



Brand Strategizing with a Twist

Visual Practices in Professional Services Firms: The Case of Interbrand

Case study

Reference no 914-007-1

This case was written by Sebastian Kernbach under the supervision of Prof. Dr. Martin Eppler. Its objective is to illustrate the importance of visual practices in professional services firms, in particular in managing the interaction between consultants and clients. Our information sources included anecdotes and examples from Interbrand. We would like to thank Prof. Dr. Jürg Hüsler for his contribution.

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Introduction

By all objective means, it was a pleasant summer evening on a Tuesday in July when Simon Kenton sat down at his office desk, watching the city landscape through the window. It didn't feel pleasant at all though. He was confused after too many meetings with his fellow consultants over the last two days. He was also under pressure.

Just yesterday morning he was appointed to lead the kick-off meeting with a new client of his company's brand strategy practice. He was excited, but felt the pressure since this was a major opportunity for him to show his abilities and confirm that Interbrand, one of the world's most reputed brand consultancies, made the right decision by hiring him more than a year ago.

He always had a passion for brands. But it was one thing to be a consumer of brands, and quite another to consult for major brands on how to create brand strategies and great brand experiences for customers and other stakeholders.

So yesterday, after he was appointed to lead the client kick-off meeting, the project team met to discuss the event. A comment from his mentor caught his attention because it reminded him of a key insight into consulting: "Yes, of course, we have to show them that we have the knowledge and capability to conduct this strategy project. However, it is crucial that we make them feel comfortable working with us, that they understand the process, and look forward to the journey together." Everyone agreed and it was now up to Simon to bring this idea to life in the meeting. "Impress but still caress", one of his colleagues had said to him jokingly after the meeting. Simon was excited not only to prove his skills to his mentor, but he also wanted to impress a new junior designer, named Linda.

Immediately he thought of two brand strategy models which were frequently used as frameworks at Interbrand to create strong brands and to guide the strategy process with clients: the brand definition model and the brand experience model (see Figure 1). This was a good start, he thought, but he knew there was more information available from the large number of projects Interbrand had been involved in, ranging from global brand identity projects for BMW and Mini, to smaller projects like the naming of the latest Porsche model called Macan.

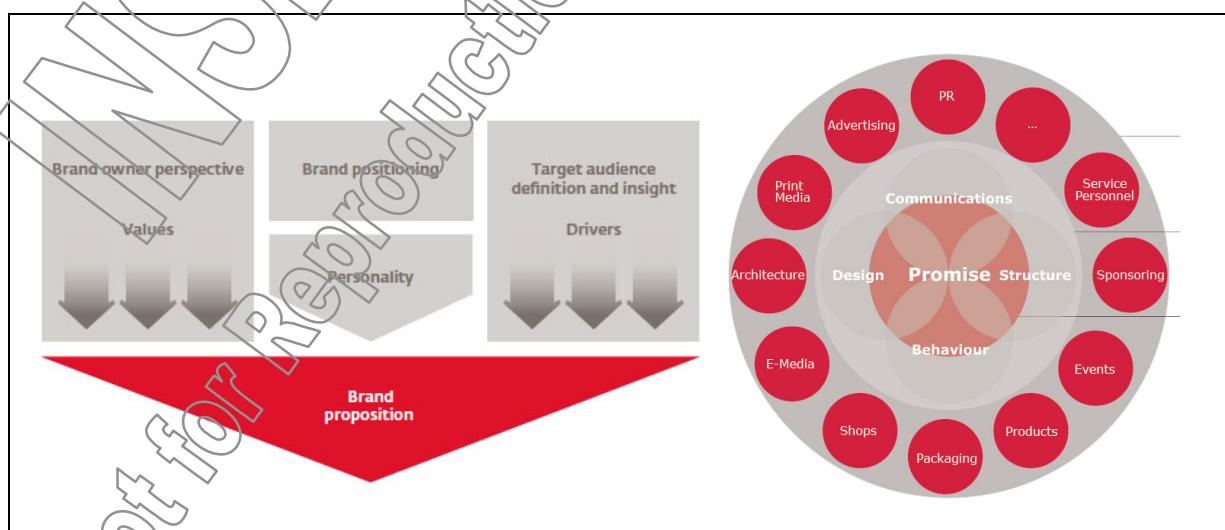


Figure 1: The brand definition model (left) and the brand experience model (right)

He had been involved in many projects since his start as a consultant and his notebook was filled with notes and sketches from other client meetings. So he decided to consult his small Moleskin booklet.

He wasn't really sure what to look for. He was puzzled yet he felt ready to take on the challenge and put the right pieces together.

Working Visually at Interbrand

Sketches and PowerPoint

Back at his desk he took out his notebook and looked at his visual notes, copied from the flipcharts at client meetings. He was wondering how he would integrate these ideas into the kick-off meeting. To have a better overview, he ripped out key pages from his notebook and put them on his desk (see Figure 2).

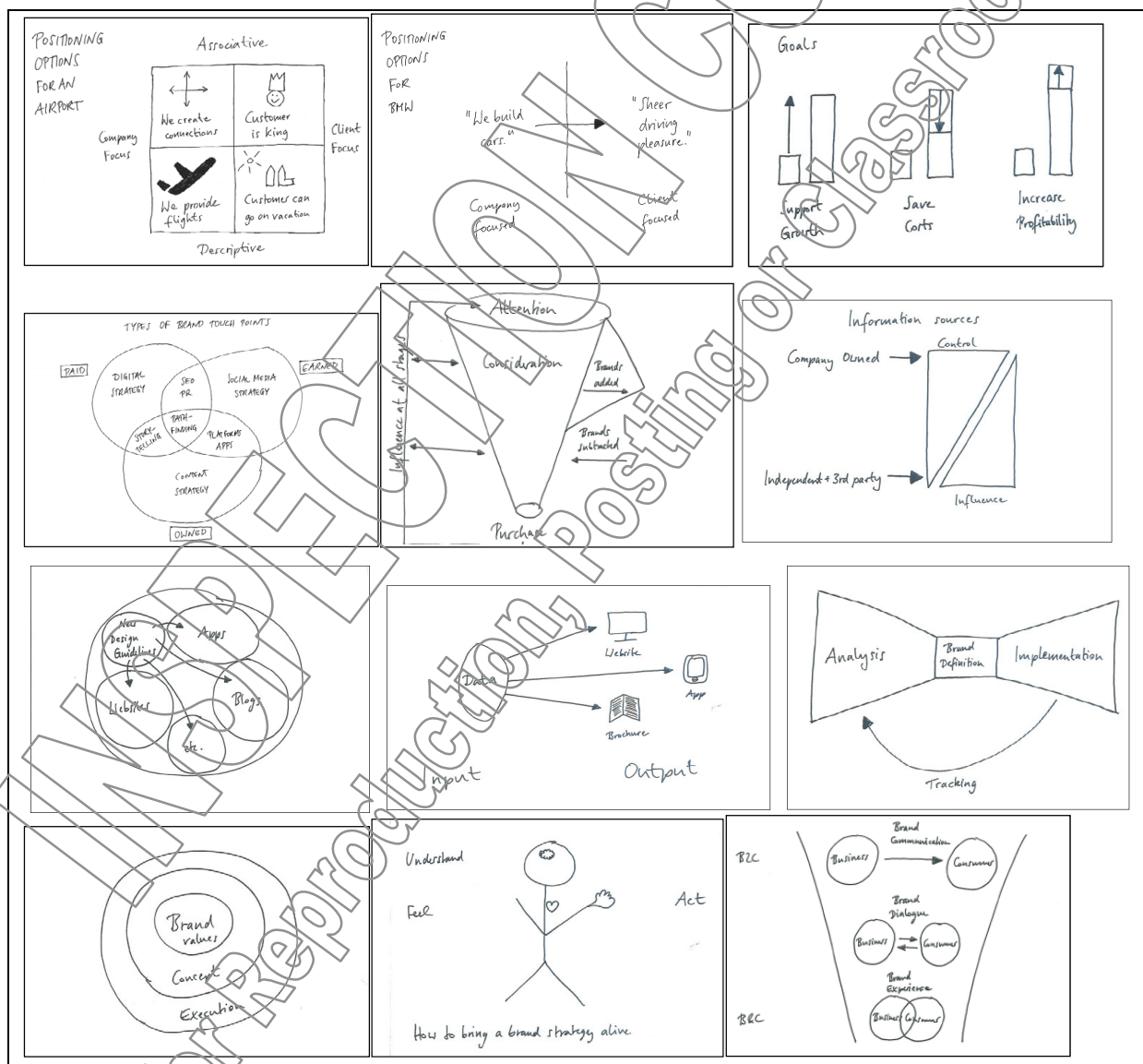


Figure 2 | Models used by Interbrand consultants with clients.

He felt somewhat overloaded and he certainly did not want the client to feel overwhelmed and confused. This would only lead to paralysis by analysis, he reckoned. He took a sip from his water and thought: "Well, I don't have to make up my mind right now". Then he piled all sketches on his desk.

A senior designer passed by his desk, looked at him and asked “What’s up with the drawings? Are you becoming an artist now?” but Simon only said: “Not really, but I have to prepare that meeting with the new client we are creating a brand strategy for.” The senior designer stopped and told him to get in contact with the European team in London to ask for presentations, ‘million dollar slides’ and the like, prepared for similar clients. Simon smiled, picked up the phone and called the European director for business development, who was luckily still in his office.

A few minutes later, Simon was going through a handful of interesting presentation slides tailored to other clients that the London office had kindly sent him. He soon realized that these key slides did not contain that many words but rather models, diagrams and other forms of visualization. He made a collection as a source of inspiration for the kick-off meeting. He printed the slides and spread them on a large table (see Figures 3-a, 3-b) without noticing that it was getting late.

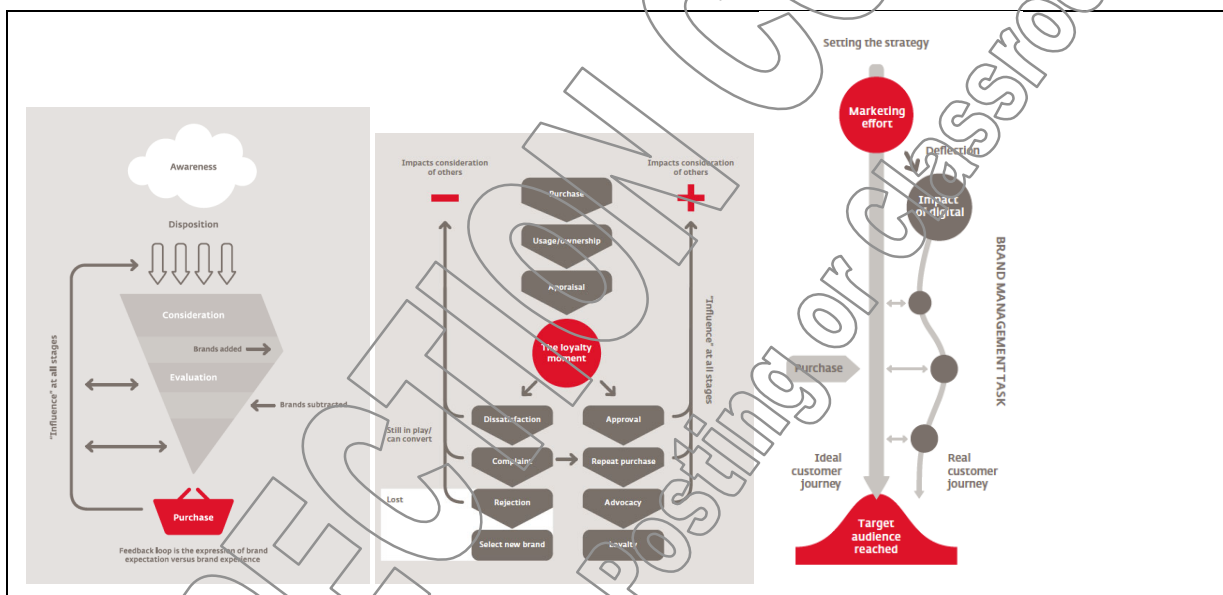


Figure 3-a: The revised models: Brand choice (left), customer loyalty (middle), brand management task (right)

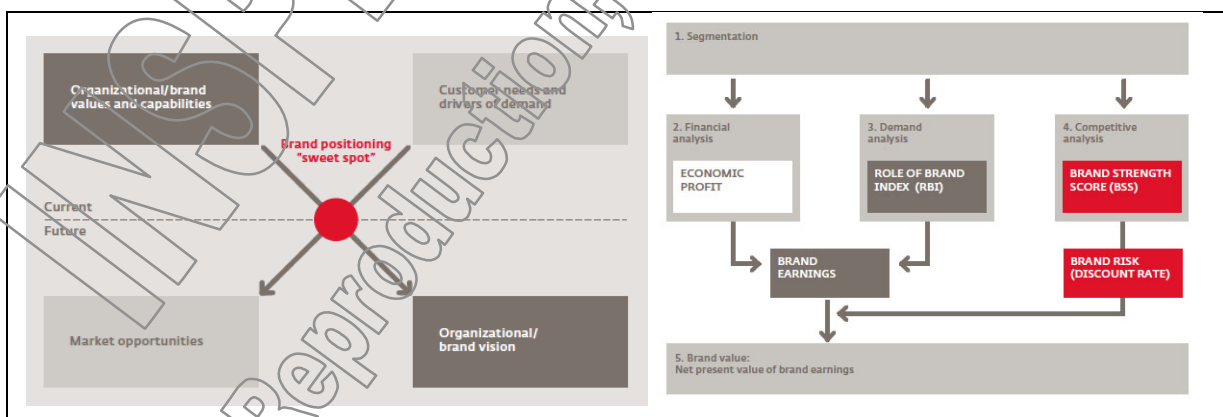


Figure 3-b: Market, Brand, and Business Audit Framework (left), Brand Valuation (right)

He was happy about the sketches and slides in front of him. What a wealth of knowledge on brand strategy! However, he realized that the visuals alone were not enough to assess their value for the meeting. Which models should he show? And how should he show them, on slides or sketch them? He remembered a client complaining in a meeting last week that too many slides were shown and that it was getting hard to pay attention. But he also thought that using interactive means such as sketching for an entire meeting would be close to impossible. He would have loved to find a reason to ask Linda for advice, but he also didn’t want to look clueless in front of her.

There is no recipe

It was getting dark, and he saw light in his mentor's office, so he knocked on the door and entered. His mentor was standing in front of a huge magnetic board staring at a lot of slides and he asked Simon "What's the matter, what makes you stay here so late?" Simon replied: "Well, there is this kick-off meeting and I'm trying to make sense of how to impress the client but also show him that we want to collaborate closely with him". His mentor smiled and invited him to talk about it over a cup of coffee.

Simon told him about the sketches and slides that he had gathered throughout the day and asked him: "I looked at these sketches and models on the slides but could not figure out how and when to use them". "Well, if you want me to give you a recipe, I'm afraid I can't help you, but I can tell you something about my experiences with sketching in working with clients on their branding strategy."

"First, if you hold a pen and head to the flipchart you are telling your audience that you know what you are talking about and that you are capable of sketching it on the spot. Second, you are telling the client: 'I am here with you in this very moment' which is very valuable and shows the client that you care about him and his situation. You are also telling him: 'This is not complete' and you are inviting them to contribute."

"Speak to the other consultants, reach out to them after work or during the lunch break and ask them about their own experiences with slides and sketches. You will quickly get a better picture of the pros and cons of using these tools. Oh, and look at the process of strategic branding again and particularly that text about Professional Services Firms I have given you a few weeks ago. Understanding both the process of strategic brand consulting as well as the general challenges of our profession will help you identify the appropriate content and make the right visualization choices."

It had been a long day for Simon and he was tired. However, the conversation with his mentor was inspiring and motivated him to dig deeper. He looked over to Linda's desk but she was gone for the day. It was dark outside and he took one of the last trams to make his way home.

Brand strategizing - Getting it right and creating brand value

On the way home Simon went through the papers his mentor had mentioned to have a better idea of both what brand strategizing was all about and also about the general challenges of the strategy consulting profession.

What is corporate branding?

Corporate branding is the sum of organizational expressions that are communicated to its stakeholders, through core values, the behavior of employees and via corporate communication to all internal and external stakeholders. Corporate branding has received a lot attention recently and it is increasingly acknowledged that corporate branding refers to creating an organization's unique characteristic and is an important driver for added value for all stakeholders of a company.

A strong brand is based on a simple idea, creates consistent experiences and produces emotional images in the minds of the stakeholders. It can be defined as a living business asset, which creates identification, differentiation and value. Brand owners can benefit from a strong brand by commanding premium, driving choice, engendering loyalty and optimizing costs.

Examples of strong brands include Nike with their strong and simple idea of honoring great athletes instead of selling shoes, BMW creating "sheer driving pleasure" and ABB promoting "efficient solutions for a better world".

Managing client expectations

It is important to manage client expectations and thus what takes to create a brand strategy. Branding and brand strategy are closely connected to business strategy and affect all functions including marketing, sales, R&D and human resources.

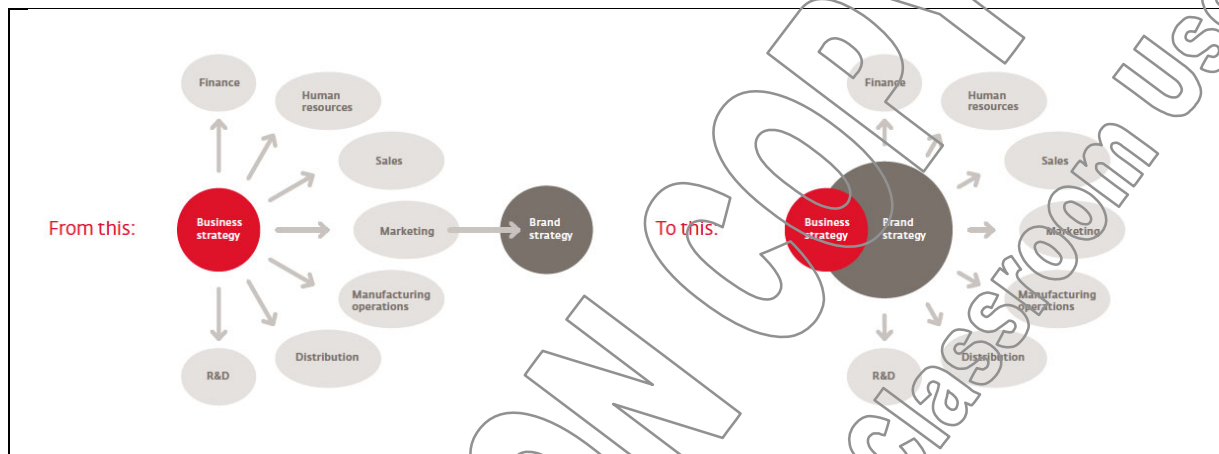


Figure 4: Brand and business context

It would be wrong to think of branding as a part of the marketing department. It should ideally guide every decision made in an organization that is affecting any touchpoint with internal and external stakeholders.

The process of brand strategizing

A brand strategy has the goal to develop the brand promise which defines what the brand should stand for in the consumers' minds. The brand promise is the most inspiring and compelling thing that we can convey about the brand to this audience. This promise is based on the assessment of the brand owners' capabilities and vision for the brand as well as its values and it is also taking into consideration the unmet need and opportunity for the brand from a perspective of the external and internal key audiences. So a brand is not only what the brand owner thinks about it, but also integrates the needs of the target audience and drivers of their current and future demand. Brands are created by bringing those two perspectives together and, based on this developing the positioning of the brand, the brand personality and ultimately the brand promise.

The brand promise is then further developed into design concepts, strategic communication, behavior strategy and structure. These conceptual elements are then implemented in everything the brand does and in every touch point any internal or external stakeholders face. For example, the website of an organization should bring the brand promise alive through the appropriate design in line with the brand, through the appropriate communication what is being said and how, as well as the behavior which can be referred to as usability and interactivity on the website and the structure of the content that is being displayed. Any decision to be taken for the creation of the website or any other brand touch point should be taken based on the brand promise.

Branding and the challenge of intangibility

The before mentioned concepts of brand promise, brand personality, and brand positioning are subject to various interpretations because of their ephemeral nature. This lack of physical evidence makes branding and brand strategy in particular a subject to explanation, as well as requires the need to

ensure a common understanding what the concepts really stands for. Further, a strategic branding project is difficult to evaluate because it unfolds over time and therefore clients, especially those not familiar with a strategic branding project, are usually insecure. Branding is very knowledge-intensive and the knowledge asymmetry between consultants and client can be very high. For consultants it is therefore important to carefully orchestrate the interactions and all forms of communication to be able to minimize any potential dissonance and uncertainty about the advice.

These circumstances make it important that professionals are aware of their impact on the relationship with the client and thus the success of the project. It is up to the individual professional to customize the consulting service with every client and to add value in the interaction, i.e. “how” the consulting service is delivered. These are sources for differentiation, satisfaction and client retention.

In professional services firms, such as strategic brand consultancies, the challenge of intangibility can be overcome and made more concrete by putting them into words and pictures to explain to the client the “why”, “what” and “how” of a project and show the effects of the work involved in the project. It is visualization and communication which makes (brand) consulting understandable - which is the core of a good relationship and thus a successful business.

Visualization in action: It is more than visual

Interaction with the client - showing multiple competences

The next morning, in search of inspiration and hoping to say “hi” to Linda, Simon walked through the area where designers create the visual appearance of brands with lots of magazines and other artifacts hanging on the wall. He met the design director and asked him about how he would use slides and sketching. The director started: “Well, at this stage, you have probably realized that branding is a lot about knowledgeable and very experienced people. You acquire this knowledge only through experience and action. The main question here is: ‘How do I demonstrate this competence in a client meeting?’ There are at least three types of competences: knowledge of the subject matter, the expertise of using various visualization tools, and the ability to build a relationship and collaborate with the client. Using elaborate slides can be exhausting for the client because too much information processing is involved. They need to relax, let go and welcome the imagery created by the sketches.” He then sketched two examples (Figures 5 and 6) in front of him on a piece of paper.

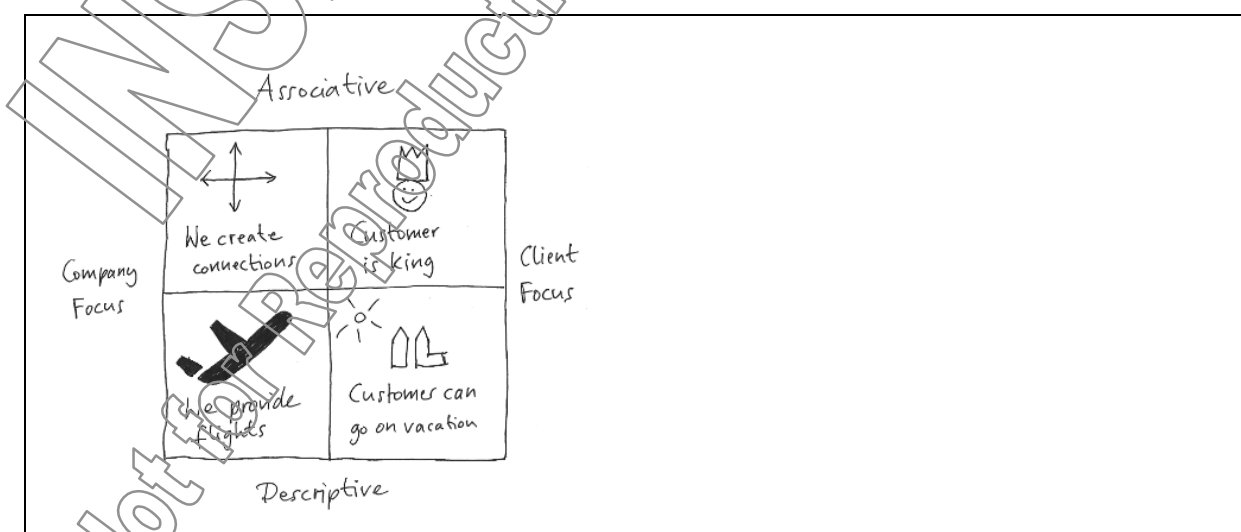


Figure 5: Positioning options explained through a matrix

“This is very helpful in making sure they really understand what positioning is and also to build trust. It is natural that our client does not think about branding all the time the way we do. First, you can

introduce the general positioning options by showing this matrix (Figure 5) and explain the difference between a company focused and client focused perspective as well as a descriptive or associative perspective. Then if it comes to the process of creating and implementing a brand position this metaphor (Figure 6) is a good way of explaining it. It is the example of finding the right location, then planning the look and feel of the house, first through sketching out ideas, then to build mock ups and finally to make the realization. This perfectly explains the process of brand positioning by using a metaphor and another good thing is that you can always use this metaphor to explain to the client where we are in the strategy process throughout the project.”

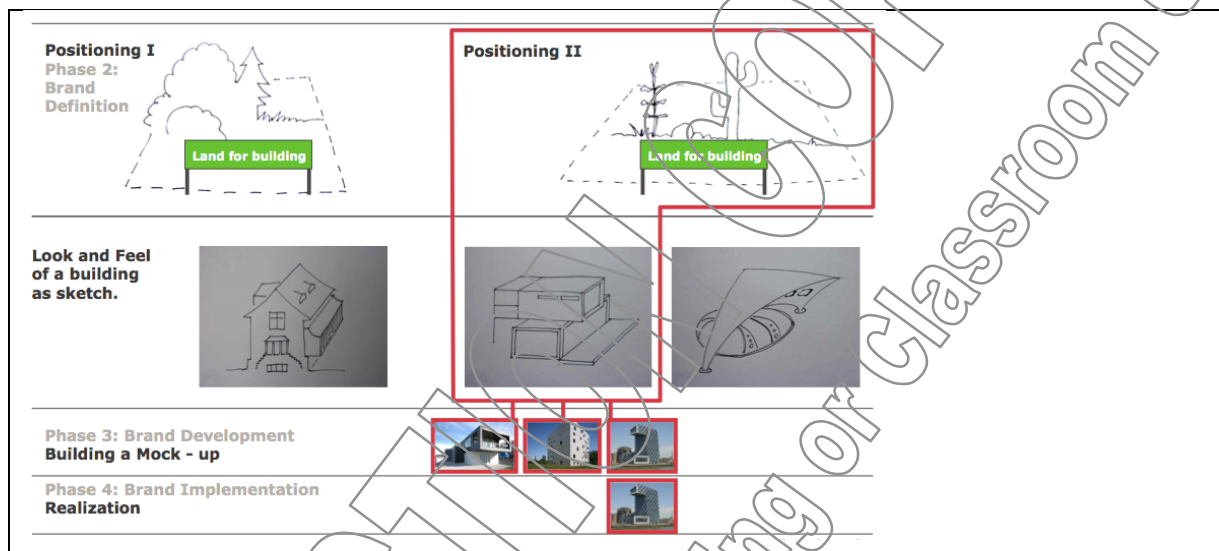


Figure 6: Positioning process explained through a metaphor

“And, you know, I love working with a flipchart. You get such a different group dynamic in the meeting when you use a flipchart compared to slides only. You can really bring together the client’s point of view and our point of view. The flipchart is best when you can refer to how they feel about certain things. You really start to have a working relationship.” Simon was happy about this conversation with the design director and went back to his desk.

Trust and confidence as ingredients for success

A little later he went to the kitchen where he met a senior consultant who told him: “No matter what you do, make sure the client feels that he is part of the process, engage him and let him work with you. When you create something together, he will feel more committed to this particular project in spite of the multitude of other projects he may be involved in. Make him enjoy the process, excited about the project and not only about the result.”

This made perfect sense to Simon, but he was still wondering how to achieve such results. The senior consultant took a piece of paper and drew a few boxes and arrows and told Simon: “To start with, show them on a slide or on a flipchart, the brand definition model. It is a good way to start the conversation about brand strategy and what the process is going to look like. If you want to get their feedback or know the best source for their company data, existing reports or potential interviewees, then you should sketch in front of them. I am sure they will be more open for feedback than if you show slides.”

Over lunch Simon was able to meet with another highly experienced consultant. Since it was a very mild summer in Zurich they decided to go to a Thai restaurant, and go to the lake to enjoy some sunshine before the next meetings. Jessica, who had been working for Interbrand for many years, was

a bit tired from an international project that made her spend a lot of time overseas. So she was really happy to enjoy some sunshine and fresh air. She started by asking Simon: “So, what is it you wanted to talk about? How to design the best client meeting kick-off ever?” and smiled at Simon. She added: “Well, do you know how much they know about branding? This is an important aspect.” Simon answered: “Well, it seems to me that their knowledge about branding is pretty uneven, since they come from various backgrounds such as art, sponsoring, and business.” Jessica had a recommendation on hearing this: “So then, one thing you want to make sure is to bring everybody on the same page. This is very important since it is very likely that the client feels insecure about a branding strategy which is different from a business strategy. That is why we have to carefully design and orchestrate every interaction with the client, in particular face-to-face meetings. Since it is a lot about trust and confidence, delivering this process as a collaborative experience is essential”. “Alright”, Simon said, “this is putting me even more under pressure, so let’s be more specific. I have seen much visualization on the slides and many sketches on flipcharts, so when should I sketch and when should we go into presentation mode?”

The power of sketching

“Well, first of all you cannot plan everything, and you need to expect anything during a client meeting. I had meetings where we had everything on slides and as soon as we started sketching we had such a good flow that we kept going and didn’t use slides anymore. In the end the client was collecting all the flipchart sheets although the same content was already on the slides. From my experience sketching really makes people understand the subject matter and in an area as complex as strategy you need that. I would do it when the content is difficult to digest; in this kind of situation, sketching can really make a difference and encourage people to ask questions – something which managers don’t do enough sometimes. If you use many slides it might be too overwhelming for the client and it also sets up an authoritative relationship, such as “we know - you don’t”. By contrast sketching invites the client to contribute, to be part of the exercise. Jessica added: “I’m not suggesting to always use sketching but to use it at times when you want to explain something further, when you want to invite the client to collaborate and provide his view.”

“Let me give you an example”, she said, “sketching is a good tool for reducing complexity and bringing the discussion down to a very basic level. I was once with a high ranking executive of one of the largest industrial companies in Germany and this client could not make a decision. I just wanted to bring the choices from seven down to three or four. So I drew seven boxes with the numbers 1 to 7 underneath and wrote one key word in every box, handed him the pen and asked him to cross out any box he didn’t find appropriate. In the end we had only four instead of seven ideas that we took to the next board meeting. Before, with a lot of slides, he wasn’t able to make up his mind. All it took to reach our goal was a simple pen. We have to tailor the brand strategy process to the client. I’m sure you noticed plenty of good examples. Select the most relevant information for your client at this point in time and customize the journey for your client.”

On their way back from the lake, Simon felt uplifted, because he had the feeling that this conversation was very inspiring and insightful. However, he was still a bit confused and thought about where to start with the planning of the kick-off meeting.

Conclusion

From these interactions, Simon understood several things: This meeting must display Interbrand’s competence in brand strategizing, including building and managing successful brands, and at the same time the meeting should foster good relationships with the client. He would have to find a way to have the best of both worlds, PowerPoint prowess with analytical brilliance, as well as empathic and

involving sketching to show they can think on their feet and listen. But the devil is all in the detail, he thought as he began to structure the meeting agenda.

One thing was sure though: Simon realized how important visualization was in strategy meetings with clients. He still didn't have a clear picture in his mind how to do this in the coming meeting, but he pushed himself with the promise to ask Linda out for a drink when this kick-off workshop was successfully over. Fortunately, he had a few more hours to prepare.

Case Questions:

- 1) What are in general the key *challenges of (brand) strategy consulting* (with special regard to client interactions)? How do consultants address these typically?
- 2) Draw a table to evaluate the strengths and weaknesses of presentation slides and sketching respectively for the context of brand strategy meetings of consultants with clients.
- 3) Summarize the key *requirements* of the client kick-off meeting. What should be the outcome on a content and relationship level?
- 4) Create an *agenda* for the brand strategy kick-off meeting of Interbrand with the client, and then describe each of its phases and your visual practices (PowerPoint or Sketching) of choice for that agenda point. Also mention which visual models you would use in the kick-off.

Optional:

- 5) You are asked to develop content and guidelines for future consultant trainings on "managing the strategy process - with clients". What would you include and why?
- 6) Look at the *sketches* provided in this case and tell us how you would *classify* them in a useful way?

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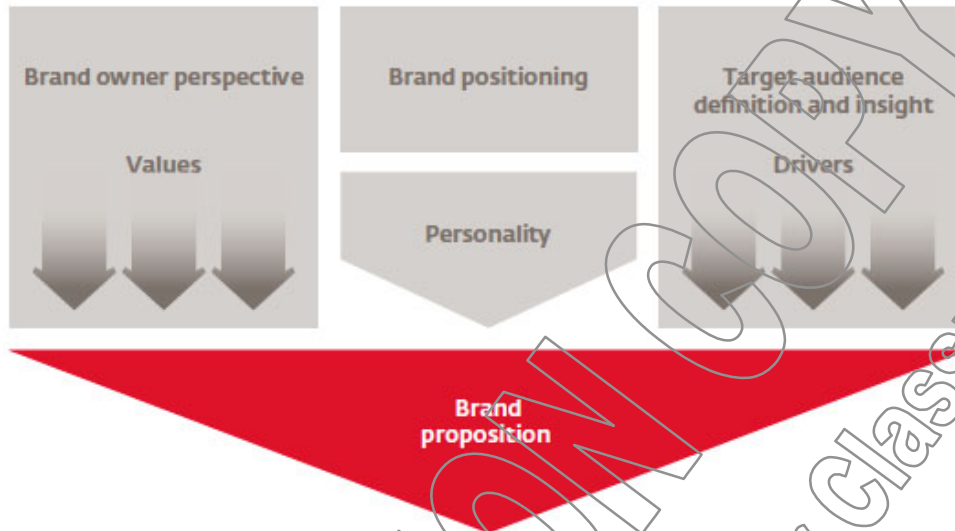
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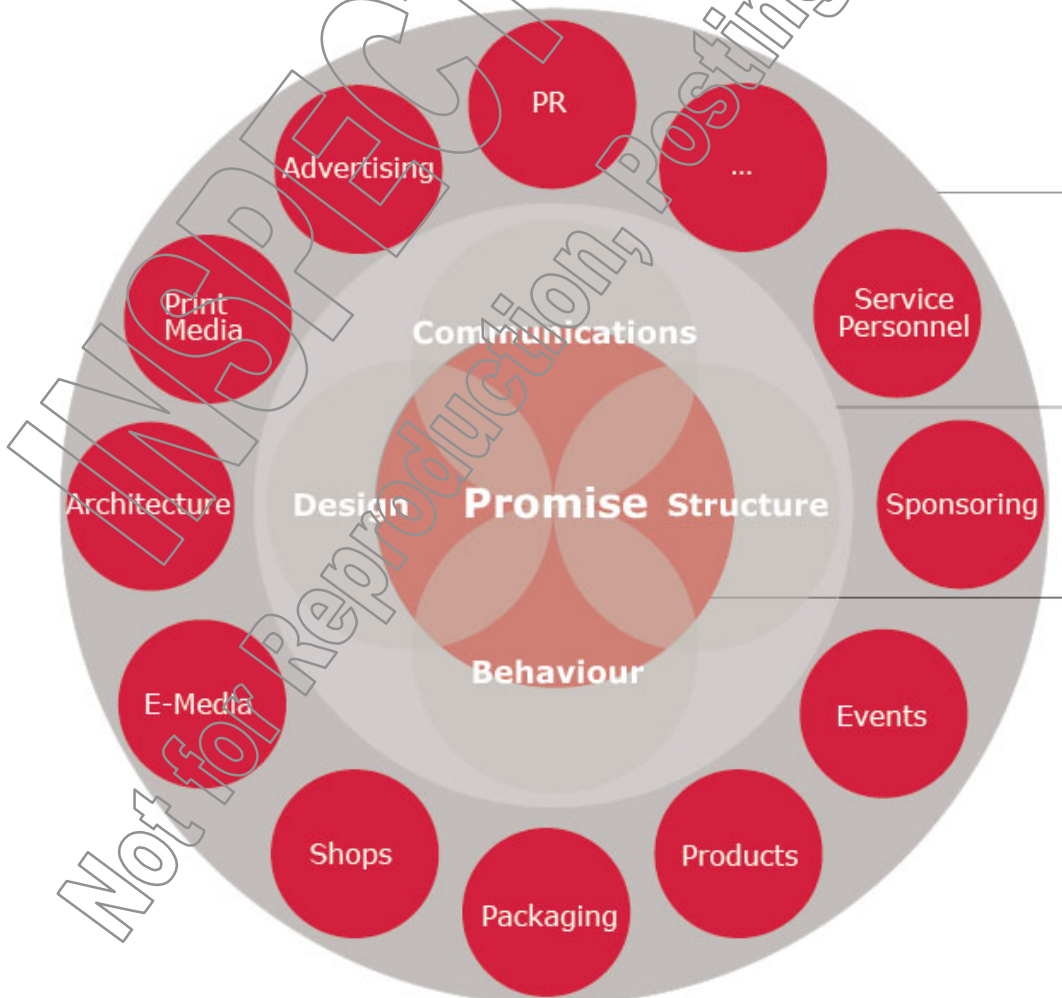
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Appendix

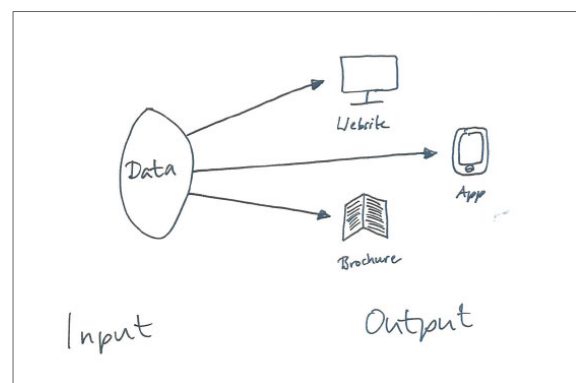
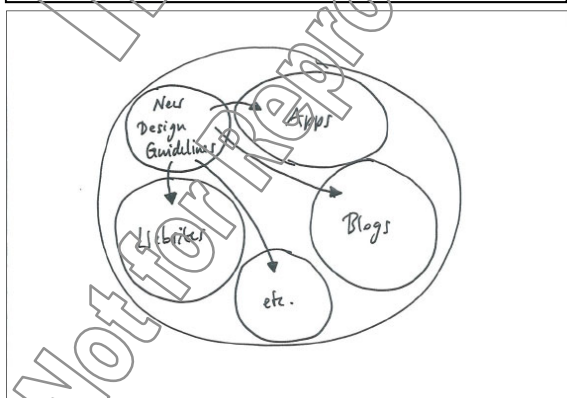
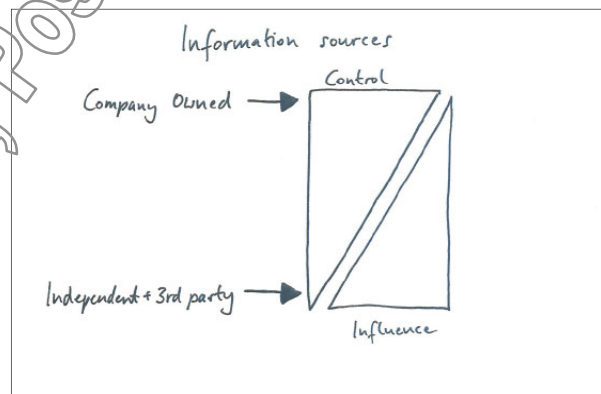
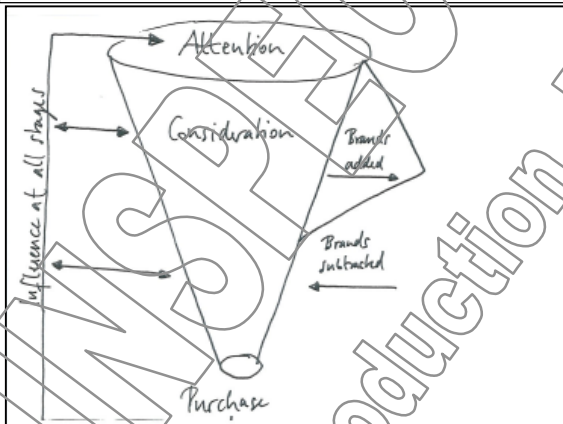
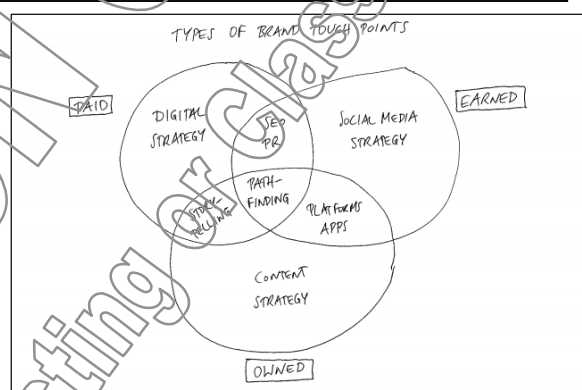
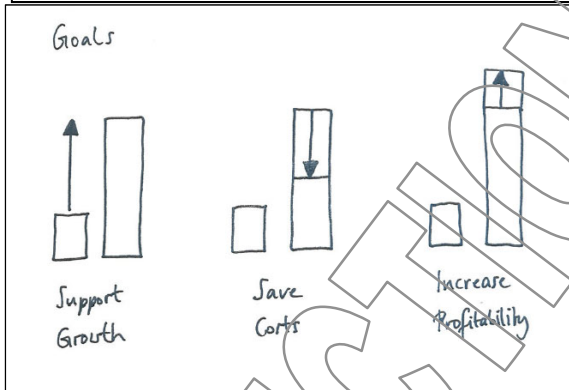
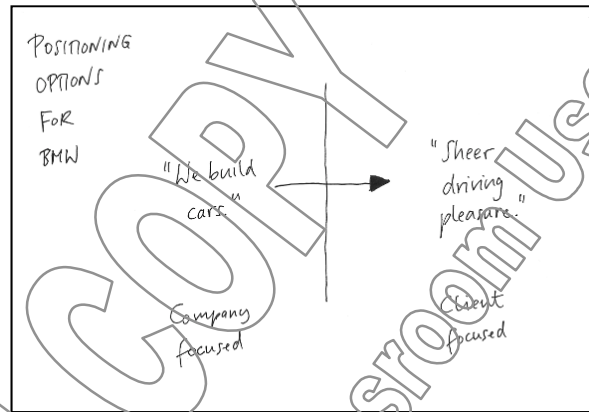
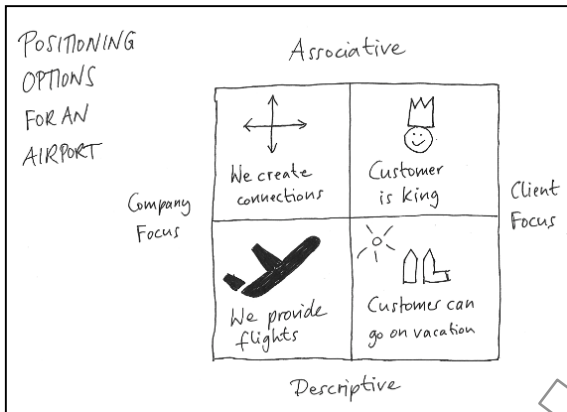
A) The brand definition model

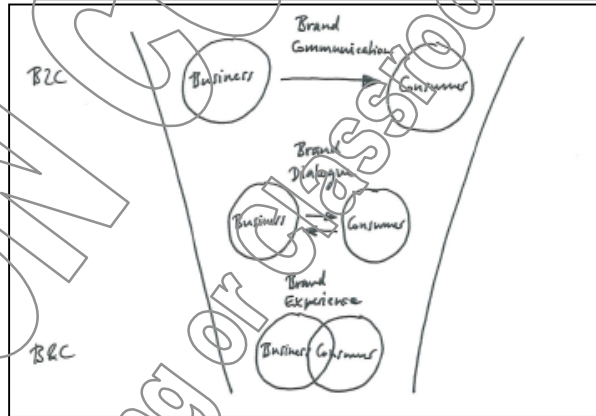
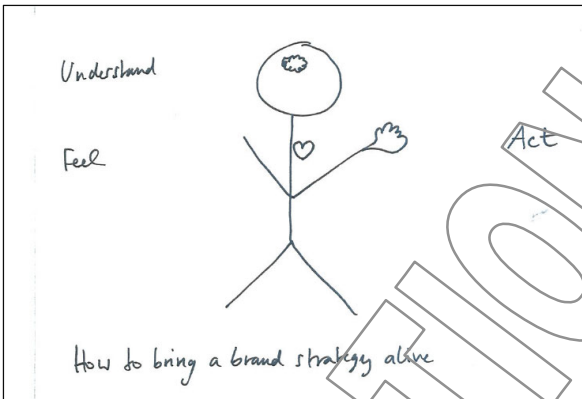
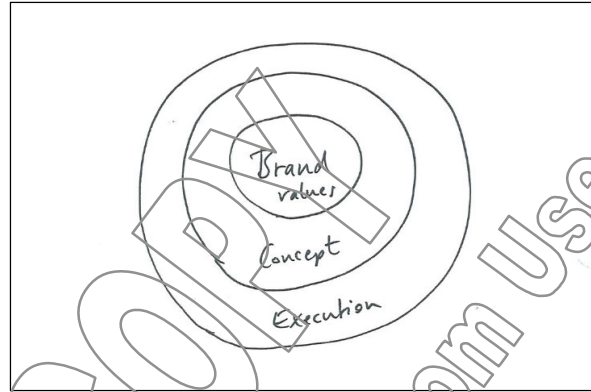
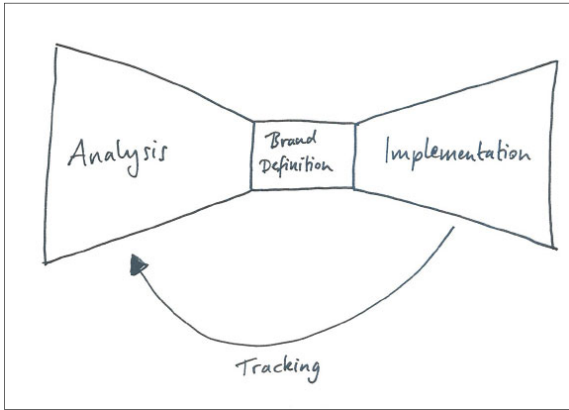


B) The brand experience model

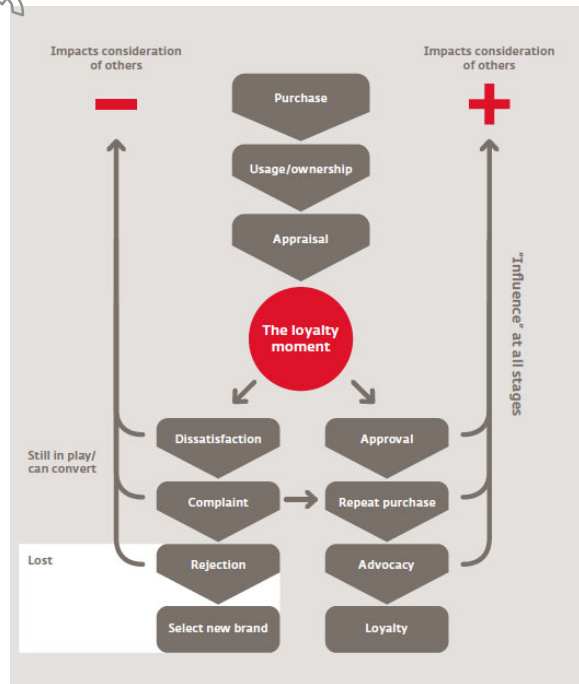
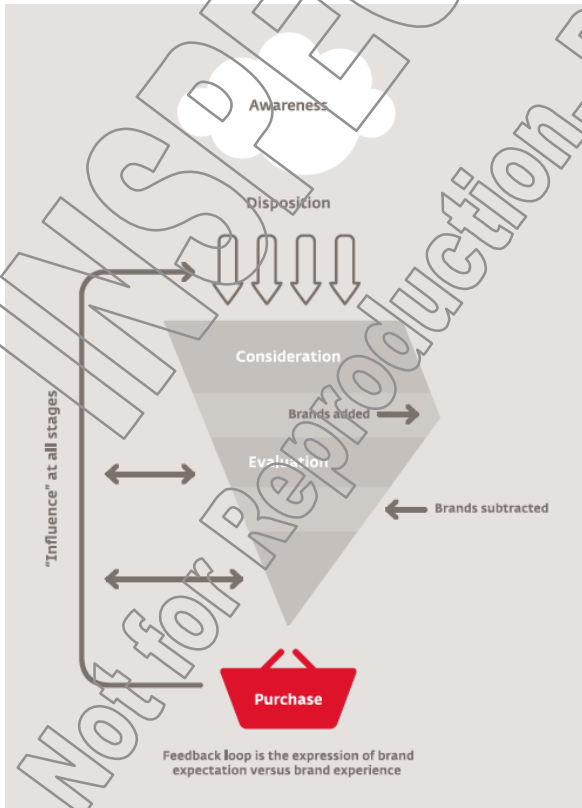


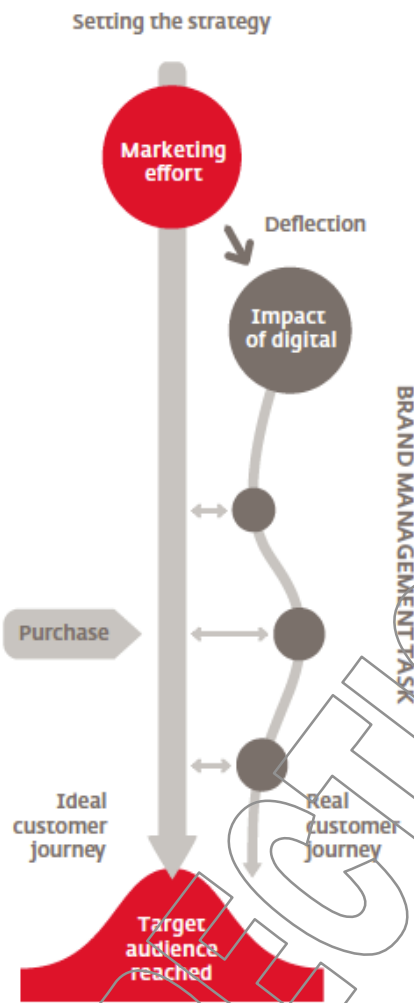
C) Sketches used by Interbrand consultants with clients



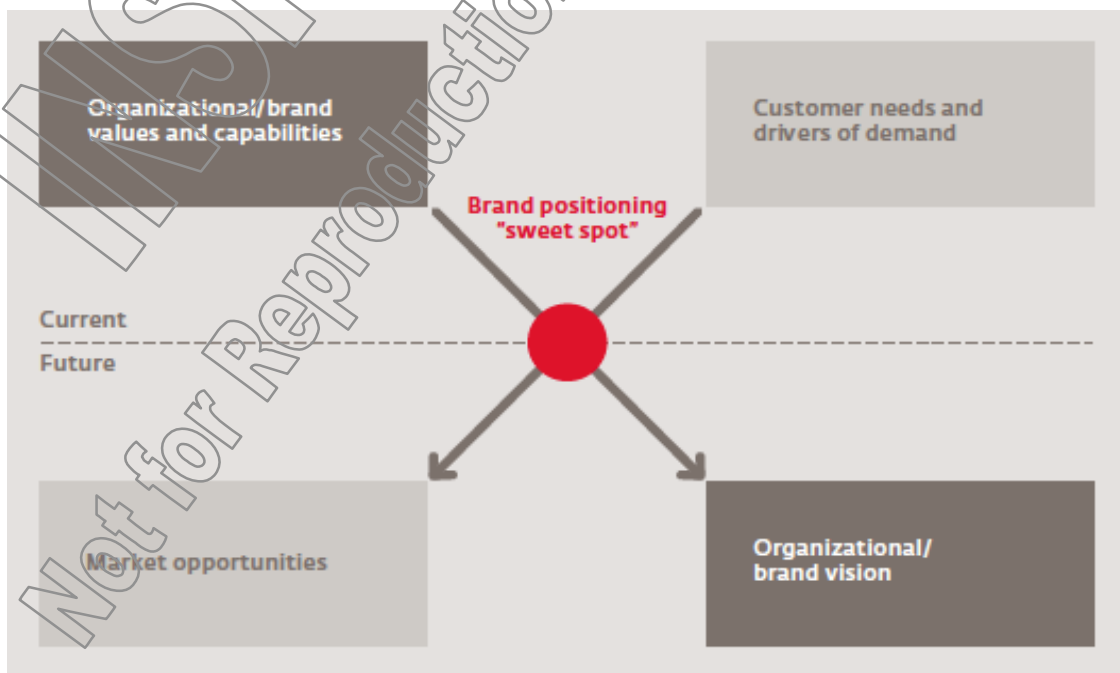


D) The revised models: Brand choice (top left), customer loyalty (top right), brand management task (bottom)

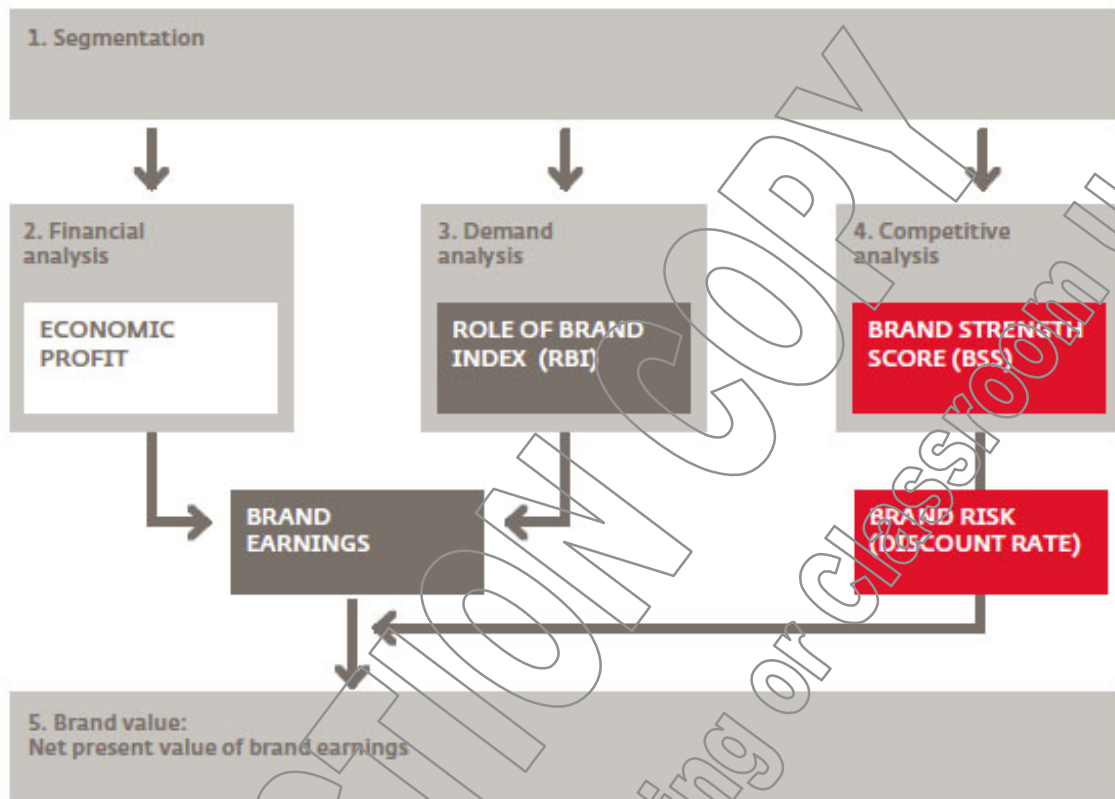




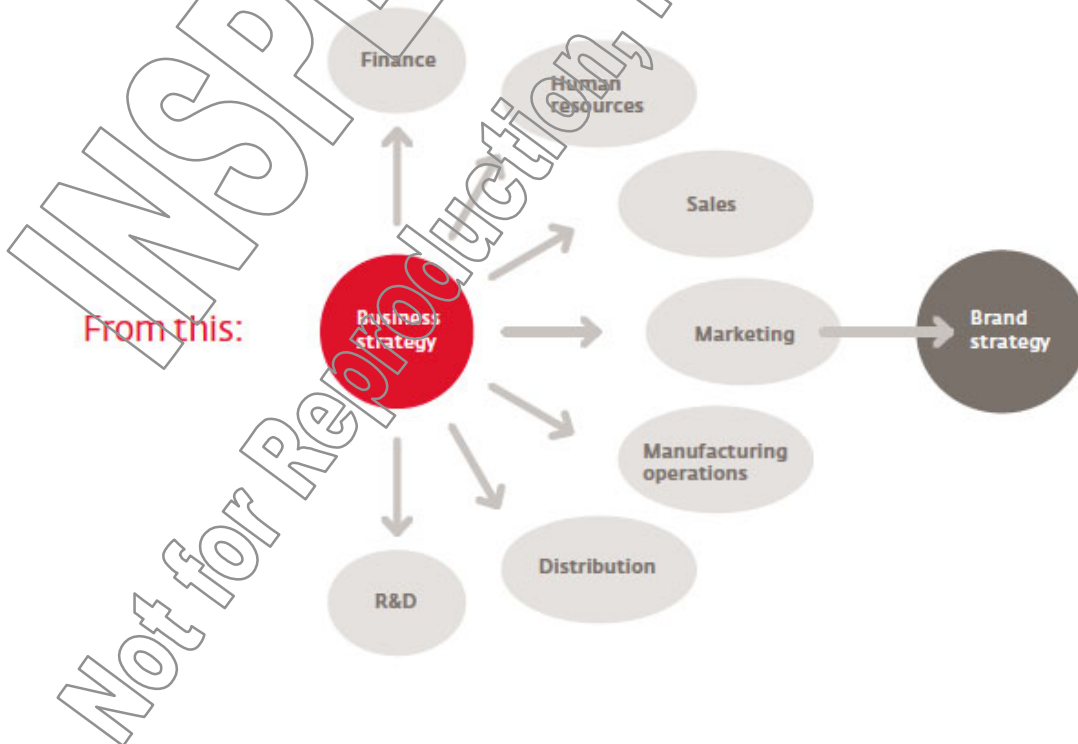
E) Market, Brand and Business Audit Framework



F) Brand Valuation Model



G) Brand and business context



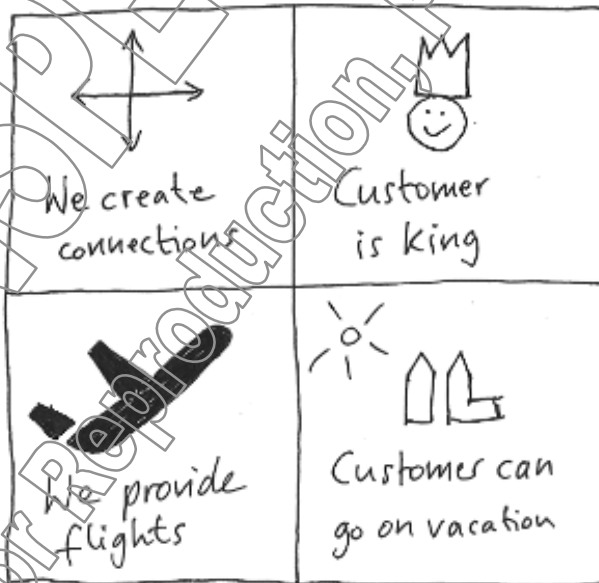
To this:



H) Positioning explained through a sketch

Associative

Company Focus



Client Focus

Descriptive

I) Positioning explained through a metaphor

