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“Are you a Delia or a Chantelle?” Engaging Stakeholders in Branding Exercises

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Abstract. This short paper describes the development and implementation of tools and methods used to consult stakeholders in the development of a brand identity for a software development company, and the further refinement of those tools for use in the redesign and branding of a beauty treatment product and its packaging. A cultural probe approach was used in the form of word and image cards (‘Explorer Cards’) to elicit stakeholders’ opinions, emotions and perceptions regarding the project at hand. This method provided the design team with a pragmatic and rapid approach to the elicitation of information from stakeholders with varying degrees of design literacy.

Keywords: Engagement, stakeholders, elicitation, emotion, product, personas

1 Introduction

A successful brand should embody the company’s personality, reputation and promises to its clients. A recognisable brand allows a company to stand out from a crowded marketplace, and provides employees with a strong sense of corporate identity. One of the main challenges in the development of a brand is the distillation of a company’s often broad and esoteric vision into an actionable branding strategy. Often a branding process begins with the design team endeavouring to gain a deeper understanding of the business through interviews, surveys or focus groups conducted with internal and external stakeholders. While these methods are suitable for larger-scale branding projects, projects for smaller companies often come with smaller budgets, meaning the designer must reduce the scope of the project accordingly. Developing new ways to draw out the seeds of inspiration in a timely and efficient manner offers the designers a route that avoids any compromise on the quality of their design solutions within a tight budget or delivery timescale.

2 Context

In May 2006, Northumberland-based Tagish Ltd commissioned The Centre for Design Research (CfDR) to develop and implement their new corporate brand. Tagish

have a long-standing reputation as developers of quality web resources for English local authorities. A series of recent changes (including a management buyout and a move to new premises following a serious fire) had stimulated internal discussions about the company's future direction, and brought about a recognition that the existing brand identity did not fully reflect the company's capabilities and aspirations. CfDR's brief was to help Tagish identify the perceived value and appropriateness of each of its offerings, and to develop coherent branding and communication resources to convey them. In addition, this re-branding exercise was to become a symbolic and cathartic experience, offering everyone at Tagish the chance to refocus.

3 Challenges

3.1 Defining Brand Values

At the beginning of the project Tagish's new management were still organising their thoughts on the future direction of the company. Some of the key information required for the development of an effective and thorough branding platform – such as mission statement, vision and values – was difficult for Tagish's management to express. We recognized that to progress our project we would need to find a way of extracting and formalizing their emergent ideas.

3.2 Time and Money

Understanding the core competencies of a business is key to the success of any branding project. This understanding can come from various sources: visiting a business's website, reading their business plans, or experiencing their products. A recognised 'best practice' approach suggested by authors such as Alina Wheeler [1] is consultation with internal stakeholders – namely management and employees – to identify their internal viewpoint on the company, complemented with a similar picture gathered from external stakeholders, such as clients and suppliers. As a small company Tagish's available project budget did not offer us the opportunity to conduct such a broad-ranging exercise, and so we made the decision to consult only with internal stakeholders, our rationale being that they were likely to be the richest source of information. Tagish planned to launch their new brand at the IT Works 2006 event in June, giving the CfDR design team just five weeks to complete the branding project and deliver marketing and promotional materials.

3.3 Engagement with Internal Stakeholders

The new management was seeking to transform the company culture, making it more participative and inclusive. We set out to adopt an approach that not only reflected these goals, but also engaged with employees in an open and democratic manner. The question was: how could we best achieve this?

4 Elicitation and Engagement

4.1 Stage 1 – Brand Audit Exercise

The research phase of the project involved two stages: a brand audit exercise, and an internal stakeholder consultation. The brand audit was used to identify the current Tagish brand image, audiences and communication materials in order to evaluate the strengths and weaknesses of the existing brand. As part of this audit a competitor analysis was conducted, examining competitor brands to clarify Tagish’s overall position within the marketplace, the results of which fed into Stage 2.

4.2 Stage 2 – Stakeholder Consultation

Keyword Generation. The ultimate goal of the consultation was to identify, and then communicate, Tagish stakeholders’ shared values and ambitions. Having evaluated traditional research methods of exploring personal constructs, such as Kelly’s Repertory Grid Analysis [2], we felt that a more targeted and visually interactive approach was needed. We were aware of the methods used by Bill Gaver [3] and his colleagues at the Royal College of Arts during the Presence project. Their use of Cultural Probes informed and inspired them about their users’ beliefs and desires, aesthetic preferences and cultural concerns. We felt this approach provided us with a suitable framework to build upon, and developed our own ‘probe’ in the form of Explorer Cards.

The managing director of Tagish was interviewed at the start of the project, and this meeting produced a broad pool of keywords and statements that were representative of the overall management vision for the future of Tagish. Keywords were then grouped under five element categories based on Tony Spaeth’s corporate brand platform [4]: positioning, purpose, mission, culture and personality.



Figure 1. Colour-coded keyword cards



Figure 2. Image cards

The keywords were printed onto colour-coded Explorer Cards (see Figure 1). Additionally, the personality category was supplemented with themed groups of

picture cards (see Figure 2) in diverse categories such as celebrities (Delia Smith or Big Brother's Chantelle?), animals (cat or dog?) and environments (rural or city?). Images were used here for the specific purpose of providing a richer and more expressive accompaniment to keyword-based descriptions of personality.

Explorer Cards Exercise. Individual sessions were held with six (out of eight) available Tagish employees¹. Given the low number of stakeholders we were able to conduct individual rather than group sessions – which we considered a great advantage as this would allow each participant to be open about his or her true opinions without feeling restricted or led by the views of their colleagues. Each session lasted approximately 15-20 minutes. At the beginning of each session we introduced to the participant the five brand elements: positioning statement, corporate purpose, mission statement, brand culture and brand personality. The participant was then given a set of keyword cards for each element and asked to select and rank them in order of relevance. For example, participants were asked to select five keywords (out of twelve) that best described the corporate purpose of Tagish, and then to place those cards in order of importance. Visual ranking proved more advantageous than numerical, due to the subtlety of visual placement. For example one participant, unable to decide on a clear ranking, instead chose to overlap each card (see Figure 4) as a compromise; while another's cards were distinctively separated, indicating that they had a very clear viewpoint on that particular aspect of the brand identity.



Figure 3. Keyword card sort exercise

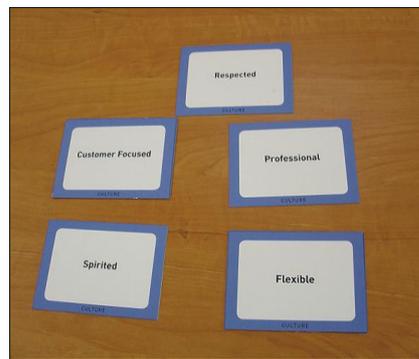


Figure 4. Overlapping ranking

While it is not essential to the successful running of the Explorer Cards exercise, we found that having two designers present for each session helped us gain extra depth from the responses. The main facilitator lead the participant through the exercise, while the second designer recorded pertinent points from the participant's dialogue with the facilitator (and themselves - as many would talk themselves through their Explorer Card selection and elimination choices). The qualitative information

¹ The remaining two were unable to attend, however their feedback was recorded through a paper version of the Explorer Cards exercise and incorporated into the consultation results at a later date.

gathered here enriched the designers' understanding of participant viewpoints, making it easier to translate the Explorer Card session results into design concepts.

5 Reflection on the Elicitation and Engagement Process

The experience of using the Explorer Cards had positive outcomes for all parties involved. For the design team, the process was a rapid approach to the elicitation of responses from stakeholders in usually intangible areas such as perception, feelings and emotions. The results of the process helped us develop an identity that positioned the company for growth, change and success. In addition to eliciting stakeholder viewpoints, the exercise enabled us to visually communicate the complexity of the branding process. Above all the Explorer Cards were a crucial visual embodiment of a design project process – the research stage, whose often-intangible results can be mistakenly perceived by clients as less than essential.

For the stakeholders, the process allowed them to express their viewpoints openly and creatively. They clearly enjoyed the interactions generated by the exercise and were empowered through them, with their views actively sought and visibly represented in the resulting brand concepts. One of the hardest objectives to achieve in branding is internal buy-in from employees. Through this early participation in the branding process, Tagish stakeholders were encouraged to feel a sense of ownership of the new brand. The process generated a real sense of excitement and engagement, which many organisations set out to stimulate through their re-branding endeavours.

We made further use of the Explorer Cards in a product branding and packaging project for a beauty treatment product². Our client was unfamiliar with the processes or terminology of design, and the Cards provided a simple and accessible means of verbalizing their expectations for the new product. In this implementation we also changed the role of the picture cards, using them instead as a tool to build up a visual 'persona' of the client's target consumer with image categories including Home (semi-detached or city flat?), Life Stage (single, married or retired?) and Shops (Karen Millen or TKMaxx?).

6 Discussion and Conclusions

To summarise, we found that the key advantages of the Explorer Cards were:

- Ease of use, requiring no additional training for designers or participants.
- Pragmatic, rapid and cost effective way of eliciting intangible information.
- Visible, explicit and engaging process that encourages inclusivity and empowerment amongst the stakeholders.

² Please note that specific details of this project are withheld due to non-disclosure agreement

- Data collected in the form of ranked keywords and images allowed quick analysis and interpretation into design concepts.
- Ranking stage of the card-based consultation helped stakeholders to focus on primary ideals that characterised their aspirational brand identity.

Based on our experience of using the Explorer Card method in two projects, we believe they will be most useful for branding projects with limited time available for stakeholder consultation. In Tagish's case we were able to conduct individual sessions due to the low number of participants. We recognise that this method would not be sustainable for larger organisations, and suggest conducting group sessions with 3-4 people. The beauty product branding project demonstrated how documenting participant dialogue from a group, in this case between 2 representatives of the client company, proved to be one of the most vital elements for the design team as discussions leading to the elimination of keywords were just as enlightening as the participants' final card choices. We therefore strongly encourage the use of a note-taker, or audio recording of the sessions, to ensure valuable insights are not lost.

It is also worth acknowledging that empowering a broad pool of stakeholders to voice their opinions in these early stages of developing a brand can encourage them to speak up at all stages of the design process – a situation which may not always be desirable to the designer, or conducive to timely progress on the project.

We now hope to expand upon our range of Explorer Cards to make them more versatile for use in future design projects. We envisage that our methods of application will evolve with each implementation, and with further refinement the Cards can become a permanent feature of our design process, providing us with an adaptable tool for identifying and defining design goals.

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