieving this can be more complicated than it seems, and is where this toolkit can help.

"In a marketplace of all too similar offerings, whether it is a website or electronic device, design focused on user experience is a key competitive differentiator."

Fast Company Magazine

"For every £100 design-led businesses spend on design, their turnover goes up by £225."

The Value of Design Fact Finder Report,
UK Design Council

"Successful executives should treat design as more than a finishing discipline that simply improves products' aesthetics. Instead, design should influence every aspect of customers' experiences."

Business Week Magazine

"Design, as a driver of innovation, contributes to getting good ideas to market. It enhances product and service development, made more effective and desirable through good design management."

Design for Growth and Prosperity, European
Design Leadership Board

"Where you innovate, how you innovate, and what you innovate are design problems. When you bring design thinking into that strategic discussion, you introduce a powerful tool to the purpose of the entire endeavor, which is to grow."

Tim Brown, IDEO

WHAT DESIGN MANAGERS DO FOR BUSINESSES

- Engage with the strategic business aims/plans
- Understand the buyers and end-users perspective
- Audit the use of design/designers to date
- Identify opportunities for innovation
- Bring in new design-led ideas
- Prepare the right design projects
- Define a structured design process
- Write a design brief (with a budget)
- Find the right designers
- Embed and repeat...

PUT SIMPLY,

design management is about doing the right design project, with the right designers at the right time. This reduces risk, increases the potential for success and can achieve the great return on investment that good design offers.

DESIGN IS NOT JUST ABOUT 'LOOKING GOOD'

Designing a product, service, environment or brand to be appealing to your audience is incredibly powerful, but successful design is about more than aesthetics, it:

- Takes new ideas through to innovations
- Connects businesses with their customers
- Makes a unique and memorable presence in the market
- Improves competitiveness
- Reduces risk
- Increases sales, market share and profit
- Attracts investment and supports growth

THE DESIGN PROCESS

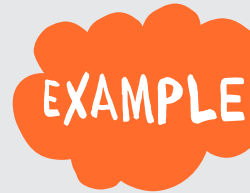
When starting on a design project most people focus on the 'thing' that will be designed in the end – e.g. the logo, the pack, the website, the product. These are the end results, but a good end result comes from having a good process.

Each type of design project has its own specific details, but all projects generally follow a series of stages from gathering and filtering the initial ideas through to concept development, finalising, production and launch. There are more stages in the design process than many people realise. It's not just a case of explaining your idea and expecting a designer to come back with the finished design a few weeks later.

As design is a creative activity, it is often unpredictable and some stages need to be checked and repeated several times before moving on. For example, researching an idea may reveal a new set of issues and may change the original plan. This might seem frustrating at the time, but it is better to be open to new discoveries so they can be taken into account as early as possible. This will reduce the risk of failure at a later stage.

Before you decide what you want at the end (the solution) discuss and understand why you want to do this (the problems). If you think through all the stages you are about to embark on you will be better prepared for what's involved. You will understand the purpose of each stage and the time and money it may require. You should also understand all the different people and activities involved so you are aware of how it all fits together to meet your business aims.

Some designers offer multiple services and can work with you on all of the stages, from new ideas and research through to the final implementation. But others might only work on part of creating what you want e.g. the packaging, the branding or the website. In that case you may require several different designers at different points along the way, so you need to consider at what stage they will be needed and how all the designers involved will be coordinated.



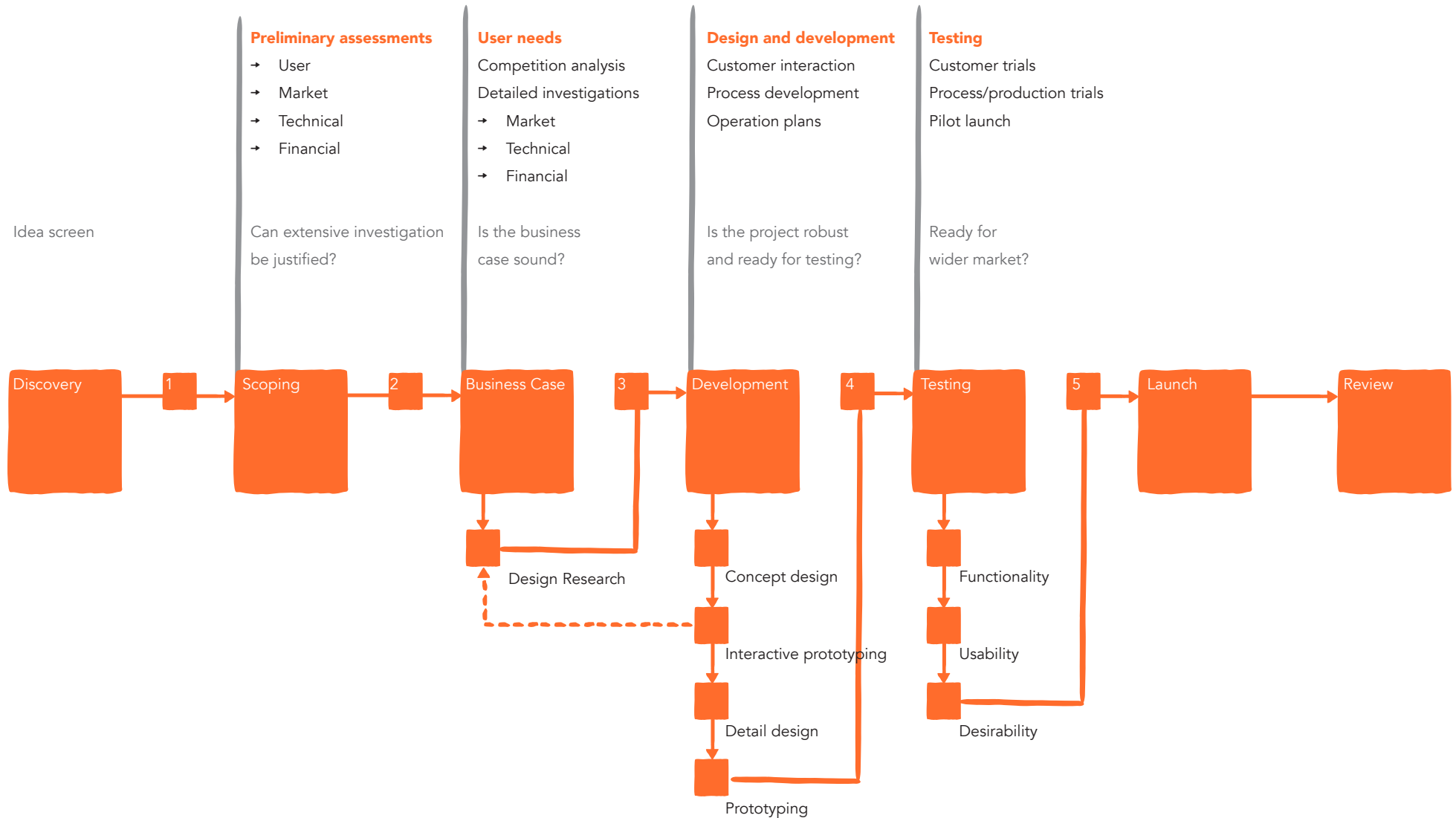
COMPANY A HAD A NEW IDEA FOR A PRODUCT AND HAD MADE AN INITIAL PROTOTYPE. THEY WANTED TO REFINE THE PROTOTYPE SO THEY COULD MANUFACTURE IT AND START SELLING.

A design management response: Company A hadn't done any significant customer research or a comprehensive competitor review. They also didn't have a clear business strategy about whether they might sell direct to users or to resellers. They needed to be clearer on the business potential before they invested more money on finalising the product. They also needed to consider the additional costs of branding, promoting, packaging and distributing.

"We think we have a good idea, but realise that we haven't thought the whole process through, including the full costs ahead of us to launch this. We now see that there is additional research to be done before we seek advice on the functional product design aspects."

DEVELOPMENT PROCESS

A good process provides a strong element of control, with points where the direction of the project can be checked against the original brief. Stages might indicate good reasons to continue, the need for modifications or reasons to stop.



EXAMPLE

COMPANY B IS LAUNCHING A NEW CONSULTANCY SERVICE FOR BIG COMPANIES AND PLANS TO BE OPERATING AT A NATIONAL LEVEL. THEY HAVE A LOGO THEY CREATED THEMSELVES AND THEY WANT A WEBSITE.

A design management response: Company B does have a logo but the quality is poor. They want big businesses to see them as professional, trustworthy and driven by quality, but the current logo makes them seem unprofessional and low quality. On top of that the name and the logo give no indication of what they do. Before going ahead with a new website, the overall branding needs to be redesigned so that they look like they belong alongside their bigger competitors. New branding can then be used on a website and other materials will also be needed. For example the consultants in the company will need a set of sales materials to help new clients understand why they should be trusted to do business with them.

"We thought we had done such a great job on our own logo, but when we saw it alongside our competitors, we could see that it wasn't going to work for us in the way we wanted. We were skeptical about 'branding' but the results we got with a design agency made such a difference to how we are perceived and how we feel about ourselves as a professional team."

REVIEW WHAT YOU ALREADY HAVE

CONSISTENCY

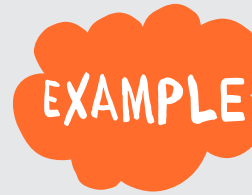
The first thing a design audit will show you is how consistent, or inconsistent, all of your materials are. It is surprising how easily things can change a little bit each time a flyer is printed or a product is improved. These changes are usually done with the best of intentions, but over time it means the perception of your company can become messy. You may not notice it, but the real question is whether your customers do. Inconsistency is confusing. Consistency equals clarity – it builds over time and improves recognition.

QUALITY

The second thing this exercise helps to show is whether everything in front of you is presenting your company in the way you want. Are all your materials conveying the quality or creativity level you want to? Are they clear and appropriate? Do they link-up with each other? Are they all up to date and correct? Have you got quality under control or have you let some of your materials slip?

PRIORITIES AND GAPS

Across all your materials, what is working and what isn't? What do you know needs replacing or updating? Have some things been done professionally but others were DIY? Is there anything missing? Are you really looking at what needs to be changed or are you picking the items that are just quickest, cheapest and easiest to get done?



COMPANY C HAS A NEW PRODUCT. THEY DESIGNED AND PROTOTYPED IT THEMSELVES AND HAVE FOUND A MANUFACTURING COMPANY THAT CAN MAKE IT FOR THEM. THEY NOW WANT SOMEONE TO DESIGN THEM A BOX TO PACKAGE IT IN.

A design management response: Company C isn't just designing a product in a box, they are taking a new product to market – and they haven't done this before. They plan to sell their product direct to customers, so they will need 'branded packaging' that looks attractive. Selling direct will also require an e-commerce website and a social media plan. They want to take orders online, so the packaging also needs to be suitable for posting. And they want to attend shows, so some promotional materials for that may also be required. By understanding everything they will need from the start, they can plan and budget appropriately and break their needs into a number of projects.

"We hadn't taken the time to think everything through. There is so much more to do for our product to launch. At first it was overwhelming, but now we feel better prepared and have more control."

DESIGN AUDIT

It will help a designer or agency involved in any project to understand what you have already, what you've done before and what you do or don't like about it.

Pull together examples of all the materials you already have. This might include:

Interiors:

OK

REVIEW

Meeting rooms and reception areas

Exhibition or trade show spaces

Internal and external signage

Print:

Business stationery

Promotion material

Printed packaging

Products:

Finished product range

Structural packaging

New concepts and drawings

Services:

OK

REVIEW

Delivery or rental services

Maintenance, customer support or repair

Training or consultancy offers

Digital:

Website and social media

Apps or online tools

Video or animations

Brand:

Logo and visual identity

Supporting photography or illustrations

Values, copy style and tone of voice

UNDERSTAND YOUR BUYERS AND USERS

Ultimately, any product, service or piece of communications material only works if it is understood and attractive to the customer. But for most businesses it is not just a case of going directly to the end user – there are usually a range of people who will be involved in the buying process or will influence it.

A classic B2C (business to consumer) example is when a small business wants to sell their product to a supermarket. To do this, you have to create a product (plus the appropriate branding and packaging) that is attractive to the end users who shop in that store. But to get to these customers you first have to be selected by the professional buyers who decide which products they stock.

Professional retail buyers are not just interested in whether a product is good for their customers and how it fits alongside their wider range. They are just as interested in the profit margins they can make and whether you can deliver the amounts that they require. In short, they are interested in how easy it is to do business with you. The same happens for B2B (business to business) companies where the people making decisions on contracts or tenders are often removed from the people who will deal with the product or service on the ground. Buyers and users have different judgement criteria and you need to take both into consideration to be successful.

What has this got to do with design? A retail buyer may prefer certain sizes of packaging that fit their shelves; they may want portions or pack sizes that can meet certain price-points. Someone reviewing tenders needs the right information quickly, clearly and in a professional manner. Meeting the needs of buyers, as well as the end users, should be taken into account by the designers involved.

BUYERS

Who is making the purchase decision?

USERS

Who will experience the end result?

INFLUENCES

What will help or hinder these people when it comes to making their choices?

DESIGN STRATEGY

Connecting your internal plans with your external market.
Understanding the design materials you have and identifying the design services you need.

Internal

Decision-making and culture inside the business

Vision

Where are you going?

Strategy

How will you get there?

Resources

What do you have to get you there?

Interior Design

Print Design

Product Design

Service Design

Digital Design

Brand Design

External

Market factors and perceptions outside the business

Buyers

Who is making the purchase decision?

Users

Who will experience the end result?

Influences

What is helping or hindering?

SECTION 3: EXTERNAL RESEARCH

WHAT ELSE IS ALREADY OUT THERE?

Even if you think your product or service is unique, there will be something else competing against this purchase in the minds of your customers. These can be direct competitors who are offering something similar, or in-direct competitors who could be enticing your customers toward an alternative purchase in another market altogether.

When did you last review your competition? It is essential to review your market regularly and keep an eye on new developments and trends. If you operate in a fast moving market, you might want to review the competition each month. But all businesses should at least have an annual check on what is going on in the market.

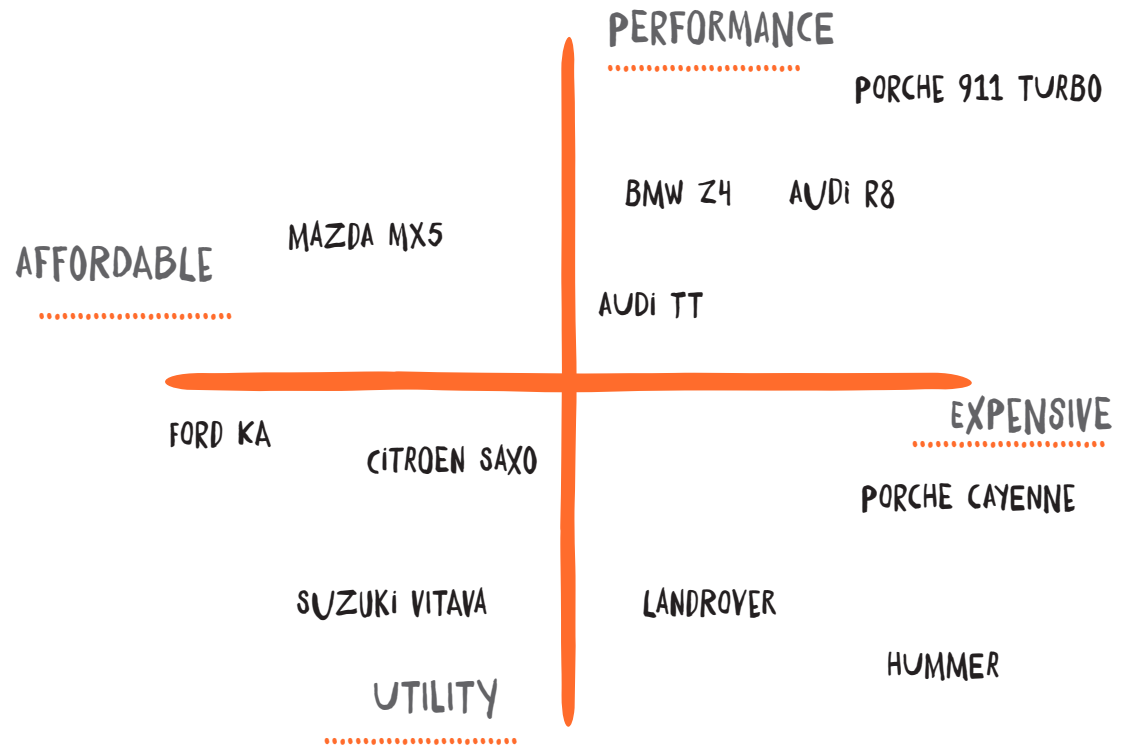
If you are creating a new proposition it is very important to review the potential competition before you make decisions on how you are going to position and communicate your product, service or brand. With the competition examples in front of you, you can compare prices, sizes, branding, quality levels, features, functions, delivery options and more. You can see which competitors you like and which ones you don't. Who are the ones to beat? This is invaluable information to give a designer so they understand your expectation of where you want to be positioned.

This type of review can be also be used to look for new ideas or inspiration from the market leaders or the new challengers. It might also help you find a gap that could be an opportunity to exploit. But beware of gaps - there may be very good reasons why other competitors have stayed away. Don't automatically assume a gap needs to be filled.

MARKET MAPPING

Examples of those attributes might be:

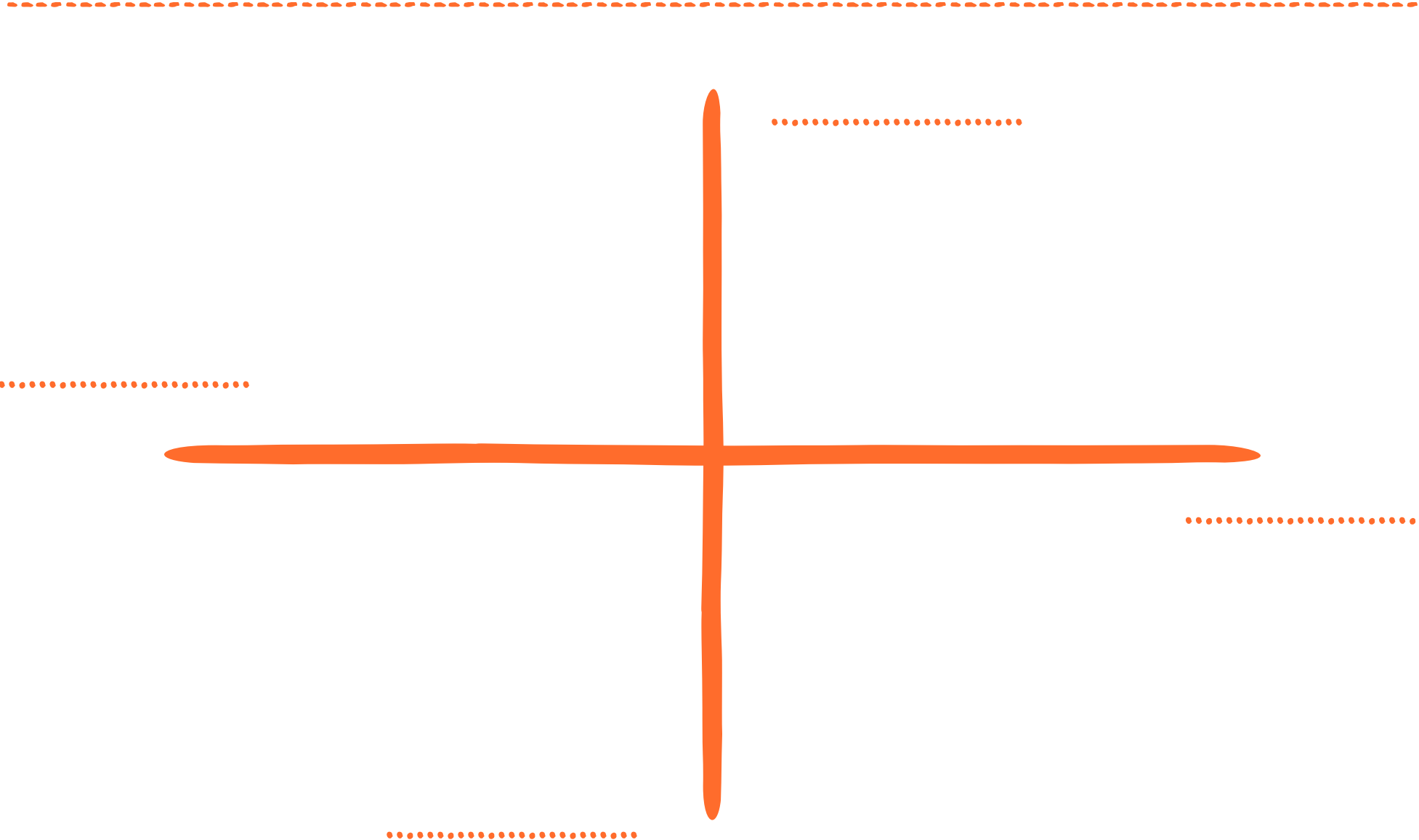
- Basic quality vs high quality
- Everyday vs luxury
- Light vs heavy
- Low-tech v high-tech



SMALL BUSINESS DESIGN MANAGEMENT TOOL:

MARKET MAPPING

A market map illustrates a range of positions that a product, service or brand can take in a market based on two attributes that are significantly important to your customers.



DO YOU REALLY KNOW YOUR BUYERS AND USERS?

Understanding customers and what they want has become more complicated as our lives have become more hectic. Customers are more critical because they are faced with more choice. Increasingly they want to become involved with the products and services they use. They are looking for value-for-money and are using new and different ways to make a selection and purchase, whether that is in person, online or with their smartphone.

To win the attention and interest of a potential customer, it is important to see things from their perspective. A traditional way to get their view is to ask them through surveys. But research shows that what people say is not always what they do, so this approach can be of little use and may even be misleading.

Interviews can of course be very valuable when the right type of questions and analysis is used. But it can be better to observe a few typical users in context to get a series of deeper 'insights' rather than questioning hundreds of people and looking for the common themes.

To take this approach, the first thing a business needs to know is who is a typical user or buyer? Often companies think they know their customers, but have never actually taken the time to describe them and visualize them in more detail so that everyone on your team – and your designers – know who you are targeting.

Creating 'Personas' is one technique used by Service Designers.

For more information about Service Design and other downloadable tools and techniques visit:
www.servicedesigntoolkit.org



COMPANY D IS OFFERING A NEW CONSUMER SERVICE. THE DEMAND FOR THIS SERVICE HAS BEEN DRIVEN BY CHANGES IN LEGISLATION AND FOR THE LAST FEW YEARS COMPANY D HAS BEEN INVOLVED IN COMPLEX LOBBYING AND DISCUSSIONS WITH GOVERNMENT TO SEE THE CHANGES THROUGH.

A design management response: By creating some personas, they realised that their consumers are very different to the officials that they have been used to speaking with. For their service to be a success they need to communicate using a new consumer friendly approach and be clear about the benefits to the user, not just the legislative requirements.

"We had become so used to communicating with officials we hadn't shifted our focus to think about our end users and how they would see our service. Now we keep our personas on the wall in the office to remind ourselves of what our different customers and contacts need."

SMALL BUSINESS DESIGN MANAGEMENT TOOL:

PERSONAS

Personas capture the personality and motivations of a typical buyer or user. Producing between four and six personas would give a broad enough picture of different customers.



NAME

AGE GENDER

ROLE

ORGANISATION

SECTOR

OTHER INFORMATION

WHAT ARE THEIR LIKES AND DISLIKES?

WHAT ARE THEY LOOKING FOR?

WHAT ARE THEIR HOBBIES AND INTERESTS?

WHICH OF THEIR PROBLEMS ARE YOU SOLVING?

WHAT IS ON THEIR MINDS?

WHAT WILL BE THE BIGGEST BARRIER TO PURCHASE?

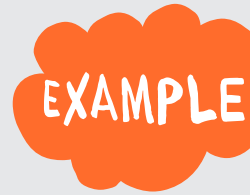
DESIGNING FOR THE WHOLE EXPERIENCE

Once you know more about the type of buyers or users you are targeting (see the Persona tool), it is then important to think about the 'journey' they will take in relation to your product or service. Most small businesses don't have the budgets for national advertising campaigns or the ability to be featured in every outlet from day one. It is important to spend smaller budgets wisely so they achieve the most impact - so plan ahead.

To do that, start from your customers' perspective and imagine the places and situations they will be in. How might they first come across your offer, especially if it is new to them? Where will you need to be to get their attention? Where and how are they likely to make a purchase and what happens afterwards?

It is very common for businesses to focus everything on 'getting the sale', but don't lose sight of what you want to happen after the sale. Repeat purchases or subsequent word-of-mouth recommendations can be hugely valuable, so design for after-sales needs as well.

And don't forget about handling complaints. Every business wants satisfied customers, but how a company deals with complaints can be an important test of its customer service. Don't just think through every customer journey as if it will run smoothly, anticipate some potential problems and design for them too.



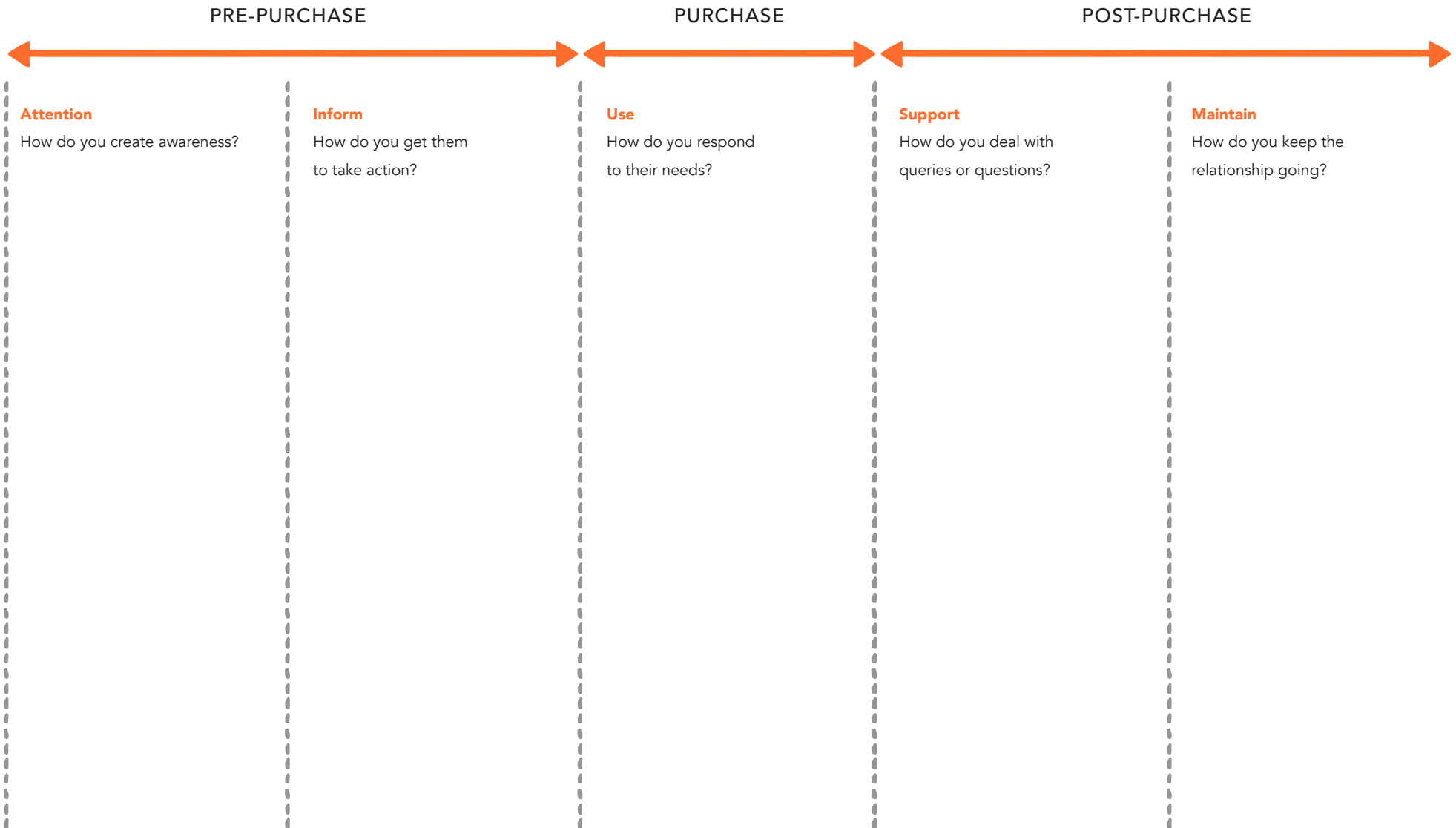
COMPANY E HAD A NEW PRODUCT IN DEVELOPMENT AND WANTED TO GET SOME HELP WITH BRANDING. THEY PLANNED TO LAUNCH IT AT MUSIC FESTIVALS THROUGHOUT THE SUMMER.

A design management response: Company E only had enough money to manufacture a first batch of their product. The launch had to create bigger repeat orders so they could scale-up production as quickly as possible. Thinking through the customer journey for the users they realised they had to create a memorable experience around their product so it wouldn't just be tried and forgotten when the festival was over. Social media, website, a 'festival unit' and other 'touch points' had to be considered. In the highly creative and chaotic environment of music festivals, they would need some designers with previous experience of this type of product launch.

"We thought we just needed an eye-catching name and logo to go on a pack and if people liked the product they would start talking about it. We hadn't thought that we could design a whole experience, but that's exactly what we had to do. We're now talking with different design professionals and have a much wider perspective about how we will create success."

THE CUSTOMER JOURNEY

A customer journey is from their perspective. Using the personas you have created, consider how they engage with your offer over time. Can you provide a better service at specific phases in their journey?



SECTION 4: BUYING PROFESSIONAL DESIGN SERVICES

WRITING A DESIGN PROJECT BRIEF

At the heart of any design project is a written brief that sets out the background context and your expectations. The brief may evolve and is likely to change before a project begins, but an introductory briefing document will help you and any prospective designers to have a clear and constructive discussion. Include:

- Background details about your company: who you are, what you do, what are your overall aims (strategy exercise)?
- Some background details about the project: why you are doing this, what do you want to achieve, what will success look like?
- What have you got already (show your design audit results)?
- Who are you targeting (show your personas and customer journey)?
- Who are your competitors (show your market mapping)?
- What do you expect to be handed over at the end of this project: e.g. new concepts, or a finished batch of products, a box of printed brochures or the files you can print yourself (the design process)?
- Key dates and deadlines that you want to meet.
- Your key contact person and details of who else will be involved.
- A budget.

WHY WOULD YOU REVEAL A BUDGET?

In many business situations, budgets are not revealed up front. Instead potential suppliers are expected to prepare a quote and often the cheapest wins the contract.

Buying creative design services is not like buying fixed pieces of equipment. Each designer or agency will have different approaches and different ways of working. A cheap designer is probably not what you need. An expensive designer isn't the aim either. Value for money is what you want.

If you meet a number of potential designers to discuss your brief before you select one, you can compare them in terms of what they propose to provide within your allocated budget. This is where you can begin to judge whether you'll get more value from one designer or agency versus another.

If you don't reveal a budget, you risk wasting your time and the designer's time. The concern is that by revealing a budget you will get over charged but by having a clear written brief and meeting several suitable designers before going ahead, you improve your chances of finding the best match and investing your budget wisely.

COMMISSIONING A DESIGNER

- Provide a written brief, with a budget
- Select around three to meet from an initial longer list of recommendations, searches or contacts
- Meet all three for an hour on the same day – this keeps it consistent and easier to compare
- Have a conversation about your brief rather than a formal interview
- For those that seem suitable, request a written proposal with more confirmed details and a budget breakdown
- If you require further reassurance about their credentials, visit them at their studio or speak to some of their previous clients

DESIGN PROJECT PROBLEM AREAS

The most common problems in design projects are not about poor design, they are about poor project management:

- No clear written brief at the beginning
- Lack of communication across the project team
- Not enough understanding of the whole process
- Lapses in time management: chasing deadlines, delays, postponements
- Lack of clarity on ownership of tasks
- Unclear contractual terms and conditions
- Unexpected costs arising part way through
- Misunderstanding over Intellectual Property Rights
- A clash between people or personalities
- A lack of trust

JUDGING DESIGNERS

PORTFOLIO

- Do they have relevant and varied examples of work?
- Do these match the level of quality, creativity or experience you require?

PROCESS

- How do they work from ideas to final delivery?
- What stages will they take you through?

PEOPLE

- Who exactly will you be working with?
- What is your overall impression?
- Can you work with them?
- Is it an in-house team or will some sub-contractors be involved?

PROJECT MANAGEMENT

- What are the costs and payment terms?
- How will they manage timings and communication?
- What about Intellectual Property requirements?
- Have you got the ability to stop the project at key stages if it is not going as expected?

THE DME AWARDS

The annual Design Management Europe (DME) Award is the only award dedicated to the management of design in private or public sector organisations across Europe.

It recognises the ongoing processes, business decisions and strategies that enable innovation and create effectively-designed products, services, communications, environments and brands providing organisational success.

Running since 2007, the DME Award promotes the strategic use of design to increase the competitiveness of industry and the effectiveness of public services. It is open to both the private and public sectors and is divided into six categories of size and type of organisation.

www.dmeaward.com

PDR

PDR is a stand-alone research institute within Cardiff Metropolitan University. It is a unique mix of meeting spaces, workshops, prototyping technologies, design studio and a user-centric design lab; all focussed on the policy, management and practice of design.

Our progressive programme of work has led to winning more than a dozen international design awards from Red Dot, iF and Core 77. Each year we design and produce over 400 bespoke medical devices that aid ground-breaking surgery and for over a decade have been leading pan-European networks that are influencing future innovation policy around the world and transforming how public services are addressing key societal challenges. The research and practice groups within PDR include: design management, new product development, design policy, ecodesign, advanced manufacturing, surgery & prosthetic design, service design and user-centric design.

www.pdronline.co.uk

SEE PLATFORM

SEE is a network of 11 European partners engaging with government to integrate design into innovation policies and programmes.

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