Prior to this Guide, I had prepared a short handbook on Brand Strategy for a specific target audience and for a specific problem. Called, ‘The Good Fun Guide to Brand Strategy’ it served its intended purpose by being badly written and well illustrated. However, in spite of this, many others who also read it, suggested that it was a good document and one worth extending. Though perhaps being better written.

My interest is in business behaviour and the attributes of that behaviour in how a company, product or service acts and is perceived. I’ve often worked for clients in developing the final designs that ultimately shape the perception the customer or target individual has of the client firm. I’ve also seen all too often the disconnect between the parties involved that help shape the client’s identity and the problems in how the client manages its design.

In writing this Guide, I’ve tried to outline the basic elements to the process of design and development of brand strategy in a way that would best support the people involved in actually designing brands. This is not to say that designers can’t read eight hundred paged books on Managing Brand Equity, but that there are some very simple elements of developing the attributes of business behaviour and that all designers should understand their vital role in improving business behaviour.

My hope is that I’ve been able to simplify the topics involved enough and display them in a practical way that makes it easier for most designers to recognize where in their own work they can improve their contribution to the client’s business. I’d also hope to give an introduction to the tools or subjects that could help designers improve their own business and abilities to deliver design solutions.
INTRODUCTION

More and more it is becoming clear that organizations can no longer just make and sell products. Today they have to make products, build brands and sell them as one. It is because of this that designers have been introduced into the process to help design the brands the organization sells. As the way an organization conducts business changes and the fragmentation of media channels continues, designing and building brands becomes harder. No longer can designers build a brand with some clever advertising that simply states the features and benefits of a product. Instead they have to consider the many dimensions a brand is experienced in and how to keep it all consistent. In light of this, building brands for an organization has become a primary function of business itself, which is as important as developing business strategy.

Product vs brand?
According to Phillip Kotler, Professor of International Marketing at the Kellogg School of Management, a product is anything that can be offered to a market for attention, acquisition, use or consumption that might satisfy a need or want. Thus a product might be a physical good, a service, a retail store, a person, organization, place or idea. Kotler defines the five levels of a product as the following:

1. **Core Benefit**: The fundamental need or want that consumers satisfy by consuming the product or service.
2. **Generic Product**: A no-frills version of the product containing only those attributes or characteristics absolutely necessary for it to function.
3. **Expected Product**: The set of attributes or characteristics that buyers normally expect and agree to when they purchase a product.
4. **Augmented Product**: Inclusion of additional product features, benefits, attributes or related services that serve to differentiate it from competing products.
5. **Potential Product**: All of the augmentations and transformations that a product might ultimately undergo in the future.
Most activity in competition happens at the 4th level of augmentation, because most organizations can adequately build products at the Expected level.

Kevin Keller, Professor of Marketing at Dartmouth College, continues on this topic by saying,

“*A brand is a product, then, but one that adds other dimensions to differentiate it in some way from other products designed to satisfy the same need.*”  

These differences can range from intangible emotional ones to rational and tangible ones specific to the features and functions of a product.

In this next example I’ve tried to contrast a well-known brand and its product: *Nike.*

**Product Level:**

**Product Core Benefit:** Performance styling in shoes that fit.

**Generic Product:** comfortable, durable and stylish shoes for sports and fitness.

**Expected Product:** High quality manufacturing, high comfort level - no blistering - protective casing. Support, expected level of durability, weight factor and life-span. In some cases, shoe laces and, inner tongue and shoe-instep. Strength of ‘new smell’

**Augmented Product:** Styling, air-pockets. Design of lugs - the odd foot-print on the under sole of shoe. Outside material is reflective, protective and weather proof and can be personalized. Inner sock to replace lacing and traditional ‘toungue’ of running shoe – etc.

**Potential Product:** Tracking and GPS device in shoe.
**Brand Identity:**

*Core Identity:* Sports and Fitness.

*User profile:* Top athletes, and all into health and fitness.

*Brand Personality:* Exciting, provocative, spirited, cool, innovative, and aggressive; into health and fitness and the pursuit of excellence.

*Subbrands:* Air Jordan, Max, Shox etc.

*Logo:* “Swoosh” symbol. (designed for 35 bucks, chosen from the least offensive of twelve concepts presented in 1971)

*Slogan/Tagline:* “Just do it”

*Organizational associations:* Connected to and sponsors of top athletes and their sports; innovative.

*Heritage:* Developed track shoes in Oregon.

*Value Proposition:*

**Functional Benefits:** High-technology shoe that will improve performance and provide comfort.

**Emotional benefits:** The exhilaration of athletic performance excellent; feeling engaged, active and healthy.

**Self-expressive benefits:** generated by using a shoe with a strong personality that is associated with a visible top athlete.

These days a designer is present in the building of a brand around a product; they’re expected to understand the different levels of a product and how each impacts brand-building exercises. They have to be able to translate the different levels of a product into what they’re capable of designing. Traditionally, the designer’s activity has been around developing a brand identity and branding materials based on it. Today, a designer is involved in the development of strategies and they get to delve into the mysteries of a value proposition, the intangible benefits of a product and the emotional responses someone might have to a brand. It’s a broader scope of design than what it used to be.
Creating a successful brand involves the careful blending of activities, which includes business and brand strategy with the design process and all the relevant participants. It is this effective collaboration that is understood to be brand strategy, which has given birth to some of the most visible and trusted brands today.

This guide aims to be a broad overview and light introduction to the immense topic of brand strategy. The guide also clears up the distinction between branding, marketing and business strategy whilst giving you a clear step by step guide in how to create your own brand strategy.

It is by no means the definitive text on the topic, but hopefully is the first thing you’ll read that will help you to look further or ask questions on the topic.

This is a first ‘edition’ of the Guide and with it I wish to create a dialogue with those that read it, collect feedback and in the future I’ll revise it to become a complete guide for designers on the subject. So I encourage you to get in touch.

As Kevin Lane Keller says about brand strategy in the prologue of his book, Strategic Brand Management:

“It’s just as much an art as a science. There is always a creativity and originality component involved.”

My hope is that designers will read this guide and arm themselves with the principles of brand strategy to design business more effectively.
WHAT IS BRAND STRATEGY?

Brand strategy is about the behavior of business and improving on that.

Brand strategy is neither branding nor brand alone. It is not marketing, nor is it strategic development but the development of a clear set of actions and plans, governed by a single stated direction. These plans (and actions) allow a business to improve its competitiveness, its position and reputation in the marketplace.

Brand Strategy is based on the core principles a company is in business. For the business to be continuously successful, it must act upon a well thought out strategy.

There are two simple rules to brand strategy.

1. Brand strategy is aspirational. It exists purely to support the long-term strategy of any organization. What it wishes to be, based on its vision and long term goals.

2. Elements of brand strategy are there to communicate a vision and consistent story to the client or consumer. These elements include personality, positioning and so on.

**Branding isn’t:**
To clarify, and something I will probably continue to repeat this throughout the guide, Branding is a marketing term that largely came about in the last decade to mean the marking of products. It is not brand strategy. Sorry.

Figure 1. The ‘fundamental’ activity of business.
WHAT IS A BRAND?

That is a difficult question and one that I have yet to find a perfect answer to. I say this because there are many interpretations of the word and ultimately most are wrong.

This said, understand that a brand is essentially the sum of all parts of the business experienced by someone and their perception of that experience. In essence, there are two fundamentals to know:

1. A brand is the total experience gained from the behaviour and relationship someone has with an organization, product or service.

2. A brand has two living parts, the part that the organization or product/service creates and the part which is kept in the mind of the person experiencing it.
Here are some other interpretations, from people that are in the business of building brands, either for their own firms or others:

“A brand is the expression of the heart of an organization, not a logo and the colour blue”.

**Chris Ford**

“Brands have become part of the fabric of our society. Brands create context about who we are and how we live. And brands aren’t just articulated by their advertising any more; they’re articulated by everything they do. Every aspect of a brand that touches people defines that brand.”

**Lee Clow**, Chairman and Chief Creative Officer of TBWA Worldwide.

“... A great brand is something that people want to be a part of and share in, a way of expressing themselves.”

**Patrick Gournay**, CEO Body Shop

“For me, brand is a name which implies a measure of quality, and over time, the name and the quality become synonymous. I’d look on a brand as a guarantee of quality, or a guarantee of a way of meeting my expectations in respect of a service or product. Brands should be attracting people to them because they offer excellence.”

**Sandra Dawson**, Prof. Management Studies, Director of the Judge Institute of Management Studies, Fellow of Jesus College and first woman Master of Sidney Sussex College, Cambridge.

“I think a brand is an embodiment of the comprehensive promise made by the organization to the outside world. It’s a proposition of the value provided to consumers by the organization, and it’s all the underlying organizational activities that support that proposition. All these constitute the brand.”

**San Jin Park**, Vice President of Global Marketing operations, Samsung Electronics.
Here are some additional points to know about what a brand is.

1. Brand systems must strive for simplicity, and strive to maintain internal and external consistency.

2. Brands evolve over time, with cumulative experiences of that brand, through direct contact or associations. They can be born overnight, but - to extend the metaphor - the brand’s legs need to grow to have any real strength to be able to stand on its own feet.

3. Weakness in a brand can occur with inconsistencies which cause misrepresentation and misunderstanding with the customer or target audience.

Figure 2. A brand weakened by noise and inconsistency.

Figure 3. A brand with a strong position through clear marketing, experience and management.
Take a look at the inside of brand. What makes the brand of a product, service or organization?

Each element, layered on top of the other, contributes to building a strong brand that is easily identifiable, memorable and can be differentiated from all other similar products, services or companies.

An Example.

Visa and Amex both offer credit to their customers. To differentiate themselves, they look, behave and offer slightly different services in order to attract and retain customers.
**What is a Value Proposition?**
Once you've figured this out, you probably can wing the rest as it will sound like you know what you’re talking about. No, seriously - the value proposition sets the foundation for building all of the brand identity elements, and as such it is the reference point for most decisions in creating an identity for a product or organization.

**The Tangible and the Intangible of a Brand.**
The value proposition is a statement of the tangible features and intangible benefits to the buyer, customer or client. David A. Aaker states that in addition to functional benefits the value proposition can include emotional and self-expressive benefits.

“That we are what we have is perhaps the most basic and powerful fact of consumer behaviour”.
Russell W. Belk

Examples of Tangible and Intangible.

**Features:** Quattro All-Wheel, offroad driving. BOSE eight stereo speaker system. Big-ass plastic looking bumpers. Raised wheel base.

**Intangible:** Cool factor. Association with all those who can afford understated status symbols. Looks like I go to Lake Tahoe for the weekends, if I live in San Francisco.
Three Things About Attractive and Useful.
1. The brand has to appeal to an individual on an emotional level, creating a relationship with a customer, client or person. Any other level simply isn’t strong enough.

2. It is the emotional interaction with a brand that enables an individual to feel something about the experience and if positive, they’ll continue to seek it out.

3. The system must clearly communicate tangible features and intangible benefits that might attract an individual’s attention and draw them into an interaction.

Emotional Benefits Explained.
This relates to the ability of the brand to make an emotional connection with the purchaser or person who interacts with the brand. The ideal is to create a personal and emotionally positive experience that the individual will keep with them and associate with the product, service or company, either within a momentary experience, or one that lasts over a period of time.

Typical Brand Book Example.
Volvo has an emotional benefit of safety. This is something that the organization realizes they can leverage through their design and production of cars, and so they try to have that emotional benefit connect with any of their potential or current customers needs. Strictly speaking, their identity alone doesn’t address this, but their entire image combined with their track record and behaviour, does.

Self-Expressive Benefits Example.
This wouldn’t be a brand paper worth reading if Nike weren’t mentioned, so here you have it: Nike fulfills a self-expressive benefit of contributing to the consumer’s concept of their own image. By wearing Nike they’re part of the, “Just Do It”, pro-athletes, superior athletic style and skill that is the Nike brand. Nike realize that the brand is much more than just their product, and that the self-expressive benefits come through the wearing of their products and how the customer perceives themselves to now be some sort of ‘athlete’ by doing so. Well, that’s why I wear ‘em.
Three Things to Remember.
In creating a value proposition, these three issues are important to remember:

1. The Features and Benefits Trap.
The focus on Features and Benefits can also be a trap. Too much focus on these can cause you to think like someone from the marketing department, in only terms of selling the product or service based on its features or benefits. To do so limits the emotional bond you are trying to create and instead is trying to satisfy rational and logical reasons for choosing a product over another.

2. A Value Proposition for a Business or Brand?
A business or product needs to satisfy the customer’s need for that product or service, thus motivating a purchase. Therefore it is the brand of that product or service that needs to have the value proposition.

A value proposition is not articulated to the customer. Instead it is translated into an identity, into the way a product is sold, and the way it is made or even delivered.

But it isn’t written out as a tagline, and as such, it doesn’t need to sound like one. For instance, Nike’s “Just Do It” is not a value proposition.

3. Consider the Sum of All Parts.
Fortunately, your job is to consider the bigger picture here and consider things like trust, loyalty and emotional bonding. Sure, a fast car may help cause an attraction to that model of car, but do the rest of the interactions in buying that car, driving that car, fixing that car and paying for that car all add up to the position the brand has taken inside the purchaser’s head.

As a designer, you are sculpting a brand and all the experiences of that brand. So consider the sum of all the parts and indicate how the experience could be given through all touch points consistently and clearly.
What is Positioning?
A term coined in the late sixties by Jack Trout and Al Ries, specifically relating to a brand’s position in a consumer’s mind.

Some simple points to remember.

1. Amongst all the noise of branded organizations, products and services out there, a brand-builder needs to consider how to position their brand to its target audience.

2. Positioning is measured by looking at the target audience, the differentiation the brand has between competitors and the types of messaging that would best resonate with the brand’s target audience.

“Being all things to all people is a recipe for mediocrity and below average performance.”
Professor Michael Porter

Figure 7. Different Positioning in cereal boxes.
What is a Brand Identity?
There are two parts to this section, the definition of what an identity is, and the types of identity structures, identities and architecture.

An identity is made up of three fundamental elements.

1. **Visual System.**
This is the mark, logotype, typographic system. Colour palette and imagery.

2. **Personality.**
Values, Attributes and Associations - as explained further on.

3. **Functionality and Behaviour.**
The integration into business and brand strategy, as well as any interaction.

A brand identity is expressed in a thumbprint of a symbol or icon, representing all that the organization, product or service is. As such, the identity is rarely experienced out of context from the brand’s expressed values, attributes or associations, as it relies on the experiences of the brand as a whole to build brand equity.
What is Brand Personality?

A brand has a personality much like a person does, in that the brand uses this to create or strengthen a position in the customer’s mind and an emotional link.

Designing brand personality is a vital part to building a Brand Identity.

Brand Personality is made up of these three elements.

1. Values
2. Attributes
3. Associations

Figure 8. The differences between personalities associated with brands.
There are three categories of Brand Identity structures. Where the illustrations use the word ‘BRAND’ image the brand of the example given above it.

**Branded Identity**
Where the company operates throughout a series of brands that may be unrelated to each other or to the corporation. (Think of Procter or Gamble or Diageo)

**Monolithic Identity**
Where the organization uses one name and visual style throughout. (Think of IBM)

**Endorsed Identity**
Where an organization has a group of activities or companies that it endorses with the group name and identity. (Think of VW Polo)

Some Difficulties.
The difficulty in using a monolithic approach can be that the brand personality or qualities may not stretch enough to cover all the company’s brand exercises. Additionally, using an endorsed identity structure demands that the organization in question exudes the values and personality that can drive the identity channels through the structure. So, there may be no rules, but there are certainly better paths to take than others.
Different Types of Logos

I wanted to include some of the examples below, created by Diphthong in Singapore, which illustrate some of the types of logos. For explanations of these types - please see their web site: www.diphthong.com.

(I just don’t have enough room here - sorry)
WHAT IS STRATEGY?

Well, you need to know about Strategy as a topic in order to feel confident about developing one of your own.

Prof. Michael Porter describes strategy as,

... the creation of a unique and valuable position, involving a different set of activities than employed by your competitors.

In essence, its a bunch of rules or principles by which you choose to run your business in order to stay on top. Or, perhaps to get there.

Since business is about selling a product to a customer, the development of a strategy and acting upon it ensures an organization’s ability to continuously sell or service better and differently than its nearest competitors.

Competitive Advantage.
Generally speaking, there will be one type of strategy your client will be concerned with in regards to brand and design and their business: being competitive advantage.

There are two fundamental approaches for gaining competitive advantage - as far as business strategy is concerned - one being: Price Leadership and the other, Differentiation.

Price Leadership means simply pricing your product competitively to increase your position within the industry. Burger King and MacDonalds are always doing this with their so called ‘price wars’.

Differentiation is the type of business strategy you’re most interested in as it gives room to brand and design. I explain it in more detail next.
Choosing a Differentiation Strategy.
Choosing a differentiation position for an organization is peculiar to each industry, it can be based on the product itself, the way it is sold, the marketing approach and other ways.

Usually, this strategy leads to premium pricing, in that choosing a differentiation position is so costly in having to adopt such unique and viable activities. That’s the reason why Apple computers are so expensive.

Being “Netscaped”.
The differentiation position is a tough stance to take in industry. Superiority in innovation is often undermined by a cost position or too much focus, whilst differentiation is a good way to define a position in industry, without evolving the strategy or testing the future viability against potential competitors, you can fall foul of the fate of Netscape.

Netscape lost marketshare to Microsoft’s Internet Explorer as Microsoft could substitute the costs of the free distribution of the browser software where Netscape couldn’t. Without increasing revenues, Netscape could no longer hold onto their differentiation position of innovation.
**Enhancing a Differentiation Position.**

This happens in two simple ways for an organization:

1. Become unique in the way the organization performs its current value activities (i.e. making products).

2. Reconfigure the organization’s value chain in a way to enhance its uniqueness.

Dell stormed the PC industry by developing its enhancement strategy of configuring and delivering PCs directly to the customer, whilst keeping far lower inventory than other PC manufacturers.

**One of the problems.**

A huge failure of business is to adopt a mix of strategies or positions and not separate the business units that need to have opposing strategies. The lines between the businesses become blurred and the value in the strategy is lessened by its lack of relevance.


“The process of design is inherently a messy process. It’s ironic that the end result is about creating order.”

Tom Mecklen

In the professional services industry, there are two ways of designing.

1. Start concepting immediately. In fact, do concepts for the pitch and spray-mount them on boards and drag in twenty or more boards for any single project. The client makes changes, you do them, go back and repeat the process until no more changes can be made, either because there’s nothing left of your concept, or one of you gives up. The result is, at best, depressing and perhaps a distant second, useful.

2. You begin by considering what the problem is. Starting with conducting research and collaboration with the client. Then you articulate a single direction with which to proceed in. Start some concepts and then ultimately design something that both defined the problem, and more importantly, solves it.

Clement Mok said, at the AIGA Wisconsin Unplugged event, “Design should be used as a verb.”

For this Guide, I’d like to concentrate on the second generally adopted way to design.

“Design without research isn’t design: it’s guessing.”
Chris Ford

Research Informs.
By giving space to research development before designing, the design can be that much more informed, allowing the final product to be proven and held accountable. Without it, it merely represents the whim of both the designer and the person who chose the concept to go through to development.

Larger design firms, like IDEO, have groups of individuals that carry out research for their design projects. As a large design firm they are able to adopt a process that allow these researchers and analysts to impact the development of concepts.

The researchers’ impact might be guidelines in which to consider concepting or development, or perhaps first-hand knowledge of the way current consumers interact with a similar product or give a framework for further investigation.

The ultimate aim of research is to develop an articulation of the direction in which to proceed. This may include a definition of the problem at hand, as well as its solution. Including, the assessment of elements that need to be considered for developing visual concepts for the design.

Types of Research.
In some cases, just browsing online is adequate. In others, a six month programme interviewing consumers, executives and collecting industry analyst’s reports is needed.

Specialist firms can help to create workshops, focus groups, collect secondary research or conduct the primary research for you.

In all cases, the research is there to inform you and reinforce a hypothesis as well as enable you to spend less time further on guessing or relying on your instincts to solve any problems.
Definition in Design.
In order to complete the research phase of your design process, you must draw a conclusion or definition to your activities. Creating definition isn’t easy if embarked upon at the end of the research work, so it is recommended to begin the research with a hypothesis in mind.

The What and How of Definition.
The definition of your research is probably best considered the “What” of the “What is the problem?” part of the work carried out. It is vital to include the “How” part of “How we’re (you’re) going to fix it”. Too often the work only reinforces what the client already knows, and says little about how and what will be done to fix and improve on the situation.

Consider developing a strategy from the definition and working with the client on that before the phase is fully complete.

Attractive and Useful.
Ensure that the deliverable created is more informative than pretty, and not the other way around. The definition work can be a ‘work in progress’ where you can deliver the final version at the end of the whole project, adding to it style-guides or any additional information collected.

Additionally, try not to undermine your work by presenting details or content that is too alien for your client to understand: it will be ignored for having no practical benefit to your client’s company.
Concept.
The second part of the process of design sees the creation of visual concepts. These tend to be either in sketch form or digitally.

Clients often like to be taken through the process of your concepts, as that is what makes a designer’s skill unique and attractive, in the ability to visually realize a concept for them.

Two Things to Consider.

1. Present One Concept.
This is rarely adopted, partly because of the demands of the client, but also because a lack of confidence in the designs being presented. Produce millions of concepts, but consider the one direction that the definition of your research indicates the design should go in. Produce variations on a concept and show the one that is ‘right.’

2. It Makes You Unique.
What makes designers and design studios unique is the ability to come up with credible, creative, and original concepts from the same information, and to the same problem as someone else could. It is the ability to have a profound idea and execute on it to produce a concept that is practical, relevant and a solution to the client’s demands. The research and production or building of the design can all be imitated and done with similar quality of output - but the concepting phase is where you, as a designer, get to leverage your talent and abilities to make your position unique.

Figure 20. Being unique.
**Design is at the End.**

The last phase of a project is developing your concepts into the functioning and living design you embarked upon. Whether it is a poster or consumer electronic device, the final concepts will probably go through a version of prototyping to a final version for release.

The result of this should be a translation of research and analysis, from the continuous collaboration with the client and designer as well as the efficiency of the process to produce a product or design that both works and succeeds.

Here are some illustrations of design processes from other firms:
**Some final thoughts on Design.**

1. **Don’t add to the problem - be responsible.**
   In short, solve the problem at hand and deliver the design solution - don’t add to the problem by making something pretty that doesn’t work.

   Look how to make your design purposeful and viable. Norman Foster, the architect, is known for once telling a client that they in fact did not need a new building but that they could solve their problem by rearranging their current space. You are allowed to do this. Not rearrange your client’s office, but look outside the brief to solve the problem. Being responsible simply requires you to consider that what you’re doing will solve a problem and not create new ones.

2. **Restless Self-Improvement.**
   One of the difficulties we face as designers is starting each project fresh, if this is the last or best opportunity of our careers. It is constantly necessary for designers to explore outside the industry as well as inside, for new methods, styles or thinking on the subject. Even if you dedicate yourself to a particular style, like Josef Müller-Brockmann or Tadao Ando, it still requires you to push the boundaries of your study and abilities, as they did.

   The constant desire to improve or better your last piece of work will lead you to see new opportunities inside every project and every job that comes your way.

3. **Take Risks.**
   However you can, in your day to day work, look for a chance to challenge what is already being assumed. Chris Bangle of BMW responded to BMW’s lagging sales and position in the market by starting up a BMW design studio in Pasadena, L.A. The studio has to generate at least 50% of its revenue from sources outside to BMW in order to create a better design group for BMW. This was a huge risk for BMW and Bangle, but paid off in delivering the X5 BMW SUV and helped BMW become the industry’s second best selling premium brand in the States.
Let's take the theory of all this and apply it to a hypothetical scenario.

In developing a brand strategy there are generally going to be two types of scenarios:

**1.** There is an existing brand with equity, a certain amount of heritage and perhaps existing strategy. With this, you take what exists, study it and develop it from there.

**2.** The other scenario is that you have nothing yet and have to develop it all from scratch.

In this practical example of developing brand strategy there are some twelve or so 'steps to development'. It is useful to have a list of all the tasks to any development before starting a project so that you can both measure where you are in the process and how successful you're being. In the restaurant trade, there is often a term called “points of service” where waiting staff have a number of items that they have to go through before the end of a customer’s visit. Sometimes it can be as high as thirty points of service. So in this case, I'm showing you twelve points of service for this example - they are listed overleaf.
Points of Service.

1. Explain the process of design. Ensure that the client understands the whole process you’re about to embark on.
2. Begin research for design, business and brand.
3. Deliver research in assessment form for review.
4. Revise and amend research to develop final analysis and Definition.
5. Present Definition, in the form of various assessments on brand, business & design.
6. Begin working on developing strategy from definition.
7. Present strategy to client.
8. Begin Concept phase of branding and design.
9. Execute and review naming, identities and branding.
10. Develop Strategic marketing deliverables
11. Review complete system.
12. Deliver Design phase of all assets – and perhaps a ‘style guide’.

Figure 23. The suggestion that you might want to have a clipboard for your points of service...
Let’s begin.

1. Explain the process of design.

Imagine, if you will, some non-descript person who doesn’t have much personality, no real identity or any real purpose to speak of. For the sake of this example, this person would look like this:

And this person, who has no name, aspires to be something else. They have a slight idea, but need some help in actually becoming what they aspire to be.

So you have been asked to help out and design, develop and show them how to build their brand. This will include an outline of a strategy, showing this person, how to behave in a way to attract a partner – an ideal partner, if you will.

This person – who we’ll name ‘X’ for the sake of this example, (And probably refer to them as ‘he’ or ‘him’ in the future as it suits our example.) explains that he thinks he needs a brand. He is finding it tough to meet someone and retain any sort of lasting or repeat relationship. It is painful for him and is costing him a lot. Emotionally.

You nod confidently and pull out a fresh pad of paper, and look like you are listening. Try to ask intelligent questions here.
Firstly - since he’s signed up, you need to explain to him your process for doing things. Outlining the steps from where he is now to where he wants to be. You are careful to explain it in a way he can understand the merit of the process and his part in it.

X looks at you blankly and waits for an explanation.

You explain that without knowledge gathering, you would be developing something that would be just as relevant for anyone else and not just him. As you see him nodding in agreement, you continue to say that you wish to conduct this research, as it will enable you to outline a strategy for him from which he can acquire his target partner. The strategy will be a set of principles and guidelines from which he will direct his behaviour and help him make all emotional and rational decisions. X begins to understand the value of your process, including where he gets to be part of it and help develop it. He’s quite excited, signs a blank cheque and all the contracts. You run to the bank and deposit the cheque.

If you were my friend Chris, you’d now run home and sit on your bum and play computer games. But since you’re not, you’ll do something like the following.
2. Begin Research.

It is important to remember that research needs to be structured. You need to design a research program that will give results that will direct you in further phases of development. A great danger of the organization of research is that it is dictated by the information you find and never ends up with a final hypothesis or analysis. Firms like McKinsey swear by ‘structured research’ where they have hundreds of three-letter-abbreviations for different types of methods and devices for structuring your initial data gathering. As silly as they might sound, the MECE or QDT [Mutually Exclusive, Collectively Exhaustive or Quick & Dirty Test] can shed some light on how to develop your own tools.

The first thing to do is develop a task list of the main areas of research, being Brand, Business and Design and list below them all the types of activities and areas of information needed to build enough knowledge. The research is not necessarily completed in a linear fashion, with areas that will overlap between the main areas.
Your list of activities and areas of research:

Business.
Situational Assessment: secondary research, Wall St. Journal – Hoovers, Edgars etc.

Competitive Landscape: same as above – additionally ask for the client’s considerations.

Best Practices: draw up a list of the characteristics and types of activities that make the leading companies within the industry segment.

Interviews: customers & employees

Mission statement: get from client. Help to articulate.

Long-term goals: as above.

Vision: as above.

Target Customer: Sometimes difficult to define – as clients never like to narrow their segmentation – try workshops with questionnaires and rooms filled with white-boards.

Brand

Personality: workshop this – with questionnaires previously filled out.

Values, features & Benefits: workshop this (explained further on).

Value proposition: workshop this.

Positioning: Products, Services & Organization: previous research from client & workshop.

Target Customer/Audience: from workshops.

Situational assessment – equity, heritage: secondary research, interviews with customers and client.
Design a list of potential elements for design.

Identity system.
Branding elements.
Web site – interactive design.
Signage.
Wardrobe.
Marketing materials.
Advertising.

So with that list of elements and activities you are now in a position to understand how much work there is involved and therefore better equipped to justify the expense of the whole thing to mister X.

Problem Solving.
Essentially, what you’re embarking on is solving X’s brand problem. So much of your research should be about finding the information needed to help identify X’s brand and the delivery of a brand strategy. Start from a point that you feel confident about, which is that this is a brand problem, specifically, the lack of having a brand and the knowledge of how to use it. Since there is also a required result to be gained from the success of this project, then you can also direct your research into finding the best ways to achieve that result. In the event you didn’t have one set for you – then you would need to include research to be able to define clear success factors. Structure your research so that you don’t find yourself trying to ‘boil the ocean’ in never knowing when enough has been completed.

Workshops and Collaborative Brainstorming.
This is an invaluable way to gather information and involve your team and client in creative disturbance. However you must plan and prepare for them, as well as conduct them with confidence, otherwise, they’re just fun meetings to go to where anyone can speak or doodle.

Figure 26. Someone wearing a brainstorming machine.
IDEO has five principles for brainstorming:
• Stay focused on the topic.
• Encourage wild ideas.
• Defer judgement.
• Build on the ideas of others.
• One conversation at a time.

With workshops, success lies in both making sure you have the right activities to do in order to get your information, and that you have all the materials and tools necessary to run and collect information from those activities.

A trick is to bring someone extra to just transcribe the workshops or brainstorming sessions, as you can never do both adequately.

Here is some of the research you conducted and presented in analysis form:

**The Situational Assessment**

What you understand from this is that there were a lot of people similar to X, although they were somewhat of a different colour, but similar size and shape. The situation seemed to show that there were strong clusters of these similar types of people in specific areas, leaving one quite empty of activity.
Back to Mister X, from the research you had identified the segment that X occupied. Looking up on Hoovers, in their industries and sectors list – you find that X is squarely in the ‘male amateur services’ sector, along with other people like Chris, Peter and Rupert.

Best Practices.

From identifying the key players within this segment you were able to list out some of their key attributes that make them important elements of this analysis.

The List:
1. Strong and clear personalities.
2. Blond Hair.
3. Large network of associates.
4. Creative.
5. Always wear similar clothing.

To qualify this list, it will be necessary to show scenarios or examples of their success in the industry segment, for instance, the benefits of ‘Peter’ having a large network of associates.
**X identity.**
Having gained some insight into the position X has within his industry segment you need to compare and overlap this with additional research. In a way it could be considered external and internal research, with this being the internal research.

**Customer/Company interviews.**
Being that you’re dealing with an individual here you will need to interview previous ‘customers’ of X’s and himself to find out key attributes, features or characteristics that you can use in forming a brand and strategy for him. In this case, it is likely you’ll need to get a list of ex-girlfriends and talk to his parents.

**The Value Proposition.**
From what you now understand, this can drive a lot of your development later on so try to collect as much information as possible to help build a solid and clear value proposition. Doing this first by looking to discover who the target customer might be.

**The Target Audience or Customer.**
Here, you will actually consider X’s target customer as a ‘partner’. Technically speaking, the Audience refers to the group or target for advertising and messaging. It sort of implies a passive role, as opposed to a customer, who makes a purchasing decision or transaction. In this case, mister X will want to attract and retain his audience, being an audience of one. And it would be wise to make sure he doesn’t refer to them as his ‘customer’, at least not to them.

By asking X who he desires as a ‘customer’, then researching what that customer typically wants or needs, and mapping them together will enable you to define a target customer. This is one of the vital elements of brand positioning, as well as the determinate for developing a benchmark for future development.
**The Target Audience or Customer -continued.**

In this case, X has described that he wants a youthful, reasonably tall brunette, with a silly sense of humour, that is dangerously close to being childish and is athletic, anal about tidiness, can illustrate and use an Apple Mac™. Aged anywhere from 30 to 31 years old.

A bonus can be from doing this repetitively is that a lot of your research and analysis can be kept on file and easily repurposed for relevant jobs. For instance in the event you specialize in developing online commerce sites, a lot of your awareness about shopping trends online can easily be kept and re-used. So keep all your research.

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You're wondering if he already has a name and address for her. Unfortunately he doesn’t and your job is to find out what he needs to do to become a brand worth knowing.
**Smart.**

What you’ve been able to do, I am assuming, is interview as many people as you can find that fit the description X gave you on the type of customer he’d like to target, and draw up a list of their ‘unmet needs’ and wants etc.

Displaying your research in a three circle Venn-diagram, we see three clear factors involved in what the target customer wants.

So you’ve managed to funnel all the raw data into three main characteristics of the type of relationship the target customer is looking for. Surprisingly, it looks a lot like the type of research you’d find on looking at online consumer shopping – that’s clearly because it is, however, in this case it is also relevant for X’s desirable partner.

The idea is that X will need to make them feel confidence; in control and that the relationship is convenient. All of which will make the target customer feel like they made a smart decision. Inside the circles are all the details and elements that could be mapped specifically to each fundamental element.

![Venn Diagram](image-url)  

**Figure 32.** Chris’ favourite type of diagram.
Therapy.

These workshops you’ve been running might feel a lot like group therapy sessions. Which is good. It means you’re on the right track. So much of brand strategy is based upon making an emotional and personal connection with a customer, which is why we cannot simply have this dictated solely by business strategy.

The new therapy sessions you have to embark on are going to be based on personality, features and benefits. Sort of like how many brand books describe those Volvo case studies or Johnny Walker ones – you have to be able to do the same here.

So you begin by the personality test. I generally chose to ask the questions face to face. I find that chief executives will treat form filling or questionnaires with the same dedication they do as discussing staff 401k retirement plans. So prepare to run a workshop where you have someone transcribe all the dialogue.

The Workshop.

If you could be a car, what type of car would you be? If you could be an actor, what type of actor would you be? Do you have severe bouts of depression? Okay – don’t ask the last one, we don’t need to determine mister X’s exact psychological profile. But this exercise begins to help us understand how X would like to be perceived. I can’t include all the information here - and so will proceed to the results. Do make sure that in all workshops you have the necessary decision makers present.

Figure 33. A suggestion of how to awkwardly sit during therapy.
You end up with a good enough list from X, having spent the best part of a day cross-examining him. You challenged him on everything he delivered, ensuring that he meant it all and could very clearly articulate core values and distinct features.

This is the list you have at the end of the day:

**Country of Origin:** England  
**Emotional Benefits:** Sensitive, and regressive.  
**Self-expressive benefits:** Confidence, acts like he’s Don Johnson.  
**Brand/Customer relationship:** Companion/Friend.  
**Features:** Has all fingers and necessary limbs.  
**Values:** Believes in monogamy, Helvetica is a lifestyle, Black and White movies and that Mallory & Irvine did summit.  
**Attributes:** Worldly, Consultative and thought-leader.  
*(Everyone will want that last one, so throw it in.)*

One thing to remember here is that the client, unless they’ve been through this before, will want to cram everything they can into this exercise. Sort of like how they stuck in that thing about Mallory and Irvine. So you will constantly need to trim this back whilst keeping the essence of what they’re saying intact.

*Figure 34. A suggestion of how to stand on the top of Everest.*
The Value proposition that you can determine out of this could run something like this:

With exceptional good looks, charm and distinct sense of humour, X provides a sense of companionship, confidence and the feeling of being smart through being attentive, delicately patronizing and washing regularly.

It’s not set in stone – but you get to break it down explaining it to the client:

**Audience:** Female.
**Differentiation:** Exceptional looks, distinct humour and cleanliness.
**Functional Features:** provision of the sense of companionship.
**Emotional Benefit:** Feeling of confidence and of being smart.
**Value Gained:** companionship.

So this is good progress. With a firm understanding of the current external market and a knowledge of the target customers’ needs and general moods, as well as narrowing down the type of person X is and could be, you are getting closer to being able to deliver definition.
Positioning

How does X retain a clear and strong position in his audience’s mind? When the time comes, are they going to be able to recall the X brand and position it favorably against other similar named brands in their minds?

To determine the positioning that X needs, you take his target customer and the differentiation X will adopt within his competition and the type of messaging that is necessary to resonate with that audience or customer.

In this case - you’re going to leave finalizing the positioning until you begin to work on the branding elements.

This next area of research would normally be a little more consistent than what we’re going to do here. For this example of developing brand strategy, where I chose X to be concerned with finding a partner and not more business, it makes my next example of research a little different than you’d experience if doing this for a company. The principles are the same, I just have to be vague because of my example.

Business.

Remember that you are going to learn what X’s lifeline’s are and how he makes his money. Also remembering that creating a brand is also about creating the way in which someone like X needs to behave, to ensure continuous and successful business. So you ask him questions about how he makes his living and how he might support a long-term relationship with his ideal target customer.

He’s a graphic designer.

Figure 35. A row of people looking just like X.
‘Oh well’ - you think, perhaps we can look at some of the hidden capabilities he has, that might increase his chances of becoming successful and not stuck freelancing the rest of his life.

You learn that as X is a graphic designer you have a lot scope to build a brand that both express that to his clients but also to his potential target customer. Now you understand why he thinks Helvetica is a way of life and that it might be important to keep as a value.

You ensure that X has the means and ability to provide what he claims he can to his target customer, and that there will not be any conflict in how he wishes to conduct business now and in the future, and with how he wishes to be perceived. A lot of this can be through learning about his vision for his business, goals and his view of the future.

What business is the brand in?
In the way that Starbucks is in the business of Coffee, and selling it, its brand is in fact in the business of “the Third Place” (as in there are three places a consumer might spend their time primarily, as seen by Starbucks’ research, Home, Office and “the coffee shop”) from home. Understanding this helps you construct levels of services that reinforce the brands position in that place of business. It also acts as the differentiator, without yet adding in the actual features and benefits of the service or product. In this example, X is actually in the business of design and his brand is (separated from that) the business of companionship.

Figure 36. Doesn’t this look like Starbucks’ logo?
Assessments for Definition

So far, we’re only between the third and fifth points of service, as listed previously. You still need to take all this research and begin forming your assessments and analysis for presentation.

For interactive work – I’ve often laid out my assessments in the following categories:

- Business and Brand Objectives
- Brand Assessment
- Creative Assessment – visual and style.
- Information Design:
  - Information Architecture
  - Usability
- Content Strategy
- Functionality Assessment
- Technology Assessment

And at design firms like Studio Archetype we would deliver this in the form of a Definition Document. What is important to consider is that your client, in this case mister X, has a limited attention span and will not read seventy pages of analysis on himself just because you gave it to him. However, if you made a pretty presentation of the findings and attached a slim booklet to it, it might come across much better and actually stick. An old favorite at marketing firms is to attach the Madonna track ‘Ray of Light’ to the presentation - it makes sense, but you do need to be specific to your audience.

Figure 37. What your Definition Document could look like.
The What and How.
You must also be clear that whilst this presentation of assessments may feel like “What” he already knows, it will be accompanied by the “How” he needs to behave, implement and perhaps manage himself. In this case, X must consider this presentation to be a working session, where you get feedback on your research and refine it to be able to develop clear guidelines and principles for business behavior. You explain to him that the next session will be to deliver a strategy for his success. X is, naturally, very pleased with your work and thus, so are you.

The Strategy.
Remembering that strategy is essentially a set of guidelines by which you conduct your business, activities or life, in order to be competitive, successful or stay alive, you decide upon a Differentiation Enhancement Strategy. Simply put, you’re going to articulate guidelines for being clearly different, whilst enhancing the value and benefits available. You might want to wrap that up in something that sounds attractive, like if you were at Sapient or McKinsey, you’d slap a title on it, in 72pt: ‘Developing a Rapid Response Culture’ or ‘Creation of Involvement Opportunities’. Yes - I’m being rude here.

Based upon X’s value proposition:

With exceptional good looks, charm and distinct sense of humour, X provides a sense of companionship, confidence and the feeling of being smart through being attentive, delicately patronizing and washing regularly.

... you outline some of the key principles that could govern a successful strategy for success:

- Speak in plain English.
- Wear a uniform.
- Read a lot.
There is a belief that there should not be more than three or four governing principles for any given strategy. Too many and you begin to get conflict between them, with the lines of differentiation blurring. In this case, you’ve taken from all that you’ve learnt about X, and in an exhaustive working session with your colleagues, you’ve narrowed it down to the above three things.

Additionally, you need to consider that these rules are only the rules for the current state of business, the position X is currently in and in regards to where he wishes to be. As things change, so might the rules, or new ones developed for specific activities.

In some cases, you might find that the brand has to be able to talk to several different audiences – like perhaps X needs to have a position for his parents as well as his potential partner. For this exercise you would need to do the same type of work, but extend it where necessary for the different positioning.

However - you have to remember, it is extremely difficult for brands to successfully face multiple audiences with the exact same positioning.

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**Figure 38.** A cube. The faces of the cube cannot be clearly seen unless orientated directly towards you. This cube has different faces to illustrate a single object showing different sides.
Whilst the fundamentals may all be the same, a different face is often necessary for each different audience. Additionally, changing behavior and the image can be difficult to manage for each audience. It’s not to say it cannot be done, often a brand can offer services or products to two different types of customers. For instance, airlines often have upper and coach class services and they might deliver separate messages to the two customer audiences but keep the same brand fundamentals.

So you take those three things and list them with some detail for a presentation. Your presentation may need specific details, illustrations or expected results from the rules chosen – be as creative as you can in telling the story here.

**Speaking Plain English.**

Speak in plain English language. Don’t hide behind jargon, complicated words or look like you don’t know what you’re speaking about. This appearance of being open and honest will add to the general brand attraction. Additionally, it has been said than an English accent makes an impression that you’re smarter than you really are. Tell this to X anyway.
**Wear a uniform.**

Consistency in presentation. The appearance of a consistent style and design will strengthen your positioning. It also seems to be dependable and makes it convenient in choosing what to wear. Being a designer it is suggested that you wear the colour black.

**Read a lot.**

This will appear that you are knowledgeable, smart and therefore any partnership must reflect positively on this. It will make the target customer feel smart for choosing the X brand and the books lying around will convey an image of thoughtfulness and deep intellect. It is suggested to use both design and antique rare books as props as they give the impression of wealth, the interest in classics as well as look pretty. This rule helps to build the position of being in control, and thus translates to the customer feeling they have a part of that when interacting with the brand.
Your presentation must show that the combination of those rules, when acted upon in different scenarios, will deliver successful results every time.

Good luck.

**Use-Case Scenarios.**

When moving into the concept phase, you might want to develop use-case scenarios to determine the different types of interactions a typical target customer might have with X. Using these in the presentation of the strategy will help illustrate your strategy, and will be useful further down the line.

So now you’re at the eighth point of service and you can begin the concept phase of branding and design.

**Naming.**

Armed with your list of things needing to be designed you first need to get mister X named. This is a mysterious side of the design business, where perfectly reasonable people make insane amounts of money to name products, services and brands. Even though you might think you can come up with a perfectly reasonable name, be warned, Monday, QuinetiQ, Tuesday and Accenture are already taken, so you call up a naming agency. Perhaps Master McNeil in the San Francisco Bay Area. For me, this process is always an eye-opener.
You thought that having gone through the exhaustive research phase yourself and having it approved by the client would be enough for the naming agency, but they’ll want to conduct their own version and ask a lot of the same questions themselves. Only this time doing it twice as fast as you did and pay attention to about half of what you did. It becomes your belief that this is simply to all them to charge so much for the administrative job they essentially have ahead of them.

However, they should give you a presentation during all of this of the different types of names. It won’t look as pretty as yours and will have lots of words.

*Suggestive:* Platinum Card.

*Arbitrary:* Motorola

*Descriptive:* LaserJet

It might not be as short as that – but that is what you’ll take away with you. You’ll also make it clear to X that it isn’t really important what he calls himself, but in this stage of the process it is relevant to consider what not to call himself. You try to explain to him that the reason why Levis or Kodak seem to work as great names is because we’ve been living with them for more than fifty years of brand messaging, advertising and product placement in our lives - so just saying the name conjures up an entire brand image, not just by the name itself. Also, it is important to warn X that you can either choose a name by what’s available online or first and foremost by what suits him.
After about six weeks your naming company will get back to you. There’s only going to be about seven of them in the firm, so they’re in fact all busy drinking cocktails, driving up to Burning Man and playing Halo live on the X-box whilst you think they’re crunching databases of available names and holding eight-hour internal brainstorming sessions. This is what they present to you:

Rudolph
Ainsley
PowerOne
Lucent
PhotoShoppe
Damien
Sara
Palm V

And you immediately get a sense of being ripped off. But one name stands out, perhaps because they coloured it in red.

So you take the name - scribble out an eighty-six thousand dollar cheque and take your scrap of paper.

**Branding**

You’ve decided that since the use of the brand is going to be pretty targeted with no real need for extensions or subbrands that you can afford to simply have a logotype developed and concentrate on the elements most needed for his acquisition of the target customer.

Knowing exactly how X, I mean, Damien is going to use the brand and live with it is vital here. Will he need it stitched onto his clothes and running shoes; will it work in a monotype signature in his email footers? Since you’re not letting him wear running shoes any more, unless for running, you certainly are not going to stitch his name on to leather shoes. But understanding the functionality here is important to knowing how to design the identity system.
Present One Concept.
Do hundreds. You might need to. But present only one. It will reside on you having the confidence to do so, but with the story you’ve developed so far, you should have little problem in convincing Damien that there is only one direction to take. It’s a trap to show anything more than two possible directions, Damien is going to rely on you for your expertise and to show too many will cause Damien to fall back on what he thinks looks the best, not necessarily what his target customer might think looks the best. Additionally, your job gets incrementally more difficult as you will have to explain that all of the concepts equally have the same amount of relevance and purpose for this endeavor. Since writing this Guide, I’ve been trying to find the firm online that boasted how it showed its client 119 different concepts a week before Christmas. Well, if that isn’t a way to put a client in hospital, I don’t know what is. Imagine all the brands a client has been bombarded with a week before Christmas.

You design the following as a concept:

In your presentation to Damien, you explain that this identity system has the ability to leverage messaging that speaks to the needs of the target audience, such as Freedom, Commitment, Confidence and unlimited credit at all Gap Inc. owned stores.
SO HOW DO YOU DO IT? - continued.

Luckily, it’s not your job to make this happen. It now goes into a strategic marketing phase where the question of PR vs. Advertising to build the brand is posed and different devices of marketing communications might be used. I list the eight commonly used elements of a strategic marketing plan so that you can see how similar the work conducted is to the research you completed on Damien.

- Corporate Objectives
- Marketing Audit
- SWOT analysis: Strengths, Weaknesses, Opportunities. Threats.
- Assumptions
- Marketing objectives and strategies.
- Estimated expected results
- Alternative plans and mixes
- Programmes
- Measurement and review.

This might be relevant for a Direct mailing campaign or even a mix of radio, broadcast and print. They’re invariably tested in US towns like Fresno and rigidly kept to plans with measurable results.

**PR versus Advertising.**

The argument of PR vs. Advertising is probably best reenacted by an Advertising account manager and comparable PR associate where you try to define the better activity to build a brand. It is commonly held that PR can make a brand and Advertising reinforces it. For instance, an event or actual experience of the brand is what literally defines it in the customers’ or audiences’ minds. Advertising can introduce a brand but it probably cannot convince the customer to make a purchasing decision. Pepsi dropping star endorsements because of the star’s actions or recent activities does more to create a position in the consumer’s mind than the advertising which just reminds you of the news item you just watched on Madonna getting dropped or Ludicrous being replaced by the Osbornes.
If that argument gets too heated, interject that none of them exist without the brand to work with in the first place and leave before they realize that you didn't really offer anything useful there. Or suggest that they read some of Al Ries’ writings for further information on the topic. 

**Messaging.**

This is the communication of the messages that you express through the brand in the form of marketing communications, advertising or branding, to the target audience. What is interesting here is that seventy to ninety percent of visual communication is non-verbal, in that visual imagery has been shown to be more powerful in affecting perceptions and memory, especially when working with visual metaphors. Gerald Zaltman, from Harvard pushes a concept of “verbocentric” thinking that aims to narrow the linguistic gap between the marketer and the marketed. And unfortunately it all reads about as friendly as that last sentence too. However, he has more to say on the matter of consumer behaviour in his research in psychology and linguistics.
**To StyleGuide or not to Guide Style?**

So, we’re finishing up with your client Damien. You completed field studies, workshops and brainstorming sessions to produce mile-high stacks of paperwork in the research of what he is, wants to be and how to get there. You constructed an incredibly simple plan of action and worked with him to adopt it. Then you delivered a clean, simple and clear identity system that he could wear and use in his pursuit for success and happiness. So are you simply going to say goodbye and leave it to him to manage it without instruction?

Perhaps not - after all, you’re not a designer for nothing. In fact, all along, you’ve been dropping completed assets and approved statements into a single document, and now at the end of your process, you’re to deliver the final version of the Definition Document which contains a manual of style for him. It’s the reference book for his behavior and instructions on how to be with a target customer.

In the corporate world, preparing a styleguide can be considered a job barely a step up from setting type on coupons, but it needn’t be. Consider it to be your last opportunity to make the client recognize the value gained in managing and building the brand consistently and carefully.

That’s it for the step by step process.
I’ve quoted and referenced work from different people throughout this guide. It might be interesting to learn more about some of them. So I put together this short ‘who’s who’ of this Guide. I apologize for trying to cram in some incredibly lively and accomplished careers into the small paragraphs that I have done.

The suggested reading list, further on, will list some of their published titles.

No one paid to get into this Who’s Who. Just so you know.
**Noted People.**

**David Aaker**
Professor Emeritus at the Haas School of Business, University of California, Berkeley, Vice Chairman of Prophet - a strategic brand consultancy. Has written nearly a dozen books, of which ‘Building Strong Brands’ is possibly the most widely known. Often considered the expert on brand strategy.

**Tadao Ando**
Born in Osaka, Japan, Ando taught himself about architecture from reading and traveling. At the age of 29 he set up his practice and twenty five years later he was the recipient of the Pritzker prize. His work is easily identifiable by the simple geometric shapes he uses as well as the consistent use of materials/elements - cement, wood and light. Great pieces are his Church of the Light, in Japan, and his meditation room for UNESCO, in Paris, France.

**Chris Bangle**
American born Head of Design for the BMW group, Bangle has been largely responsible for turning the success of the firm around through its design of new cars. BMW bought the firm Designworks/USA in 1995, which is in L.A. USA. Bangle has used the outside design studio, which has to generate 50% of its revenue from outside sources, to revitalize the product line, with items such as the Henrik Fisker designed Z Roadster. (Fisker has been quoted as saying: “If design isn’t profitable, then it’s art.” Fast Company, March 2000)

**Russell W. Belk**
N. Eldon Tanner Professor of Business, University of Utah. Belk has published many books - almost as many as Aaker I think, and specializes in consumer behaviour and marketing. I am afraid I don’t know much about him personally.
Josef Müller-Brockmann

Chris Ford
UK based designer, specializing in interactive design and information architecture. Founding partner of one of the UK’s largest online recruiters, PlanetRecruit.com - Chris now lives and works in Brighton, UK. When he’s not working on projects for some of the largest UK companies, he’s swearing at me through one-liner emails.

Lord Norman Foster
Here it becomes painful to limit a forty year career in such a short space. One of the UK’s most prestigious architects, Foster became the 21st Pritzker Architecture Prize Laureate. He was knighted by the Queen of England in 1990 and given life peerage in 1999. He originally started a practice in 1963 with another, now equally prestigious architect, Richard Rogers. Some four years later he established Foster and Partners where Foster built the £650m skyscraper for the Hong Kong and Shanghai Bank Headquarters, having previously designed and built nothing taller than four stories. The brief apparently called for “the best bank building in the world”. The practice, is currently working on the largest construction project in the world, Hong Kong’s new airport. Foster has a habit of flying his own airplanes and reportedly has his license to fly 747s.
Steve Jobs
Apple Computer Inc’s CEO, which he founded in 1976, as well as being the CEO of Pixar, the animation studios. Since most of the audience reading this Guide use and buy Apple products, I guess I don’t have to say any more here.

Don Johnson
Actor. Made some fifty odd movies, most notable performances have been in the critically acclaimed vehicles, such as - Harley Davidson and the Marlboro Man and Miami Vice. The TV series Nash Bridges was cancelled in the last year or so. I once walked through the filming of an episode, in downtown San Francisco, completely unaware of what was happening, because I was distracted by all the food that was out on display for the actors to eat.

Mallory & Irvine
The question of, “Did they summit Everest?” remains, to this day unanswered. In June 1924, George Mallory and ‘Sandy’ Irvine were never to return from making a bid to summit from the Second Step on Mount Everest. Mallory had previously tried two attempts without oxygen assistance, on the third he brought 22 year old Irvine, with oxygen tanks. A few years back, Mallory’s body was found but with no further clues as to the success of the summit attempt or not. Recently, it was announced that there is now an internet cafe at one of the base camps on Mount Everest.

Tom Mecklen
As hard as I try, I still cannot find any information on this gentleman - perhaps someone can illuminate me on to this person’s history so far?
Clement Mok
Currently President of the AIGA National Board, Clement Mok is a designer, author, and entrepreneur. Mok worked at Apple as Creative Director, overseeing the launch of the Apple Macintosh and eventually went on to form his own design firm which became Studio Archetype. Studio Archetype’s portfolio included putting UPS online, the IBM sponsored Nagano Olympic sites, and the most visited site, at that time, on the net, the IBM Chess site. Along the way, Mok also started up The Royalty Free Stock images company, CMCD and technology company, NetObjects. Mok recently served as the Chief Creative Officer of Sapient, when they bought Studio Archetype in 1999. I don’t get the impression that he ever sleeps.

Michael Porter
Michael E. Porter is the Bishop William Lawrence University Professor, based at Harvard Business School. Porter is a leading authority on competitive strategy and the competitiveness and economic development of nations, states, and regions. Porter has more academic qualifications than Aaker, Chris and Don Johnson put together and his books, especially ‘Competitive Advantage’, lead the reading lists of most MBA courses. Oddly enough, I think Porter first studied mechanical engineering, at university - perhaps he was considering being an architect?

Al Ries
Coined the term Positioning with Trout, and has published many books and papers around the topic. Ries’ most notable achievements would be writing a book that sounds like he’s actually shouting it at you, entitled, The 22 Immutable Laws of Branding. Ries runs a consultancy firm, with his daughter Laura, in Atlanta.
Jack Trout
The marketing strategist who co-authored the Positioning papers and books with Ries. Trout also authored the oddly familiarly titled book, The 22 Immutable Laws of Marketing, as well as many others. And as far as I am aware, he doesn’t have anything to do with the Jack Trout International Fly Fishing tagline, “Think like a fish, look like a bug...”

Gerald Zaltman
Harvard Professor of business, Zaltman specializes in buyer behaviour and how managers use information in learning about markets. Zaltman developed the ZMET research tool, which specifically looks at the mental models underlying customer behaviour. Zaltman is often referred to as, “Gerry” Zaltman.

Noted Firms/Organizations and X-Box Game.

Accenture
Formerly known as Andersen Consulting, this large-scale consulting services firm changed its name shortly before the massive corporate scandals brought down its former parent company Arthur Andersen. A bitter legal battle formed around the use of the parent name, and in the end, the now named Accenture was unable to leverage the equity it had built in Andersen Consulting and had to rebuild its brand from scratch.
> www.accenture.com

Burning Man
A celebration/festival that started on San Francisco’s Baker Beach in 1986. Eventually it was moved, so that the growing masses could burn a huge effigy of a wicker man, and prance around semi-naked for days in the privacy of a huge desert - somewhere outside of the city. I’ve never been.
Design International/USA
The product design and architecture firm, owned by BMW but still portions much of its services to outside clients and industry.
> www.designinternationalusa.com

Diphthong
An outstanding Interactive Design firm based in Singapore. The firm's current web site hosts the information about different types of identities listed on page: 16. Their work has been profiled by Macromedia Asia, DigitalThread and Surfstation online.
> www.diphthong.com

Halo
‘Truth and Reconciliation’. Bungie’s amazing multiplayer game for Microsoft’s X Box. I have to admit that I played the whole game, from beginning to end.
> www.bungie.net/halo

IDEO
Specialists in human factors, psychology, business, design, engineering and manufacturing. The design consultancy that gave us the first laptop, the mouse, Palm V and many other innovations. Formed by the merging of Moggridge associates in London, ID Two in San Francisco, and Matrix in Palo Alto. Moggridge named the new company IDEO. On a side note - it was Moggridge who designed the GriD Systems laptop and at the time coined the term, ‘Interaction Design’.
> www.ideo.com

Master McNeil
A naming firm headquartered out of the East Bay here in San Francisco. Most notable names have been PayPal, Ariba and FirePower.
> www.naming.com

McKinsey
Another one of the top management consultant firms on the planet. Who haven’t had to change their name.
> www.mckinsey.com
Monday
The briefly named management consultancy firm that was desperate to shed its ties to PricewaterhouseCoopers. Formerly PwC Consulting, the company rebranded the first day of the week, Monday for itself and launched the identity some thirty days before it was announced that it had sold itself to IBM. It now exists as IBM Global Services. The UK firm Wolff Olins handled the rebranding.

QuinetiQ
I just had to include this in here, as this has to be an example of someone taking the piss out of the process of branding. This silly name in fact is a UK government initiative to fuel commercial activity within government defense research.
> www.quinetiq.com

Starbucks
I’m not sure, but I think they’re a Seattle Coffee company.

Sapient
A leading business and technology consultancy with offices around the globe and some 1,500 staff. Responsible for buying up Studio Archetype, and other firms, to remove their purple logo and shape themselves to dominate their industry.

Stone Yamashita Partners
The thirty strong, brand/marketing/seismic change agents based in San Francisco. Their work with HP showcases their ability to mobilize large corporations around a single focus. They like to use words, videos and strong colors in their deliverables - apparently.
> www.stoneyamashita.com

Studio Archetype
At it’s peak, the Studio was regarded to be the leading interactive design firm in its industry. The studio used Mok’s DADI (Define, Architect, Design, Implement) methodology in delivering brand and design solutions to firms like, UPS, IBM, SUN, Adobe, Apple, Eudora, Caterpillar, and Revo.
**Templin Brink Design**
A small San Francisco based design studio, started by Joel Templin and Gaby Brink. Their work is a mixture of brand and marketing collateral and is diverse and detailed as you’d expect from such accomplished creatives. I especially like their Brand Book idea, as a deliverable as part of their collaborative process, and it was their branding system for the winery Kelham-Maclean which brought my attention to them. The wine is pretty special too.
> www.templinbrinkdesign.com

**VSA Partners**
This hardcore strategic marketing, brand and design firm based in Chicago can boast that it produced March First’s identity and web site. VSA’s success at designing annual reports must give Cahan Associates something to be worried about. Cahan’s Ass. (I had to write that) win virtually every award for designing annual reports, and are based here in the Bay Area.
> www.vsapartners.com
> www.cahanassociates.com

**Tuesday**
Allegedly this is another named and branded consultancy in Asia, which was also named and branded by Wolff Ollins. I kid you not.

**Nike**
A global marketing firm which sells shoes and clothing.
There is more to read on the topics covered in this guide than I could possibly know about, which would include everything written in a language outside of English.

This unorganized list is simply some of the titles I used for information or details for this guide and others I found interesting. It's not the definitive list, but more of an introductory one, to the subject.

*Marketing, Brand and Brand Strategy.*

The Handbook of Brand Management
*David Arnold.*

New Rules for the New Economy
*Kevin Kelly*

Brand Leadership
Building Strong Brands
*David A. Aaker*

The 22 Immutable Laws of Branding,
*Al Ries and Laura Ries*

Positioning
*Marketing Warfare*
*Al Ries and Jack Trout*

The New Positioning
*Jack Trout*

Strategic Brand Management
*Kevin Lane Keller*

Marketing Strategy
*Steven P. Schnaars*

Brands, The New Wealth Creators
The Future of Brands
*Interbrand*

Simplicity Marketing
*Steven M. Cristol and Peter Sealey*
Marketing Aesthetics
_Schmitt and Simonson_

TechnoBrands
_Chuck Pettis_

Band Asset Management
_Scott M. Davis_

Building Brand Identity
_Lynn B. Upshaw_

The Brand Mindset
_Duane E. Knapp_

Warp-speed Branding
_Agnieszka M. Winkler_

On Brand Management
_Harvard Business Review_

The New Guide to Identity
_Wolff Olins_

No Logo
_Naomi Klein_

_Strategy, Innovation and Management Titles._

Competitive Advantage.
On Competition.
Strategy: Seeking and Securing Competitive Advantage.
Competitive Strategy.
Interbrand Choice, Strategy and Bilateral Market Power.
All five by _Michael E. Porter_

The Essential Drucker,
_Peter F. Drucker_

The Inmates are Running the Asylum,
_Alan Cooper_
SUGGESTED READING - continued.

The Strategy-Focused Organization
*Kaplan and Norton*

The McKinsey Mind
*Rasiel and Friga*

The Cluetrain Manifesto
*Levine, Locke, Searls, Weinberger*

The Invisible Computer
*Donald A. Norman*

The Art of Innovation
*Tom Kelley*

*Design Titles.*

The Visual Display of Quantitative Information
Envisioning Information
Visual Explanations
*Edward Tufte*

The Timeless Way of Building
*Christopher Alexander*

Information Design
*Edited by Jacobson*

The Design of Everyday Things
*Donald A. Norman*

Joseph Müller-Brockmann
*Lars Müller*

Grid Systems in Graphic Design
*Joseph Müller-Brockmann*

Designing Business
*Clement Mok*

What is a Designer
*Norman Potter*
The Education of a Graphic Designer
*Steven Heller*

Marks of Excellence
*Per Mollerup*

Design Writing Research
*Lupton, Miller*

I am Almost Always Hungry
*Cahan Associates*

Soak Wash Rinse Spin
*Tolleson Design*

Designing Books
*Hochuli, Kinross*
AFTERWORD & THANKS.

Wow - I’m impressed you made it this far. Or did you simply flick through to the end to see if you’re mentioned here?

As stated in the beginning, this is a draft and something that I wish to continue to evolve, with the hope to bring out a complete version of a Guide to BS for designers. So I encourage feedback and suggestions of areas to have more depth in, or elements you would like to read more about.

This current version has to be considered as a draft simply because I’ve been unable to gather as much information as I’d have liked on the topic or receive permission to use all the content that I’ve collected.

I plan to continue to work on this, and pursue my own case studies to be able to publish in parts and in full sequence over the coming months.

If you’d like to learn more, or get in touch, please see the web site at: www.mdnstudio.com/t36

I’d like to Thank:

I have to thank Sara, who has lived with this document for longer than she cares to recall. She read it numerous times and listened to me rant on about this topic constantly. And she also gave me some forty odd illustrations for this Guide too.

My father, William Newman, was the original person to suggest I wrote this as a book. I figured that since he’s written three himself, he’d be in a position to reliably suggest so.

Daniel Sturdy always pushed me to write, which makes little sense to me, as it must be as uncomfortable to read my writing as it is for me to write it. But thank you.

Chris Ford, who is gratuitously mentioned throughout is a friend and colleague with whom I’ve the typical English relationship where we do nothing but swear at each other. He edited this too.

And my sister, Chantal who simply writes better than i .
p. 7 “A Brand is the expression...”: Chris Ford, in communication with mdn.

p. 7 All Remaining quotes: The Future of Brands, by Interbrand.

Fig 5. p. 8 Artwork reprinted courtesy of American Express and Visa.

Fig 6. p. 9 Artwork reprinted courtesy of Audi.

p. 9 “That we are what we have...”: Gerald Zaltman, Possessions and the Extended Self. Journal of Consumer Research 1988. p.139


Fig 9-16. p. 16 Artwork reprinted with permission by Diphthong, Singapore.


Fig 18. p. 19 Artwork reprinted courtesy of Dell.

p. 20 "Design is inherently...": Tom Mecklen, saw in the signature of an email.

p. 20 “Design should be used as a verb”: Clement Mok, used with permission.

p. 21 “Design without research...”: Chris Ford, in communication with mdn.

Fig 21. p. 24 Artwork reprinted courtesy of TempinBrink Design.

Fig 22. p. 24 Artwork reprinted courtesy of VSA Partners.

p. 25 Norman Foster - gathered from On Foster... Foster On. 2000

p. 25 Chris Bangle - Information gathered largely from online sources including Fast Company and BMW.


p. 33 IDEO principles - Don’t remember - try The Art of Innovation, Tom Kelly.

Fig 29. p. 34 Artwork reprinted courtesy of Hoovers.

p. 39 Mallory & Irvine - Drawn from conversations with my father, from having met Mallory’s Great Grandsons and read numerous books.

p. 43 Studio Archetype & p. 44 Sapient & p. 48 Master-McNeil - Drawn from having worked for and with these firms.
This was not published in the explicit terms of publishing, but perhaps so by the mere fact I’ve put it together and distributed it for free.

**Layout and Design:**
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Apple Powerbook G4
Apple Powerbook Pismo G4
HP LaserJet 1200 series
Mitsubishi Diamondtron Diamon Plus
Apple iPod
Hand crafted beaker from Chris Keenan
Bialetti Espresso Coffee maker... really.

**Written in:**
The United kingdom & United States