
Overview

This unit deals with the following:

- 1 Determine and agree client's needs
- 2 Analyse opportunities and constraints
- 3 Compose briefs with clients
- 4 Negotiate contracts with clients

During this work you must take account of the relevant worksite operational requirements, procedures and safe working practices AS THEY APPLY TO YOU.

Previous Version

Unit 1.1 SEMTA National Occupational Standards in Packaging (STM4)

COGPACK1

Develop packaging design briefs

Performance criteria

- You must be able to:*
- P1 clarify and agree the client's design development needs, the purpose, scope and limits of the objectives for the design
 - P2 obtain information from the client about their needs through interview and discussion
 - P3 advise the client on the interface between the design and the manufacturing process
 - P4 identify and agree the responsibilities of both the client and the designer and levels of confidentiality
 - P5 negotiate in a manner that promotes understanding, trust and goodwill
 - P6 record all agreements made and the rationale for your ideas and discussions
 - P7 oversee data-gathering to ensure that it will provide evidence of opportunities and constraints
 - P8 analyse and evaluate objectively the nature and potential of any limitations, constraints and opportunities that may affect the design
 - P9 ensure that the analysis is relevant, reliable and is based on the best available information given the constraints of time and cost
 - P10 provide clear and accurate reports to those involved within the agreed timescales
 - P11 discuss outcomes of research with the client and explain any significant points likely to affect the design
 - P12 identify broad design strategies with the greatest potential to meet the agreed design objectives
 - P13 identify the reasons for re-defining the client's needs where the designer's interpretation differs from the client's perspective
 - P14 express yourself in a way that meets your audience's needs
 - P15 define clearly, agree and record the contracting arrangements and any amendment or variation required to the brief by the client
 - P16 negotiate and agree the details of contracts with clients and other relevant people in terms of timescale and any particular requirements
 - P17 negotiate and agree additional financial aspects of the contract where relevant
 - P18 discuss the potential for variation to contracts and agree method for re-negotiation
 - P19 evaluate the implications of any variations on the proposed project schedule, costs, legal aspects and any other commitments where relevant

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Knowledge and understanding

You need to know and understand:

- K1 the factors affecting the scope and limits of the work (e.g. timescale, restrictions imposed by the client)
- K2 the nature of the client's business and market
- K3 different possible manufacturing methods and the advantages and limitations of each
- K4 the roles and responsibilities of those involved in the development and manufacturing processes including those of suppliers
- K5 the purpose and function of client briefs
- K6 the history of the relationship with the client
- K7 the client's organisational structures for decision taking
- K8 negotiation techniques
- K9 to whom to report problems
- K10 the limits of your own responsibilities
- K11 the resources, equipment and consumables needed to manufacture the solution and any suppliers providing these
- K12 how to estimate the time and cost of the work under discussion and factors affecting these
- K13 how to carry out or commission research
- K14 how to evaluate the research findings
- K15 to whom to present the results of your analysis, the content and appropriate format for presenting your report
- K16 market trends
- K17 the client's business and markets
- K18 the client's competitors' products and markets
- K19 the nature and implications of relevant legal and regulatory requirements
- K20 the client's requirements and how these affect your ability to deliver the contract
- K21 the purpose and function of contracts
- K22 sources of information and advice on contracting arrangements, and the financial and legal aspects of the contracts
- K23 your organisation's financial tendering policies and procedures and any constraints attached to them
- K24 the importance of Intellectual Property Rights (IPR)

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Glossary

- 1 **Clients**
 - New clients
 - Existing Clients

- 2 **Communication methods**
 - Face to face (individually)
 - Face to face (small groups)
 - In writing (paper)
 - In writing (electronic)

- 3 **The factors affecting the time and costs**
 - The proposal
 - Delivery of the final products

- 4 **Formats**
 - Formats for presenting and recording the findings for internal consumption, for the client

- 5 **Constraints**
 - Technical
 - Production
 - Legal
 - Environmental
 - Imposed by the client

- 6 **Different audiences**
 - The client
 - Different departmental colleagues

- 7 **Additional financial considerations**
 - Fees
 - Samples
 - Discounts
 - Rebates

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Suite Packaging

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