



PHOTOS COURTESY OF JOSH WALLACE

# Packaging 101

DESIGNING FOR PRODUCTION AND PROFIT BY EDITH G. TOLCHIN

**W**hen I began to facilitate manufacturing for inventions over 25 years ago, I had no clue how critical packaging design and branding would become in the development of a new product. Sometimes inventions were manufactured in China and imported—without packaging—into the United States. Clients then paid a U.S.-based printing company or distribution center to undertake the task of manually retrofitting the product into the packaging and design—a now-obsolete job. By the time I wrote my first book, *Sourcing Smarts*, in 2008, times—and the packaging of inventions—had changed. One of the biggest improvements is that products can now be manufactured and packaged at the same time, which gives the advantage of being shelf- and retail-ready—providing you know the process.

Also in 2008, I was introduced to Josh Wallace, a talented young artist and graphic designer, who has since been an integral part of my team. He recently took the time to discuss

his experience working with inventors and has suggestions for making your new-product submission “picture perfect,” not only for prospective manufacturers, but ultimately for retail buyers and consumers.

**Edith G. Tolchin:** Before we get into the nitty-gritty of packaging, tell us about the process for designing a logo for a new invention.

**Josh Wallace:** Many people think that designers just learn a bit about the product and then sit down to draw out the finished logo, but there is actually quite a bit of prep work. My process for designing a logo for a new invention is pretty much the same process I like to go through when designing anything. I have a set of questions that I ask the client to help me get to know him or her, what it is he or she is selling and what the ultimate goals are. If there is a prototype or finished product at



*"I think it's beneficial to design the logo first since it's a symbol of the product that will determine the direction of the other graphics revolving around the product."* —JOSH WALLACE

hand, I ask for one. Otherwise I won't fully be able to get a feel for it. From there, I do lots of research about the product's industry to learn even more and also to see what has already been done with graphic design. Designers need creative fodder. We can't design blindly, so all of this prep work creates a pool of thoughts that we can draw ideas from.

At this point, I start some doodling, but all the while, I'm still looking through a couple thousand fonts, contemplating endless color choices and researching any other details that may come up. I keep scribbling away until I see some smart, concrete ideas forming. I then translate those ideas to the computer to explore further. Once I have a few good ones, I'll share them with the client to choose from. We then work back and forth until everything is perfect with their new logo.

**EGT:** Would it be fair to guess that most inventors who ask you to design their logos also ask you to work on creating their packaging designs?

**JW:** That is mostly the case and the way I'd prefer to work. If I'm able to be part of the entire design process, from the logo through the packaging (and oftentimes beyond that), then I can make sure that everything is cohesive and that the client's goals will be accomplished.

I think it's beneficial to design the logo first since it's a symbol of the product that will determine the direction of the other graphics revolving around the product. Everything should look consistent. You wouldn't want to have your website designed a certain way and then toss in some logo that agitates the look of everything.

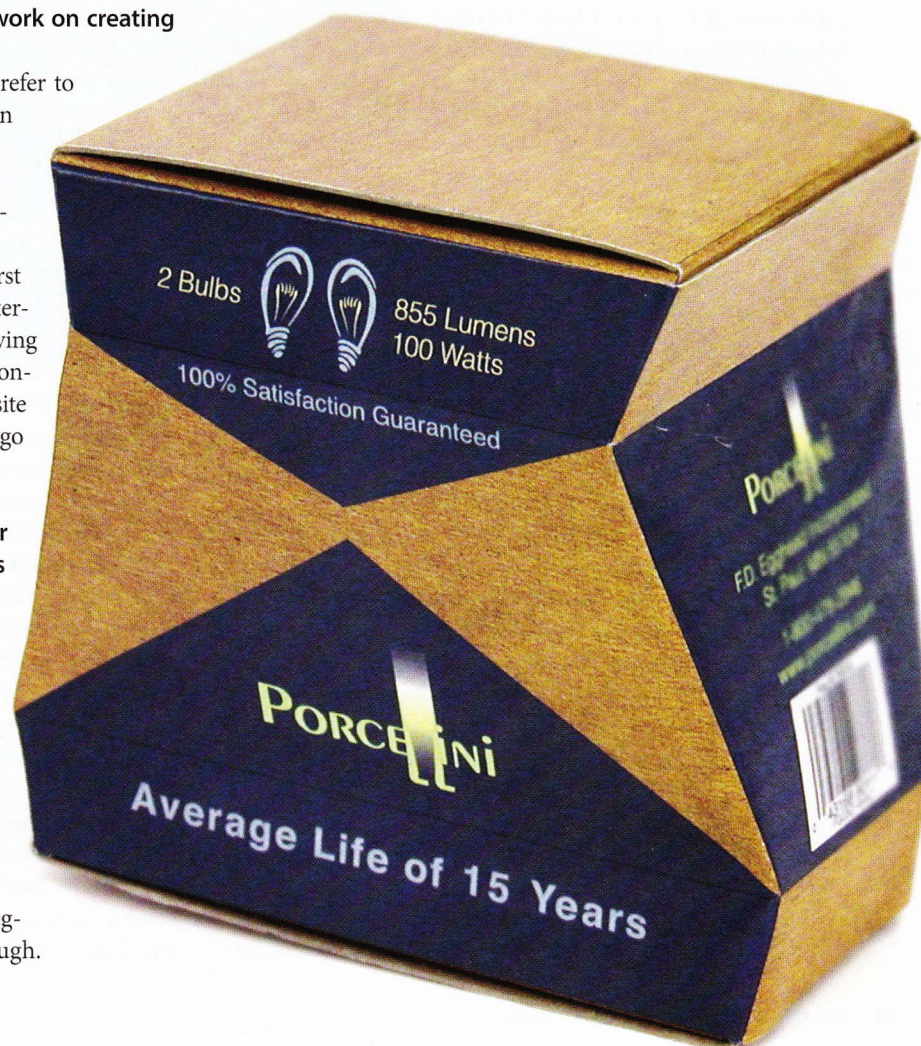
**EGT:** I've personally found recent Consumer Product Safety Improvement Act regulations for the marking of babies' and children's inventions to be particularly challenging in the many stages of product development. Would you like to share anything on this?

**JW:** I suppose they don't affect me as much as they do others involved in product development. We always go through them to get some of the specific text that is required to be on the package, but other than that, I don't really need to worry about them too much. Regulations of any kind can be bothersome, though.

They're extra hurdles that we have to keep track of and help our clients through.

**EGT:** Once you and your client have agreed on the final packaging design, how do you create a mockup? Can you discuss a few different types of packaging, such as bags with header cards, or cardboard boxes, for example?

**JW:** If we're going with conventional packaging for the product, then I can pretty easily create the physical mockups. Anything unconventional and more complicated most likely would be outsourced, so we'd need to work with a packaging engineer. A lot of what I do is outsourced with the help of EGT Global Trading, so we make sure to have mockups created in order to fit the product inside. The package containing the product is then sent to factories for quotes.





With mockups, I prefer that the client send me samples of existing packaging that they'd like me to take into consideration for shape and materials. If it's a product hanging in a plastic bag, it's best for the client to go to stores and look for existing products that utilize the type of bag that they envision, buy those products and then send the bags to me. That will ensure that I have the correct size bag with the correct thickness of plastic. Otherwise, if the client prefers my recommendation, I would just go out to do the same thing. I can always order fresh supplies, but they're sold in bulk. The poly bags, for example, would come in a carton of 500 to 1,000, so that would not make sense just for mockups.

There is usually paper or cardboard with printed text and graphics, so I print those out and fasten them to the package. If we're using a box for the product, my laser printer only handles up to a certain weight of paper, so with thicker cardboard boxes, I have to print on paper and glue it to the cardboard. We then instruct the factory to print directly on whatever materials they end up using (the same thickness of cardboard as the mockup, but it would have a coated side for printing). We usually send a few notes to the factory since the mockups probably won't be made with the exact materials that we want them to use.

For packaging that is more complex or is made out of materials that I can't create in my studio, like glass and metal, I would create a 3-dimensional-looking illustration of the packaging. It would show different views with estimated measurements for the factories to determine production quotes.

**EGT:** How does a mockup help prepare a prototype for submission to a factory for production quotes?

**JW:** Creating the mockups is extremely helpful because everyone has a good grasp of how the product will work within the packaging. It's very important for us to be able to visualize how it all works together with the logo, the graphics, the text and so on. If we left it up to the factories, the process would take a lot longer. We have very few surprises when we go about it this way, because we can work out most of the bugs before contacting production facilities for their quotes.

**EGT:** Once the factory has quoted your client, what type of software files do you need to prepare so the client can send



the artwork to the factory to reproduce? Should the files be editable if needed, such as to reflect updated manufacture dates?

**JW:** I work with the industry-standard design software produced by Adobe Systems Inc. I can export final files into more universally used file types, such as PDFs, that the factories can work from. PDFs can be edited to an extent if the factory has the software to do so (which they should). Otherwise, I always expect there to be some changes before the actual production, so I leave room for that. The bulk of the work is done, so simple text changes take no time.

Sometimes the factory requests that the package be resized slightly for a better fit to the product, but that's also an easy fix. I just have to shift the graphics and text to play well within the new size.

**EGT:** What are some of your personal preferences with packaging design? For example, color over content? Or, how can you tell a client that you feel his/her ideas are too conservative? Should you suggest they step outside of their comfort zones, or does it depend on the invention?

**JW:** It depends on the invention to an extent, but mostly it depends on the budget. Sure, there are low-cost ways to stand out, but the best ways, like gold-foil printing or using tactile features like a bumpy texture on a box, usually cost extra. I cer-

tainly love working with these flashy techniques and will recommend a slew of methods if there is a budget for them.

My preferences span the spectrum. I love really clean, minimalist design. Just look at everything Apple does. Their packaging uses tons of white space. The graphics are just the company logo, the product logo and a product photo. They also use a glossy varnish over those items, making them shinier, more vibrant and compelling. The boxes are smooth and durable, and everything fits inside neatly. They do an amazing job. It's not a crazy, in-your-face type of design, but in a way, it ends up acting like that because it's hard not to notice. The image they created echoes throughout the layout and design of their stores, as well as commercials and other advertising.

The other end of the design spectrum is the noisier, more flamboyant side. You'll see examples across different industries, but some frequent it more than others. Beer packaging is a fun one. You'll see everything from the sleek, minimalist design to surreal



illustrations that belong in art galleries. And then there is the toy industry, with all of its products and packaging designed to scream down to the children who want them so badly.

It's a really fun challenge designing for either end of the spectrum, but there is plenty of fun designing something that lies in the middle of the spectrum, too. It all depends on what we can get away with. There always needs to be something to stand out to grab the attention of the consumer, whether it's a bright photo of the product or big block letters stating a specific claim.

The preferences of clients I've worked with over the years have varied tremendously. Some of them are very specific with what they're looking for, even when my recommendations differ. If I don't agree with them, I just do my best to explain why we should design the package in a certain way. I give them examples of other success stories and show them how I would design their package to also be successful. If they don't agree, we usually find some kind of compromise. There have been a couple instances where I've turned down work because of the person's skewed design goals, but that's not very often. I like to be easy to work with, but I'm also hired to contribute my perspective.

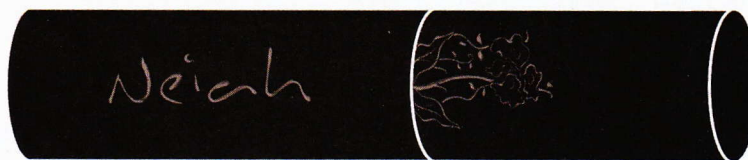
**EGT:** Have you learned anything interesting in working with inventors?

**JW:** I've learned lots about new product development, product branding and marketing. I've also learned more about the packaging industry and outsourcing those jobs. The experiences that have stuck out the most, however, are the stories of what inventors go through to get their products to market. Inventors and other small business owners have made up the bulk of my career, so I've gotten to work with some wonderfully ambitious people over the years who put serious blood, sweat and tears into their ideas. There are some tremendously driven people who never give up, but there is no other way to succeed.

**EGT:** Is there any advice you can share with readers of *Inventors Digest* if they choose to manufacture their inventions on their own and need help with logos and packaging design?

**JW:** Personify your products and think about their personalities. This mindset allows you to imagine how the product would want to be displayed on the shelves. What traits should stand out and what kind of graphics would complement it? Inventors should continually add to and refine a list of personality traits throughout product development because this will help direct people like me on the creative side. Every product is unique, and it is our job to show the world why. 📦

To learn more, visit [www.joshwallace.com](http://www.joshwallace.com).



## Words to the Wise

**BEFORE** YOU SUBMIT YOUR IDEA TO FACTORIES:

- Picture how you'd like to see your product on store shelves.
- Create a good packaging mockup.
- Work with a qualified designer to get the mockup ready to submit for production quotes.

IF YOU **DO NOT** INCLUDE YOUR PACKAGING MOCKUP WHEN SUBMITTING YOUR PROTOTYPE FOR QUOTES:

- Your first quote will not be accurate.
- You'll waste time in determining your selling price.
- You'll ultimately delay your product launch by having inaccurate information from the beginning. This can be disastrous for many reasons, not to mention off-target profit margins.

Edie Tolchin has contributed to *Inventors Digest* since 2000. She is the author of *Secrets of Successful Inventing* and owner of EGT Global Trading, which for more than 25 years has helped inventors with product safety issues, sourcing and China manufacturing. Contact Edie at [egt@egtglobaltrading.com](mailto:egt@egtglobaltrading.com).





# Inventors

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IPO EDUCATION FOUNDATION'S  
INVENTOR OF THE YEAR

## What Does It Take?

SIX QUESTIONS  
EVERY INVENTOR  
SHOULD ANSWER

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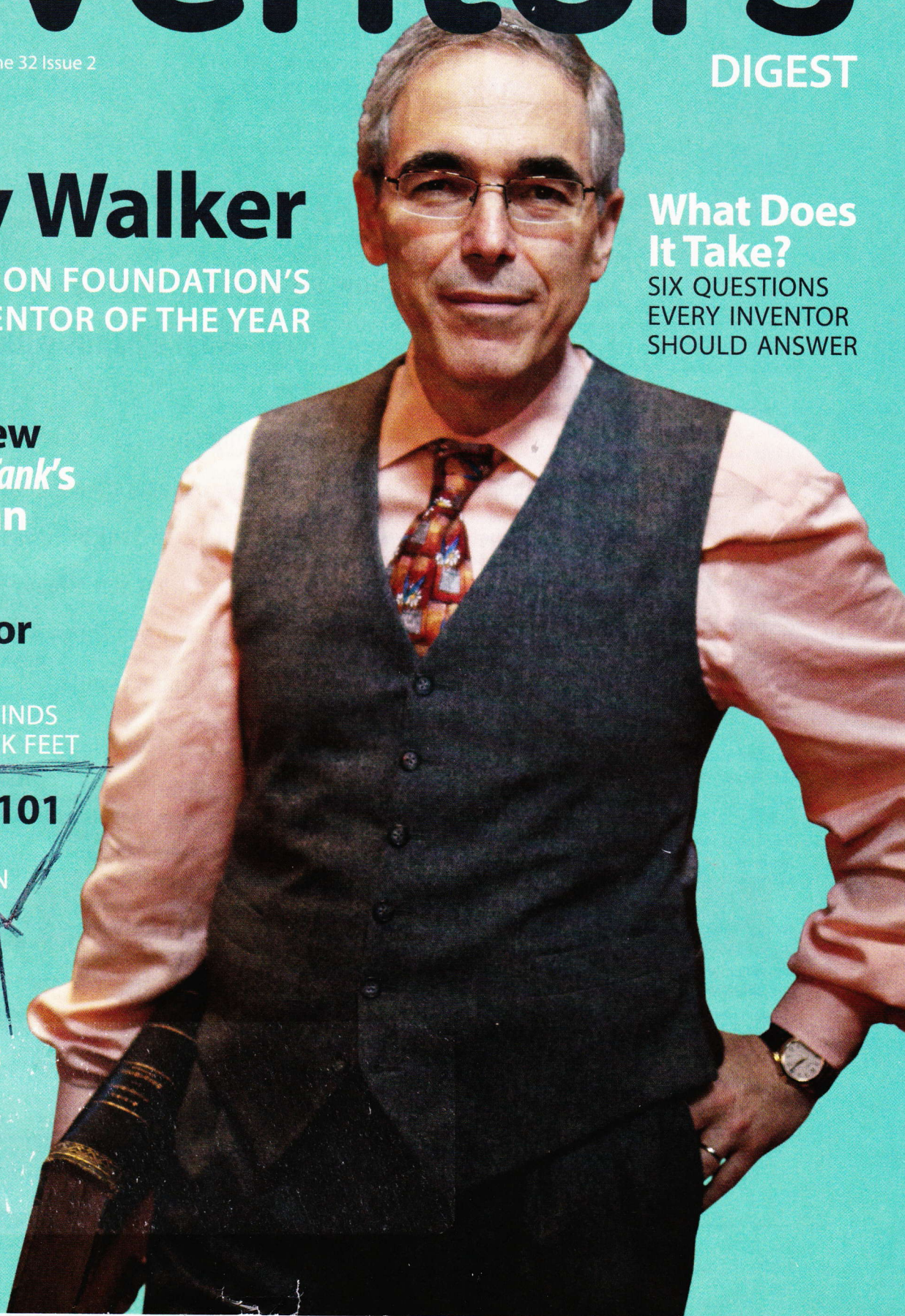
SHELBY MASON FINDS  
COMFORT IN SOCK FEET

## Packaging 101

DESIGNING  
FOR PRODUCTION  
AND PROFIT

## Failure To Launch

SEVEN STEPS FOR  
SUCCESS IN THE  
MARKETPLACE



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