



## A Do-It-Yourself Visual Audit

When was the last time you put all of your printed materials —from your business card and letterhead to store signs, newspaper ads, and shopping bags — in one place and took the time to analyze how well it all conveys your store’s identity? A “visual audit” or “communications audit” is the process that graphic design firms use to assess a company’s existing print materials and develop a publications strategy for the future.

Here’s how to do your own visual audit ... the main requirements are an open mind and a clear understanding of your store’s identity and competitive environment.

### 1. Ask some tough questions about your LOGO

- Does your logo make a strong impact?
- Is it attractive?
- Is it understandable? Do people “get it” easily?
- Does it stand out from the crowd (especially from your primary competitors)?
- Does it accurately represent your business?
- Is it memorable?
- Does it work well on all your print materials? Is it flexible enough to work on a business card and on a large shopping bag? Does it look as good in black & white as it does in color?
- Does it look timely or is it dated?

### 2. Get the “BIG PICTURE”

Next, gather samples of all your printed materials and spread them out on a work surface. Here’s a list of the typical print pieces that bookstores have, but feel free to add others.

- Business cards
- Letterhead and envelopes
- Notecards
- Postcards
- Bookmarks
- Book plates
- Gift certificates
- Shopping bags
- Signs — shelf-talkers, section signs, display signs, etc.
- Loyalty program materials — customer cards, sign-up forms
- Print ads
- Logo merchandise
- Web site pages
- Newsletters
- Form letters
- Comment cards and other feedback instruments
- Order forms
- Press kits and press releases
- \_\_\_\_\_

### 3. Focus in on **STRENGTHS** and **WEAKNESSES**

Looking at your collection of materials, consider the following questions. It may be helpful to rate each item or set of items numerically (for example, where 1 = very weak and 5 = very strong).

- Do your materials have a specific **personality** or could they belong to any college bookstore? Does the personality they reveal match your store’s image/personality today and in the foreseeable future?
- Is there **consistency** in style or do your materials look like they were created at different times by different people? Consistency is important because it helps “train” your customers to notice your materials and to remember them. It also makes most items easier to produce and often less expensive to produce as well. Of course, consistency taken too far leads to rigid design and boring publications. Think about this as “coherence” or “continuity” if you find that “consistency” has negative connotations.
- Do these materials accurately and effectively convey your **goals**? For example, if you are trying to change your image and portray the store in a warmer, friendlier way, you want to make sure that your printed materials are warm and friendly rather than formal or intimidating.
- Are they **easy to read** and **easy to use**?
- Is there any **duplication**? Could you save time and money by eliminating certain pieces?
- Is there anything **missing**? If you could add one print piece this year, what would it be?
- Is the **quality** level satisfactory? Read your text with a critical eye for everything from the basics (grammar, punctuation and spelling) to the effectiveness of its marketing message. Are paper choices, design, and production methods at an appropriate level?
- Get **expert advice** where needed. If you’re not 100% happy with the quality level of your materials, consult professionals (marketing experts, graphic designers, printing experts, etc.) who can offer advice and practical suggestions on achieving the look you want for the budget you have.
- Don’t be afraid to ask for feedback! It’s easy to be less than objective when it comes to materials that we have used for a long time, or that we may have designed ourselves. Involve your staff, other businesspeople whose opinions you trust, and, best of all, your customers.

### 4. **Take ACTION**

Choose three items that are most in need of an update:

- (a) \_\_\_\_\_
- (b) \_\_\_\_\_
- (c) \_\_\_\_\_

# Personality in Print

Put opposite qualities on a continuum — then decide where you want to position your store.  
For example:

**Formal** ----- **Casual**  
**Traditional** ----- **Modern**  
**Serious** ----- **Playful**  
**Upscale** ----- **Down-home**  
**Sophisticated** ----- **Cozy**

How would a FORMAL style be expressed in a newsletter as compared to a CASUAL style?

	<b>FORMAL</b>	<b>CASUAL</b>
Paper	“Resume paper,” perhaps with subtle texture or a conservative shade (cream, pale grey)	Colorful, preprinted border, or standard photocopy weight paper
Typefaces	Elegant scripts or serif faces with letters that are taller rather than wider. Examples: <i>Monotype Corsiva</i> , Bernhard Modern	Simple typefaces, perhaps with wider letterforms or looking more like handwriting (examples: Bookman, Dom Casual)
Illustrations	Professionally done photos	Cartoons, caricatures
Color	Subtle paper shade, darker traditional colors (navy, forest green, burgundy)	Brighter shades and use them over a larger percentage of the space

## **You can convey your personality in print through your choices in typefaces, illustrations, colors, paper, etc.**

**Example I: Consider a bank which specializes in serving a thriving downtown business community. They also provide consumer banking services, primarily to an affluent clientele, and their emphasis is on providing service that goes above and beyond that of the average bank. If you look at their newsletter, you'll notice several things:**

- Rich textures (ex. wood grain, marbles) used as light-colored backgrounds
- High quality photographs, primarily head shots of key staff and managers
- Conservative yet interesting typeface choices
- Headlines are done in "small caps" (SMALL CAPS LOOK LIKE THIS, BY THE WAY) to convey both formality and a sense of strength
- Gold metallic ink is used to accent subheadings and backgrounds
- Text is written for well-educated, business-savvy professionals

**Example II: A health maintenance organization (HMO) uses a newsletter to educate its members about health issues and HMO services. They also want to portray their company as caring, accessible, and friendly. Many of their members are from lower income and educational levels. In their newsletter, they use:**

- Simple typefaces (Times Roman and Helvetica or similar), with slightly larger body text than is commonly done.
- Some photos, but primarily drawings of people in various health-related situations. These drawings are consistent in style and well-drawn, but friendly-looking.
- Black ink with a second color (blue). The blue ink is used frequently as background shading to help set off key information.
- Sentences are short. Vocabulary is simplified, with definitions provided for terms that may be unfamiliar.
- Many entry points are provided into the text. Lots of short articles, boxed text, and bullet items.
- Smooth, white paper (not glossy).