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**AN INVESTIGATION INTO
THE COMMUNICATION EXCHANGE
BETWEEN SMALL BUSINESS CLIENT
AND GRAPHIC DESIGNER**

DEBORAH CUMMING

**A thesis submitted in partial fulfilment of the
requirements of
The Robert Gordon University
for the degree of Doctor of Philosophy**

August 2007

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This thesis is dedicated to my husband, Walter.

Abstract

Graphic designers encounter particular difficulties when undertaking work for small business clients. Identifying the core business values is an essential step to ensure that a successful design solution results. An initial case study involving the merger of two established businesses, highlighted difficulties that arose as a result of poor communication and a failure to identify the core business values and subsequently translate these into the design brief.

The research aimed to gain an understanding of the key influences that surround the communication exchange concerning small business core values that inform the graphic design process. Graphic design, communication theory, business models and small business practice were drawn upon to inform this study. The literature review found that little formal research had previously been conducted on this topic.

Participant observation and action research were the selected methodological approaches adopted, involving the author as researcher and also graphic design practitioner. Following a series of nine case studies that focused on the SME sector, a graphic design communication tool (CDT) was developed and evaluated with the help of four professional graphic designers. The CDT consists of a detailed questionnaire conducted with key stakeholders, developed through a formalised process of analysis, including the author as action researcher, graphic designer and facilitator. The resulting CDT represents an original contribution to the field.

Using the CDT resulted in the responsibility for providing relevant information, which could be used to inform the design brief, moving away from the designer to the small business stakeholders. In addition, the role of a specialist facilitator/analyst might be developed in order to provide expert interpretation of core business values aligned to graphic design elements. The results of this research have particular significance for those working in the graphic design industry, educators and business advisors.

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Publications

The following publications have resulted from this study:

- Cumming, D., (2007), An alternative method of communication between client and designer at the "fuzzy front end" of the design process, European Academy of Design Conference, 11-13 April, Izmir, Turkey, 2007.
- Cumming, D. and Malins, J., (2006), The value of graphic design in small UK businesses as a pre-brief communication tool, D2B 1st International Design Management Symposium Conference, 17-19 March, Shanghai, China, 2006.
- Cumming, D., (2005), Red Path, Blue Peach: Discovering the core market values of the small business, Engineering and Product Design Education Conference, 15-16 September, Edinburgh, Scotland, 2005.
- Cumming, D., (2005), Alignment of market values through a Communication Design Tool, Joining Forces Conference, University of Art and Design, Helsinki, 22-24 September, Helsinki, 2005.

CHAPTER 1: Introduction

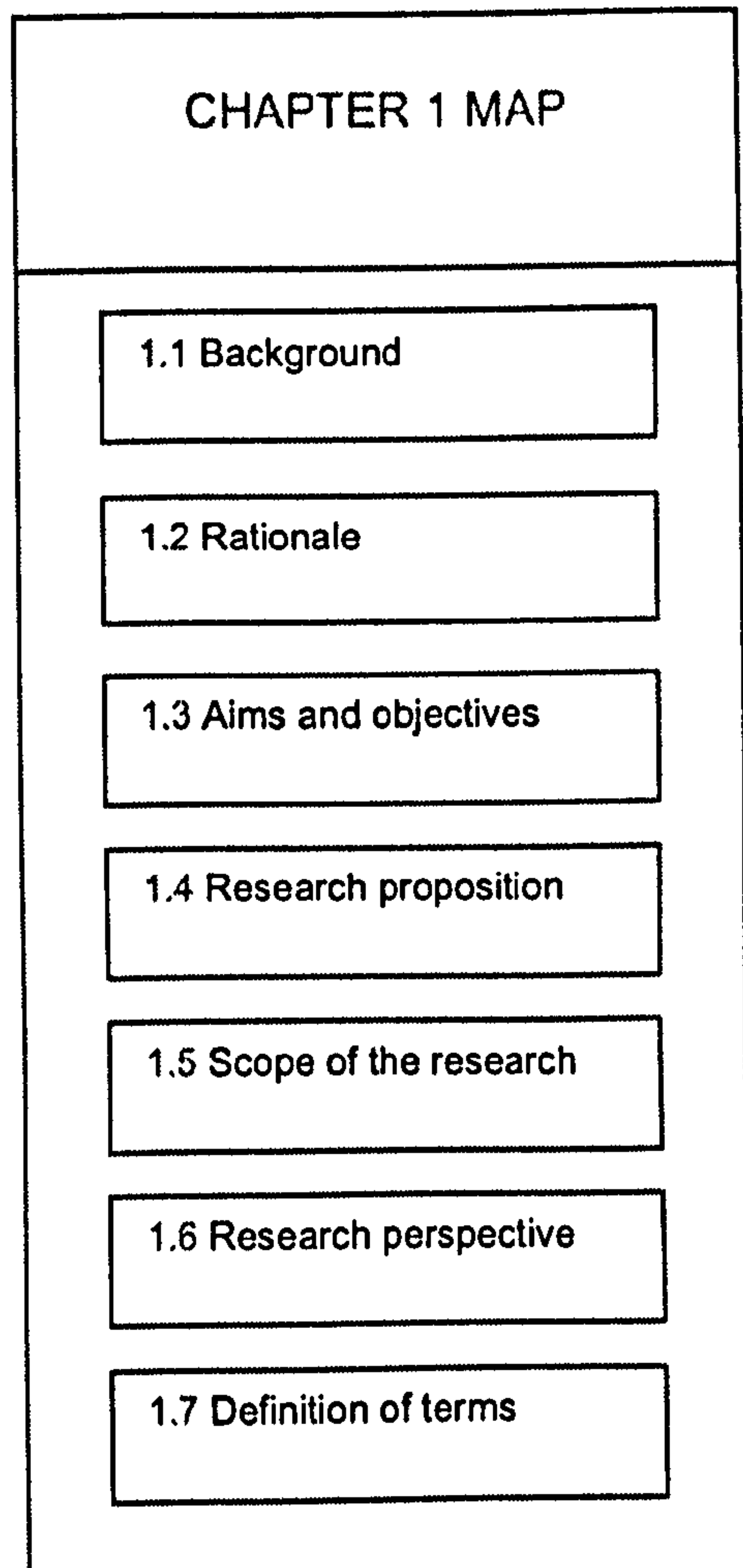


Figure 1.1: Chapter 1, chapter map

“Design as a communication tool: Design tells people what an organization [sic] does, how it does it and who for... Every part of an organization that communicates with the customer has the creativity of a designer behind it, from its logo and website to its marketing materials and delivery vans. Designers create the right impression, keep messages consistent and create efficient communication channels between organizations and the people using their services” (The Design Council, 2006).

1.1 Background

One of the challenges graphic designers encounter when dealing with the small business client is in understanding the nature of the business in terms of its business values. Within the context of this research the term business values refers to the individuality of the business that describes its uniqueness in the market place. Given that this may be the business's first attempt at using a professional graphic designer, existing information on the business may not be available. Initial discussion with the client generally provides the main source of information on the businesses core values.

The graphic designer relies on intuition and experience to uncover sufficient information to enable an understanding of what the business is about in terms of what they do, what their ethos may be, their aims and aspirations. Often armed with insufficient understanding of the core values of the business, the graphic designer offers solutions, which may or may not meet the client's needs. It is within the small business sector that the process of making implicit values explicit generally remains dormant at this stage in the business's design maturity, resulting in inadequate information necessary to inform the graphic design process. Where an unsatisfactory design solution occurs, the result is time consuming, frustrating, counter-productive, has cost implications and reflects badly on the design profession in general, for both client and designer.

In most new business ventures there is a recognised need to incorporate some form of graphic design from the outset. Basic advertising and stationery is a requirement of even the most modest of businesses. At this start-up stage of a business, graphic design is often carried out by non-designers, created either in-house or outsourced to a talented associate.

In some cases the work is contracted to a professional graphic designer. Walker (1990) links design involvement with business maturity. Walker uses a ladder analogy to describe the progressive design steps taken throughout the lifespan of an organisation.

At the early stages of an organisation's maturity, Walker recognises that:

"A small company may be seeking the services of a designer for the first time a medium organization [sic] already experienced in the use of graphic design may be taking a new step into interior design, or commissioning a new building; while a very large organization may be seeking a way of unifying disparate products into a complete and persuasive corporate identity" (Walker 1990, p.43).

Generally, the small business's first encounter with professional design is through graphic design. Stationery and basic promotional material, provided through graphic design "is the first rung on a business's ladder of design maturity", according to Walker (1990, p.44). This is an important first step in the small business client's introduction to and experience of the design profession, where the level of design input remains minimal.

Accurate interpretation of small business values made visible through graphic design is integral to the economic development and market competitiveness of the small business enterprise. However, the support mechanisms of corporate communication processes required to underpin accurate representation of core business values is not generally available to the graphic designer working with small business clients. The independent graphic designer sources pertinent information on the client's business either directly from the client or through ad hoc research carried out by the lone designer, or a combination of both.

Information forthcoming from the small business client regarding core values that underpin the design process is generally sparse. This can be due to the small business client's lack of understanding and inexperience of the graphic design process and also the financial constraints placed upon the small business. Although the design brief offers a documented method of gathering pertinent information, its function serves more technical aspects of the design project.

A substantial amount of literature addresses: branding, corporate communication, marketing and management generally within medium and large organisations. Medium and large organisational theories cannot always be successfully scaled to fit small business

practice. Small businesses are not simply scaled down versions of larger organisations, as explained by Penrose:

“The differences in the administrative structure of the very small and the very large firm are so great that in many ways it is hard to see that the two species are of the same genus... We cannot define a caterpillar and then use the same definition for a butterfly” (Penrose 2002, p.121).

Research carried out in the small business sector provides a particular set of challenges that does not exist within the large organisation e.g. “A small number of human beings engaged in a common endeavour can create very complex, subtle interactions” (Curran and Blackburn 2001, p.5).

1.2 Rationale

The rationale for this research originated from the author's experience as a graphic designer working with the small business client where an issue of poor communication impacted on the design process. This is expanded upon in more detail in section: 4.2.

The small business sector (0 to 49 employees) represents 99.3 per cent of the UK's 4.3 million business enterprises (www.dti.gov.uk, 2006). This sector represents a substantial percentage of the UK market.

Most businesses develop a business plan during the early stages of the new business. This serves to tentatively project future small business development but it is not until the business matures that it begins to understand where it fits in the market place, its customer base, objectives, attributes, ethics and origin. It is at this stage of business maturity that, according to Walker (1990) a need for professional design input is recognised.

It is at this stage in the graphic design process, in dealing with the small business client, that problems arise: without a structured method of gathering information and/or adequate budget to work with, the designer is left hoping that all relevant questions have been covered, filling gaps with guesswork and intuition. Formulating questions to obtain an understanding of core business values presents

problems for the inexperienced graphic designer. One of the main contributing factors which leads to poor design solutions is where the designer does not understand the business (Bernstein, 1986).

When commissioning a design to interpret identity, the small business faces challenges that larger organisations struggle to understand, as the organisation “discovers it’s unique purpose in the world” (Dickson 2001, p.31). Graphic design is an integral aspect of this process, described as: “a multi-layered discipline, which should be built into all the marketing and promotional strategies of a business right from their inception” (Conran 1988, p.137).

There remain a large number of small and medium sized companies that do not understand the role of design, and do not incorporate it effectively in setting project objectives.

This lack of information to better communicate small business values that informs the graphic design process has provided the impetus for this research.

The Cox Review (Cox, 2005) represents an important government policy report, relevant to this research, by recognising the need to integrate design and creativity into business. The Cox Review’s main recommendation, relevant to this research reports that: “The current HM Treasury review of R & D Tax Credits should consider changes to increase its effect on smaller businesses” (Cox 2005, p.22). A further recommendation of the Cox Review states that: “The profile of creativity and design in business-support activities should be raised” (*ibid*, p.22). The impact of the Cox Review recommendations to increase awareness of the benefits of design in business is directly relevant to this research.

1.3 Aims and objectives

The aim of this research was to provide mechanisms that would facilitate the communication process to better inform both the graphic designer and small business client, resulting in a more explanatory process of aligning graphic design to small business values. This would involve the client at an early stage in the design process and thereafter empower the client to update relevant information as the

business evolves.

The specific objectives within this research are set out below:

1. To investigate methods of communication used to achieve an understanding of small business values.
2. To formulate a prototype method to enable graphic designers to facilitate an analysis of small business values, underpinning the information gathering stage in the graphic design process.
3. Investigate the effectiveness of the method in a) the small business market and b) the graphic design industry.

1.4 Research proposition

If a method was developed that would assist the small business in making implicit business values explicit to better inform the graphic design process, that would result in a deeper level of communication exchange between designer and client during the information gathering stage in the design process.

1.5 Scope of the research

This research is predominantly concerned with small business enterprises located in the North East of Scotland i.e. businesses employing between 10 and 20 people, relative to their level of design maturity, according to Walker (1990).

The scope of this research is positioned within stage 3: Growth of Scott and Bruce's (1987) model, as shown in Figure 1.2.

Stage	Top management role	Management style	Organisation structure
1: Inception	Direct supervision	Entrepreneurial, individualistic	Unstructured
2: Survival	Supervised supervision	Entrepreneurial, administrative	Simple
3: Growth	Delegation/co-ordination	Entrepreneurial, co-ordinate	Functional, centralised
4: Expansion	Decentralisation	Professional, administrative	Functional, decentralised
5: Maturity	Decentralisation	Watchdog	Decentralised functional/product

Figure 1.2: Management role and style in the five stages of small business growth. Source: Scott and Bruce (1987), in Storey 2002, p.121.

The market sector has been randomly selected, mirroring the random nature of sectors within the small business context that employ graphic design skills. The businesses selected were drawn from a combination of looking through the local Yellow Pages and also from a list of local businesses provided by the marketing agency, Dunn and Bradstreet, Aberdeen. The final businesses selected were as a result of the author contacting each business on the list until the total number of businesses required (seven) agreed to take part in the research.

Lack of experience of the processes required to elicit corporate values is a distinction of the small business sector (Bruce *et al.*, 1988; Wootton *et al.*, 1998; Cumming and Malins, 2006). The graphic design process in particular requires a clear understanding of business values within a short time frame in comparison to the design profession in general e.g. product design, interior design and architecture. Graphic design provides a fast turn-around service resulting in short-term relationships with their clients. This is particularly relevant to small business client's who buy in graphic design as and when required.

The process of formulating an understanding of business values is not prioritised in graphic design education within the UK undergraduate programme. Graphic design practice differs from other design practice such as product design and architecture where long-term client relationships develop in line with the longer life span of the project. This can result in a better understanding of the business for product designers and architects who work with clients over a longer period of time.

Also, the architectural design brief is more in-depth compared with that of the graphic and product design brief. Scottish undergraduate education regarding graphic and product design and architecture is four years. A further two years at postgraduate level is required to become a fully qualified architect.

Medium and large organisations are more experienced in the design process (Walker, 1990). Furthermore, due to the lack of understanding of not only the design process but also how design can impact on market competitiveness and growth potential, the small business does not allocate sufficient time and resource to provide the graphic designer with adequate information concerning business values.

The financial constraints of the small business as described by Heskett, speaking at the Design Management Symposium (2006) can also restrict the commitment necessary to communicate implicit and often un-documented information on business values. For these reasons, the small business client tends to factor in insufficient costs within their budget to adequately carry out these functions.

There remain a large number of small and medium sized companies that do not understand the role of design and do not incorporate it effectively in setting project objectives (Cox, 2005; The Design Council, 2003; Press and Cooper, 2003).

1.6 Research perspective

The perspective of this research is from that of the independent graphic designer, with a portfolio of clients from the small business sector. Generally, the graphic designer is hired to perform a particular design function, dipping in and out of small business graphic design projects as and when required.

The research draws upon a number of disciplines involving graphic design, small business practice and corporate communication. This point is illustrated in Figure 1.3.

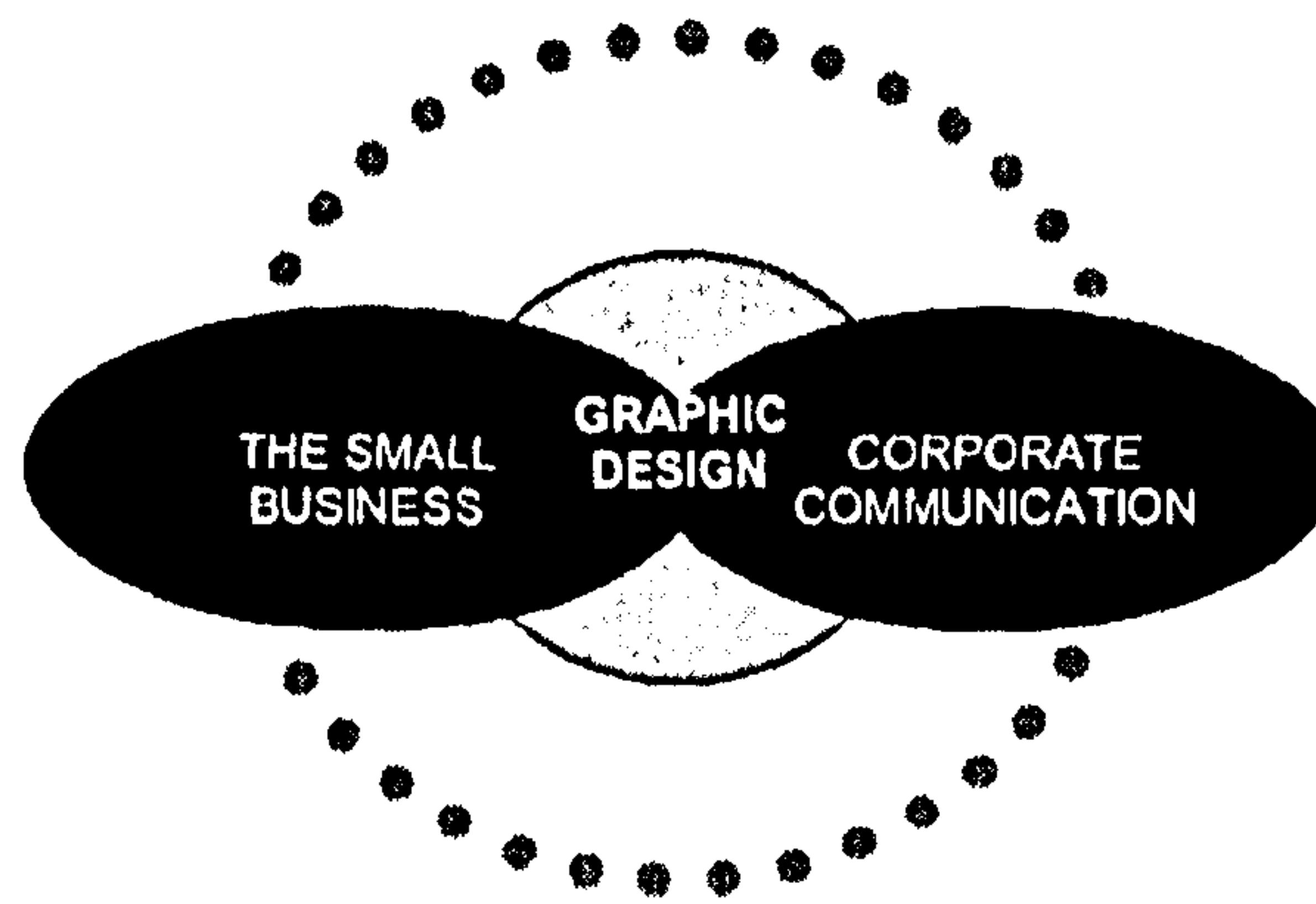


Figure 1.3: Research framework.

Management and marketing models also informed the study. The focus of the research involves establishing business values through corporate communication practices within the small business context to inform the graphic design process.

1.7 Definition of terms

The following terms used throughout this thesis are defined as:

Branding: The reputation of a business, as perceived by its stakeholders.

Business values: The unique aspects that combine to make up each individual small business, regardless of type of business.

Communication Design: The design of all communication media.

Communication Design Tool: A mechanism to assist the communication process between designer and client during the front-end of the design process.

Corporate Communication: All forms of communication used by businesses encompassing: "marketing communication, organizational [sic] communication and management communication" (Van Riel 1992, p.1).

Front-end of the design process: The information gathering stage in the design process.

Graphic Design: The design of words and pictures spanning various communication media.

Graphic Design elements: Elements that combine to make up all graphic design solutions i.e. symbolism, imagery, colour, copywriting, typography, layout.

The small business sector: The most recent and widely accepted definition of the UK business sector refers to the 2003 European Commission Recommendations

An investigation into the communication exchange between small business client and graphic designer

(www.dti.gov.uk, 2007) where size in terms of headcount, turnover and balance sheet thresholds represent the criteria selected.

Stakeholder: Any person with an interest or concern in a business e.g. staff, customers, investors and suppliers.

Visual Communication: All forms of communication media transmitted through visual perception.

CHAPTER 2: Literature review

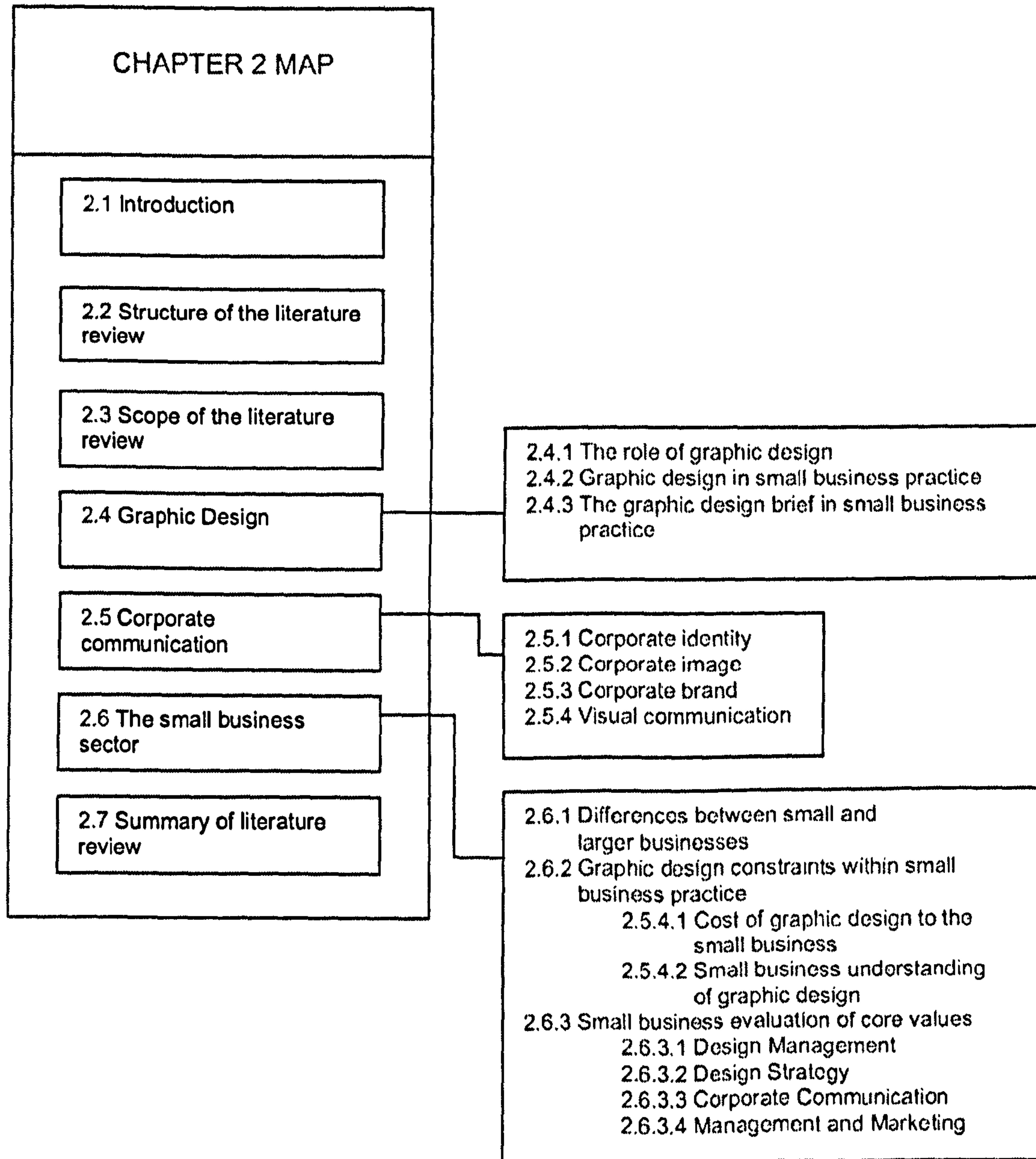


Figure 2.1: Chapter 2, chapter map

2.1 Introduction

The literature review focuses on key references in relation to:

1. The role of the graphic designer in small business practice during the information gathering process.
2. Corporate communication literature that underpins the development process of making implicit small business core values explicit.

The approach carried out regarding the literature search involved carefully selecting a number of key words, which were then input into various databases (Gray and Malins, 2004; Bell, 2002; Philips and Pugh, 1994). This was carried out on a regular basis throughout the study, refining the key words and sources of information as the research developed. The results of these searches provided a plethora of information from which the structure of the literature review was formulated. A summary of an initial literature search shown in Figure 2.2, details that little research has been carried out that is directly relevant to this study.

The literature searches revealed that information dealing with the communication of business values required to inform the graphic design process specifically within the small business sector is sparse. Research carried out by Wootton *et al.*, (1998) deals with gathering information on the business to better inform the design process, but Wootton's research deals with this at a later stage in the design process.

Although corporate communication literature has informed the business value analysis aspect of the study, it has not addressed the small business context, which is specific to the scope of this study. In this respect, relevant corporate communication models that deal with larger businesses were sourced and adapted to provide more pertinent information in line with small business requirements.

Literature that has underpinned and defined the scope of this study, relevant to the context of graphic design within the small business sector has been sourced from Walker, (1990), Curran and Blackburn (2001) and Scott and Bruce (1987). Storey (2002), the UK Design Council (2006), the Cox Review (2005) and the Department of Trade and Industry (2006) provide information on the small business sector in terms of: categorisation, development and challenges throughout the life-span of the small business, the impact of

the small business within the economy and also how political policy influences the small business.

Database	Keywords	Total search results	Keywords search results	Possible relevance	Selected to review further (in bold)
ARIAD (Allison) UK	<ul style="list-style-type: none"> • Design strategy • Design management • Graphic design • Visual communication • Corporate strategy • Brand management 	3,000*	<ul style="list-style-type: none"> • 500 • 500 • 500 • 500 • 500 • 500 	33	<ul style="list-style-type: none"> • PhD Central Lancs. 53-1074 • PhD St. Andrews 47-11147 • MSc (BIAD)
COPAC® (Victoria University of Manchester)	<ul style="list-style-type: none"> • Design strategy • Design management • Graphic design • Visual communication • Corporate strategy • Brand management 	6,735	<ul style="list-style-type: none"> • 408 • 2,194 • 1,755 • 968 • 1,270 • 140 	<ul style="list-style-type: none"> • 24 • 79 • 46 • 21 • 52 • 12 	<ul style="list-style-type: none"> • 17 • 24 • 12 • 9 • 32 • 5
INDEX TO THESES (PhD & MA)	<ul style="list-style-type: none"> • Design strategy • Design management • Graphic design • Visual communication • Corporate strategy • Brand management 	3,000*	<ul style="list-style-type: none"> • 500 • 500 • 500 • 500 • 500 • 500 	<ul style="list-style-type: none"> 2 2 0 0 2 1 	<ul style="list-style-type: none"> • PhD Lancaster 23-2098 • MSc Loughborough 23-2103 • MSc Bath 31-5560 • PhD Canada 30-5357 • PhD Manchester 33-436 • MSc Strathclyde 26-1804 • MSc Loughborough 23-2103
ELSEVIER Science Direct	<ul style="list-style-type: none"> • Design strategy • Design management • Graphic design • Visual communication • Corporate strategy • Brand management 	22,164	<ul style="list-style-type: none"> • 9,635 • 8,712 • 1,580 • 822 • 1,241 • 174 	<ul style="list-style-type: none"> • 84 • 95 • 36 • 29 • 18 • 46 	<ul style="list-style-type: none"> • 5 • 20 • 9 • 23 • 7 • 14
DAAI: Design & Applied Arts Index	<ul style="list-style-type: none"> • Design strategy • Design management • Graphic design • Visual communication • Corporate strategy • Brand management 	4,842	<ul style="list-style-type: none"> • 47 • 40 • 4728 • 128 • 8 • 19 	<ul style="list-style-type: none"> • 10 • 12 • 281 • 23 • 0 • 3 	<ul style="list-style-type: none"> • 3 • 7 • 34 • 9 - • 1

* These searches were limited to a total of 3,000 at a time, providing 500 results for each set of keywords.

Figure 2.2: An initial literature search

The literature search relating to the design brief was widened as little information was found that directly related to the small business context within the study. Local enterprise agencies were reviewed and although they provided design process information for the small business, it proved difficult to find any pertinent information on the design brief (www.businessgateway.co.uk, 2007; www.businesslink.gov.uk, 2007; www.scottish-

enterprise.com, 2007; www.sbs.gov.uk, 2007). No previous research has been published within these enterprise agencies that directly informs this study. In this respect, literature that focused on the design brief within more mature businesses, in terms of market presence and level of graphic design experience was sourced (www.designcouncil.org.uk, 2007; www.dti.gov.uk, 2006; www.cds.org, 2006; Phillips, 2004; Boyle, 2003; Goslett, 1992; Bruce, *et al.*, 1988; Wootton *et al.*, 1998; Bruce and Docherty, 1993; Tomes *et al.*, 1998; Hands, 2005; Ryd, 2004).

Van Riel (1992) provided the most pertinent corporate communication literature from which relevant analysis models that address core business values were adapted within this study (Bernstein's cobweb 1986, 1992; Lux's star, 1992). Models sourced from management and marketing literature served to underpin the corporate communication process in defining small business values. Relevant management and marketing models that informed the research were sourced from: Johnson and Scholes, 1993 (SWOT and PEST analysis) and Jobber, 1995 (Fishbein and Ajzen's model of reasoned action); Porter 1980, 1985 (Five Forces) and also Kaplan and Norton, 1996 (Balanced Scorecard).

Although dealing with large organisational corporate identity, Olins's (1978, 1988, 1989, 1995, 2003) extensive graphic design experience proved informative within this study. Other exponents of brand identity were also reviewed. These included: Bernstein (1986, 1989, 2003), Ind (1997), Dickson (2001), Moingeon and Soenen (2002), Floch (2000), Kapferer (2001), Gorb (1988), Oakley (1990), Robertson (1988) and Balmer and Greyser (2003). Although these authors relate predominately to larger businesses, the overarching theories relevant to corporate identity literature have been important in developing and refining the review.

In summary there is little in the way of formal research, which directly impinges on this study.

2.2 Structure of the literature review

The focus of this research involves the communication exchange of business values between the small business client and graphic designer prior to any design work being carried out: the phase in the design process generally known as "the fuzzy front-end", as

discussed by Press and Cooper (2003, p.58). In this respect, the communication exchange between the small business client and graphic designer has evolved through a design problem-solving activity. The author's experience as a graphic design practitioner, dealing specifically with the information gathering stage in the design process in relation to small business clients provided the impetus for the enquiry. The aim of the research was to understand relevant issues that could impact on potential improvement of the design process through a more informed communication exchange between client and designer. The cross-disciplinary nature of the research initially incorporated graphic design process and small business practice. Corporate communication practices emerged as a key influence within the literature. Corporate communication literature informed the development of evaluating small business core values within the research, with the purpose of providing information at the front-end of the graphic design process.

A visual explanation of the cross-disciplinary framework depicting where disciplines interact and are located in relation to each other is depicted in Figure 1.3. The structure of the literature review is expanded and categorised, as shown in Figure 2.3.

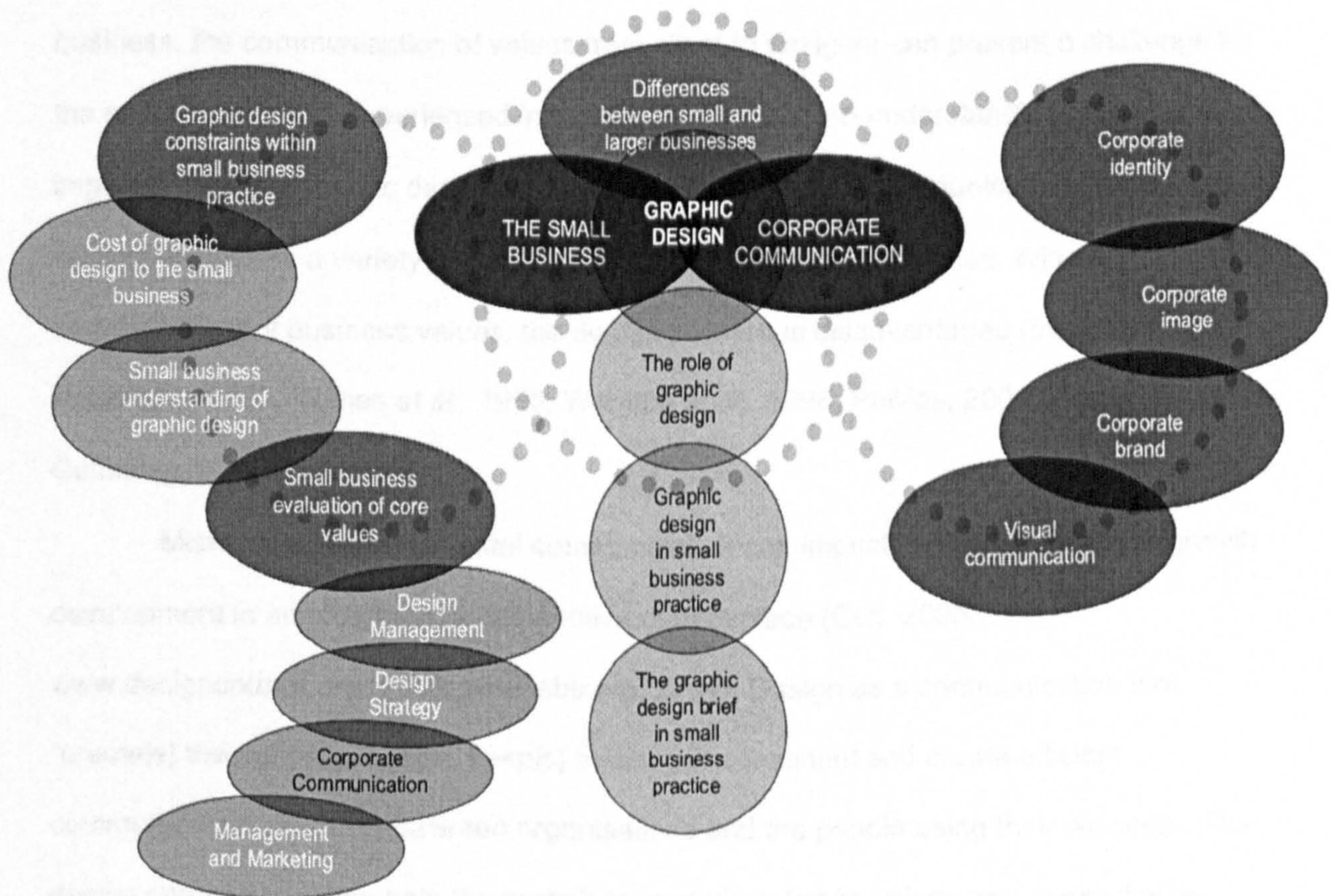


Figure 2.3: Expanded framework of literature review

2.3 Scope of the literature review

The Cox Review of Creativity in Business focuses on “what stops SMEs making greater use of the UK's creative talents, and what can be done about it” (Cox 2005, p.4). This aspect of the Cox review confirms that there is little information available for small business enterprises regarding how to integrate creativity into business (Cox, 2005). Three areas of the Cox review that define the main obstacles that SMEs encounter in utilising creative talent involve: “Lack of awareness and experience”, “Not knowing where to turn for specialist help” and “Too many other pressures on the business” (2005, p.4). These key areas of focus within the Cox Review define and underpin the scope of the research carried out within this study (*ibid*).

The scope of the literature review relates to the role of graphic design processes and procedures in small business enterprises and the lack of information available to assist in this process. An understanding of small business values to be communicated through graphic design is of specific importance.

As business values are a unique set of factors known implicitly within each individual business, the communication of values from client to designer can present a challenge for the small business, inexperienced in the design process. An understanding of values is imperative for the graphic designer, charged with the task of communicating those values accurately, across a variety of media and targeting different audiences. Without an understanding of business values, the design process is disadvantaged (Ind, 1997; Robertson, 2003; Tomes *et al.*, 1998; Wootton *et al.*, 1998; Phillips, 2004; Hands, 2005; Cumming and Malins, 2005).

Misrepresentation of visual communication can impact greatly on business growth development in an increasingly competitive market place (Cox, 2005; www.designcouncil.org, 2006; www.sbs.org. 2004). Design as a communication tool “create[s] the right impression, keep[s] messages consistent and create efficient communication channels between organisations and the people using their services...The design process can also help the organisation clarify what its values are” (www.design-council.org.uk, 2006). It is the focus of this literature review to explore the way in which,

within the small business context, the design process can “help the organisation clarify what its values are” (*ibid*).

David Irwin, Chief Executive, Small Business Service, Business Link recognises that the small business sector represents a substantial part of the UK economy and that design plays a key aspect in communicating the individuality of those businesses (www.designcouncil.org.uk, 2006). Irwin states that:

“Small businesses are the lifeblood of the British economy, but even the most enterprising people need help to make the most of their ideas...Design is a vital part of the toolkit all businesses need if they want to be competitive. In the UK, we cannot always be the cheapest, but we do have the capacity to offer people something much better and more worthwhile – innovation made into something by design” (ibid).

Graphic design can be perceived by the small business client as a necessary form of communication, contracted out and completed with little input from the client (Cooper and Press, 1997; Bruce *et al.*, 1988; Cumming, 2005). Return on investment is a key driver for the small business, with the additional complication of time constraints impinging on perceived non-essential tasks such as graphic design (www.sbs.gov.uk/smes, 2004). In this respect, allocation of time and financial resources to inform design projects can be difficult for the small business client to justify.

Generally, UK start-up businesses are provided with information on advertising, promotion and marketing from enterprise organisations such as Small Business Gateway and Scottish Enterprise, who offer website links to The Design Council and Department of Trade and Industry. However, information dealing specifically with the communication of business values required to inform graphic design projects is sparse within these areas. The literature search within these enterprise organisations in 2004 did not reveal any information dealing specifically with this phenomenon. It is important to note that from the period of review (2004) to time of writing there was a marked increase in information on design process, especially within the area of corporate branding relevant to the small business sector. This is significant as it highlights the emerging increase of design process information, which is available to the small business sector within UK enterprise agencies.

Although a start up small business can be guided through a business plan, provided generally by enterprise organisations, little information is available for the small business as

it considers continuing development of business values. This is particularly problematic when the business commissions graphic design. The evolving nature of the development of the business as it matures and gains an understanding of its values through market presence and trading experience requires the business to reassess its values in line with its strategy (Curran and Blackburn, 2001; Dickson, 2001; Drucker 1993, 1998, 2002).

Corporate strategy is an important management tool when applied as an evolving process in line with environmental influences (Johnson and Scholes, 1993). It is important because it encourages: "The ability to sense changes in the environment ... changes in environment influences signal the possible need for changes in strategy; they throw up opportunities and warn of threats. The evidence is that organisations which are better at sensing the environment perform better than those which are poor at it" (*ibid*, p.107).

An understanding of business values is an important corporate communication tool that reflects corporate strategy (Van Riel, 1992; Wootton *et al.*, 1998; Bruce *et al.*, 1988; Bernstein, 1986; Ind, 1997; Argenti, 2003; Bruce and Bessant, 2002; Birkigt and Sadler, 1992; Balmer and Greyser, 2003). However, in small business practice, the need to formalise an understanding of business values is generally set-aside until such times as it becomes necessary. This usually happens when additional funding is required, and in this respect information is generally tailored to meet the criteria of the relevant financial institutions' requirements (Story 1994, p.58). Another area that requires information on small business values is when the business communicates with a graphic designer.

Authors such as: Johnson and Scholes (1993), Jobber (1995), Drucker (1998), Van Riel (1992), Olins (1989, 2003), Cooper and Press (1997), Bernstein (1988, 1991), Ind, (1997), Moingeon and Soenen (2002) and the UK Design Council (2006) argue that an explicit understanding of business values, as an ongoing development process, is essential in any business that requires to communicate accurately to stakeholders and their many audiences.

The role of the designer within the small business has been reviewed across a broad spectrum of design activities. Various analysis models aimed at formalising business values have been explored mainly within corporate communication. Corporate communication models have been influenced by management and marketing practice. More specifically, corporate communication models that inform the "front-end" (Press and Cooper

2003, p.58) of the graphic design process have been incorporated into the research (Bernstein's cobweb 1986, 1992; Lux's star, 1992). Visual communication literature, in relation to how graphic design translates small business values through corporate communication practice has been reviewed. As little information was found in relation to the small business sector, the search was widened to include the larger business context.

Lastly, the literature review considers how the small business enterprise attempts to understand its core values that serve to inform graphic design practice. In this respect, the thesis acknowledges that medium and large organisational theories can be problematic when scaled to fit small business practice.

Design management, design strategy and graphic design literature have also been examined. Corporate identity, corporate image and branding have been investigated mainly within the medium and large market sector.

A great deal has been written on corporate identity communicated visually through graphic design within medium and large organisations. However, literature dealing with the communication of small business values that informs the graphic design process remains a relatively untapped area. As described by Wootton *et al*, (Requirements Capture, 1998) the main source of information on small business design activity in dealing with these "soft" issues has been through empirical research. However, there is little exploration of methods to understand small business core values communicated to inform the graphic design process, as the review will attempt to reveal.

The following literature review therefore provides a contextual framework for understanding the concepts and ideas contained in the rest of the thesis.

2.4 Graphic design

Numerous authors agree that graphic design provides visual communication solutions spanning all communication media, such as: Olins (1995, 2003), Hollis (2001), Heller (1995, 1997), Meggs (1998), Gorb (1988), Lawson (1997), Margolin (1990), Oakley (1990), Cross (2004), Gedenryd (1998), Van Riel (1992) and Seehra (2003).

Originally seen as typesetters and page layout specialists, the purpose of graphic design was to combine words and pictures into interesting arrangements following cultural

and aesthetic norms (Silver and Silver, 1991). The impact of graphic design on communication media is now widely recognised as a powerful tool when intelligently constructed. Technological advancement from the first metal type (Gutenberg c.1450), through computer capabilities (Macintosh c.1984) and into multimedia, utilises graphic design expertise across a wide variety of platforms. According to Chang's research (2006, p.33), where graphic design is a key aspect of designing emotionally-engaged Web interaction "Communication always has a specific goal formed by communicators to convey information to someone". In this way, Chang's research (2006) highlights the expanding breadth of the graphic design discipline. There is clearly a need for graphic design and with that need graphic design continues to change and adapt with evolving media channels.

Positioning graphic design within the aesthetic environment fails to satisfy its need as a corporate communication tool within the market place. As a pioneer of design, Loewy defines the difference between art and design as: "Design is the art of making the cash till ring" (1988, p.36).

Bloxcode, former managing Director of Imperial Tobacco, brings his experienced perspective of design in business, stating that: "Innovation leads us businessmen to the world of design and to those vital creative juices we do not possess. It galvanises management, inspires the workforce, enthuses the retailers and excites the consumers" (1988, p.46). Phillips, concerned with the integration of design within the core of a company, compares art and design as: " 'Art' and 'Design' are two different things. Art is largely concerned with aesthetics, beauty, a self-expression of the artist. Design, on the other hand, is a problem-solving discipline that also incorporates many elements of 'art'. Art could be said to be subjective. Whereas design could be said to be objective" (2004, p.1).

Robertson's exploration of how designers are taught and the importance of differentiating between design as aesthetics and design as a communication medium, states that:

" It is important that designers more fully understand the social meaning of their activity and the industrial contexts of the media that are their carriers. Such an approach should liberate design from its stylistic obsessions and give a full understanding of its power and potential as an increasingly dominant system of meaning" (2003, p.1)

The central concern of these authors: Loewy (1988), Bloxcodger (1988), Phillips (2004) and Robertson (2003) is to locate design within the business context, rather than purely aesthetic. This is also a significant concern within the context of this research.

Numerous authors from education or industry recognise the design process as a problem solving activity, including: Cross (1984), Schön (1983, 1987), Cooper and Press (1997), Borja de Mozota (1990; 1997, 2003), Oakley (1990), Bernstein (1988), Gosslet (1992), Lawson (1997) and Phillips (2004).

The practice of design can include individual or team involvement, although “there are design situations in which it is not clear which mode of practice is desirable for the front-end of the design process: a team effort or individual’s endeavour” (Cross *et al.*, 2004). Within the context of this study, it is generally an individual graphic designer who is commissioned by the small business client (see section 1.1). This necessitates the need for the individual graphic designer to make decisions regarding the front-end of the design process within this particular client sector.

According to research carried out by Bruce and Docherty (1993, p.421), the designer-client long-term relationship “allows the [graphic design] consultant to draw on the wealth of knowledge acquired about the client and his/her company. This fuels the concept development stage in the creative process and leads to the production of appropriate design solutions”. Research conducted by: Hands (2005) and Tomes *et al.* (1998), confirms that the relationship between designer and client is an integral aspect of developing effective design solutions, particularly at the front-end of the design process.

However the fast turnaround service provided as part of the graphic design process precludes the opportunity to develop long-term relationships experienced within other design disciplines, for example: product design and architecture. This is a significant aspect of the role of the graphic designer within the small business sector where graphic design is generally the small business’s first encounter with design (Walker, 1990).

The future of graphic design, while changing in line with technology continues to provide “clear and imaginative visual communications to relate people to their cultural, economic, and social lives ... As shapers of messages and images, graphic designers have an obligation to contribute meaningfully to a public understanding of environmental and social issues” (Meggs 1998, p.475). It is therefore not only an understanding of the small

business core values as an essential aspect of the graphic designer's meaningful contribution. Critical issues such as: environmental, social and cultural areas are all essential aspects of graphic design practices and procedures.

2.4.1 The role of graphic design

A great deal of ambiguity surrounds the identification of the graphic designers' role in business. The graphic designer's role in business can vary from client to client: in some cases the designer takes a project through from concept to delivery, others are given a specific design function to perform. Hollis (2001, p.10) provides a clear perspective to three roles within graphic design, explaining that:

*"The primary role of graphic design is to **Identify**: to say what something is, or where it comes from (inn signs, banners and shields, masons' marks, publishers' and printers' symbols, company logos, labels on packaging). Its second function, known in the profession as **Information Design**, is to **Inform and Instruct**, indicating the relationship of one thing to another in direction, position and scale (maps, diagrams, directional signs). Its third role, very different from the other two, is to **present and promote** (posters, advertisements), where it aims to catch the eye and make its message memorable".*

The role of the graphic designer in business as a communication conduit of business values adds another dimension to Hollis's (*ibid*) description of graphic design. Robson's proposition that the role of design communicates the style of a business, where style "encompasses attitudes" raises the question of how design translates values (1988, p.165). Robson (*ibid*) describes design and style as an integral aspect of corporate communication, claiming that: "Design then plays a major role in announcing and making clear what that style is. It is the physical expression of style backed up by attitudes, relationships with staff and, where applicable, customers. It is about communication". In this respect, Robson's perspective (1988) underpins the research proposition defined in this thesis, where design communicates business values, in line with corporate strategy. Wootton *et al.* (1998), Van Riel (1992) and Olins (1978, 1988, 1989, 1996, 2003) all support this perspective.

Maroni (1988, p.49) argues that an understanding of corporate strategy provides "a good designer ... to identify not only the solutions but the problems of a company from his

wide knowledge and be able to point a clear finger to the future". While Maroni's (*ibid*) outcome is desirable in theory, in practice this is a difficult role to achieve.

Research carried out by Gioia *et al.* (2002) and Tirimizi (2005) concerned the perceived needs of an organisation in-line with its corporate strategy, arguing that whilst desirable is not always carried out on that basis. Recognising that "All companies are designed but only some are designed by designers", Borja de Mozota (1990, p.73) argues that design as a strategic management tool requires "to know the strategy in depth. This often results in the firm going back to a renewed consciousness of its fundamental values. Designers help the firm to conceptualize [sic] these values and, therefore, work in the company's ideation process" (Borja de Mozota 2003, p.51). In this way, design integration at a strategic level is integral to the successful communication of core values through graphic design.

Seehra's PhD (2002) concerned the development of a "Communication Design Management" tool that provided a design management process within an advertising agency environment. A focus of her thesis was to integrate the development of advertising solutions within the design agency environment in-line with the nature of the clients' business. In this respect, ensuring that advertising solutions were aligned to their client's needs. Although Seehra's research (2002) reflected this study in terms of the provision of a mechanism to enhance the graphic design process, Seehra's concern involved the design management process within advertising agency procedures (*ibid*).

This thesis argues that to provide apposite visual communication solutions for small business clients' design in business, the graphic designer requires the "knowledge of how our clients function as businesses that is critical to developing successful design management strategies" (Seehra 2002, p.79).

As a highly experienced brand exponent, Olins (2003, p.191) provides an additional aspect in providing apposite visual communications, stating that design is "an immensely influential power in creating differentiation".

Design as an integral part of the business agenda is a valuable communication resource within the corporate framework, according to: a review of "Creativity in Business" (Cox, 2005), research carried out by: Seehra (2003), Hands (2005), Wootton *et al.* (1998),

Bruce *et al.* (1988) and authors such as: Cooper and Press (1987), Bruce and Bessant (2002), Phillips (2004), Van Riel (1992) and Olins (1978, 1989, 1995, 2003).

Concerned with the way design works and with what lies behind the creative impulse, Bernstein explains that in practice often the designer is called in too late in the design process, stating that: "the designer's role is that of a stylist to give some sort of surface appeal to another's design" (1988, pp204 - 205). The problem has been solved and executed and the designer, according to Bernstein is a "prettifier" (*ibid*).

The designer as an aesthetic stylist has historically failed to add value to industry. Blaich describes design at Philips, before a design strategy was put in place as "regarded as a styling operation" (1997, p.119). Companies that commission "the designer at the end of the project to 'tart up' the product or provide some packaging and sales literature is not using design effectively" (Cooper and Press 1997, p.264).

Another approach by organisations is to hire designers with a specific "design fingerprint" where a designer is sought out for their particular style, which can result in successful solutions (Palshoj *at al.*, 1990, p.40). In contrast to this approach, "silent design" (Gorb & Dumas 1987, pp150 - 156) refers to design being carried out by non-designers i.e. "most design is not done by designers, it is done by engineers, programmers and managers" (Norman 1988, p.188).

Conran (1988, p.137) argues that design is "a multi-layered discipline, which should be built into all the marketing and promotional strategies of a business right from their inception. 'Without a more educated market place, the expertise of the graphic designer will not be fully utilised'". Clearly, design is not fully utilised within business.

The role of graphic design in business is unclear: companies do not understand the role of design, and do not incorporate it effectively in setting project objectives, as defined by: the UK Design Council (2003), Cox review (2005), Press and Cooper (2003), Wootton *et al.* (1998) and Bruce *et al.* (1988).

2.4.2 Graphic design in small business practice

The role of the graphic designer has been reviewed across a broad spectrum of design activities. Generally, the small business's first encounter with professional design is through

graphic design: stationery and basic promotional material, provided through graphic design represents "the first rung" on a business's ladder of design maturity (Walker 1990, p.43). This is an important first step in the small business client's introduction to and experience of the design profession. Walker (1990) identifies that at this early stage in the business's design maturity, the design process is generally new to the small business.

One aspect of the graphic designer's role within the context of the small business client is that of design educator. In this respect, the graphic designer also inadvertently takes on the role of design ambassador. It is therefore extremely important to provide the small business client with a successful early design experience that will reflect favourably across the entire design profession.

The designer can be required to educate the client from three basic perspectives. These are: 1. The design process, according to: Press and Cooper (2003), Robertson (2003), Lawson (1997) and Cross (2004). 2. How design translates values, as discussed by: Bernstein (1986), Robertson (2003), Floch (2000) and Kapferer (1988, 2001). 3. How to measure design success as a return on investment, according to a report by: the UK Design Council (2003), the Cox Review (2005) and also by Phillips (2004) as a key exponent of the briefing process.

Medium and large organisations that are design mature (Walker, 1990) focus design activities within their corporate strategy in setting design project objectives, according to: Gornick (2005), Phillips (2004), Borja de Mozota (2003). Boyle (2003) recommends that project objectives should be integrated into the design project management process, stating that: "The objective of the [design] project is to fulfil part of the ongoing vision for the organisation" (Boyle 2003, p.35). In this way, project objectives should reflect business values as integral to the *vision* of the business, formulated through the corporate strategy, as discussed by Tirimizi (2005).

Wootton *et al.* (1998) and Bruce *et al.* (1988) recognise that the main source of design activity in dealing with these "soft" issues within the small business context has been carried out through empirical research.

A two-year research study carried out by Wootton *et al.* (1998, p.8) aimed at defining "Customer, user and market requirements; design requirements and technical requirements", identified that the "front-end" is a critical phase of product development.

According to Wootton *et al.* (1998, p.12), the importance of gathering relevant information on how the market defines value prior to product development is essential, in order that: "an understanding may be gained at both the tangible and intangible aspects of how the market defines value".

Although Wootton *et al.* (*ibid*) acknowledge that before any design work is carried out, an understanding of market and product values is essential and in this respect their research required existing business strategy as part of the Requirement Capture process. The context of the Requirements Capture process operates effectively when a) a clear business strategy and b) a formal product development process exist (Wootton *et al.*, 1998). Business strategy informs and filters ideas and concepts and is also informed by the resulting research regarding technology and market drivers.

Wootton *et al.* (1998, pp11 - 12) refer to the "Whole Product Model" as an integral aspect of the Requirements Capture process along with how "the market defines values". The point of entry within The Whole Product Model is defined as the "Core: The absolute minimum elements a product must have" (Wootton *et al.*, 1998, p.16). The "star-gate" product development process is offered within the Requirements Capture process as a generic example of guiding a product through the development stages from concept to market (*ibid*). The relevance of the star-gate process is that it offers developmental guidelines with which to channel users along key stages during the evolution of the product life cycle. Similarities exist between Requirements Capture and this research regarding gathering key information to better underpin the design process in industry but differ at the point of entry.

The research carried out in this study refers to the information gathering stage in the design process prior to idea generation or conceptualisation, whereas Requirements Capture is supported by "a clear business strategy" to be provided by the company (Wootton *et al.*, 1998, p.15).

In making small business values explicit to better inform the graphic design process, little literature is available for either the small business client or graphic designer. A key concern of Hands' thesis (2005) involved the design briefing process and the influence of the brief as a design management tool in creating crime secure environments. In this way, Hands' research (2005, p.99) defined the content parameters of the brief and its

suitability to include specific business values by incorporating “crime resistant features” relevant to his research. Identifying values that may be essential to the client presents problems according to Hands (2005, p.90), who states that: “To try and communicate the emotional values of the proposed design solution to the designer from an inexperienced client is not an easy task”.

This implies that the process of gathering pertinent information on the business values within the early stages of the design process relies upon the graphic designer's skills, obtained either from the client or through research generated by the graphic designer, or a combination of both. Research carried out by Hands (2005), Tomes *et al.* (1997), Bruce and Docherty (1993), Murphy and Press (2006) and Cumming (2006) emphasise that during this information gathering stage in the design process, the communication exchange between graphic designer and client is key.

Ironically, within the small business context, the communication exchange between designer and client is the least informed area within the literature reviewed. The most widely used method available by the graphic designer of obtaining information on the business is provided through the briefing process (BS 7000; The Design Council; AIGA; The Chartered Society of Designers; The Design Management Institute).

2.4.3 The graphic design brief in small business practice

According to research carried out by Hands (2005), literature on the briefing process is sparse. One aspect of the design brief is to provide the graphic designer with information on the client's business (Phillips, 2004; Goslett, 1992; Boyle, 2003; Press and Cooper, 2003; www.designcouncil.org, 2006; www.csd.org, 2006; Hands, 2005; www.businessgateway.co.uk, 2003; www.businesslonk.gov.uk, 2006; www.dti.gov.uk, 2006). However, there is no one definitive list of questions within the design brief to fully assist the graphic designer in formulating an understanding of small businesses values, as the review reveals.

The author traced the steps that a UK small business may take in accessing information relating to graphic design in general and more specifically, how to formulate an understanding of core business values through the briefing process. The result of this

search revealed that information available to the small business explaining how to understand and communicate values to better inform the graphic design process is sparse. Difficulties encountered by the small business in sourcing relevant information emerged as significant. Given that the author knew what to look for, this search revealed that there is a lack of information available to the small business in formulating and communicating values to the graphic designer.

According to the UK Small Business Service a key source of UK information available to the small business regarding design process and in particular the graphic design brief is provided through enterprise agencies (www.sbs.gov, 2006). This information has been explored within local and UK websites, including: Scottish Enterprise (Grampian), Small Business Gateway, The Design Council, Business Link and The Department of Trade and Industry. It is important to note that over the period of review (November 2004 to time of writing), the inclusion of design related areas has increased dramatically, specifically within the Business Link and Business Gateway websites.

Particularly interesting is the inclusion and more prominent positioning of design process within Scottish Enterprise, Small Business Gateway and Business Link websites. Once in and around these areas, the quantity of design information available has also increased greatly over the period of review. A more detailed analysis of the review into enterprise agency sources is provided in Appendix 1.

In reviewing sources for information available to the small business regarding the design process in general and also information that deals more specifically with the design briefing process, the information found referred mainly to defining project objectives and clarifying technical aspects such as: time frame, budget, target market and distribution networks (see Appendix 1). No information was found within the enterprise agencies in 2004 that dealt specifically with interpretation of small business values through the design process. However over the period of review, this situation changed dramatically. A great deal of information on the design process and in particular, brand management has since been provided. A noted increase in the level of information especially within the Business Gateway and Business Link websites was evidenced. The Scottish Enterprise (Grampian) and the Department of Trade and Industry websites remained relatively unchanged in terms

of content, although the Department of Trade and Industry website regularly publish design specific papers.

The UK Design Council website continues to provide a comprehensive source of design information on design process, design in business and design education. Information continues to be updated and the UK Design Council was the only enterprise source found to provide guidelines on the briefing process as a two stage approach: stage 1 – the initial brief as a project specification and stage 2 – containing information on strategic issues (www.designcouncil.org.uk, 2006). In this way the UK Design Council recognise the importance of incorporating business values as part of business strategy within the brief as a separate issue (*ibid*). This point is reflected in Hands' research (2005, p.84) acknowledging that although the UK Design Council provide guidelines that “tentatively raise the important aspect of aligning the proposed outcome to corporate strategy”, “they do not provide detailed advice or suggestions as to how the organisation can translate and embed their ‘values’ within the brief itself”.

Enterprise agencies identify that business objectives are an integral aspect of the brief. However, as a key small business resource, they do not provide adequate information to assist those businesses in understanding and accurately communicating their values in relation to the graphic design process including the design brief, as the review reveals (Appendix 1).

Business objectives are identified within the brief as part of the ongoing vision for the organisation and are included within the brief as “project objectives” (Boyle 2003, p.33). In developing the client design brief a number of technical areas require to be addressed, including an understanding of the design process as vital in the development of a design brief as described by authors such as: Boyle (2003), Philips (2004) and Ind (1997). This is a problematic issue regarding the small business design client who, according to Walker (1990), is inexperienced in the design process.

The Chartered Society of Designers provides *professional codes of conduct guidelines* regarding the design brief (www.csd.org, 2006). The Chartered Society of Designers approach to the design brief, as an important contractual document between client and designer is described by Goslett (1992) as:

“If you have extracted all the information you can get out of him [the client] by

asking the right questions and then confirmed the brief in writing when you quoted your fees; if he has accepted your fee letter in writing; if you have submitted to him preliminary designs which fulfil that brief to the very best of your ability, then you could take him to court for his refusal to pay your fees... Some clients may genuinely but mistakenly feel that a designer has not fulfilled a brief and then your only protection is the detailed notes you have taken and confirmed to him. It would be no use arguing the case without them" (ibid, p.30).

Decisions made by the designer regarding "all the information you can get out of him by asking the right questions" (*ibid*) is a particularly interesting aspect of the information gathering process. How does the designer know the "right" questions to ask? Technical questions regarding budget, fees, timescale, product delivery, product quantity, product materials are straightforward. Questions regarding interpretation of underlying business values are more complex to formulate and also in uncovering pertinent answers.

Goslett (1992, p.31) acknowledges that specific questions asked during the briefing process relevant to individual design professions are not straightforward: "As this is not a book about design I am not going to suggest what detailed technical questions you should ask. You will know all about those". This helps to clarify the lack of direction of the designer's role in performing this specific aspect of the design process. The design process can be quantified and agreed between client and designer from the basis of accurate communication of design requirements. However, where the client is looking for design interpretation of business values and given that the client has difficulty in communicating those values, the designer must employ skills to better understand their client's values. This aspect of the front-end of the design process is supported by research carried out by Wootton *et al.* (1998).

Explaining the importance of agreement between client and designer regarding the designer's interpretation of what is required, Goslett (1992) provides example graphic design guideline questions to ask the client. These are: "What is the impression to be conveyed – prestige, elegance, luxury, practicality? Is the appeal to be to one sex more than the other? To a special age or income group? A special section of the community?" (*ibid*, p.32). These questions refer to marketing rather than core business values.

According to Phillips (2004), Oakley (1984) and Hands (2005), the parameters of the briefing process fail to provide adequate information on the core values of the business,

which ultimately impacts on resulting designs. Although Goslett (1992, p.30) points out that experience is the main criteria for knowing “the right questions to ask: ironically, according to Walker (1990) and Cumming (2005), it is generally the inexperienced designer and small business client who engage in this process.

Tomes *et al.* (1997, p.31) describe the brief as “fundamental, since it contains the initial definition of what is to be translated”. Research based on a review process, carried out by Tomes *et al.* (1997) identified that the communication exchange between designer and client as part of the briefing process relied on: a) long term client/designer relationship; b) visual-verbal translation between client/designer and also additional input from other designers and c) achieving clarity through verbal-visual iteration processes. Tomes *et al.* (1997) identify that a continuous loop of input and evaluation that oscillates within a visual-verbal methodology from both client and designer(s) defines the communication process surrounding the brief, carried out between design agency and client. Parsloe (1990) points out that as a (verbal) communication process, the brief is influenced by psychological factors: misperception, language ambiguity and agreement issues. To overcome some of the psychological complications that can arise during the briefing process, Tomes *et al.* (1997) identified that the communication exchange between designer(s) and client was essential. Also, research carried out by Bruce and Docherty (1993) concerning the client-design consultant relationship concluded that the long-term client-designer relationship engenders a deeper understanding of the client’s business. Although Hands (2005, p.93) recognises that the brief is “constantly bridging the communication gap between designers and client”, the client-designer relationship emerges as a significant aspect of the briefing process.

Phillips discusses the design brief from a unique perspective, advocating that the briefing process should include an involved, iterative and “partnering” process (2004, p.18). Topalian (1980), Oakley (1990) and Hands (2005) recognise that the brief requires greater input, involvement and encourages the development of the brief through iteration processes. “Partnering” however, is a more interesting and unique theory (Phillips, 2004). Rather than a designer being commissioned in response to a recognised problem, Phillips (*ibid*) recommends that the designer refer to clients as partners (and vice versa). The designer therefore adopts a pro-active approach within an organisation, recognising

potential problems and providing design solutions. This approach can only be successful where the client and designer are viewed as partners in the organisation. Phillips recommends that: "Designers and design managers must change their mindset from being service providers, or 'taxi-drivers', to a mindset of being a strategic, equal business partner" (Phillips 2004, p.17). Based on the views of Phillips (2004), Hands (2005), Tomes *et al.* (1997) and Bruce and Docherty (1993), it might be concluded that involving the designer as a "partner" reiterates the proposition regarding the client-designer(s) relationship as an integral aspect of the briefing process.

Involving the designer in the business at a strategic level lies at the heart of design management theory evidenced in the work of authors such as: Bernstein (1986, 1988, 2003), Bruce *at al.* (1988), Borja de Mozota (1990, 2003), Bruce and Bessant (2002), Cooper and Press (1997), Cox (2005), Fitch (1988), Gorb (1988), Gornick (2005) Heskett (2006), Jerrard *et al.* (2002), Oakley (1990), Olins (2003), Phillips (2004), Topalian (1990), Von Stamm (2003), Wootton *et al.* (1998). However, these existing approaches require the business to have reached a level of design maturity as identified by Walker (1990) that is out with the scope of the small business client as defined within this research.

In this section of the literature review there is little literature that informs the graphic designer with information regarding the front-end of the design process within the context of the small business client. Existing briefing practices, particularly within the context of the small business graphic design client, do not provide information to assist the client in communicating core business values to inform the design process.

2.5 Corporate communication

The aim of this section of the review is to identify underpinning literature that provides the small business with an understanding of how to improve its corporate communication. Corporate communication literature that has informed this study involves: corporate strategy, corporate identity, corporate image, corporate branding and visual communication. As an expert in the field of corporate identity, Van Riel (1989, 1991, 1992, 1994, 1997, 2000) represents a key influence underpinning corporate communication theory and is of

particular relevance to this thesis. Corporate communication literature reviewed was sourced mainly from large business practice, refined and applied to the small business context from authors such as: Van Riel (1989, 1990, 1992, 1994), Birkit and Sadler (1992), Olins (1978, 1988, 1989, 1995, 2003), Bernstein (1986, 1988, 2003), Lux (1986, 1992), Dickson (2001), Ind (1997), Floch (2000), Kapferer (1988, 2001), Knapp (2001), Pearson (1996), Margolin (1995), Moingeon and Soenen (2002), Oakley (1990), Guilford (1954), Argenti (2003) and Balmer and Greyser (2003).

Little literature was found that related specifically to small business corporate communication practices. During the investigation, business models were sourced from management and marketing that could inform the small business of certain aspects of their business. Management and marketing models included: SWOT Analysis (1993); PEST Analysis (1993); Porter (1980, 1985), Kaplan and Norton (1996) and also Fishbein and Ajzen (1995).

According to Van Riel (1992, p.19), the philosophy underlying the corporate communication framework within this thesis is described as: "directing the company's communications policies from within the 'corporate strategy - corporate identity - corporate image' triangle".

The corporate communication "triangle", (*ibid*) is defined as: a) corporate strategy as a formalised understanding of business values from its members; b) corporate identity as making implicit business values explicit and c) corporate image as mirroring the identity of a business, reflected individually by each stakeholder. It is therefore the "corporate identity" aspect of Van Riel's corporate communication "triangle" that contextualises the research in terms of underpinning models applied to make implicit small business values explicit (*ibid*).

Further than this, the corporate identity mix is described as: "behaviour, communication and symbolism", representing "any action or expression of a company" (Van Riel 1992, p.32). It is within the "symbolism" aspect of the corporate identity mix, as a form of "expression" that provides a more focused underpinning of the research in terms of corporate communication theory (*ibid*).

As part of the corporate identity mix, symbolism as defined by Van Riel (1992), is understood within the context of this research to represent all areas of visual communication, including written communication i.e. "words and pictures" (Silver and Silver,

1991). Therefore symbolism, in representing all forms of visual and written communication within business (internally and externally) provides a bridge between graphic design process and small business practice in understanding small business corporate values contextualised within corporate communication theory.

Authors such as: Olins (1989), Ind (1997), Kapferer (1988), Mintzberg and Quinn (1991), Johnson and Scholes (1993), Moingeon and Soenen (2002) and Tirimizi (2005) acknowledge that corporate strategy is an anchor point for many businesses. Establishing a corporate strategy can present a difficult task for any business and is often represented through a company's mission statement. Olins (2003, p.175) argues that a mission statement engenders a great deal of ambiguity due to the interpretational problems of these statements that can be: "pious, predictable, repetitive, interchangeable and ultimately irrelevant". Johnson and Scholes (1993, p.187) define a mission statement as a "general statement of purpose" and argue that it should include purpose, value and objectives, for example:

- *It [mission statement] should be visionary and likely to persist for a significant period of time. This is important as a backcloth against which more detailed objectives and strategies can be developed, delivered and changed over time.*
- *It should clarify the main purposes of the organisation, and the reason why the organisation exists.*
- *It should describe the organisation's main activities and the position it wishes to attain in its industry.*
- *There should be a statement of the key values of the organisation – particularly regarding attitudes towards stakeholder groups.*
- *The organisation should have the intention and capability to live up to the mission statement" (ibid).*

Ind (1997, p.40), evaluating the importance of a corporate strategy in terms of meaning and what it stands for in relation to the employee perspective, states that:

"A strategy has no value unless it is communicated and acted upon by employees: Most corporate strategy statements never actually penetrate the ranks of management to touch the minds of the employees doing the everyday work of a company. Yet they are the people facing customers and clients daily and for good or ill, creating the true image and reputation of the business... If your employees don't know what the strategy is, or can't translate it into workable terms, the

strategy will simply grind into oblivion somewhere in the offices of senior management".

According to Ind (*ibid*), the importance of incorporating "employees" within the evaluation of a corporate strategy is a significant aspect of the business's understanding of its core values, generated by "the minds of the employees doing the everyday work of a company". This is significant as it reflects the objective of this research.

Van Riel (1990, 1992), Drucker (1998, 2002), Johnson and Scholes (1993) and Bruce and Bessant (2002) acknowledge that the basis of formulating a company's corporate strategy is an essential aspect of corporate communication. In practice, achieving a strategy that encompasses core business values and can be accurately communicated by all stakeholders is complex and often unsuccessfully executed. This is reflected in the work of various authors such as: Van Riel (1992), Kapferer (2001), Olins (2003), Bernstein (1986), Ind (1997) and Dickson (2001).

According to Van Riel (1992), the visual interpretation of corporate communication from within the corporate strategy, corporate identity and corporate image triangle is represented through symbolism, via the formation and continuous process of representing a corporate identity. In this way, symbolism in terms of graphic design, represents a significant role of corporate communication within the context of this thesis.

2.5.1 Corporate Identity

Corporate identity is a recognised term within the small business sector and at best represents a visual interpretation of business core values, at worst it represents a logo unprofessionally executed and bearing no relationship to business values. Van Riel (1992, p.28) recognises that the way in which a company represents itself through symbolism i.e. "logos and house style", is an outdated concept of the meaning of corporate identity.

Van Riel (1992) clarifies the confusion surrounding the terms corporate image and corporate identity, providing an understanding and dissemination of the corporate communication paradigm that has greatly influenced this study.

Henrion *et al.* (1992) provide various definitions of the term 'corporate identity', evidenced from the results of surveys carried out within their study. During the

research, telephone interviews were conducted with 160 people responsible for corporate identity from the top 500 European companies (*ibid*). Interviewees were asked: "How, briefly, would you define corporate identity?" (Henrion *et al.* 1992, p.29). The results revealed that: "It is clear that virtually no one knew exactly what 'corporate identity' meant, and that this confusion greatly hampers communication of the concept" (*ibid*). Clearly, these conclusions reveal the ambiguity surrounding the corporate identity term.

Moingeon and Soenen discuss the "five facets of collective identities" through professed, projected, experienced, manifested and attributed identity (2002, p.17). The integrative model is based on corporate identity as a multi-faceted issue that requires all five areas to be addressed. This multi-faceted approach also exists in corporate communication models that have informed this study, for example: Bernstein's cobweb (1986, 1992) and Lux's star (1986, 1992). The multi-faceted approach is evident in all business models within this study (see Chapter 4). This is important as it reflects the nature of existing practice.

Corporate identity is a widely discussed topic within visual communication. Authors such as: Olins (1978, 1988, 1989, 1990, 1995), Gorb (1988), Oakley (1990), Bernstein (1986), Floch (2000), Kapferer (1988, 2001), and Knapp (2001) explore various aspects of the corporate identity paradigm. As a key author within this study, Olins (1978, 1989, 1995) describes various aspects of corporate identity advocating the importance of visualising the company's strategy and brand personality through design. Often the organisation is more concerned with a projected identity, rather than clarifying its unique values (Argenti, 2003). Olins (1995, p.76) explains that the development of a corporate identity programme emanates from "the central idea" as "the driving force behind the organisation", supported by his vast experience as: "based around the 200 or so major identity programmes that Wolf Olins has carried out since it was started as one of the pioneering identity consultancies in 1965". Olins recognises that:

"All organisations are unique even if the products/services they make/sell are more or less the same as those of their competitors. It is their history, their structure, their strategy, the personalities who have created and dominated them, their successes and their failures, that shape them and make the organisation what it is." (1995, p.10).

This thesis acknowledges that “symbolism” (Van Riel 1992, p.32) in corporate identity within corporate communication is part of a whole that cannot be viewed in isolation (Van Rekom *et al.*, 1991). The literature reveals that corporate identity is not a straightforward issue to understand and therefore is problematic in providing satisfactory design solutions.

This thesis argues that it is unrealistic to expect the graphic designer to visually interpret small business values without sufficient information. This proposition is compounded by the fact that within the larger business context, according to Walker (1990), design mature businesses are more experienced in the design process than the small business sector.

2.5.2 Corporate Image

Van Riel (1995, p. 78) differentiates between image and identity, stating that: “ ‘corporate image’ can be described as the picture that people have of a company, whereas ‘corporate identity’ denotes the sum total of all the forms of expression that a company uses to offer insight into its nature”. According to Olins (1995, p.3), identity and image are intrinsically linked: “The totality of the way the organisation presents itself can be called its identity. What different audiences perceive is often called its image”.

The corporate identity mix (behaviour, communication and symbolism) combine to represent the “corporate personality”, which in turn is “reflected as the corporate image” (Birkigt and Stadler, 1992 p.33). Bernstein (1986) recognises that although corporate image is a reflection of corporate identity, it does not follow that image is perceived by all stakeholders in the same way. The image that stakeholders have of a business varies, depending upon the relationship each group or individual stakeholder has with the business. This emerges as a result of each stakeholder experience through individual interaction and involvement with the company. Van Riel (1992), Bernstein (1986) and Ind (1997) recognise that although corporate identity is communicated through behaviour, communication and symbolism, emanating from corporate strategy, interpretation of that strategy through image varies among stakeholders’ both internally and externally.

Bernstein (1986, p.125) acknowledges that corporate image represents: “The net

result of the interaction of all the experiences, impressions, beliefs, feelings and knowledge that people have about a company". An understanding of how the image of a business is perceived from all stakeholders (including customers) was an important aspect of the small business's value analysis process within this research (see section 6.3).

2.5.3 Corporate brand

Olins (2003) reflects that the notion of the brand is now a familiar term, emerging from the corporate identity context. The terms: brand, corporate identity and corporate image offer a great deal of confusion and are often miss-used within the cross-disciplinary areas identified within this research.

Olins (2003), Bernstein (1986) and Kapferer (1992) recognise that a corporate branding exercise encompasses ongoing processes dealing with corporate communication including identity and image initiated through promotion of the brand personality or reputation. According to Olins (2003, p.209), "The corporate terms: identity, image and branding will be replaced by the more appropriate term: reputation".

Branding, in terms of corporate identity and corporate image, represents more than personality or character. Building on organisational identity, authors such as: Reitter and Ramanantsoa (1985), Schwebig (1988) and also Kapferer (1992) proposes that the essence of a brand identity is found in answering six questions, involving: "individuality, long-term goals and ambitions, consistency, values, basic truths and recognition signs" (1992, pp31 - 32). Lury (1998), Ries (1998) and Pearson (1996) describe the specifics of developing and growing a brand through brand building, in terms of attributes, qualities and challenges. According to Pearson (1996, p.6), the attributes, qualities and challenges of brand building are represented by: "what the product is", "what needs and wants the product meets" and "what the customer associates with the product".

Kaplan and Norton (2004, pp52 - 63) question the "intangible assets" of a company in terms of the how employees perceive those values through its corporate strategy. Ind (1997) also recognises that business employees are a valuable force behind the brand and are responsible for communication the values of the business through its

corporate strategy. However, according to Ind: "most corporate strategy statements never actually penetrate the ranks of management to touch the minds of the employees doing the everyday work of a company" (*Ibid*, p.40). According to Mitchell (2002, pp99 - 105) and Lencioni (2002, pp113 - 117), incorporating employees within the business value evaluation process is an important aspect of understanding business values.

These authors reflect the perspective of this thesis. However, they refer to corporate identity, corporate image and brand management within medium and large organisations.

Dickson discusses the attributes of brand management within medium and large organisations in relation to small business activities, explaining that a key attribute of brand management in medium and large organisations is that they "achieve their goal through consistency in presentation, combined with the art of advertising agencies, design companies and marketers" (2001, p.77).

Although the small business sector recognise the importance of branding, they generally do not enter into this level of corporate communication input. This is reflected in research carried out by Wootton *et al.* (1998) and Bruce *et al.* (1988) and also from authors such as: Dickson (2001) and Walker (1990). According to reports carried out by Sir George Cox (2005) and the UK Design Council (2003) cost, lack of understanding and knowing where to turn for assistance are the main factors that deter the small business from actively pursuing brand development. This is explored further in section 2.6.

2.5.4 Visual communication

The context of visual communication within this study is situated within the corporate communication paradigm relating to a variety of authors such as: Van Riel (1992), Moingeon and Soenen (2002), Argenti (2001), Balmer and Greyser (2003), Olins (2003), Bernstein (1986), Dickson (2001), Floch (2000), Kapferer (1988, 2001), Knapp (2001), Lury (1988), Seehra (2003), Shitaro and Webb (2004) and Morgan and Welton (2003). According to Van Riel (1992, p.28), visual communication represents corporate identity through "symbols". It is also contextualised within communication theory as "a mode of expression", as described by Mattelart and Mattelart (1995, p.156).

The research objective of this study is to investigate visual communication in relation to corporate communication processes, focusing specifically on the early stages of the graphic design processes within the small business sector. Although semiotics as a "natural connection between the signal and its signification" (Saussure 2000, p.68) underpins the visual communication paradigm, the depth of literature relating to the theory of semiotics is not explored further here. However, visual communication in terms of graphic design interpretation of business values is a relevant aspect of this study.

According to Floch, visual identity is produced by "bricolage" underpinned by cultural anthropology and also as a development of "aesthetic semiotics" (2000, pp7-8). In working on the development of logos and systems of visual identity, Floch refers to the language used as: "a community of value" (*ibid*). Corporate identity, depicted through visual communication is: "Like any other identity, visual identity can, in the first instance, be defined in terms of both difference and continuity. Visual identity means difference because it ensures the recognition and proper positioning of a commercial enterprise and because it is an expression of the company's specificity" (Floch 2000, p.32). Floch evaluates Ikea's (the Scandinavian home furnishing company) underlying values as emanating from its corporate strategy, explaining that:

"In understanding the semiotic perspective of Ikea - described as 'practical' values, the founder provides a statement of purpose and ethos: 'We should be thrifty, even to the point of meanness. We need neither big titles nor uniforms. Divide your life into ten-minute units and waste as little of them as possible on futile pursuits'. The aesthetic that goes with this morality is one of 'sobriety' and 'lack of anything fancy': pale colours and the curves of the wood alone must ensure the 'warmth' of this simple and ingenious comfort" (2000, p.126).

The way in which company values are translated through visual communication, according to Floch (2001, p.9), is described as involving "the selection or preservation of those qualities of form, colour, volume or typography that are deemed pertinent" and facilitating "the choice or preservation of those qualities that assure that the packaging, product design or logo signify what they are supposed to signify".

Bernstein (1989, p.35) acknowledges that visual communication translates values through symbolism involving "metaphor" as complex and often lacking continuity. This lack of continuity misrepresents the values of a business and therefore it is essential to ensure

that graphic design translates business values as accurately as possible. In this respect, the accurate communication of business values is integral to the graphic design process.

According to authors within the visual communication arena such as: Barthes (2000), Santong (1978), Floch (2000), Rose (2003), Emmison and Smith (2002), Evans and Hall (2003) and Morgan and Welton (2004), who discuss the way in which visual communication is influenced by the cultural context. This is an important aspect of how the graphic designer translates values.

Shirato and Webb (2004, p.16) state that the graphic designer applies cultural literacy to “naturalise certain values and ideas”. In so doing, the designer creates a visual language, specific to their clients’ business sector.

2.6 The small business sector

As the graphic designer considers what constitutes a small business, this section of the review reveals that the literature available is generally inconsistent and relatively sparse. Inconsistencies exist regarding literature that considers the UK small business in terms of how it operates, what factors influence its birth, growth and death, the impact it has on employment and where it fits in relation to the larger business sector. These areas will be considered in this section of the review in order to clarify what constitutes the small business sector in relation to this research.

Research carried out by Wootton *et al.* (1998) that influenced this study, claims that little design management research has been carried out into the small business sector. This may be due to the small business sector being relatively young: “over a quarter of a century old”, according to Curran and Blackburn (2001, p.156). Curran and Blackburn also acknowledge “the difficulties in locating relevant previous research” and warn that: “the apparent simplicity of the small business has tripped up a lot of researchers. Small does not mean simple. Neither is a small business merely a scaled-down version of a large business” (*ibid*, p.5).

Economic and statistical guidelines have historically been used to identify the UK small business sector, as defined within a Report of the Committee of Inquiry on Small Firms (Bolton Committee Report, 1971). Analysis of the Bolton Committee Report (1971)

proved problematic as the measurement criteria resulted in inconsistencies: varying definitional perspectives were applied i.e. employment, turnover and assets.

The Bolton Report (1971) acknowledged that the small business was managed through ownership or part ownership from a personalised approach and not from a formalised management structure. This was inconsistent in relation to the statistical management criteria reported within the manufacturing sector, where up to 200 employees could be found and where management structures were in place (*ibid*).

This inconsistency was highlighted further by research carried out by Atkinson and Meager (1994) who reported that managerial appointments are made when firms reach a size of between ten and twenty workers and also that decisions are made by other people in the business during this stage of the small business's growth.

Another inconsistency in understanding this sector related to the proposition that the small business could not affect its environment (Bolton, 1971). Storey (1982, 1990, 1991, 1993, 1994, 2002) represents a key author within this thesis regarding informing the study with issues that influence the small business sector. Story (1991, 1993, 2002) prescribes that the small business operating from niche markets, often in geographical isolation can in the short term achieve higher prices and profits than the industry norm.

Five critical points emerged from the Bolton Committee's statistical identification of the small business (Wynarczyk *et al.*, 2002). These included:

1. No single identification of "smallness" exists. Employees, turnover, ownership and assets are the criteria applied to define small businesses.
2. Three different upper limits of turnover are applied to different sectors and two different upper limits of employees are applied.
3. Monetary definitions are complex to confirm due to inflation rates over time. Also, International monetary comparisons are problematic due to currency differences.
4. Employment criterion is difficult to define over time due to increases of productivity per unit of employment, particularly in the manufacturing sector.
5. Statistical definition assumes that the small business sector is homogenous.

Factors that influence an understanding of the small business sector in relation to the economy are affected by birth, growth and death rates of the sector. According to

Storey (2002) and Curran and Blackburn (2001), the birth and death rates of the small business sector are difficult to measure due to problems surrounding registration: not all small businesses register. Also, the UK Governmental Small Business Service state that there is no single source of estimates of the number of businesses in the UK (www.sbs.gov.uk/smes, 2006). Value added tax (VAT) and/or Pay As You Earn (PAYE) registration are useful methods of measuring small business statistics (www.dti.gov.uk, 2007). However, only a little more than half (55 per cent) of all small businesses were VAT registered at the time of start-up (www.sbs.gov.uk/analytical, 2006).

The growth rate of the small business sector can be easier to determine where the small business ultimately grows into a medium or large business. A key element of government policy-making is influenced by small business growth (Storey, 2002). This is reflected in the economy through employment implications of job creation and low unemployment (www.dti.gov.uk, 2006).

Employment in the small business sector is dependant upon the quantity and quality of jobs available (Storey 1994, 2002). This is influenced by the small business job specification, training, remuneration, working hours, job satisfaction and fringe benefits such as working within a small business environment, greater autonomy, responsibility and involvement (www.dti.gov.uk, 2006).

It is important to recognise the employment significance of the small business sector within the UK economy as a whole: the small business sector employs almost half (46.8 per cent) of an estimated 22 million people who are employed in the UK (www.dti.gov.uk, 2006).

Although the government recognises that public policy making influences promotion of the small business sector across the wider economic and social framework, negativity exists regarding the range of government services delivered both locally and nationally. The Annual Small Business Survey findings (2002) reveal, according to small business owners that:

*“There are too many government agencies offering similar services’
‘There is inconsistency in the quality of services delivered to business’
‘I would like government support to develop my business but struggle to find out what is available’”* (www.sbs.gov.uk/analytical, 2006).

Curran and Blackburn (2001) recognise that the financial assistance provided to the small business sector varies within the financial environment (with bank-lending criteria reported as: "asymmetrical" within this sector (Storey 2002, p.205). According to research carried out by UK Small Business Service, the amount of financial assistance sought proportionately increases in relation to the size of the business (www.sbs.gov.uk/analytical, 2007).

These authors describe the difficulties encountered during the lifespan of the small business as it struggles to survive. This is significant, as this vital information in understanding the nature of the small business sector can remain unknown to the graphic designer, as a result of the inconsistent nature of literature available.

2.6.1 Differences between small and larger businesses

Wynarczyk *et al.* (2002, pp10 - 12) describe three aspects that distinguish small businesses from larger businesses, involving: "uncertainty, innovation and evolution". According to Wynarczyk *et al.* (*ibid*), the small business sector experiences uncertainty due to: a) a small market share which compromises the small businesses ability to secure premium prices; b) as a sub-contractor or with a limited customer base, the small business is dependent on dominant customers who can withdraw easily and c) the small business's relationship with customers is generally closer than that of the large business due to the lack of reporting procedures found in the large business, resulting in a greater amount of time spent on fewer customers.

In general, external environmental influences present uncertainty to the small business, while at the same time the small business tends to operate from a strong and consistent internal environment. Research carried out by Scott and Bruce (1987) recognise that as the small business grows, the stages at which the growth development takes place become progressively decentralised (Storey 2002, p.121).

Bradburd and Ross (1989) claim that the small business tends to serve niche markets, as opposed to the large business, inclined to standardise products or services. In this respect, the small business can provide innovative solutions to the market place without the research and development costs generally incurred by large businesses as

described by Storey (2002). Wyncarczyk *et al.*, (2002, p.12) state that assumptions regarding the small business as a “scaled down” version of a large business are inaccurate and should instead be explored through “bottom-up” theories. Conversely, small businesses do not scale up according to Hamm (2002, p.110), as “the [entrepreneurial] qualities that serve them well in launching businesses often bring them down as their companies grow”.

In this respect, the context of the small business as defined within this study, in relation to larger businesses is important because they tend to operate in a more intimate and intense environment, with few support systems in place. This requires appropriate and careful consideration when dealing with this particular market sector. These factors bring particular challenges to the independent graphic designer in dealing with small businesses and tend not to be issues that are as relevant in larger organisations.

2.6.2 Graphic design constraints within small business practice

The role of the graphic designer in small business practice varies according to client and designer needs, as defined within this literature review (see section 2.4.2).

The Cox Review (2005), the UK Design Council (2006) and the UK Small Business Service (2004) all identify that the small business is constrained by design costs, a lack of experience and understanding of the design process (including how and where to find help) and also how design can influence market competitiveness (www.designcouncil.org.uk, 2006; www.sbs.gov.uk/smes, 2004; Cox Review, 2005). These aspects of the small business graphic design client represents major influences that impact on the client-designer processes and procedures.

2.6.2.1 Cost of graphic design to the small business

According to the Design in Britain, 2003 - 04 survey findings, “Graphic, branding and communications design is the UK’s most common type of design activity” (The UK Design Council, 2004). Although graphic design is clearly in demand within the UK business sector, it is not widely used within small business practices as described by Walker (1990).

Research carried out by the UK Design Council reported that: "Finance is the biggest factor stopping organisations making more use of design" (Design Council National Survey, 2002).

The Cox Review investigated "The barriers to greater creativity in the smaller business", reporting that: "they [small businesses] perceived neither the time nor the cost to be justified" (Cox 2005, p.14). Cost is therefore a significant issue to the small business graphic design client.

2.6.2.2 Small business understanding of graphic design

The Cox Review focuses on "what stops SMEs making greater use of the UK's creative talents, and what can be done about it" (Cox 2005, p.4). Influences that emerged within the report involved: a) understanding how and where to better utilise and source creativity; b) lack of confidence in the return on investment in terms of time, cost and disruption and c) lack of knowledge or understanding of how and where to find help (Cox, 2005).

Recommendations resulting from the report are based on existing company achievements.

These are:

- *Tackle the issue of awareness and understanding, including taking the Design for Business programme, which has been developed and piloted by the Design Council over the last four years, and making it widely available to SMEs throughout the UK and those that work with them.*
- *Improve the effectiveness of government support and incentive schemes, prominent among which is the Research and Development (R & D) Tax Credits.*
- *Tackle the issue, in higher education, of broadening the understanding and skills of tomorrow's business leaders, creative specialists, engineers and technologists" (Cox 2005, p.4).*

The inexperience of the small business in terms of the design process relating to design interpretation of business values is a key factor that influences the context of this study. According to Wootton *et al.* (1998, p.8), the "front-end" as a critical phase in the design process is "imperative for the successful generation of the 'right' product specification". These factors are essential to an effective design process and outcome for the small business client.

2.6.3 Small business evaluation of core values

Literature was sourced initially from Design Management with particular interest in Design Strategy. As little literature was found within Design Management that related directly to the research proposition within this study, the scope was widened, with more appropriate information in relation to this study sourced within Corporate Communication.

Van Riel (2003, p.163), states that although "located within business administration and economics since the 1970s" the corporate communication process became a recognised profession during the 1980s. The corporate communication process raised the awareness for the need to formulate an understanding of corporate values (Argenti, 2003).

According to Mattelart and Mattelart (1998, p.139), the Entrepreneurial model of communication as a key small businesses resource, "was promoted as a technology for managing social relationships and imposed recognition as the only effective method for establishing links with various components of society". Whilst this model is useful in developing an understanding of start-up businesses, it does not address an evaluation of business values required to inform the early stages of the graphic design process.

Corporate Communication practice, informed by business theory including management and marketing models has influenced this study. These disciplines conclude the remaining aspects of the cross-disciplinary nature of the literature review.

2.6.3.1 Design Management

The design management process aims to unify coherency of any given design project at a strategic level within an organisation. Design management literature represents key information on managing the design process and the value of design in business as a strategic management tool provided by key authors such as: Wootton *et al.* (1998), Bruce *et al.* (1988), Scott and Bruce (1987), Phillips (2004), Cooper & Press (1997), Press & Cooper (2003), Borja de Mozota (1998, 2003, 2005), Bruce and Bessant (2002), Gorb (1988) and Oakley (1990) and also pertinent organisation such as: the Design Management Institute, the UK Design Council, the European Academy of Design and the recent Design Management Symposium (2006). However, little information is available

within the field of design management that relates directly to defining small business values as part of the graphic design process.

The Design Management Institute and the UK Design Council recognise that although a relatively young profession, design management is effective when carried out within organisations (www.dmi.org, 2004; www.designcouncil.org.uk, 2003). Research carried out within the design management context by authors such as: Gorb (1988), Oakley (1990), Borja de Mozota (2003), Cooper (1993, 1998, 1994, 1995, 2002, 2003) and Press *et al.* (1999, 2001) acknowledge that mature organisations, experienced in design processes, are beginning to adopt design management practices.

A review of research carried out by Wootton *et al.* (1998) that has influenced this study within the design management context was described in section 2.4.2. The Requirements Capture process represents a key source of information within design management that addresses the front-end of the design process within the SME sector (Wootton *et al.*, 1998). However, it fails to address the process of defining core values within the Requirements Capture process (*ibid*).

In integrating design management processes into the SME sector, research conducted by Bruce *et al.* (1988) provides conclusions that identify the importance of design awareness and training within the SME sector. Bruce *et al.* (1988, p.2) reported that specifically within the small business sector: "Many small companies need extensive training and support by a qualified design manager in order to even begin the design management process, let alone manage it successfully".

Although medium and small enterprises are largely unfamiliar with the design management concept, Design in Britain (The Design Council, 2002 - 2003) reports that small and medium-sized businesses have a growing awareness of the need for design within business.

2.6.3.2 Design Strategy

Cooper and Press (1997), Press and Cooper (2003), Olins (1978, 1989, 1995, 2003), Borja de Mozota (2003, 2005, 2006) and Phillips (2003) advocate design integration in business at a strategic level.

Design management acknowledges the necessity of integrating design at a strategic level in business, therefore enabling the designer to understand, plan and deliver appropriate corporate communication solutions according to: Borja de Mozota (2003), Von Stamm (2005), Press & Cooper (2003) and Bruce and Bessant (2002). Cooper and Press (1997, p.228) claim quite simply that: "A design strategy should set out how the company is going to use design to achieve overall corporate objectives".

Within the context of this thesis, it is impossible to disassociate design strategy from corporate strategy as the research proposition offers that an understanding of small business values is an essential aspect of the front-end of the design process. Without an understanding of business values the corporate strategy cannot be appropriately developed and therefore any design strategy that emanates from a corporate strategy must be informed by business values. As part of the "corporate strategy - corporate identity - corporate image triangle", design strategy is an essential aspect of the design process in line with corporate communication theory, according to Van Riel (1992, p.19).

However, incorporating design at corporate level is uncommon within small business practice, as described by Wootton *et al.* (1998), Bruce *et al.*, (1998) and Dickson (2001). Cooper and Press (1997, p.139) recommend that a new relationship between client and designer, where design could "better exploit its abilities to consider 'the bigger picture' and thus contribute to industry more effectively" would engender a deeper level of communication at the early stages of the design process. This would also benefit small companies according to Bruce *et al.* (1998, p.47) who recognise that small business design clients are not design aware, have distinct design needs and require specialist design training to understand the importance of engaging "with the designers to develop the design project in partnership, rather than the graphic or the product designers developing [the design solution] externally and in isolation".

Boyle (2005) offers a simple business hierarchy model (Figure 2.4) that could benefit small business practice, not only in respect of informing the graphic design process but also in communicating business values across the businesses' many audiences.

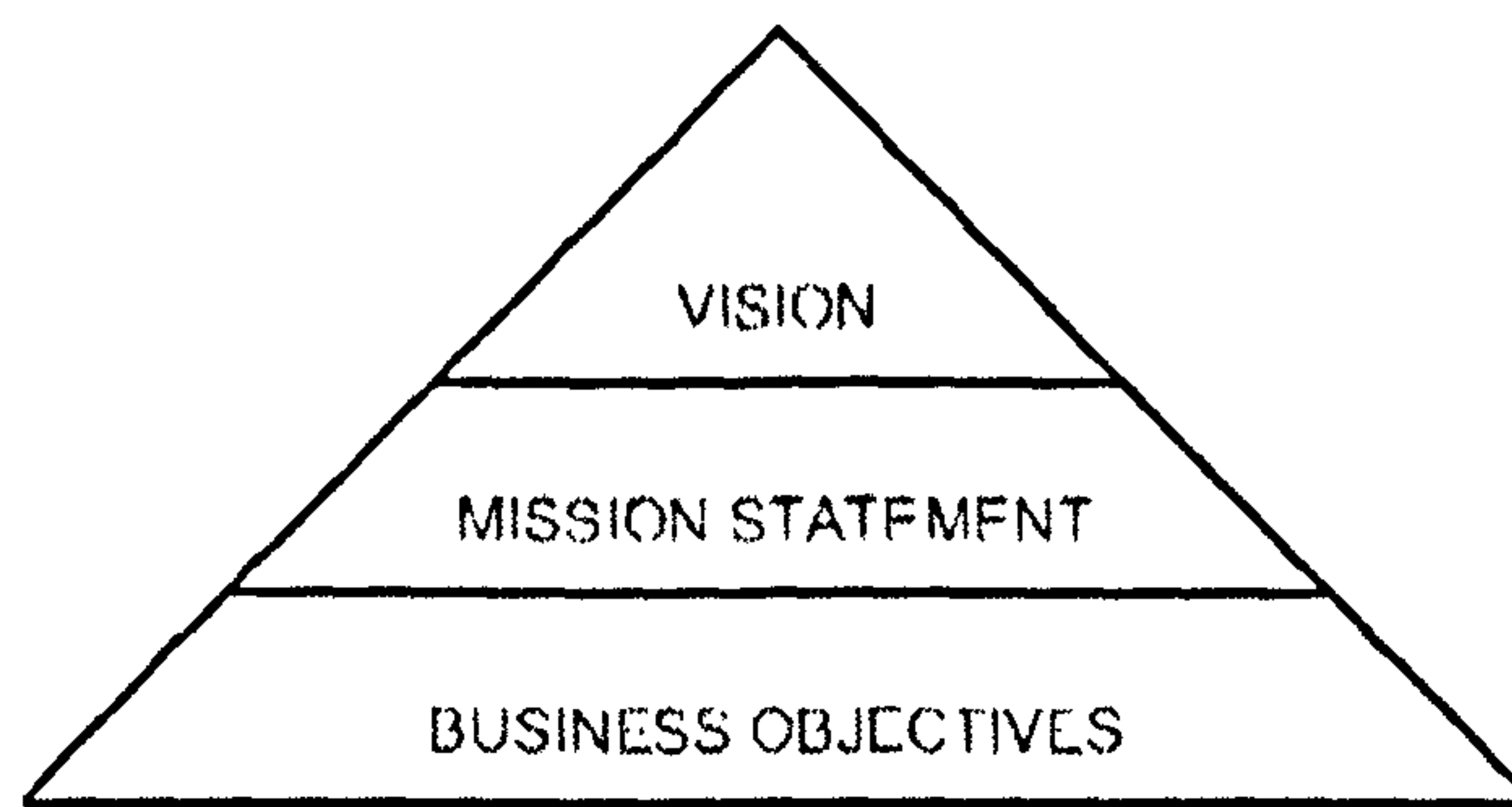


Figure 2.4: A business hierarchy. Source: Boyle (2003, p.35).

An interesting aspect of this model is the implicit connection with Maslow's theory of hierarchy of needs (1943). Maslow posits that there exists a natural individual hierarchy of human needs that require to be satisfied in order to "develop one's full potential as a human being" (2005, p.430). Parallels can be drawn between human hierarchy of needs and organisational hierarchy of needs. Similarities exist regarding identifying business requirements from: business objectives, mission statement and vision within a hierarchical framework, as detailed in Figure 2.4.

To satisfy the hierarchy of organisational needs the business progresses from fundamental issues of business development to self-actualisation of business values, resulting in a more transparent organisational identity. Organisational value-actualisation as an analogy of Maslow's (1943) human self-actualisation would therefore be positioned at the highest level of the hierarchical framework.

Organisational identity in relation to individual identity is a topic of debate that has attracted cross-disciplinary discussion from the field of management and psychology according to authors such as: Cornelissen (2002), Haslam *et al.* (2003) and Payne and Holt (2001). Although an interesting aspect of corporate identity, organisational identity is out with the scope of this research.

2.6.3.3 Corporate Communication

Key corporate communication models that have been adapted relative to formulating an analysis of small business values within this study include: Bernstein's Cobweb method (Bernstein, 1986) and Lux's Star method (Lux, 1986). Both models involve a process of

communication that encourages internal reflection and analysis, combined to produce an understanding of business values at a given point in time.

Bernstein's Cobweb method (Bernstein 1986, p.234; Van Riel 1992, pp49 - 50) represents an evolving evaluation of corporate values. It serves as a communication tool, providing an assessment of the perceived internal values of the organisation (agreed upon by decision makers) and then distributed within the organisation to be completed by all internal staff (Figure 2.5). The resulting collated and analysed information presents an insight into how the perceived values match up between decision makers and staff (Figure 2.6).

The relevance of this method is two fold: first it encourages stakeholder input into the analysis process and second it allows key decision makers to match their perception of business values against the resulting analysis. This process engenders an evaluation of business values from a wide perspective and can reveal inconsistencies that the key decision makers may not be aware of. According to Ind (1997), this process is essential in accurately communicating values from those people who have a "stake" in the business.

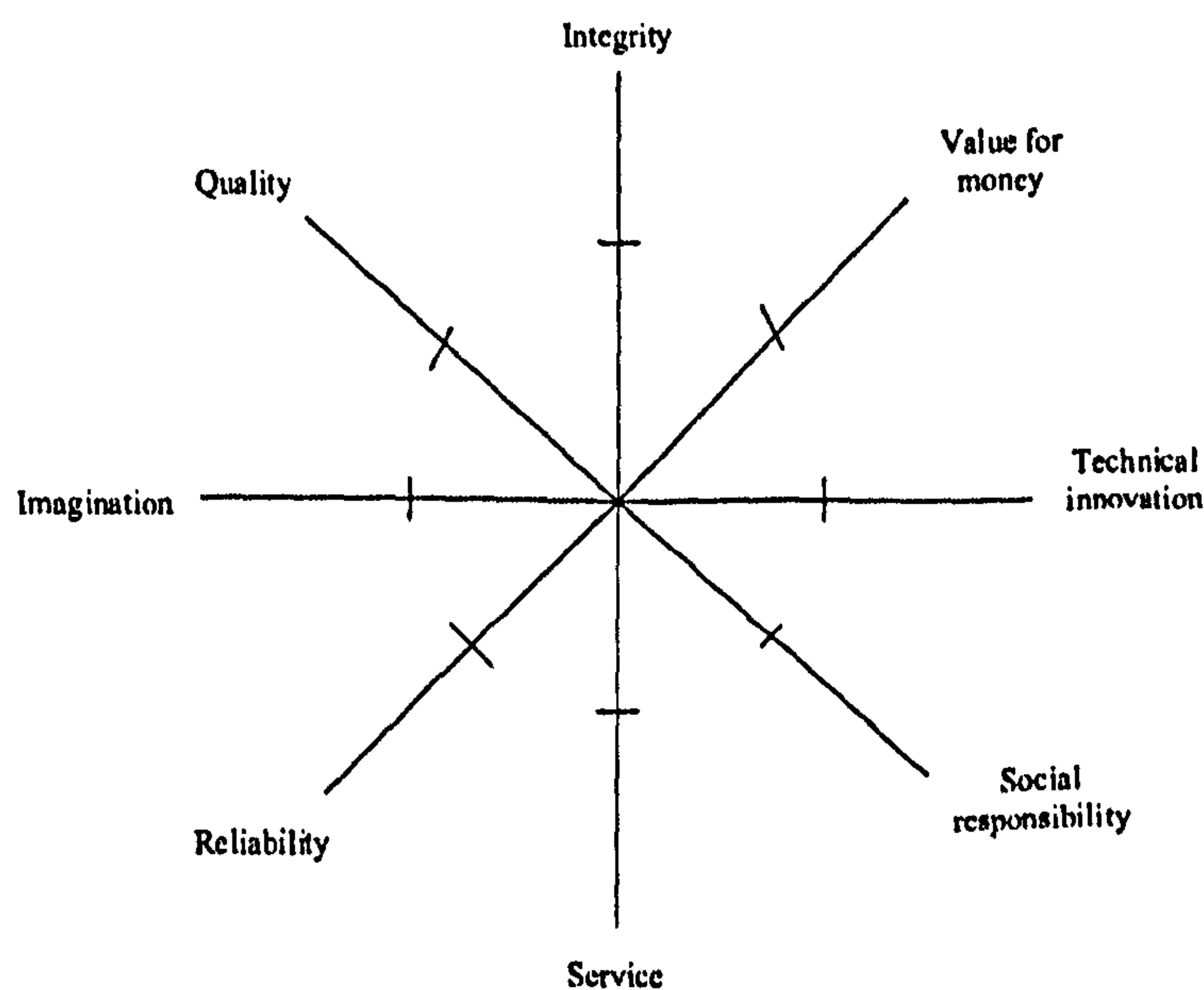


Figure 2.5: Bernstein's cobweb Method *before* discussion. Source: Van Riel 1992, p.49.

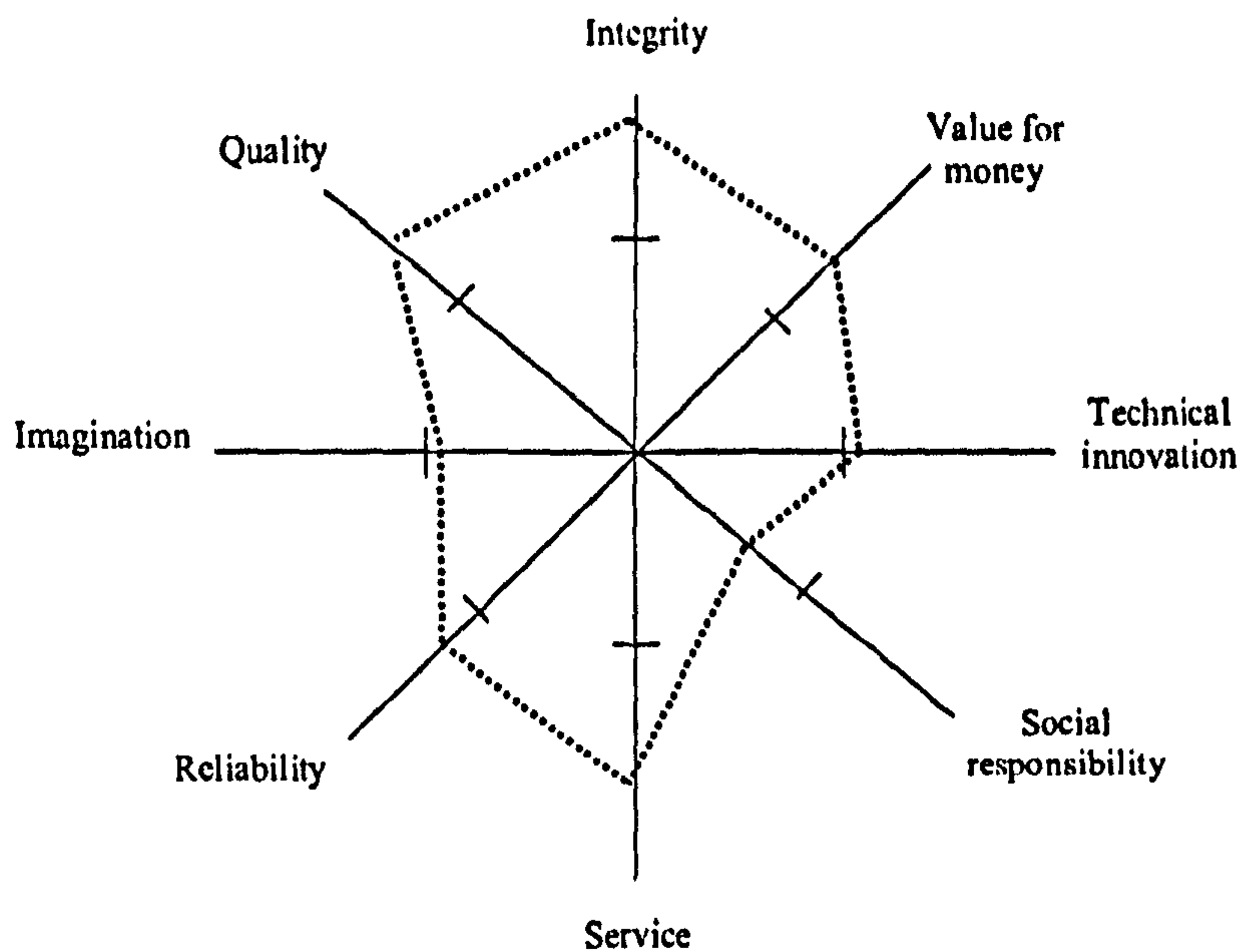


Figure 2.6: Bernstein's cobweb Method *after* discussion. Source: Van Riel 1992, p.50.

According to Van Riel (1992, p.51) Lux's star method is similar to Bernstein's cobweb method in terms of encouraging a communication platform for internal and/or external stakeholder discussion. The main difference between the two methods is that Lux's star method begins with a pre-determined set of attributes. The pre-determined attributes of Lux's star method are detailed in Figure 2.7.

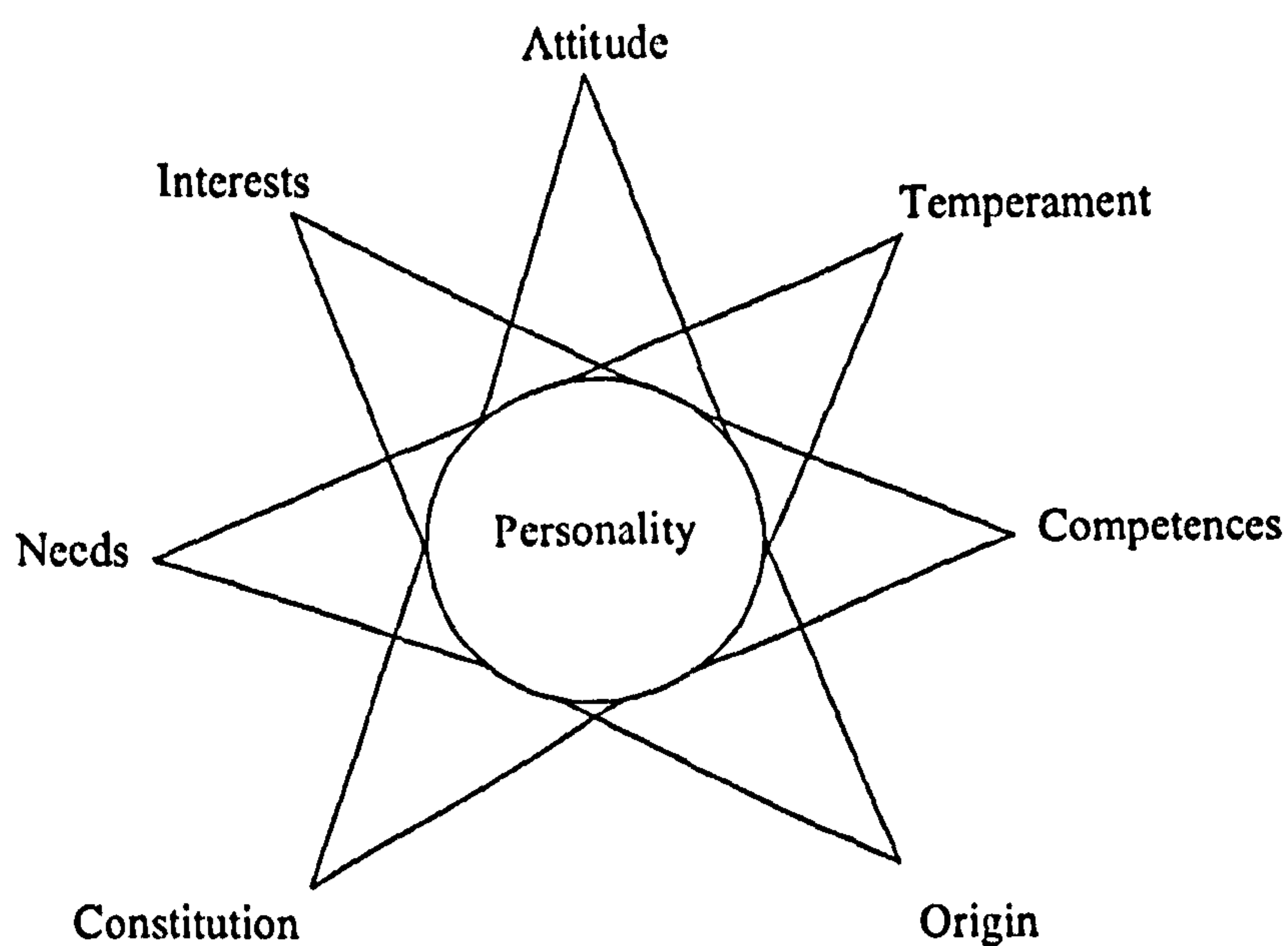


Figure 2.7: Lux's Star method. Source: Van Riel 1992, p.52.

Influenced by Guilford (1954), who offered seven dimensions that characterised individuals, Lux (1992) adapted Guilford's dimensions to reflect business identity analysis. Lux believed

that the seven areas: attitude, temperament, competences, origin, constitution, needs and interests represent distinguishing business personality attributes that are evident in all businesses (1992, p.50).

The author acknowledges Lux's (1992) business personality attributes as a carefully selected process, influenced by Guilford (1954) but questions the nomenclature of the terms in two respects: 1. Can these generic terms truly represent the small business sector? 2. Are the selected terms appropriate to the organisational culture within each individual small business?

One method of ensuring that the nomenclature relates to the specificity of the business involves combining both aspects of Bernstein and Lux's nomenclature process. This process was carried out by selecting Lux's terms, adopting Guilford's dimensions, as a starting point and "filtering" those terms through selected management and marketing models (refer to section 4.3.2).

It was necessary to adopt Lux's method (1986) as a pre-determined set of terms that had been tried and tested by Guilford (1954) but it was also important that the selected terms were appropriate to the specific business, as in Bernstein's method (1986). As the key decision makers within each business selected key terms to be used, this could result in a complex negotiation of semantics (Dong, 2005). It was important that the selection process of key terms, generic to the small business sector involved four simple key questions (see section 4.3.2, Figure 4.7). It was also important that the resulting terms were derived from "common" business language relevant to the small business sector. Therefore, the two problems identified earlier could be addressed in this way.

The methodological approach carried out i.e. an intense iteration process involving seven case studies and four experienced graphic designers, would ensure that the final key terms selected had undergone a rigorous analysis process within the small business sector and also by a number of experienced graphic designers (see Chapter 5). In this way, the nomenclature could be tailored to the specific culture experienced within each small business.

2.6.3.4 Management and Marketing

Management theory delivers a plethora of evaluation tools aimed at understanding the business from various analytical perspectives. The aim of this section of the literature review is to understand management theories that underpin core business value evaluation.

Overarching management theories can be applied to a variety of different businesses. It is not the purpose of this research to understand all management theory: that would be impossible. The research acknowledges that management and marketing theories play an important part in the formulation of corporate communication. However, small businesses in general, are not familiar with large business corporate identity evaluation practices and in this respect the focus has remained at an introductory level.

According to Drucker (1993, pp9 -10), a common sense approach to business theory involves three basic assumptions, first: "assumptions about the environment of the organisation: society and its structure, the market, the customer, and technology"; second: "assumptions about the specific mission of the organisation" and third: "assumptions about the core competencies needed to accomplish the organization's [sic] mission".

Underpinning these three aspects of business theory is an understanding that society, markets, customers and technology are in a constant process of change as defined by Drucker (1993) and Handy (2002). Johnson and Scholes (1993, p.158) acknowledge that these issues are essential in formulating a business strategy, stating that: "values of society change and adjust over time, and, therefore policies which were acceptable twenty years ago may not be so today".

The notion that corporate strategy refers to a plan which "is written in stone" and provides the basis and focus for the business throughout its existence is an outdated theory according to Johnson and Scholes (1993, p.157). Rather, corporate strategy is influenced by changes in society, markets, customers and technology that shape the evolving corporate strategy (*ibid*).

Handy (1994, p.61) describes the basic purpose of management theory as improving business ventures in line with internal and external influencing factors, to encourage "the past and the future to coexist in the present". These influences within the

business environment described by authors such as Drucker (1993, 1998, 2003), Handy (1994) and Johnson and Scholes (1993) reflect the perspective within the context of this study.

This thesis argues that understanding business values does not follow a prescribed process, due to the fact that business values are as unique to each business as the DNA (deoxyribose nucleic acid) coding is unique to every living entity (Watson and Crick, 1953). However, as with the DNA coding where generic elements exist but are unique to one particular entity, business values involve generic elements known within the business that combine to make up that unique entity.

Turner (BAAs design director) clarifies that the need “to understand the context of design – where it touches your business” is through “the DNA of the business” (1999, p.12). In order to “understand the context of design” i.e. “where it touches the business”, this study focused on sourcing various core business models that could underpin the development of “the DNA of the business” (*ibid*).

The inclusion of business models was to try and understand those generic business models that were in common use and that the small business sector may be aware of. It was also important to understand the intended benefit of these models within the small business context. In this respect the research has focused on generic methods of evaluation and analysis of core business values, drawing from existing corporate communication, management and marketing models. Appendix 4 provides a summary of these selected models. The benefits of these models and their relevance within the context of this study will now be described.

SWOT Analysis (1993) offered a “bi-polar” semantic approach that was simple in terms of offering four key areas of the business to consider: strengths, weaknesses, opportunities and threats. The language used is simple and straightforward and this business analysis tool that is also a well known, tried and tested method according to Johnson and Scholes (1993). In developing the Communication Design Tool (CDT), the SWOT Analysis model represented a key focus in maintaining a simple and clear solution to evaluating a business through four core areas: strengths, weaknesses, opportunities and threats.

As a method with which to track changes in the business in line with the environment, PEST Analysis (1993) was relevant because it could provide an evaluation of the business at any given point in time. This was important as it reflected the “constant flux” management theory as described by Drucker (1993, p.9), which emphasised the need for an ongoing process of analysis as a method of tracking the development of the business according to Johnson and Scholes (1993). Both Bernstein's cobweb method and Lux's star method could also be used to track attitudinal changes and changes in perception throughout the lifespan of the business (Bernstein 1986, 1992; Lux 1986, 1992). As the CDT could be used independently by the small business, it was important to ensure that the “tracking” ability was designed into the CDT from the outset. This aspect of the CDT could be carried out by the business without the input of the designer. It was only where the resulting business values were aligned (or otherwise) to the graphic design preferences that the graphic designer's analysis was required.

Understanding the business in terms of “competitive forces”, Porter's (1985) model offers an evaluation of the businesses competitors in the market place involving: new and existing businesses, suppliers, customers and other products. The author made a connection between the need to understand external “forces” that could affect the small business with the visual language of key competitors, as an important aspect that linked the analytical process within Porter's business model (1985) with that of the information gathering design process. This connection was significant as it introduced a cross over with the needs of the business in understanding its values and the needs of the graphic designer in understanding the “forces” that influenced the design process (see section 4.3.5). It was at this stage in the research that the author made the connection between a method with which to link business values to graphic design elements through analysing the way in which the intangible (business values) could be translated into the tangible (graphic design elements). In essence, how values are translated through design.

As a relatively new management model, Balanced Scorecard (Kaplan and Norton, 1996) represented an interesting arrangement of business perspectives: learning and growth; business process; customer perspective; financial perspective. The Balanced Scorecard model (*ibid*) provides an understanding of the business from a variety of perspectives, similar in concept to SWOT analysis. Specific to the Balanced Scorecard

model is a “double-loop” feedback that provides both retrospective and future planning perspectives/analysis. The feedback aspect of this model was important as it encouraged the business to recognise the past, present and future in contextualising the development of the business as a method of analysis (see section 4.3.1.4).

Within the context of marketing, the marketing Mix (Jobber 1995, pp14 - 21) and Fishbein and Ajzen's model of reasoned action (Jobber 1995, p.71) were also considered relevant. The marketing Mix is a well-known model of understanding the balance of ingredients that combine to measure the success of the business. The evaluation process of understanding the *right* balance within the marketing context mirrored the *multi-faceted* approach also adopted by Moingeon and Soenen within corporate communication (2002, pp13 - 34). Although it was important to maintain simplicity in terms of SWOT Analysis's bipolar semantic perspective, it was also essential to offer alternatives as part of the analysis process. In reviewing business analysis models, the author recognised that all models incorporated alternative or “multiple faceted” perspectives as described by Moingeon and Soenen (2002, p.30).

The relevance of Fishbein and Ajzen's model of reasoned action (1995) is in evaluating the business within a specific context. The process of “reasoned action” as described by Jobber (1995, p.71) represents a considered judgement that is analysed as a process of evaluation through actions such as “beliefs”, “attitudes” and “intentions”, that lead the customer to a purchase. These actions: beliefs, attitudes and intentions, underpin the evaluation process within Fishbein and Ajzen's model (1995) in relation to a specific business value. It is the reflective aspect of Fishbein and Ajzen's model (1995) that is significant within this study.

The marketing perspective within this research, according to Sheldrake (1996) and Jobber (1995) acknowledges that marketing places the customer at the heart of all business activities and also that marketing can influence business activity and growth development. The two fundamental opposing business philosophies: marketing (customer) orientation and production orientation was considered an important aspect of understanding the values of a business to determine the marketing “orientation” of the business, as defined by Jobber (1995, p.7). This was achieved through a “rating” process

within the CDT questionnaire: section 3 b) customer service; product/service quality (see Appendix 3.6).

Within this section of the literature review there is little literature that directly informs the small business in evaluation of core values as part of the graphic design process in relation to the scope defined within this research.

2.7 Summary of literature review

The literature review has revealed that there is little formal research available regarding the graphic designer within the small business context. The lack of research within this area underpins the need for this research study to be carried out.

While the literature review acknowledges that information relating to the focus of this research is available to larger businesses, it does not apply within the small business context.

The information gathering process concerning the graphic designer in working with the small business client was also reviewed within the literature. The review highlighted difficulties that arise during this process, specifically surrounding the design brief and also the client-designer relationship.

A great deal has been written on corporate identity, image and branding communicated visually through graphic design, specifically within medium and large organisations. However, there is little exploration of methods to understand how the small business client communicates core business values to inform the graphic design process.

The published literature does not provide the small business with information on how to achieve an understanding of its individuality and how to communicate this individuality to better inform the graphic design process. These concerns are central to this research.

CHAPTER 3: Methodology

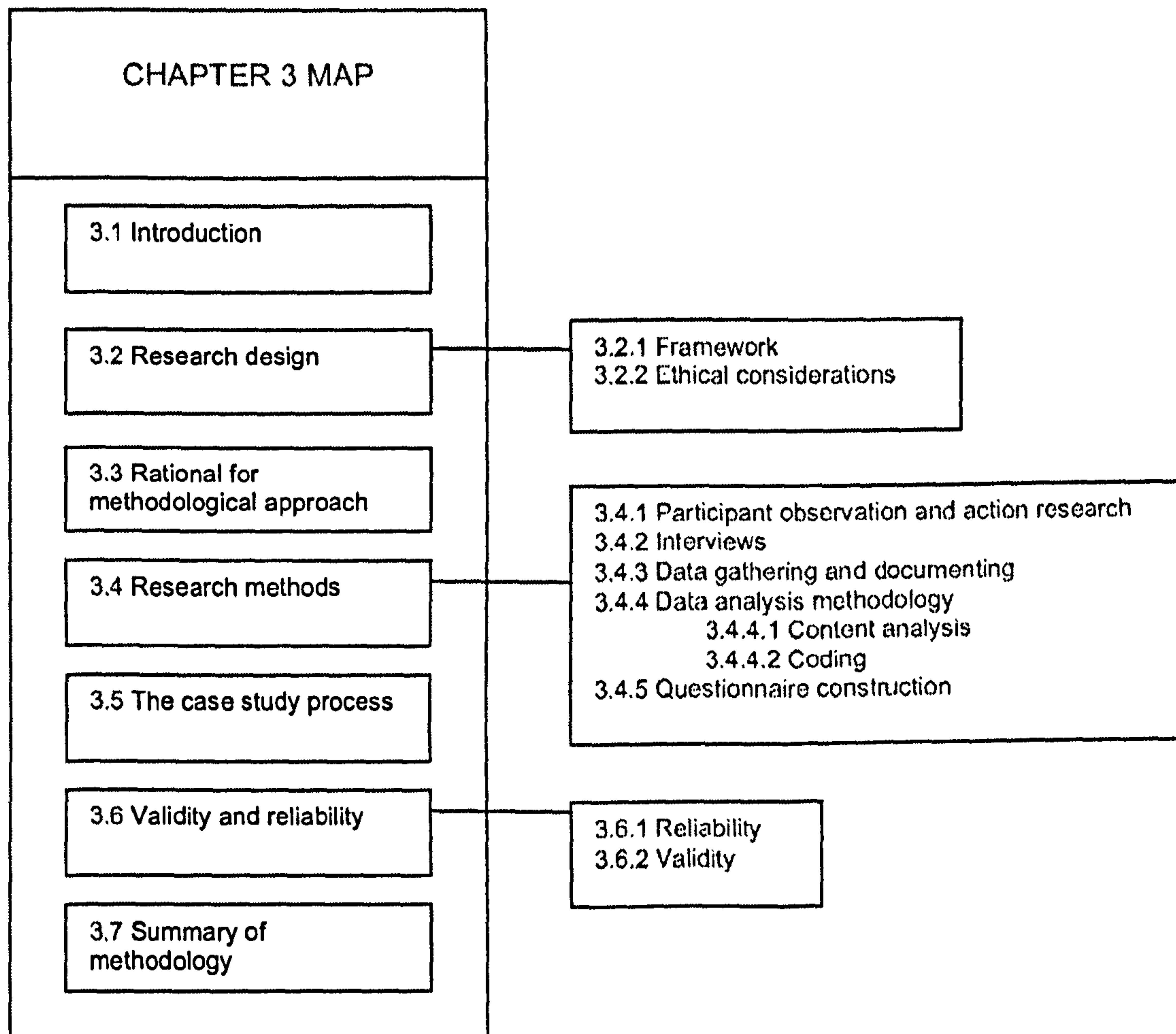


Figure 3.1: Chapter 3, chapter map

3.1 Introduction

This chapter sets out to explore decisions made regarding research methods within this study. An explanation of the methodological approach carried out and ethical considerations are reported. A summary of the analytical approach and explanation of the research process is provided, concluding the chapter with issues surrounding validity and reliability.

3.2 Research design

The nature of this research is that of an ongoing process of information gathering and analysis from a social science perspective, reflecting a qualitative approach (Nelson *et al.*, 2003). The researcher carried out the research based on loosely structured questions informed by Oliver (2004), Murray (2003) and Phillips and Pugh (1994). The author as graphic designer was actively involved in the entire process.

3.2.1 Framework

This research design framework consists of five phases. This has been summarised as:

Phase 1: Establish the research proposition (Case study 1 & 2; 1st graphic designer evaluation)

- Investigate the phenomena as participant observer.
- Examine key processes and identify potential areas where supporting information may aid the perceived phenomenological problem.
- Formulate a prototype method as a result of case study 1 and 2.

Phase 2: Pilot the method (subsequently known as Communication Design Tool (CDT) (Case studies 3 - 5; 2nd graphic designer evaluation)

- Deliver the CDT to a predetermined selection of small business clients, including stakeholders, where possible.

- Develop the CDT through an iteration process involving each case study in turn, building on the evolving CDT as a continuous process involving delivery, input, analysis, feedback and development.
- Facilitate the processes within the CDT in collaboration with industry, as defined above.
- Obtain graphic designer evaluation.

Phase 3: Develop the CDT (Case studies 6 - 9; 3rd graphic designer evaluation)

- Continue iteration process, delivering the CDT as developed in phase 2 to all four case studies (6 - 9).
- Facilitate the process with selected small businesses and graphic designers.
- Obtain graphic designer evaluation.

Phase 4: Trial the CDT (Case studies 3 - 9; 4th graphic designer evaluation)

- Collate information from studies 3 - 9 and formulate reports, disseminating results to case study representatives.
- Obtain graphic designer evaluation.

Phase 5: Request feedback (Case studies 3 - 9)

- Return to respondents and request feedback and evaluation concerning a) The level of understanding of the graphic design process in relation to the CDT adopted and b) If the CDT is something that the business would use?
- Obtain graphic designer evaluation.

3.2.2 Ethical considerations

The ethical considerations of this research concerned the author collaborating with live companies. This involved ensuring that participants were aware of the purpose of the research and that confidentiality was maintained at all times.

Due to the sensitive nature of the first case study, company and participant names have been anonymised to ensure confidentiality.

Professional code of conduct in graphic design practice was adhered to during this study (Gosslett, 1992; Chartered Society of Designers, 2006).

3.3 Rationale for methodological approach

This ethnographic method of gathering information was particularly relevant during the first case study, where practice based participant observation was essential to experience in the field situations. During the first case study, the need for a procedure to aid the communication process between small business client and designer was elucidated.

3.4 Research methods

The author designed the research methodology prior to undertaking the research (Yin, 2003). Although the research did not follow the exact structure, it provided a framework from which to work. In attempting to try to understand a set of circumstances within a social, cultural and organisational context, a qualitative approach was adopted. This approach was chosen because it was necessary to follow an ethnographic study due mainly to direct observation (Garfinkel, 2004).

Methods adopted within this study include:

- Participant observation
- Action research
- Semi-structured and informal interviews

The first study was based on a participant observation approach within case study research. Yin (2003) provided a comprehensive overview of case study research methods, acknowledging challenges concerning three main potential problematic areas of case study research: bias, scientific generalisation and length of time.

The CDT was then developed in collaboration with potential end users i.e. small business clients and graphic designers who work with this client base. Action research became necessary as a research approach during this process, due to the iterative nature of developing the CDT.

This research approach focused on a specific situation within a particular context to try to produce change that: “puts action research firmly within the case study strategy” (Robson 1997, p.439). In influencing “Social change-oriented research” (Greenwood and Levin 2003, p.131) an action research approach was adopted. Action research involves one additional aspect of participant observation i.e. where the researcher initiates or influences change (Denzin and Lincoln, 2003).

Designing case study research carried out within this research is influenced by Yin (2003). Yin’s case study method is depicted in Figure 3.2.

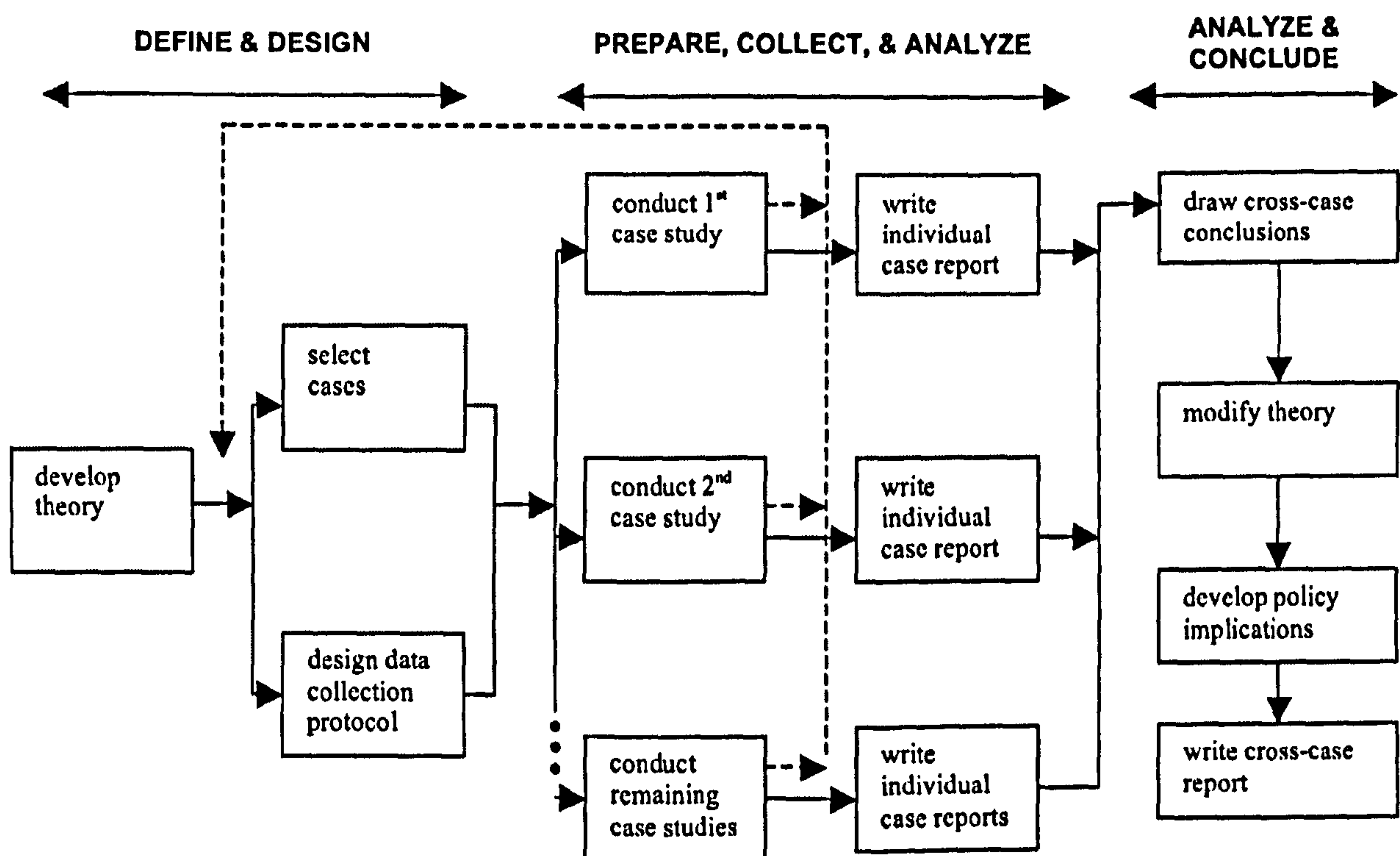


Figure 3.2: Case study method. Source: COSMOS Corporation, Yin (2003, p.50).

The first two case studies provided elucidation of the research proposition and identified the need to develop a CDT. In collaboration with a pre-determined selection of a further seven small businesses and four graphic designers, a prototype was developed to unpack methods in an attempt to make implicit core business values explicit. This was initiated through a questionnaire completed by principal stakeholders and customers where possible, within each business. The intention of the questionnaire was to establish a state of play of the business in terms of perception of business values and later, graphic design preferences.

The questionnaire offered a paper-based format for the purposes of information gathering and development of the CDT with participants.

Completion of the questionnaire resulted in an individual profile of four general areas of information required to inform the graphic design process of key business values and graphic design elements. This information involved the individual perspective of each selected member within the seven selected businesses.

These four main areas of the questionnaire included:

1. Basic business information.
2. Competitors' visual language.
3. Core business values.
4. Graphic design preferences.

To complete the iteration process, four graphic designers were involved at various stages in the development of the questionnaire (see Figure 3.6). The end users of the CDT i.e. small businesses and graphic designer's, were fully involved in the development of the CDT throughout the entire process.

The next stage in the process was to translate business values into a set of visual guidelines. These guidelines, having emerged as a result of the development of the CDT and clarified by the small business, inform the graphic design process through a pre-design brief analysis (section: 5.4). A report distributed to each business representative concluded the development and analysis of the questionnaire (see Appendix 2).

To conclude participant research, interviews were conducted during delivery, clarification and analysis of the reports to each business representative. At this final stage in the research, the business representatives were asked to evaluate the viability and level of success of the CDT as a useful process of information gathering. Also, whether or not the procedure provided a better understanding of the graphic design process in determining business values to be interpreted through graphic design.

This last feedback and analysis process was influenced by the methodological approach adopted within Gray's thesis (Gray 1988, p.280) where an integral aspect of concluding the research was to go back to respondents and find out how they evaluated the alternative approach to an existing phenomenon, developed within the research project.

3.4.1 Participant observation and action research

Participant observation was the first method adopted within this research and was chosen to reveal the situation in question within the remit of this study. The results of this first study clarified the research question and rationale in an attempt to address a problematic situation, which out with the context of the research would be more difficult to validate.

The researcher as design practitioner carried out a number of live design projects, involving the researcher as designer within the research project. This represented an ideal time to take on the role of participant observer, graphic designer due to the relatively small time gap between the author changing roles from practitioner to researcher. Often, the researcher is participating in the research prior to the research being undertaken (Jorgensen, 1989).

The author as graphic design practitioner had worked within the small business client sector for a number of years prior to embarking on this research. The frustration experienced by the author in dealing with issues surrounding the front-end of the graphic design process was a key aspect of undertaking this research.

Although the author could draw from previous working practices that she had direct experience of, it was felt necessary to investigate the phenomena within the context of the research project. This could eliminate some of the problems surrounding pre-conceptions.

Jorgensen (1989) discusses the nature of gaining entry, identifying who the gatekeepers are and whether or not to conduct overt or covert research prior to the process. These factors were all considered prior to carrying out the research. The researcher acknowledged the mutual benefit surrounding live projects and the "rich" (Geertz, 1983) experience and data forthcoming viewed as beneficial for the research project.

This initial participant observation study provided a bases from which the need to develop a CDT to offer an alternative solution to the communication problem between designer and client was elucidated (see Chapter 4).

The basic model adopted within this research relates to Spradley's "Ethnographic Research Cycle" (Spradley 1980, p.27). Spradley's sequence is illustrated in Figure 3.3. At various stages throughout the research this model proved useful, as a refocusing checklist.

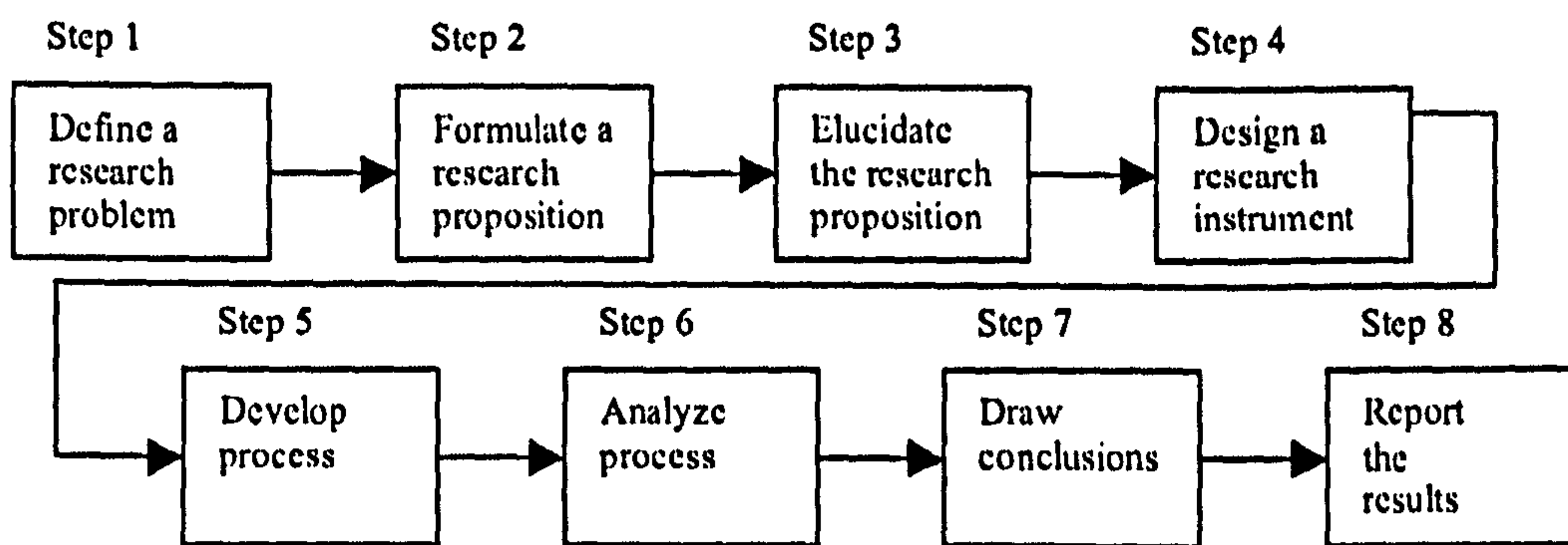


Figure 3.3: Linear Sequence in Social Science Research. Source: Spradley (1980, p.27).

A further development of Spradley's model, relevant to this research where participant observation and action research has been carried out is to request feedback, also previously acknowledged by Gray (1988). This is depicted in Figure 3.4.

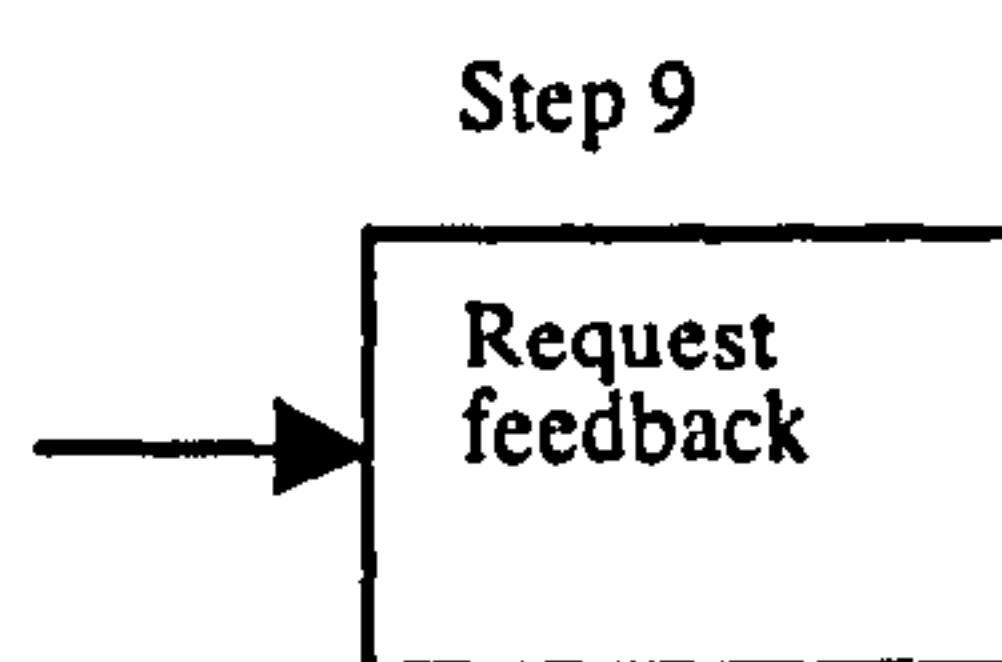


Figure 3.4: Additional step (9) in Spradley's (1980) Linear Sequence in Social Science Research model.

After the first case study and early into the second case study, the methodological approach changed from participant observation to action research. The remainder of the research set out to improve problems perceived within the situation through action research methodology.

The author, as participant observer, practitioner and facilitator of the development of the CDT became actively involved in the entire process. Developing a CDT in collaboration with potential end users reflects an action research methodological paradigm. The researcher placed great emphasis on the input of the end-users' participation in developing the CDT, involving small business stakeholders and graphic designers.

The researcher acknowledges that the research involves subjective judgement but also the importance of an objective perspective when involved in action research. This is a difficult balance to achieve. The tension between subjective and objective has been explored and is understood as: "looking in as opposed to looking through" (Ladkin 2005, p.120). Throughout this research process the researcher has attempted to maintain a balanced perspective and recognises that through participants' collaboration, positive steps have been taken towards achieving this balance.

3.4.2 Interviews

Qualitative interviews were carried out throughout the information gathering process. This involved either pre-scheduled or informal face-to-face or telephone interviews. Exploratory interviews were carried out initially, which became more focused as the research developed.

Key business members and graphic designers provided interview material, as listed in Figure 3.5.

BUSINESS	INTERVIEWEE	POSITION
Company A	Anonymous	Managing Director
Company A	Anonymous	Marketing Manager
Company A	Anonymous	Marketing Assistant
Company B	Anonymous	Marketing Director
MB O	Andrew Cumming	Managing Director
Management Consultants	Vic Baxter	Director
Soft Furnishing Manufacturer	Alison Millar	Owner
Oilfield Cataloguing	Kathleen Miller	Operations Manager
Physiotherapy	Jeff Wallace	Senior Physiotherapist
Florist	David McIntyre	Owner
Plant Hire	Willie Forsyth	Sales Director
Freight Forwarding	George Booth	Operations Director
Graphic Designer	Rae Alexander	Graphic Designer
Graphic Designer	Silvia Dicke	Graphic Designer
Graphic Designer	Ian Cargill	Graphic Designer
Graphic Designer	Ken Gowans	Graphic Designer

Figure 3.5: Semi-structured interviews.

An interview guide involving a pre-determined set of questions was prepared for all pre-scheduled interviews. The interview guide and a conversational approach was chosen, combining a semi-structured interview situation along with a more natural conversational approach, allowing the researcher's discretion to explore topics. Open-ended questions were carried out at all times where possible. Clarity of questions, an ability to listen to both verbal and nonverbal responses and sufficient interviewee feedback was the aim of the researcher (Patton 2002, pp375 - 376).

Although the theory behind the practice of being a "good" researcher is comprehensive, the author acknowledges that when placed in real world situations, that this is a particularly challenging aspect of qualitative research. Engaging and collaborating with various small businesses and graphic designers provided a challenging situation for the researcher due to the dual role undertaken. One success of this research was to take the participating professionals away from their business endeavours to allocate their most valuable asset i.e. time, to contribute to this research. In this respect, it has proven to be very important to ensure that respondents understand the nature of the research and are comfortable with the management and handling of it by the researcher, at all times.

3.4.3 Data gathering and documenting

The processes adopted for data gathering and documenting draws from the work of Spradley (1980) who specifies the importance of detailed note taking. Jorgenson (1989) describes in detail what to do in these conditions. Patton (2002) provides an overview of various perspectives that influence textual data recording. Exploring methods of data documenting, with a view to coding and analysis within this research was influenced by Bailey (1996).

During the initial case study, extensive note taking was carried out at every opportunity throughout the four-month period where the author undertook graphic design work while at the same time taking on the dual role of participant observer. The role of the author as graphic designer involved establishing close working relationships with members of the first case study, where not only design processes were documented as they were carried out, but valuable raw communication data was collected in the form of e-mail. This was mainly due to the remote nature of the author working within the first case study as graphic designer. Although there are disadvantages regarding e-mail as a form of non-spontaneous communication, documentation gathered in this way remains first hand raw data.

Other forms of communication such as telephone conversations, scheduled meetings and informal conversations were all written up as soon as they were carried out.

Additional methods of documenting data gathered involved transcribing all hand written notes from journals, interview recordings and other documentation, "The field notes created by an ethnographer as a record of research grow with amazing rapidity" (Spradley 1980, p.155). All graphic design work was catalogued. The initial case study, carried out over a four-month period involving participant observation research resulted in a substantial transcription document that has since been carefully anonymised and summarised within the thesis.

Bailey (1996) provided a valuable framework for documenting data. This proved useful from the outset as a process of continuously formulating possible categories relevant within the data as it unfolded. Bailey describes the relevance of the researcher using all the human senses when carrying out field research, stating that: "Sometimes in the social sciences we forget the importance of using all our senses" (Bailey 1996, p.65). This can be time consuming to document but enhances the richness of the data collected.

Attention was given to comments made which may not have seemed relevant at the time e.g. a casual conversation that subsequently became significant during Case study 1 where comments made to the researcher provided information on how graphic design was perceived by one of its staff (see section: 4.2.3). The aim of participant observation research in the field is to absorb as much information as possible, documenting even the most insignificant detail as soon as the opportunity to take notes arises (Jorgensen, 1989).

The faster pace experienced by the researcher when the research changed from participant observer to action research resulted in a reduction of observational note taking and increased documentation regarding participation and interviews.

3.4.4 Data analysis methodology

A hands-on coding method of data analysis was adopted within this research, working with the text through multi-coding categories, looking for patterns, checking the data against the research proposition and other data collected (Bailey, 1996).

This research methodology has been influenced by the hermeneutic paradigm as a method of understanding and interpreting "human (social) behaviour" (Schwandt, 2003). The

researcher acknowledges that: "prejudices are brought to the research platform" which influences the author's understanding at a particular time (Patton 2002, p.115). The author has taken care to ensure that the research information gathered is looked at "objectively", within the "context" of the author's work and also in relation to: "the genre and tradition of the culture" being studied (McAuley 2004, p.193).

Qualitative analysis involves a continuous process of assessing information gathered when undertaking field research and at the same time maintaining a holistic perspective (Spradley, 1980). The author has found that a focused perspective has been achieved by being immersed in the data during collection and at various stages within the research project. This immersion in the research and overview of the entire data can enable identification of emerging patterns of analysis (Bailey, 1996).

Content analysis was selected as a technique for textual data analysis. The main and most common concern with content analysis is that although the number of times a word is used can be calculated, the meaning and context of the words in question remains ambiguous.

The relationship between words within the context of the study is more relevant than counting words or categories as a method of analysis. Analysis involves a way of thinking, examining individual parts in relation to the whole (Spradley, 1980).

3.4.4.1 Content analysis

Content analysis originally focused on newspaper publications, radio and television and now encompasses analysis of a wide variety of media communication (Robson, 1997). Content analysis within this research concerns participant observation data including: field notes, e-mail, telephone, semi-structured and informal interviews and graphic design visual analysis. Data collected through action research includes all of the above areas and also one additional aspect of data collection i.e. the documented development of the CDT carried out as an iteration process in collaboration with small businesses and graphic designers.

Three general case study data analysis strategies, influenced by Yin (2003) have been adopted within this research. These are:

- *Relying on theoretical propositions* – referring to research aims, objectives and research proposition/s.
- *Thinking about rival explanations* – referring to alternative or opposing research proposition/s.
- *Developing a case description* – referring to a descriptive framework for organising the case study.

Yin's recommendations regarding analytic case study techniques, such as pattern matching and explanation building have informed the study: "pattern matching" involves coding and cross-case study analysis; "explanation building" concerns "analyzing [sic] the case study data by building an explanation about the case" (Yin 2003, p.120). The "iterative nature of explanation building" applied to multiple case study analysis describes the iterative approach adopted within this study involving:

- *Making an initial theoretical statement or an initial proposition about policy or social behavior*
- *Comparing the findings of an initial case against such a statement or proposition*
- *Revising the statement or proposition*
- *Comparing the revision to the facts of a second, third, or more cases*
- *Repeating this process as many times as is needed" (Yin 2003, pp121 - 122).*

3.4.4.2 Coding

Bailey (1996) provided valuable information on methods of coding by identifying categories of coding, such as: chronological or analytical; relating to meanings such as relationships or the mundane; and offering methodological approaches such as: typologies, patterns, diagrams and metaphors.

The process of coding involved being immersed in the data, coding using a number of terms from a variety of perspectives, followed by checking and re-checking. At the same time repeatedly reflecting on the results until consistent patterns emerged, clarifying the analysis.

Coding terms applied within this study involved multiple categories such as:

- *Chronological*
- *Process*: Design process; facilitation process; communication process.
- *Observations*: Thoughts (author, graphic designer, small business owner).
- *Communication*: Verbal (semi-structured and informal interviews, meetings, telephone, casual); written (e-mail, documentation); visual (graphic design) and other (body language, non-verbal).
- *Outcome*: result of a previous action or set of circumstances.
- *Point of note*: unexplained observations regarding various communication categories.

3.4.5 Questionnaire construction

The main criteria adopted within this study for questionnaire construction refers to the phenomena being studied (Oppenheim, 1992).

This section reports the process used in constructing the CDT developed within the final stages of the research as a traditional paper based questionnaire. The researcher adopted a variety of techniques throughout the development of the CDT through an intensive iteration process (this is discussed in Chapters 4 and 5). An in depth description of the underpinning models and development of the questionnaire as CDT is provided in Chapter 5. This section of the thesis serves to provide an overview of underpinning theories adopted in constructing the questionnaire.

Questionnaires were personally distributed to each of the pre-determined small businesses. The researcher presented the questionnaire to a key representative from each of the seven businesses that took part in the research. This was carried out during an interview process, explaining the purpose of the enquiry and confidential nature of the research. The required number of questionnaires was distributed within each business, providing additional contact information for each respondent, should the need arise.

This approach provided all participants from each business with the same questionnaire throughout the development process, ensuring that the same questions were delivered in the same sequence. The author acknowledges that there is a greater risk of bias

through language misinterpretation and participants' degree of literacy within the group-administered questionnaire approach (Oppenheim, 1992).

A "filtering" technique provided a general introduction to the questionnaire, employing open-ended questions within the first half of the questionnaire, and closed questions throughout the remainder (*ibid*, pp111 - 115).

The questionnaire involved four key questions. These were:

1. What does the company do?
2. What visual language do competitors use?
3. What are the values of the company?
4. What are the company's graphic design preferences?

Question 1. *What does the company do?* The author presented a general introduction to the questionnaire, by asking a broad question. Additional information could be provided within the questionnaire, to clarify the question being asked i.e. "Please provide general information below on the business e.g. what it does, where it is located, how long it has been trading etc."

This section of the questionnaire includes a blank area where respondents can write their response. A considered approach to the space allocated for respondents' writing is advisable, "The space provided for this action can influence the respondents' perspective on amount of words to use within the answer" (*ibid*, p.112).

Question 2. *What visual language do competitors use?* is divided into three parts:

- a) Please list the names of key competitors below.
- b) Please provide visual information sourced from a variety of key competitors.

This may be in the form of web, pages, stationery, leaflets, advertising etc.

- c) Please provide additional sources of visual information, which you feel may be useful to include in an analysis of graphic design preferences. *Please give reasons for selecting this information.*

The third section of the questionnaire includes a blank area regarding all three parts of question two, within which respondents can write their response (see Appendix 3.6).

A combination approach has been provided in question 3: *What are the market values of the company?*

The question has been further divided into four sections:

- a) What are the company's objectives - *What does the company want to do in the future?*
- b) What are the company's attributes - *What differentiates the company in the market place?*
- c) What are the company's ethics - *What influences the behaviour of the company?*
- d) What is the company's origin - *What are the attributes that have shaped the company in the past?*

Question 3. a) and d) refer to open-ended questions, with space provided for the response (as in questions 1 and 2). Question 3 b) and c) require respondents to rate their answer within a closed type of question. Rating allows the researcher to gather data, which can be statistically analysed, with reference to pre-coded answer categories (Oppenheim 1992, pp230 - 233).

At this stage in the questionnaire the questions are more complex, following the "filtering" technique, discussed by Oppenheim (1992), (see Appendix 3.3 - 3.6).

Question 4. *What are the company's graphic design preferences?* This section is depicted as a diagram detailing a set of questions and relevant categories. The diagram involves seven main questions. Each question requires to be answered by a process of selection i.e. only one area from each of the seven categories should be selected. Within this section of the questionnaire the diagram provides seven main categories. Within each category a variable quantity of alternatives is offered. Each alternative is depicted by a number, which relates to written descriptions provided within the document (see Appendix 3.6)

The CDT is a paper-based questionnaire. The questionnaire examples provided in Appendix 3.6 refer to the final stage of development of the CDT carried out within this research.

3.5 The case study process

Figure 3.6 depicts the five phases carried out within this research.

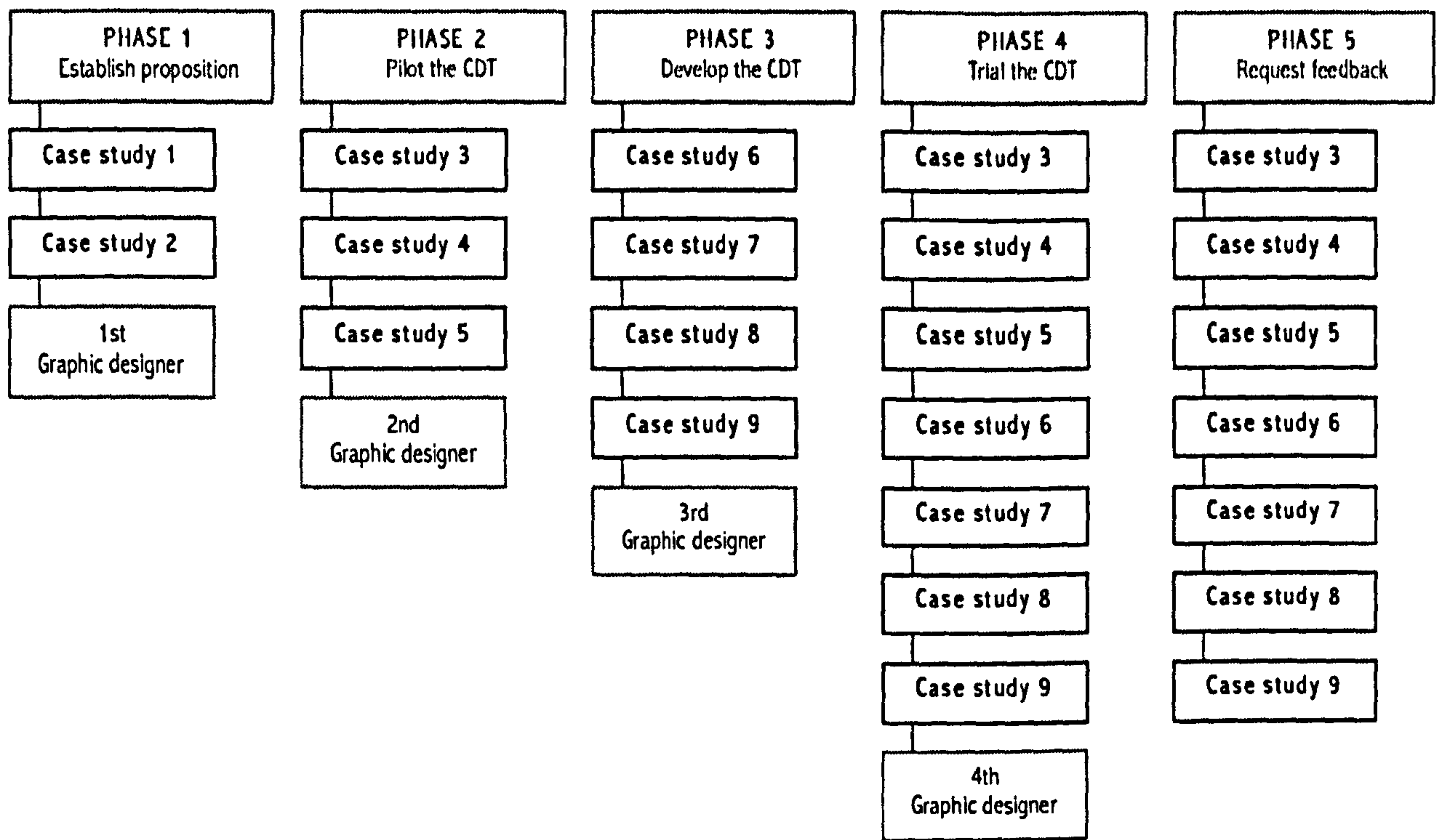


Figure 3.6: Development of Communication Design Tool process.

Phase 1 – Establish the proposition

Case study 1 – elucidate the research proposition by identifying the need for an improved method of communication

The researcher had previously been employed as a graphic designer for Company A and was asked to represent their corporate identity values during a forthcoming merger with Company B. Various graphic design projects were completed for the merger between Company A and Company B over a period of four months from January to April 2004 by the author as graphic designer, participant observer. This initial study uncovered and elucidated the need to better communicate business values during the communication exchange between client and designer.

Case study 2 – establish the content of information to develop a CDT in relation to a complete graphic design process

An early conceptual version of the CDT was used within the second case study. This stage in the development of the CDT focused on information relating to establishing business values. Case study 2 identified the need for a mechanism to improve the communication exchange between client and designer. The need for a more comprehensive body of work became evident during this case study, including two additional areas. These were: 1) An

understanding of competitors' visual language and 2) Graphic design preferences. In this way, graphic interpretation of business values could draw comparisons with key business competitors (see section: 4.3.5).

At specific stages in the development of the CDT four graphic designers who have experience in dealing with small business clients evaluated the concept, process and development of the CDT.

Graphic design evaluation and input, in response to an interview conducted, occurred at the end of this case study (2); in phase 2: case study 3, 4 & 5; phase 3: case studies 6, 7 8 & 9 and at phase 4. Additional graphic designer input occurred during phase 2: case study 3.

Phase 2 – Pilot the CDT with its end users i.e. small business client and graphic designer

Case studies 3, 4 & 5 – iteration process, formulating the CDT content

The research continued with three further businesses taking part in the development of the CDT. As the researcher would be involved in facilitating the development of the CDT and initiating direction, the methodological approach changed during case study 2 onwards, from participant observation to action research.

Graphic design evaluation and input, in response to an interview conducted, occurred at the end of this phase.

Phase 3 – Develop the CDT with small business clients and graphic designers

Case studies 6, 7, 8 & 9 – intensive iteration process, developing and refining content

Through an intensive iterative process, in collaboration with a further four local North East Scotland small businesses, the CDT was further developed, unpacking categories in an attempt to ensure that core business values were made explicit. This was initiated through the CDT delivered as a questionnaire to be completed by principal stakeholders including customers where possible, within each business. The questionnaire attempted to establish the state-of-play of each of the businesses in terms of stakeholder perception of business values and graphic design elements (see Appendix 3).

Graphic design evaluation and input, in response to an interview conducted, occurred at the end of this phase.

The business value section of the questionnaire draws from business models applied within corporate communication, involving business models from management and marketing (see Appendix 4).

Phase 4 – Collate Information and provide analysis

The fourth phase of the process incorporated case studies 3 - 9. The procedure involved translating core business value terms into a set of visual guidelines, informed by graphic design elements. The resulting guidelines, having emerged from an analysis of the CDT and clarified by the client, would result in information to underpin the graphic design process (see section: 5.4.2).

Graphic design evaluation and input, in response to an interview conducted, occurred at the end of this phase.

Phase 5 – Disseminate results through reports, clarify to respondents' satisfaction and conclude the field research by asking for feedback regarding the usefulness of the CDT.

Upon participant's completion of the CDT the author provided a report to each business representative, detailing the results of the analysis (see Appendix 2). The report was based on the analysis process disseminated to respondents within case study two for evaluation and feedback. The report formulated for case study two provided an early template and procedure for all subsequent reports undertaken.

As participating researcher, the author as graphic designer facilitated the procedure of business members' formulating an understanding of their business values. In this way, the initial analysis process was piloted during case study two.

Analysis results were then fed back to each business representative, after which a final semi-structured interview session took place.

During the final interview process, two closed questions were asked of each business representative regarding evaluation of the CDT. These questions were key to

validating the success or otherwise of the CDT and the research itself. The two questions concerned:

- 1) Is the CDT something that you would use?
- 2) Has it [the CDT] given you a better understanding of the graphic design process?

3.6 Validity and reliability

Validity and reliability have been examined within the context of this research, dealing with reliability first.

3.6.1 Reliability

Reliability concerns duplicating the research project, given the research context in terms of: scope; geographical location; actors' social and cultural background (i.e. small business participants, graphic designer participants and author participation) and the timeframe within which the research project was carried out. Reliability requires to be measured before validity can be evaluated (Robson, 1997).

This research has adopted Yin's "chain of evidence" (Yin 2003, pp105 -106), the principle of which is to increase the reliability of information. The case study reader should be able to trace the steps from this research proposition to case study conclusions progressively and retrospectively, cross-referencing and linking each stage in the process, resulting in theoretically duplicating the research.

3.6.2 Validity

The research reported in this study followed an established principle of Triangulation as one method of attempting to deal with research validity. Triangulation represents: "an attempt to secure an in-depth understanding of the phenomenon in question", incorporating internal and external factors (Denzin and Lincoln 2003, p.8).

Qualitative analysis triangulation has been reviewed from four perspectives.

These concern:

1. Methods triangulation: *"Checking out the consistency of findings generated by different data-collection methods"*.
2. Triangulation of sources: *"Checking out the consistency of different data sources within the same method"*.
3. Analyst triangulation: *"Using multiple analysts to review findings"*.
4. Theory/perspective triangulation: *"Using multiple perspectives or theories to interpret the data"* (Patton 2003, p.464).

1. Methods triangulation in this study was carried out through data-collection methods involving:

- a) Participant observation and action research
- b) Semi-structured and informal interviews
- c) The literature review

2. Triangulation of sources collected within a) participant observation and action research, b) semi-structured interviews and c) the literature review. This involved:

- Journal note-taking, recorded semi-structured and informal interview transcriptions, e-mail, telephone conversations, observations and researcher reflection.
- Content analysis involving coding and discourse analysis.
- Cross-referencing literature.

3. Analyst triangulation: Multiple-analysis, where participants evaluate research results, has been adopted within this research regarding two areas of data analysis.

The first involved an intense iteration process concerning research participants, representing the recipients of the method being developed i.e. small business stakeholders and graphic designers. Numerous iterations carried out during development of the CDT involving input from thirty nine participants within case studies 2 - 9 and also four graphic designers experienced in working with the small business client base.

The second area of multiple-analysis concerned the final phase in the data collection process. This involved participant feedback during semi-structured interviews carried out within case studies 3 - 9, regarding individual report findings. Patton describes the importance of research participants being involved in data analysis and the way in

which: "Evaluators can learn a great deal about the accuracy, fairness, and validity of their data analysis" by "having the people described in that data analysis react to what is described" (Patton 2003, p.468).

4. Theory/perspective triangulation: Denzin (1970) acknowledges that theory/perspective triangulation is the most difficult area of research validation to achieve.

The author has adopted a reflexive ethnographic approach, acknowledging that the observer shares a perspective with the observed. In this way, the author "is still viewed as a unified subject of knowledge that can make hermeneutic efforts to establish identification between the observer and observed" (Visweswaran 2003, p.469).

Theory/perspective triangulation during the data collection process involved coding, checking, re-checking and cross-referencing information sources from:

- a) Small business participants
- b) Graphic design participants
- c) The author as graphic designer, facilitator.
- d) The literature review

3.7 Summary of methodology

The nature of the study located the researcher firmly within the context under investigation.

The entire process was driven by the research proposition, which served as a key focus and anchor point throughout the study.

Care was taken to ensure that the research proposition was elucidated within the confines of the research and also that the subsequent development of the CDT remained in the hands of its intended end-users i.e. small businesses and graphic designers. The author brought graphic design experience to the research platform, making every effort to maintain an objective, unbiased perspective at all times during the research and facilitation process.

The research uses a model leading to the development of the CDT based on an iterative process. Information was provided on methods of coding and content analysis. Data analysis involved a systematic process of immersion and reflection until theoretical saturation was reached.

The methodological process both challenged and rewarded the author, providing valuable insights into understanding the phenomena.

CHAPTER 4: Case study 1 & 2: Initial development of the CDT

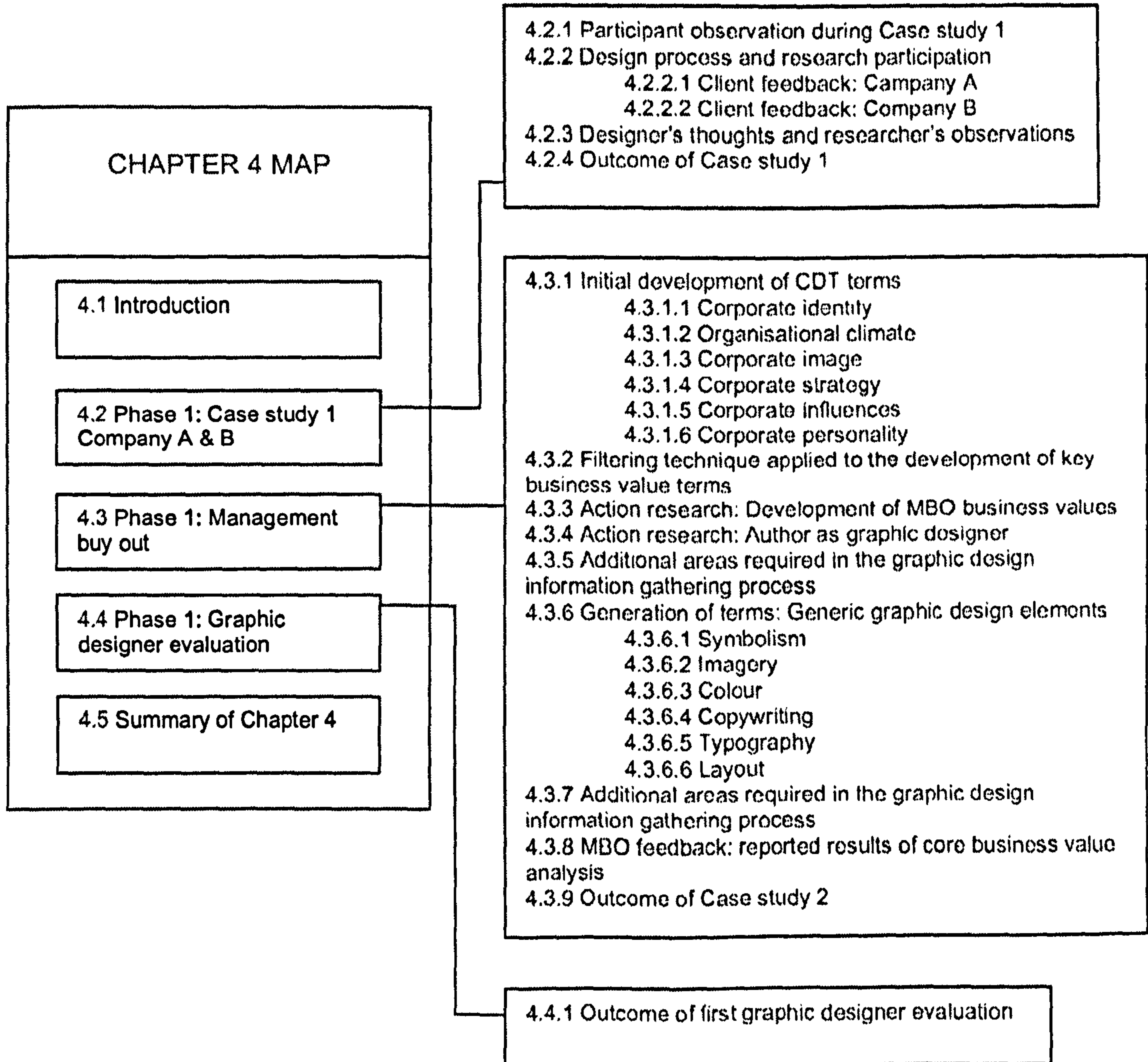


Figure 4.1: Chapter 4, chapter map

4.1 Introduction

This chapter is concerned with elucidating the research proposition. The chapter also reports areas generated within the Communication Design Tool (CDT). Lastly, the chapter describes the first graphic designer evaluation of the CDT as a result of the research proposition and case study one and two.

The author was able to draw from a network of professional contacts built up over a number of years' experience as a graphic design practitioner working primarily within the small business sector. The author carried out two graphic design projects during the study: the first was to provide design expertise to an existing client and the second was to work with a new client. The first design project involved working with a previous small business client during the preparation of a forthcoming merger with a medium sized business. The second design project was to work with a new breakaway business that was in the process of undertaking a management buy out within a medium sized business. Both businesses approached the author requiring graphic design input including interpretation of core business values to be communicated through graphic design solutions.

The first study provided an invaluable source of participant observation data from which to rigorously elucidate the research proposition. Company and participants' names have been anonymised within this case study only, due to the sensitive nature of the communication reported.

The second study served to identify elements required to carry out an evaluation of core business values during the early stages of the design process. The second study began as participant observation and evolved into action research as the research developed.

The first independent graphic designer: Rae Alexander, provided an evaluation of the proposed elements that would underpin the initial components of the CDT.

All four designers who took part in the evaluation process were selected in respect of their graphic design expertise and experiences in working directly with the small business client. Each designer's Curriculum Vitae is detailed in Appendix 5.

Figure 4.2 depicts phase 1 of this study.

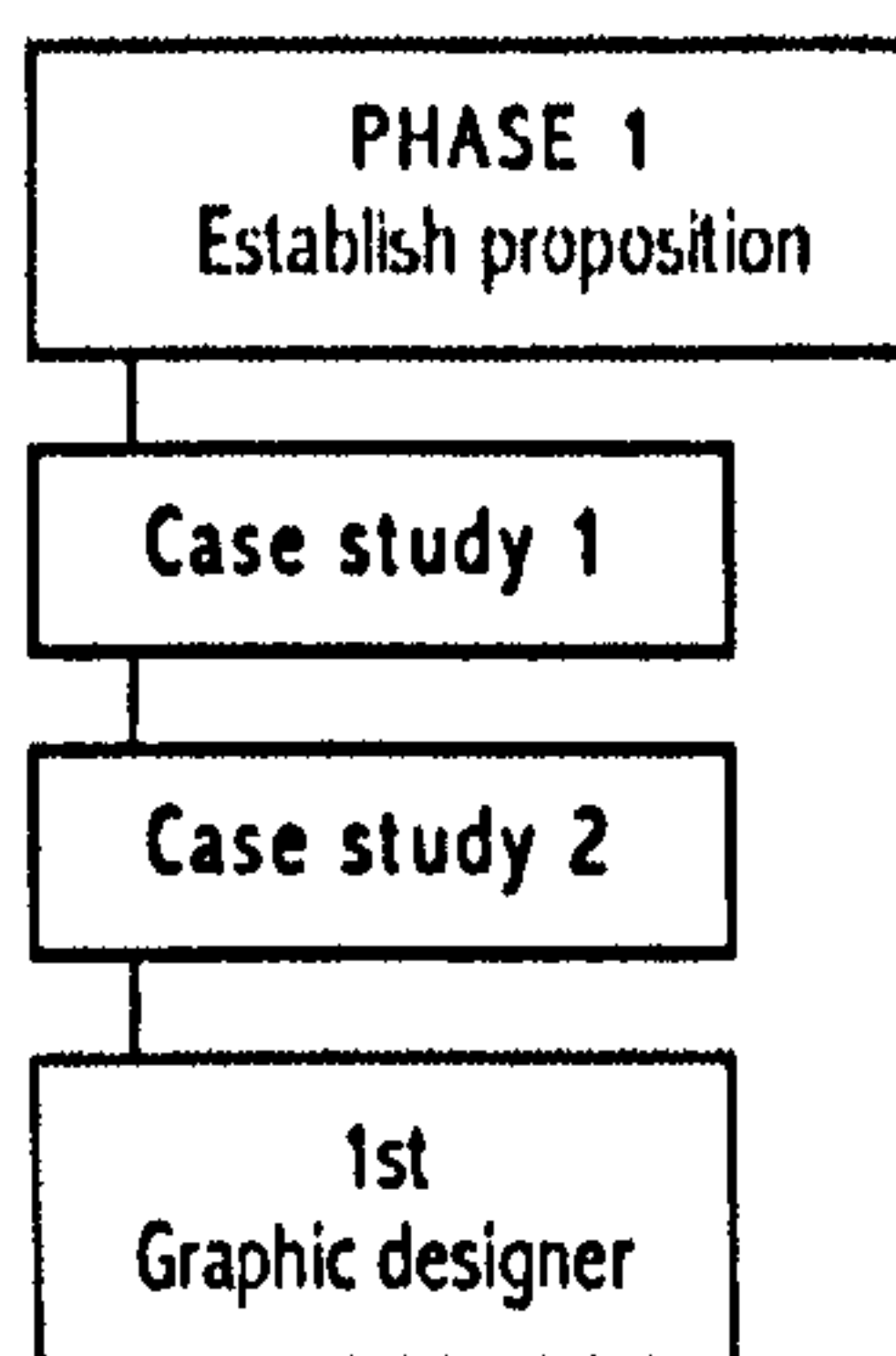


Figure 4.2: Phase 1: Establish research proposition.

4.2 Phase 1: Case study 1 - Company A & B

Company A have been trading for fifteen years and had grown from a one man business to a company employing twenty five staff over three offices located in Central England. Company A was known as the largest firm of its kind serving its geographical area.

Company B are a well-known national business with offices widespread throughout the UK. Company B have been trading for almost two hundred years and currently employ 350 partners and staff.

The author was asked to work as a graphic designer during a merger between Company A and Company B. The author had previously been contracted as a graphic designer on several occasions for Company A and was asked to represent their corporate identity values during the forthcoming merger with Company B. Various graphic design projects involving advertising and promotional launch literature were completed for the merger by the author as graphic designer, participant observer.

Graphic design input involved the integration of both Company A and B's corporate identity within all existing communication literature, providing two versions, one for each business.

4.2.1 Participant observation during Case study 1

An initial meeting took place at Company B's head office. The purpose of this meeting was to plan publicity material for the launch of a forthcoming merger between Company A and

Company B. The meeting involved four people. Names have been abbreviated for reporting purposes as:

Managing Director, Company A	<i>Company A/Participant 1</i>
Head of Development, Company B	<i>Company B/Participant 2</i>
Marketing Director, Company B	<i>Company B/Participant 3</i>
The author, Graphic Designer, Participant Observer	<i>DC/Participant 4</i>

The meeting addressed issues relating to the processes involved in the public relations aspect of the forthcoming launch. The meeting started off with *Company B/Participant 2* describing how they (Company B) dealt with another recent merger. This provided a procedural template from which the team could work.

The author's previous client connection with Company A as graphic designer engendered an obligation to ensure that Company A's business values were accurately represented through graphic design solutions.

Agreement on the merging businesses' values proved complex for participants to communicate during the meeting. *Company B/Participant 3* offered on several occasions that once the press statement was written and agreed, the visuals would then follow. Although the key players involved in the merger had an implicit understanding of business values, the dialogue surrounding these issues did not adequately communicated this to the designer.

The discussion concluded that:

Company B/Participant 2: "The biggest firm of ... [Company B] will be merging with the biggest firm of ... [Company A]".

Company B/Participant 3: "Let's get something down on paper to work with and take it from there. I will write the copy and distribute it to Company B/Participant 2 and Company A/Participant 1 for editing and thereafter myself [Company B/Participant 3] and DC/Participant 4 will work on the visuals".

Company A/Participant 1 emphasised: "...the importance of maintaining Company A branding in order to keep existing Company A clients on side. During the recent Company A re-branding process DC/Participant 4 sat me down and made me discuss identity and issues surrounding it".

Given that all four participants were not new to the design process, in fact Company B had a great deal of experience in this area, the communication exchange regarding core business values during this initial meeting did not adequately inform the design process.

The need for a more informed method of communication between client and designer was evident as a result of these discussions.

4.2.2 Design process and research participation

Following initial discussions, a design brief was formulated by the author as graphic designer, which was subsequently approved by all members of the team. The designer started work on the project, gathering information on both businesses in terms of what they did, market competition and also formulating an understanding of the visual language within their specific market sector. Company B provided a style guide manual that included guidelines on how the logo, font, colour, image style and general layout were to be designed. The design agency and web agency were contacted regarding recent work carried out for Company B. Both agencies provided information on recent designs created for Company B, giving the designer a sense of the style used.

Company A did not provide any visual information. This may have been due to the fact that the designer had previously worked with the company on several occasions. To maintain continuity between both brands, existing logo designs were evaluated in terms of: typography; use of colour; illustrative, photographic or symbolic representation; with or without name of business and strap line inclusion. The Press Release provided by *Company B/Participant 3* was approved and the designer provided with a copy.

One area within the design brief dealt with the agreed concept: "Provide a solution, which relates to the Press Release copy i.e. 'the biggest and the biggest', representing the forthcoming merger between Company A and Company B". This was felt useful by the designer in order to communicate "the biggest and biggest" sentiments described within the Press Release copy.

In reviewing the information contained within Company B's style guide manual, the designer came across a strap line that read: "Building our success through teamwork". The

designer felt that this would be a useful communication phrase to utilise within the design visuals.

Design concepts emerging from the phrase: “the biggest and the biggest” were progressed and developed into four visuals, which were then presented to both companies. The visuals were sent off as Portable Document Format (PDF) files, initially to the primary client (Company A) and then forwarded to the secondary client (Company B), pending any changes to be made from Company A. Due to logistical problems in locating all the team members together at one time and at short notice, the author also sent a design rationale along with the visuals.

4.2.2.1 Client feedback: Company A

Initial feedback from Company A was positive, selecting the preferred design visual from the four provided. Comments regarding the strap line rewording were changed from “Building *our* success through teamwork”, to: “Building *your* success through teamwork” by Company A. *Company A/Participant 1* felt that it was important to emphasise the merged business values, as perceived by Company A.

This comment revealed that Company A's business values were from a customer rather than product driven perspective (Johnson and Scholes, 1993). The meaning behind this interpretation reveals subtleties between the merging businesses' corporate culture.

The processes of identifying the purpose of a business are carried out through: strategy, standards and behaviours, and values as stated in the business mission (Jobber, 1995). By changing the strap line from: “*our* success” to: “*your* success” the business values reflect company A's management style and corporate culture regarding customer orientation. Whereas: the meaning of: “*our* success” in the strap line inferred a product orientation corporate culture within Company B's' management style.

4.2.2.2 Client feedback: Company B

Feedback from *Company B/Participant 3* (*Company B/Participant 2* devolved responsibility over to *B/Participant 3* at that time) was also positive. *Company B/Participant 3* had

concerns that the image chosen had been used recently in the market place and that they had also used a similar image in the past. *Company B/Participant 3* stated that they had a couple of “stock images” that may be suitable and that *Company B/Participant 3* would send them to the author to “see what she thought”.

4.2.3 Designer's thoughts and researcher's observations

At this stage in the design process the author, as graphic designer, participant observer noted that the situation became “delicate” due to the fact that the visuals did not fully meet the needs of Company B.

Comments were brought to the author's mind regarding two sources. The first occurred at Company B's head office after the initial meeting. The author was inadvertently introduced to various Company B's staff as Company A's graphic designer. One member of Company B's staff commented that: “It would be good to get some consistency with the designs that go out”.

The second comment occurred during a telephone conversation with Company B's website developers, who stated that: “Company B's designs are all over the place. They use about five different fonts on one page”.

The resulting image that *Company B/Participant 3* claimed “may” be useful (indicating that it was to hand i.e. “stock images”) had been specifically instructed by *Company B/Participant 3* as a new concept. Also, the positioning and scale of both company logos had been changed and the strap line deleted.

The author recognised that the alternative concept was perfectly acceptable, although the quality of the illustration used was inferior. Also, the re-positioning of the logos and deletion of the strap line was contrary to *Company A/Participant 1's* development decision and approval.

In referring back to the initial meeting discussions and subsequent approved design brief, there is no mention of the proposed new concept, rather the selected phrase: “the biggest and the biggest” was approved as the concept from which all promotional designs would be based.

Also, the strap line that *Company A/Participant 1* had worked on and approved was deleted in the new mock up. The issue of the visual representation of the two logos, which again *Company A/Participant 1* had approved, was subsequently changed under *Company B/Participant 3's* direction without consultation.

Further interpretation of the altered design solution uncovered a deeper problem: the way in which the logos were positioned within the page layout and in relation to one another did not represent equality between both companies, rather it implied *Company B's* superiority. The way in which *Company A's* logo was represented reflected an unprofessional, poor quality design solution. In discussing the unprofessional design solution with *Company B/Participant 3*, it was suggested (by *Company B/Participant 3*) that the *Company A* part of the logo (written out in full under the *Company A* symbol) should be deleted. As an integral aspect of *Company A's* logo, the name of the business in full further underlined their identity in the market place. Should the suggested deletion of the *Company A* name (written out in full under the *Company A* symbol) be followed through, it would greatly affect the corporate values underpinning *Company A's* brand identity.

The designer became aware at that time that *Company A/Participant 1* had not been consulted on the progressed changes, and felt obligated to provide *Company A/Participant 1* with an update. *Company A/Participant 1* subsequently sent an e-mail to *Company B/Participant 3*, stating that:

Company A/Participant 1: "... I understand that you have suggested the removal of the words 'Company A [written out in full]' from the logo. I am adamant that this should not be removed. We are recognised in the market as 'Company A [written out in full]' and not A [an acronym of the company name in full]. The [acronym] part of the logo is a relatively new addition and has not had time to be recognised on its own yet. I am happy that "Company A [written out in full]" is not repeated in the document, on the illustration or in the text but it must remain in the logo. This is a requirement for all joint documents including letter heads, comp slips, business cards and so on...Can I please see any amended versions of the visuals?"

Company B's attempt to project their business values through the proposed design solutions compromised the design and more importantly, the business values of *Company A*. The final design was the result of major changes to the agreed brief in terms of graphic

design concept and re-interpretation of business values. Company A's logo remained intact and was depicted in a professional manner within the range of literature distributed for the merger with Company B.

4.2.4 Outcome of Case study 1

Three areas emerged from this study as influential to the information gathering stage in the graphic design process. These were:

1. Lack of adequate clarification of business values within the organisation communicated to the graphic designer.
2. The design brief proved to be inadequate in terms of client approval regarding a common understanding of business values.
3. The fact that the designer had previous graphic design relationships with one of the parties also had a bearing on the process and outcome.

Regarding area 2, this study revealed that the brief is at too late a stage in the communication exchange of business values to adequately inform the graphic design process.

The study findings elucidated the research proposition in part i.e. the communication exchange of business values between client and designer fails to adequately inform the graphic design process. Moreover, an approach to information gathering that is process driven or systematic could be useful in negating bias and preconceptions.

4.3 Phase 1: Case study 2 - Management buy out – Scott-Moncrieff Life and Pensions

Scott-Moncrieff Life and Pensions employ eleven staff and are located in Glasgow. The Life and Pensions group are the independent financial services arm of Scott-Moncrieff, Chartered Accountants, established in 1988, employing over two hundred staff. The Life and Pensions division within Scott-Moncrieff is operated by two directors and a nine support staff. The Life and Pensions group was in the process of proposing a management buy out

(MBO) from Scott-Moncrieff at the time of research participation. To this end, the author as graphic designer was asked to assist the MBO in making their core values explicit.

The MBO study was focused on formulating an understanding of business values that underpin the graphic design process and not on the creation of a corporate identity symbol i.e. corporate logo. The author emphasised to all MBO participants from the outset that the outcome of discussions would attempt to formulate an understanding of the MBO's business values. The resulting MBO business values would then inform the graphic design process underpinning subsequent future design solutions.

It was agreed that the MBO participants would be involved in the early stages of the development of the CDT to facilitate an understanding of business values between client and designer. Although the study began by involving the graphic designer as participant observer, the project quickly evolved into action research.

As the author became more involved in action research, little time was available to spend on documenting observations while participating in the study. During this period, the author and participants worked through an intensive information gathering process, which was then analysed by the author with results fed back to respondents in the form of a report (see Appendix 2.1).

The report provided an analysis of core business values, as a direct result of discussions and information provided by key decision makers within the new MBO business. The author facilitated the process as graphic designer, action researcher. Further discussions regarding the accuracy of the report with participants were carried out to conclude case study two.

4.3.1 Initial development of CDT terms

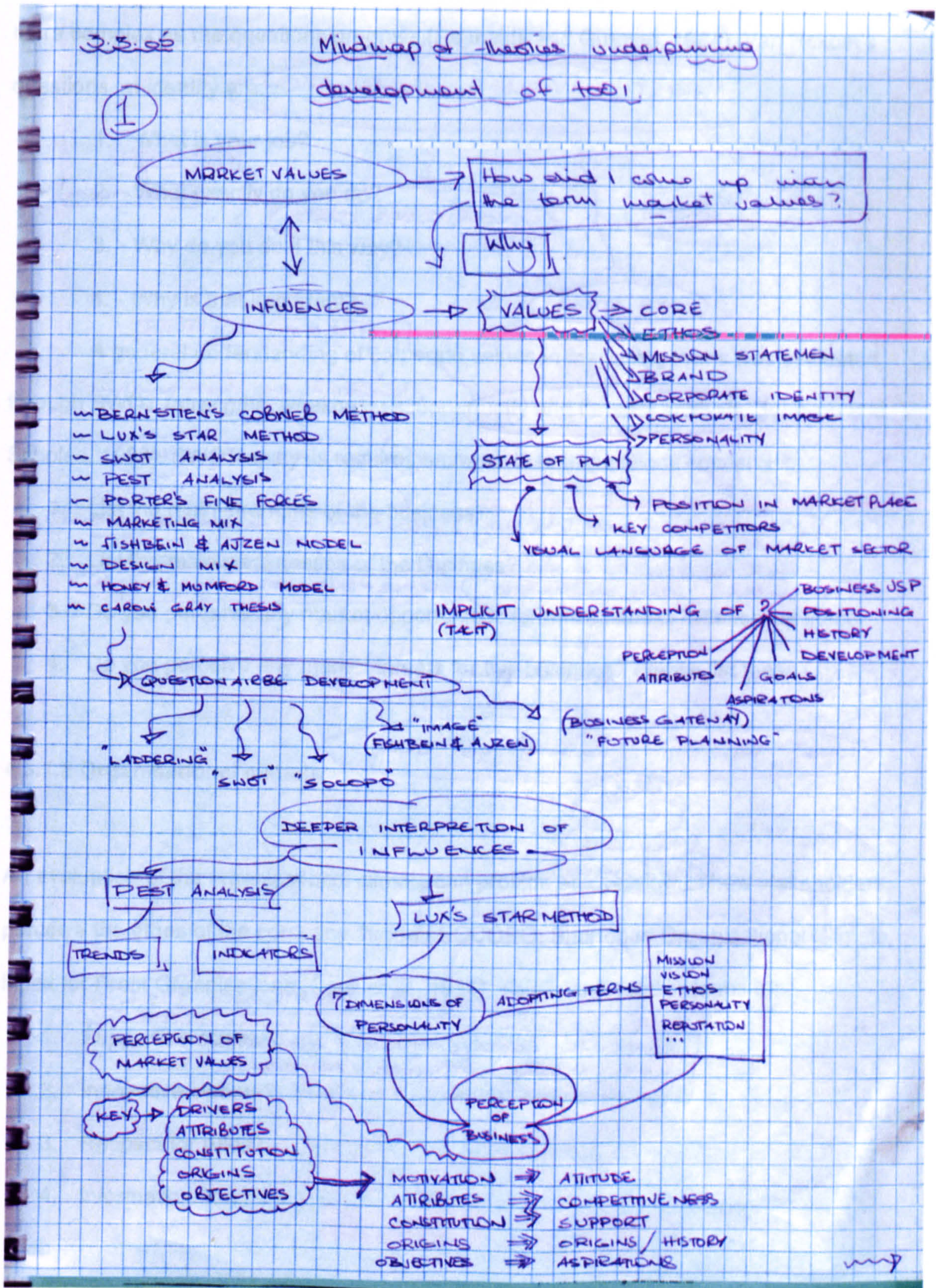
The aim of this second case study was to uncover business values known implicitly to the decision makers of the new business. Discussions involving three key decision makers in the MBO business, facilitated by the author would provide the basis from which implicit business values would be made explicit.

Figure 4.3 depicts a mind-map providing a description of general models reviewed from corporate communication, management, marketing and other sources, during various

brainstorming sessions. The models shown in Figure 4.3 and also general business models listed in Appendix 4 provide the basis for formulating an understanding of business values. The filtering technique applied to the nomenclature of business value terms generated from selected models is also depicted in the mind-map. The author made decisions regarding selected terms, underpinned by literature and from discussions with management and marketing professionals.

Relevant communication, management and marketing models were investigated prior to the MBO discussions that would underpin business value terms. This is explained in the following sections: 4.3.1.1 to 4.3.1.6.

In this way, the results of case study two would further inform the development of more concise questions regarding business values.



4.3.1.3 Corporate image

Figure 4.3: Mind-map of brainstorming process regarding nomenclature of corporate value terms.

Fishbein and Ajzen's (1975) Fishbein model regarding the relationship between attitude and behaviour

4.3.1.1 Corporate identity

regarding the relationship between attitude and behaviour

attitudes. The model aims to explain

Van Rekom (1992) offers questions asked of stakeholders in an organisation to find out perceptions of their sense of place and how they fit in an organisation. This is carried out through a "Laddering" technique, involving questions that start off as simple and become

more complex as the questions progress (Reynolds and Gutman, 1984). Van Rekom's questions on identity are:

1. What is your job?
2. What exactly do you do?
3. Why do you do it this way?
4. Why is that important?

A general understanding of corporate values in marketing terms was evaluated through SWOT (strengths, weaknesses, opportunity and threats) analysis (Johnson and Scholes, 1993). SWOT analysis requires answers to four questions concerning:

1. List the main strengths of the business?
2. List the main weaknesses of the business?
3. Do you perceive any market opportunities for this business? Please list these.
4. Do you perceive any market threats for this business? Please list these.

4.3.1.2 Organisational climate

An evaluation of the organisational climate can provide an overview of how stakeholders perceive the ethos of the company through SOCOPO: Shortened Organisational Climate Index for Profit Organisations (Cock *et al.*, 1984). This is analysed in terms of:

1. Supportive climate?
2. Innovative climate?
3. Respect for rules?
4. Information flow?

4.3.1.3 Corporate Image

Fishbein and Ajzen's (1995) attitude model asks respondents to provide a judgement regarding the attributes of a given image object and also to attach a value to each of the attributes. The model rating involves a scale ranging from one to five, where one represents: "strongly disagree" through to five, representing: "strongly agree". The value selected represents the weight assigned to the attribute e.g.:

1. Company A sells quality products.
2. Company A staff are friendly...
3. Company A is cheap...
4. etc ...

4.3.1.4 Corporate strategy

The Future Planning link located within the Business Gateway website offers relevant information on formulating the future state of play of an organisation. This section of the website describes the need for information gathering on future planning, described as: "key people in business sharing their views on where we are now, how we got here, where we want to be and what we need to do" (www.businessgateway.co.uk, 2006).

4.3.1.5 Corporate influences

Within the PEST (Political/legal; Economic; Socio-cultural; Technological) analysis model, two areas have influenced an understanding of corporate identity (Johnson and Scholes, 1993). These areas refer to: Trends and Indicators. Trends include areas from: Demographics; Environmental; Attitudes and Values; Globalisation. In evaluating these areas a further breakdown is carried out, including:

1. What are the positive and negative implications of trends and indicators?
2. How could this trend change the business we do?
3. How could this trend allow other competitors to get into our market space?
4. How does this trend relate to other trends and help build up a picture of the future?

Indicators located within the "market values" section of the CDT, refer to developing the above four trends through scenarios for future predictions.

Porter's five forces have informed the development of the CDT regarding industry sector influences (Porter, 1985).

4.3.1.6 Corporate personality

Lux's Star model provides a method of evaluating stakeholders' perception of the personality of the organisation. It is important to note that the seven key terms identified within Lux's model are predetermined (Van Riel 1992, pp50 - 52). Participants are asked to rate their perspective in relation to each of the seven key corporate personality terms: attitude; temperament; competencies; origin; constitution; needs and interests. Once completed by all participating stakeholders, the information provided from each stakeholder is then collated. The resulting analysis provides an evaluation of the organisational personality as a mapping exercise that reveals stakeholders' perception of the organisation in relation to that of the predetermined terms.

While similar to Lux's Star method, Bernstein's Cobweb method represents a significant differentiating factor that underpins the development of the key terms generated within this research study. The difference between the two methods relates to the way in which the key terms are determined.

Bernstein's Cobweb method (Van Riel 1992, p.50) adopts a process whereby key decision makers within the organisation decide appropriate key terms to be used within the method, whereas Lux's Star method (Van Riel 1992, p.52) provides predetermined key terms. This aspect of generating key terms within the Cobweb method represents a significant influencing factor within this research. The process of developing key terms as understood within this thesis is a valuable aspect of any communication exchange, rather than being provided with predetermined key terms that may or may not apply. According to Van Riel: "the most important function of the method [Bernstein's Cobweb method] is to bring out into the open the terms which the managers are thinking, and to arrive at an unambiguous statement of the corporate identity desired by the management" (Van Riel 1992, p.50).

This is important, as the communication process in relation to understanding attributed meaning and individual interpretation is integral in understanding a common language. One aim of this research was to provide a communication platform from which client and designer can achieve a deeper level of communication exchange i.e. a CDT that

attempts to facilitate a more informed communication exchange between client and designer.

4.3.2 Filtering technique applied to the development of key business value terms

Influenced by the literature reviewed and the plethora of terms surrounding corporate identity, the author required combining relevant key terms in order to focus discussions with the MBO participants regarding business values.

Filtering relevant information through the predetermined terms defined in Lux's Star method (Van Riel 1992, p.52) resulted in the development of Lux's seven dimensions emerging as possible terms and relevant questions to ask, regarding stakeholder perception of business values.

Through a four stage process of filtering business value terms, initially through Lux's Star method (Level 1) and thereafter selected from accumulated information, four final key terms emerged: objectives; attributes; ethics; origin. The first stage in the filtering process is depicted in Figure 4.4.

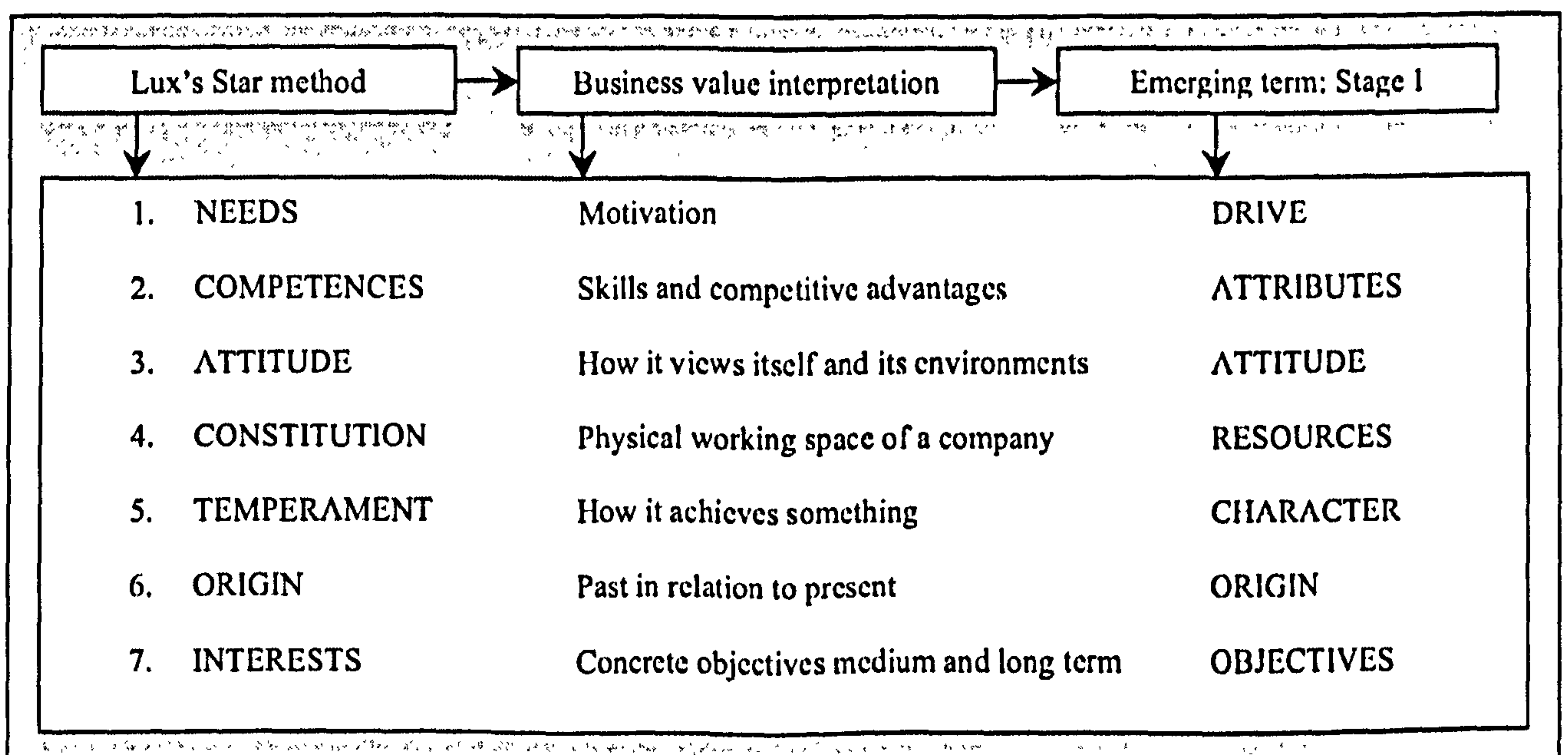


Figure 4.4: Filtering business value terms: Stage 1.

Stage two involved inclusion of additional influencing business value terms. These were sourced from the "long-term drivers of change" aspect of the PEST (Political/legal, Economic, Socio-cultural, Technological) analysis (Johnson and Scholes 1993, p.82).

Analysis at this second stage in the process of the second level of emerging key terms resulted in the formation of five terms: drivers, attributes, constitution, origin and objectives, detailed in Figure 4:5.

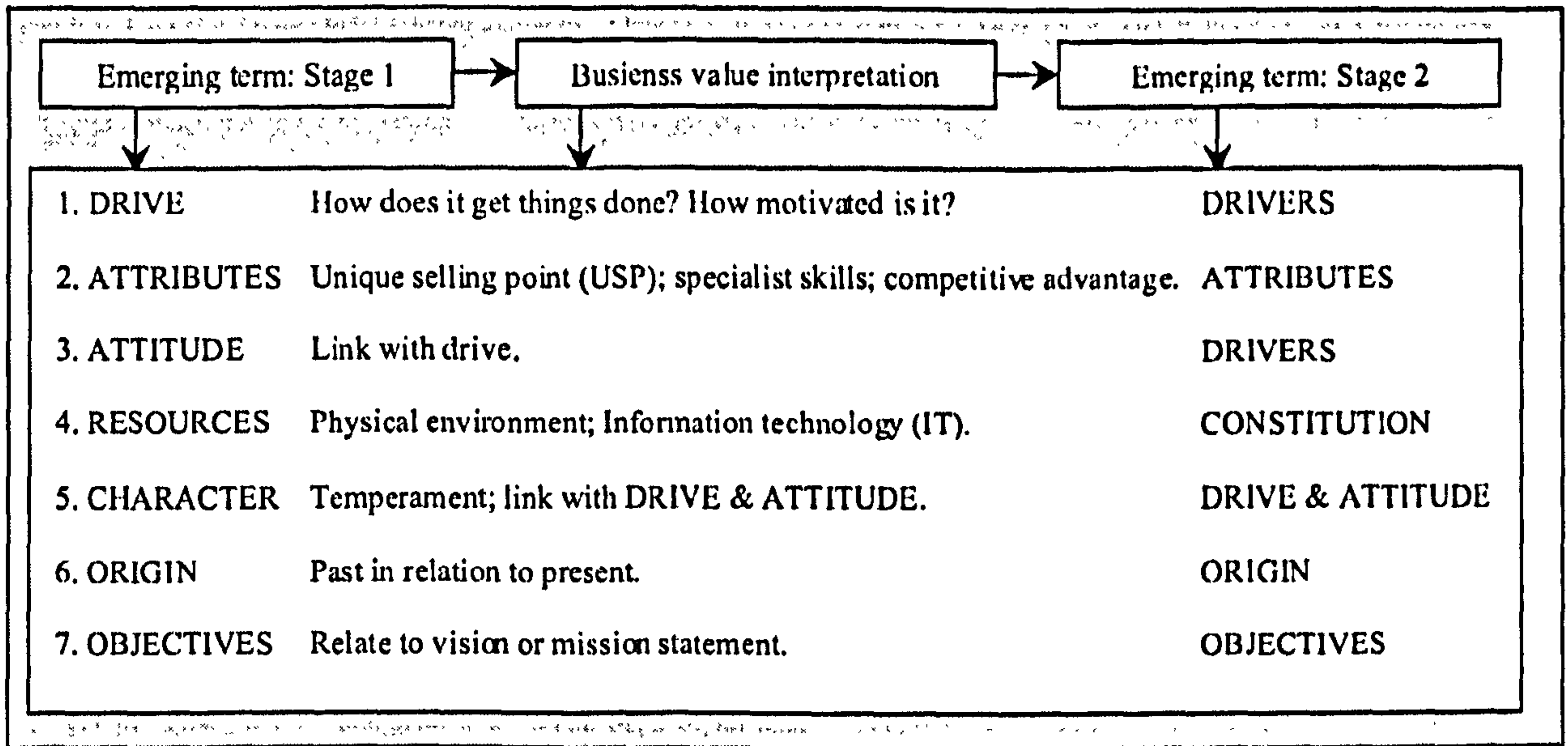


Figure 4.5: Filtering business value terms: Stage 2.

Stage three in the process involved further refinement of the above terms. One term: Drivers was changed to: Motivation. This was viewed as a more accurate description. The term: Drivers remains in the explanatory text part of the question (see Figure 4.6). The terms: Motivation and Constitution were combined to form the term: Ethics. This term was felt to more accurately describe the influencing nature of the organisation. Stage three is depicted in Figure 4.6.

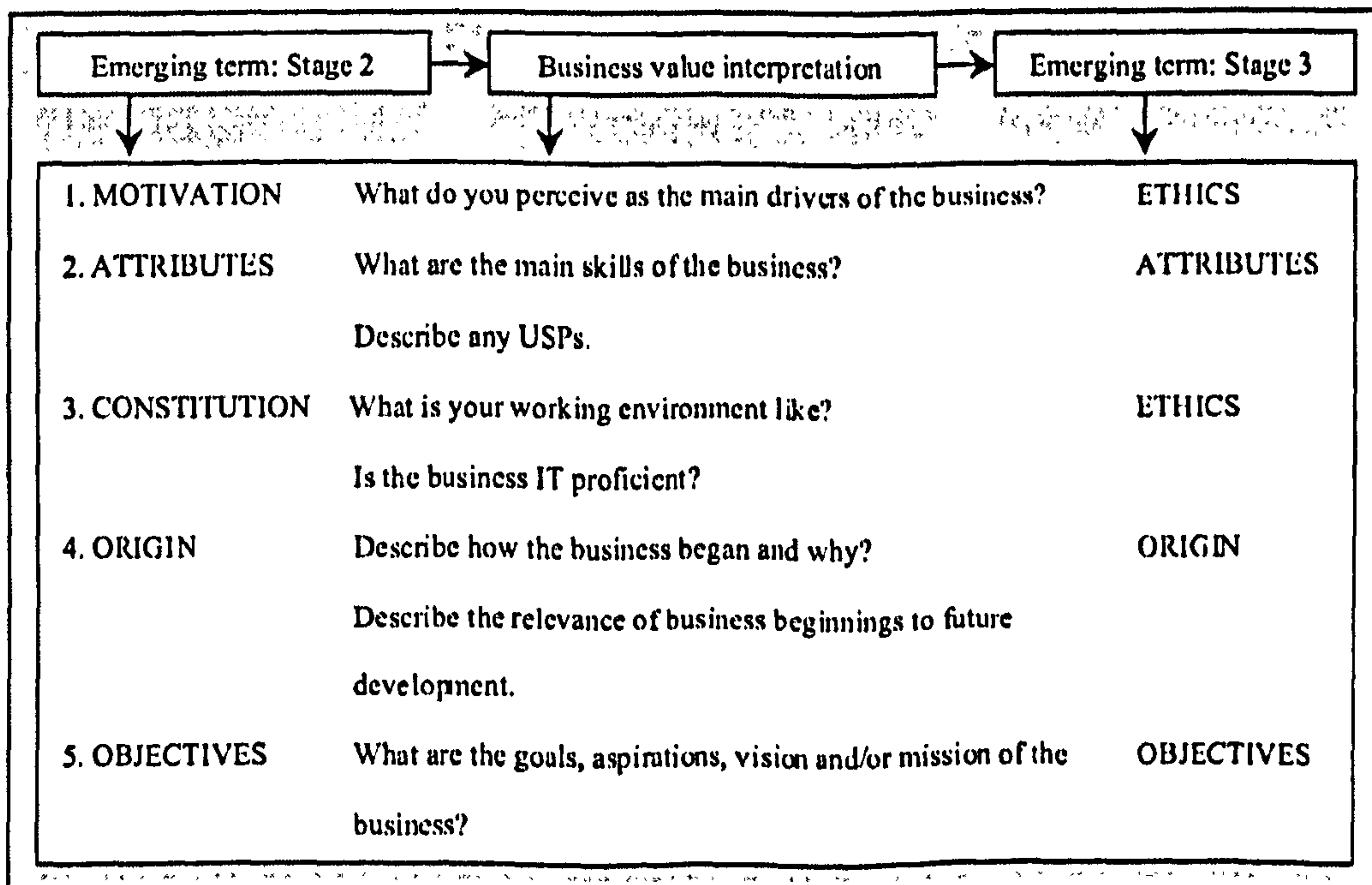


Figure 4.6: Filtering business value terms: Stage 3.

Checking and re-checking the information within these three stages resulted in the final fourth stage in the process. The key business value terms emerged as: objectives; attributes; ethics and origin. Appropriate explanatory text was minimised to maintain focus during the forthcoming discussions. This information provided the author with four business value terms that would combine to focus the MBO discussions regarding core business values, as shown in Figure 4.7.

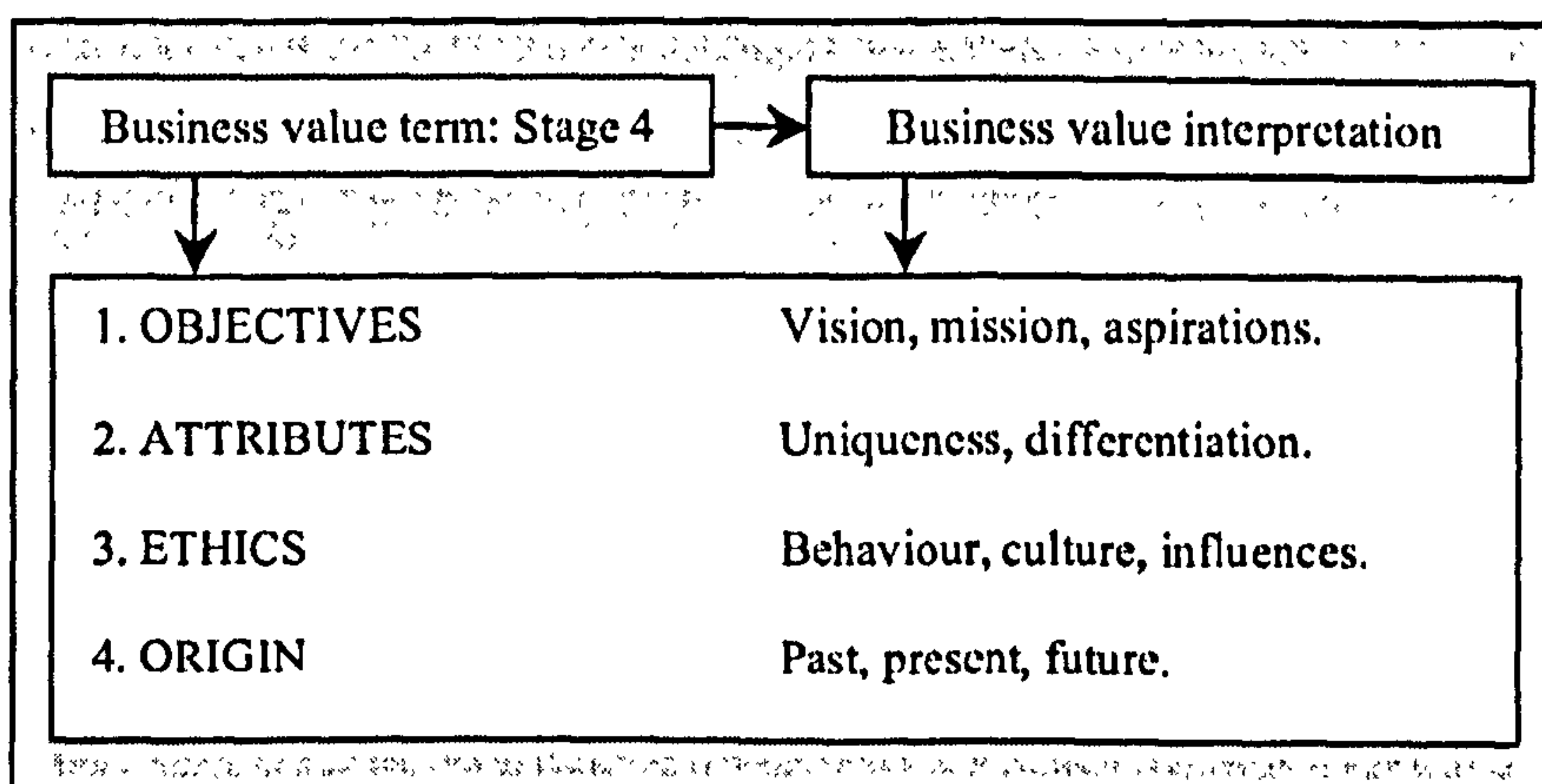


Figure 4.7: Final business value terms: Stage 4.

4.3.3 Action research: Development of MBO business values

Discussions between the MBO key decision makers and the author were carried out in order to make the implicit values of the new MBO business explicit. The following attendee's names have been abbreviated for reporting purposes:

Andy Cumming, Director, Scott-Moncrieff, Life and Pensions *AC*

Raymond Ellis, Associate Director, Scott-Moncieff, Life and Pensions *RE*

Jennie Ellis, Associate, Scott-Moncrieff, Life and Pensions *JE*

Deborah Cumming, Action researcher, Participant observer, Graphic Designer *DC*

The meeting began by *AC* explaining that they [*AC* and *RE*] were breaking away from the main Chartered Accountant firm [Scott-Moncrieff] and starting up on their own, with a number of existing and new staff. The MBO were looking for graphic design input regarding an assessment of the MBOs design needs, acknowledging that the first stage in that process was to understand the business's core values. *AC* had previous experience of working through a corporate identity project, having been involved in the Scott-Moncrieff logo re-design. As the meeting agenda had previously been agreed, all attendees were

prepared for discussions relating to the MBO's business values.

Key corporate identity terms: objectives, attributes, ethics and origin that were formulated in preparation for the MBO discussions, provided a facilitation focus aid.

The results of the discussion were analysed through a filtering process, involving content analysis and coding and fed back to the client in the form of a report (see Appendix 2.1).

4.3.4 Action research: Author as graphic designer

In working through the steps taken to interpret business values into graphic design solutions, the author could draw from previous graphic design experience. These steps require unravelling in order to contextualise the graphic design process.

Interpreting business values into graphic design solutions involves an awareness of visual communication (Bernstein, 1986; Dickson, 2001; Floch, 2000; Kapferer 1988, 2001; Knapp, 2001; Lury, 1988; Shitaro and Webb, 2004; Morgon and Welton, 2003).

The graphic design communication process should ensure that the overall appearance of a document transmits a message that is not "different from the explicit statement of the wording" (Silver and Silver 1991, p.16).

4.3.5 Additional areas required in the graphic design information gathering process

During the graphic design information gathering process, the author could draw from previous professional experience. The author recognised, as a direct result of working through the graphic design process, that other areas were necessary. These areas concerned:

- a) Collect a variety of competitors' graphic design examples.
- b) Translate business values into graphic design elements.

It was extremely valuable for the author to be involved in the phenomena as it occurred. The author was able to bring a more objective perspective to reviewing the graphic design process through working directly with the MBO participants. In preparing the MBO report, the author documented two aspects of the graphic design information gathering

process that had been dealt with implicitly during the field research but not documented as such. These areas referred to information contained in the MBO report:

1. "A review of the graphic design elements used within the financial/ insurance sector refer to the six key competitor's provided by the client"
2. "... to compare use of symbolism, words, copywriting style, typographic style, layout design and use of colour" (see Appendix 2.1).

Generally, the graphic designer gathers visual information on the client's key competition, either through information provided by the client or initiated at the designer's discretion, or a combination of both. The resulting visual examples of how the competition uses graphic design provides the designer with an up to date understanding of the visual language within a given market sector.

In reporting the graphic design process to the MBO Company, the author unknowingly provided a breakdown of the generic visual elements that are required in all graphic design products. This aspect of the graphic design process became transparent by working through the development of the CDT.

4.3.6 Generation of terms: Generic graphic design elements

Having generated terms that would facilitate an understanding of business values, the author then deconstructed the elements that combine to make up any graphic design solution during several brainstorming sessions, in an attempt to map business values to graphic design products. These generic graphic design elements include: symbol; imagery; colour; copywriting; typography and layout. The genesis of these individual elements are described in the following sub-sections: 4.3.6.1 - 4.3.6.6.

4.3.6.1 Symbolism

Symbolism, as part of the corporate identity mix: "behaviour, communication, symbolism", represents the outward graphic design aspect of corporate identity (Van Riel 1992, p.28). Corporate identity, brand reputation and the use of symbolism in corporate logos are connected with design through: "creating differentiation" (Olins 2003, p.191). A symbol as a

logo is used to describe "any design or symbol, such as a pictogram, which forms the centrepiece of a corporation or organisation's corporate identity" (Campbell 2000, p.290).

The term symbolism within the graphic design section of the CDT refers to the corporate logo. Variations described included: mark, shape, linear, organic, photographic, representational, abstract, with/without strap line, typographic solution, single/multi colour, reproductive suitability, usage.

4.3.6.2 Imagery

Pictures and graphics are known interchangeable terms used in graphic design. Imagery represents the style of images used within the graphic design solution. These have been categorised as: photographic, illustrative, geometric, curvilinear, coverage.

4.3.6.3 Colour

Colour represents the main or basic colours used within the graphic design solution. Other areas that require to be taken into account when applying colour to graphic design solutions are shade, tint and coverage.

4.3.6.4 Copywriting

Copywriting represents the style of writing applied to the written form of communication within the graphic design solution. The length of text and language style used should also be taken into account.

4.3.6.5 Typography

Typographic style relates to associated meaning attached to font styles. Other areas of typographic style such as weight of line, scale and prominence on the page are to be considered.

The more technical aspects of the art of type design such as: family of fonts; typeface style and characteristics; point size; x height; kerning; line length; leading; tracking etc. are considered as specialist information not normally required at this basic level.

4.3.6.6 Layout

Page layout in graphic design represents four basic positioning formats: centred; off-centre; grid and diagonal (Silver and Silver, 1991). These terms were refined to represent a less technical aspect of page layout through the more generalised terms: minimalistic; contemporary; traditional and structured.

4.3.7 Additional area required in the graphic design information gathering process

The author recognised, as a direct result of working through the graphic design information gathering process that another additional area of the graphic design process was required i.e. basic information on the business e.g. what it does, where it does it and for whom?

4.3.8 MBO feedback: reported results of core business value analysis

MBO feedback was provided upon delivery of a report (see Appendix 2.1). All respondents agreed that the information contained in the report relating to business values was: "exactly right. There is nothing that I [AC] or anyone else would change".

The report fed back the collated information, analysed by the author, resulting in core business value terms and visual analysis of competitor's graphic design examples, relative to the MBO's market sector. Two sections of the report regarding interpretation of the MBO's core business values were beneficial to the development of the CDT. These involved:

1. Definition of key terms
2. Translating business values into graphic design guidelines

4.3.9 Outcome of Case study 2

Case study two reported the genesis of the CDT that provided a successful understanding of business values. Case study two resulted in positive feedback from collaborating participants to the extent that the MBO members reiterated their intentions to take the process through to fruition out with the author's research commitments.

The MBO's business values resulted from discussions between the key decision makers of the MBO business and the author, based on the key business value terms: objectives, attributes, ethics and origin. Appendix 2.1 provides a copy of the MBO report.

4.4 Phase 1: Graphic designer evaluation

To complete phase one of the process (see Figure 4.2), the first independent graphic designer: Rae Alexander, provided an evaluation of the proposed elements that would underpin the initial components of the communication model. The author encouraged the graphic designer to comment on the developing CDT, based on her experience of working with the small business client sector over a number of years. A copy of Alexander's CV is detailed in Appendix 5.1.

Comments from Alexander were positive, offering a balanced perspective. The most informative comments concerned language ambiguity in relation to meaning attributed to terms. Pertinent comments reported from Alexander included:

- 1. "Questions should be more specific so that you receive the same information from all the participants".*
- 2. "Although the management have probably thought about these issues perhaps some of the employees haven't. Therefore the questions should be more direct or else people will skip over what they don't know. I would make it compulsory that they answer all questions because then their lack of knowledge about the company (e.g. aspirations) is communicated to the management and/or their misinterpretation. Making it [the questions] specific will allow the company to form their market values and communicate them correctly to the whole company".*

3. *“Perhaps beside each competitor they [the client] should list what they do and how they are different from each other. Also they could analyse their competitors visual information – why it works, why it doesn’t etc.”.*

4. *“Finally, what worries me here is that everybody has the same definition in their heads of the descriptive words. I fear people who are not in the design industry probably don’t have the same vocabulary. Therefore would it be possible to have concrete examples or descriptive text? For example, to the layman, what is the difference between minimalistic and contemporary?”.*

4.4.1 Outcome of first graphic designer evaluation

The main aspects of the first graphic designer evaluation of the CDT was that:

1. All business members are required to complete the questionnaire: in this way an understanding of the business can not only inform the graphic designer but serve to provide a basis for stakeholder understanding of the business.
2. The use of jargon specific to either the small business or the graphic designer requires to be clarified during the communication exchange between client and designer. One solution may be to provide “concrete examples or descriptive text”.

4.5 Summary of Chapter 4

Analysis of the first graphic designer evaluation reports that the CDT incorporates: a) completion by all members of the business and b) jargon to be eliminated.

The emerging analysis of case study one revealed that communication between client and designer, the design brief and the relationship between client and designer impacted on and influenced the development and success of the graphic design projects undertaken.

Case study two revealed that an accurate interpretation of the MBO decision makers' core business values was successfully achieved through the early version of the CDT as acknowledged by all participants.

An evaluation of the components that combine to make up an alternative method of information gathering that informs the graphic design process provided by the first graphic designer was positive, offering valuable information to consider and inform the further development of the CDT.

CHAPTER 5: Case studies 3 - 9: Continuing development of the CDT

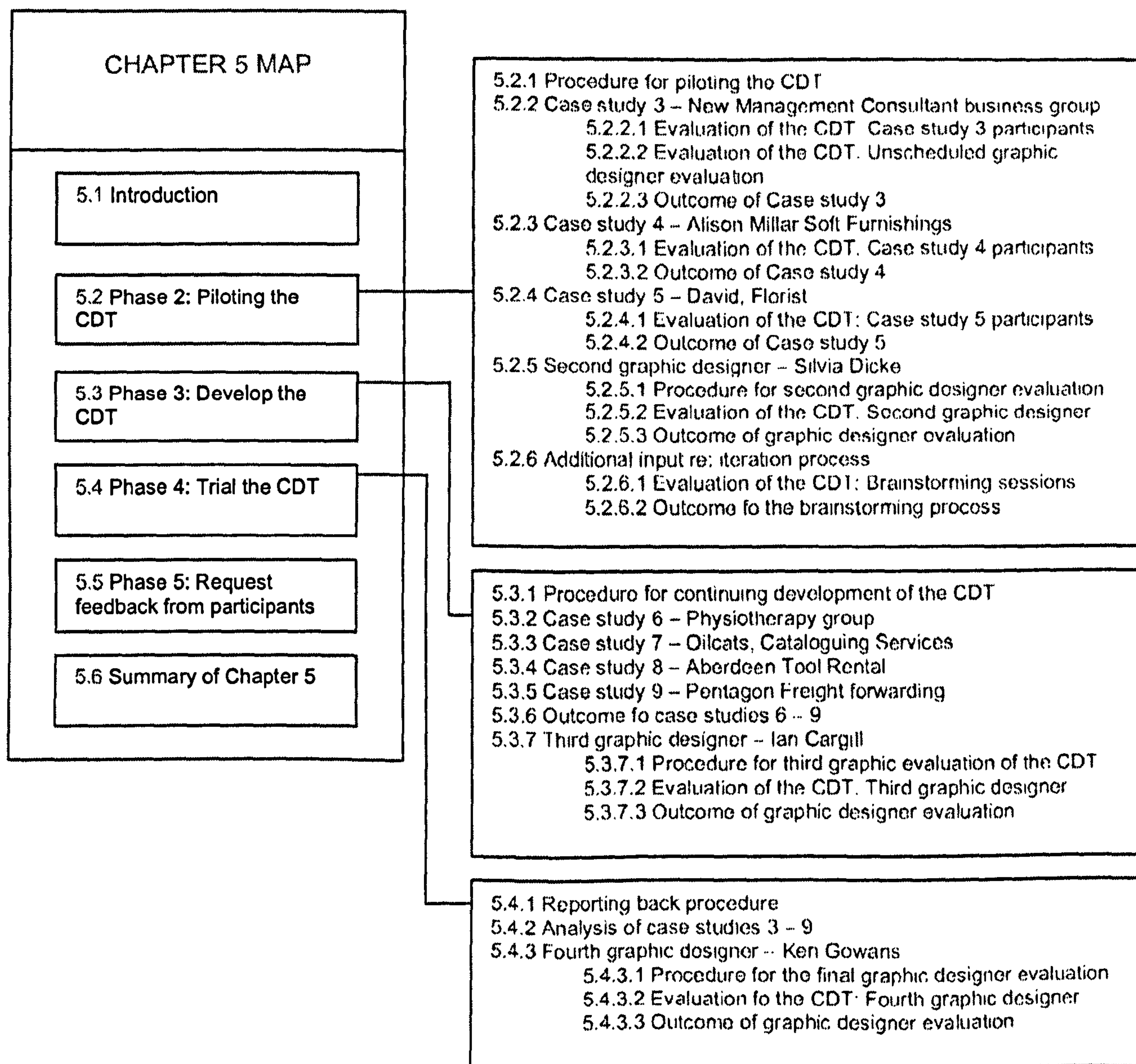


Figure 5.1: Chapter 5, chapter map

5.1 Introduction

This chapter reports seven case studies and input from three scheduled and one unscheduled graphic designer involved in the development of the Communication Design Tool (CDT). Participants involved in this section of the research include stakeholders from seven (North East Scotland) small businesses and three independent graphic designers, experienced in working within the small business client base. Several attempts were made at securing participation from the pre-determined criteria resulting in adequate representation from a cross section of the market place.

The iteration process was an integral aspect of the development of the CDT and in this respect the studies were defined as:

PHASE 2 – Piloting the CDT: Case studies 3 - 5

PHASE 3 – Developing the CDT: Case studies 6 - 9

PHASE 4 – Trialling the CDT: Case studies 3 - 9

PHASE 5 – Request feedback from participants: Case studies 3 - 9

A number of semi-structured and informal interviews took place with case study respondents and graphic designers during delivery and throughout the entire process. Scheduled graphic designer evaluations occurred at the end of each phase in the process, detailed in Figure 3.6. One unscheduled graphic designer evaluation occurred during case study 3.

5.2 PHASE 2: Piloting of the CDT

This phase concerned piloting the CDT involving three case studies and the second graphic designer evaluation. This is depicted in Figure 5.2.

Phase two reports the procedure, evaluation and analysis of an intensive iteration process during the development of the CDT. The iteration process proper began with this phase, carrying forward the CDT as a result of case studies one and two and also the second scheduled graphic designer evaluation.

The CDT evolved at the end of phase two having undergone numerous iterations. The iterations reported were as a result of: case studies 3 (also involving an unscheduled

graphic designer evaluation), 4 and 5; the second (scheduled) graphic designer evaluation; semi-structured interviews with respondents and a combination of brainstorming sessions carried out throughout the process.

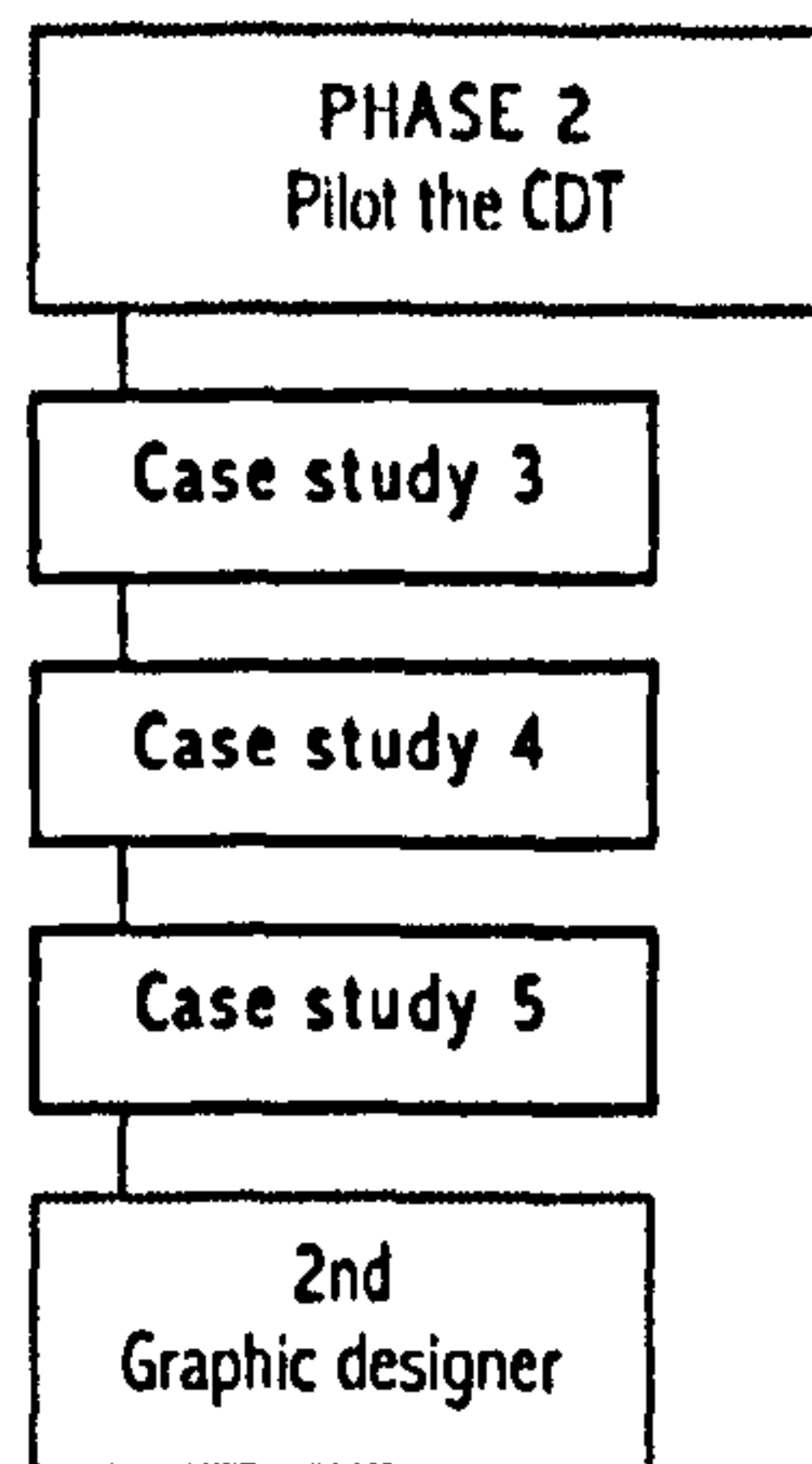


Figure 5.2: Phase 2 of the Communication Design Tool iteration process.

5.2.1 Procedure for piloting the CDT

The Market Value Facilitation Analysis, as the CDT was called at this stage in the process, was distributed as a questionnaire to all case study 3 participants for completion. Ian Cargill, who was working with the group as a graphic designer at the time, distributed the questionnaire to the group. Thereafter, the author as action researcher distributed all subsequent questionnaires to the remaining six case studies. Appendix 3 records the Market Value Facilitation Analysis (CDT) questionnaire at the start of the pilot study iteration process.

Completion of the Market Value Facilitation Analysis (CDT) concerned case study participants answering all sections of the questionnaire. This involved business members who were selected at the discretion of each business representative. A covering sheet attached to the questionnaire stated the nature and purpose of the research, encouraging inclusion of any additional comments and also the author's contact details for clarification on any aspect of the Market Value Facilitation Analysis (CDT) and/or process (see Appendix 3.7).

5.2.2 Case study 3 - New Management Consultant business group

This new management consultant business was at the early stages of forming an understanding of their business values. The function of this company was to offer a variety of quality management consultancy services to the market place in general. The graphic designer (Ian Cargill) involved in this process under the direction of the eight company members, invited the researcher to put forward an early version of the method as an alternative exploratory process of the new business formulating their business identity. The group actively responded to the development of the CDT, offering several suggestions for improvement.

This opportunity provided an initial evaluation of the CDT as questionnaire from both small business client and graphic designer. The resulting evaluation would assist in uncovering business values to inform the graphic design process.

5.2.2.1 Evaluation of the CDT: Case study 3 participants

Several areas arose as participants worked through the CDT questionnaire. The main comments reported were:

1. Question 1: what does the company do?

Comments reported: is this to be completed by everyone?

2. Question 3: what visual language do competitors use?

Comments: what if there are no competitors?

3. Question 4: what are the company's graphic design preferences?

Comments: imagery e.g. curvilinear, what does that mean?

4. General comments:

a) Could we use metaphors to describe the business?

b) Should we collaborate on the questions being asked?

c) The group felt empowered, rather than being presented with a fait accompli.

5.2.2.2 Evaluation of the CDT: Unscheduled graphic designer evaluation

An unscheduled evaluation by the graphic designer (Ian Cargill) reported that the CDT could serve as a “double mapping” exercise and saw it working as an analysis process that upon completion would provide an evaluation of the conceptual direction of the new business identity. Cargill reported that compatibility between the concept generated by the CDT and the concept provided by the designer could result in a safety check, revealing communication harmony (or otherwise) between designer and client.

5.2.2.3 Outcome of Case study 3

The author as action researcher processed comments from participants of Case study 3 by collating the information and changing the CDT accordingly. This resulted in the following iterations:

1. Question 4: graphic design preferences.

Changes made: inclusion of additional font styles.

2. Question 4: graphic design preferences.

Changes made: the use of a metaphor as a visualisation tool was included within this section relating to association with wild animal personality characteristics.

Other general comments required attention. These were:

1. Question 2: what visual language do competitors use? Respondents commented that the company had “no competitors”. It was suggested that although no direct competition may exist, the market might offer similarities with other associated businesses and that it would be in the small businesses interests to investigate these sources.

2. Collaboration during completion of the CDT was reported to be problematic. This was particularly pertinent within this group, as Cargill reported that: “The group dynamics had historically been driven by two or three strong vocal characters that influenced decisions made by the remaining group members”. The CDT operated from a need to maintain individual perspectives that would attempt to provide a more accurate reflection of stakeholder perception.

3. The author changed the name of the method from Market Value Analysis Tool (CDT) to Communication Design Tool (CDT) as a result of various brainstorming sessions.

4. Question 4: what are the company's graphic design preferences? This section was revisited. Figure 5.3 details information provided before iterations were made and Figure 5.4 details resulting information after iterations.

PHASE 2: Case study 3 Before iteration		
Section 4: What are the company's graphic design preferences?		
Terms	Description	Categories
SYMBOLISM		<ol style="list-style-type: none"> 1 Mark 2 Shape 3 Linear 4 Organic 5 Photographic 6 Representational e.g. illustrative 7 Abstract 8 With/without strap-line 9 Typographic solution 10 Single/multi-colour 11 Reproductive suitability 12 usage
LAYOUT		<ol style="list-style-type: none"> 1 Minimalistic 2 Contemporary 3 Traditional
COLOUR		<ol style="list-style-type: none"> 1 Red – anger, danger, drama 2 Blue – conservative, medical/clinical, clean 3 Yellow – happy, sunshine, fresh 4 Green – environment, organic, medical/clinical/health 5 Black – strong, dynamic, overpowering 6 White – pure, clean, simple 7 Grey – sombre, subtle
IMAGERY		<ol style="list-style-type: none"> 1 Photographic – full colour etc., style stc. 2 Illustrative – style etc. 3 Geometric – strong, linear, organised 4 Curvilinear – organic, feminine, clutter 5 Coverage – layout % importance
FONT		<ol style="list-style-type: none"> 1 Typographic style – traditional, contemporary, structured, organic, fun, scriptive etc. 2 Usage - % on layout
COPY		<ol style="list-style-type: none"> 1 Style of writing 2 Length of text - % on layout 3 Language – within specific business sector

Figure 5.3: Case study 3: Section 4 before iterations.

PHASE 2: Case study 3 After iteration		
Section 4: What are the company's graphic design preferences?		
Terms	Description	Categories
SYMBOLISM	e.g. graphic identity	<ol style="list-style-type: none"> 1 Mark 2 Shape 3 Linear 4 Organic 5 Photographic 6 Representational e.g. illustrative 7 Abstract 8 With/without strap-line 9 Typographic solution 10 Single/multi-colour 11 Reproductive suitability 12 usage
LAYOUT	e.g. page, website etc.	<ol style="list-style-type: none"> 1 Minimalistic 2 Contemporary 3 Traditional 4 Structured
COLOUR	e.g. page	<ol style="list-style-type: none"> 1 Red – anger, danger, drama 2 Blue – conservative, medical/clinical, clean 3 Yellow – happy, sunshine, fresh 4 Green – environment, organic, medical/clinical/health 5 Black – strong, dynamic, overpowering 6 White – pure, clean, simple 7 Grey – sombre, subtle
IMAGERY	Pictorial style	<ol style="list-style-type: none"> 1 Photographic – full colour etc., style etc. 2 Illustrative – style etc. 3 Geometric – strong, linear, organised 4 Curvilinear – organic, flowing, clutter 5 Coverage – layout % (please indicate)
FONT	Letter style	<ol style="list-style-type: none"> 1 Typographic style - traditional 2 Typographic style - contemporary 3 Typographic style - structured 4 Typographic style - organic 5 Typographic style - fun 6 Typographic style - scriptive 7 Typographic style - stately 8 Usage - % on layout (please indicate)
COPY	Text	<ol style="list-style-type: none"> 1 Style of writing (please indicate) 2 Length of text - % on layout (please indicate) 3 Language – within specific business sector (please indicate) 4 Key terms (please indicate)
PERSONALITY QUALITIES		<ol style="list-style-type: none"> 1 Lion – ruler 2 Elephant – long-term reliability 3 Giraffe – sources the best 4 Dolphin – anticipating change 5 Bee – skilfully productive 6 Chameleon – ability to merge 7 Owl - wise and knowing 8 Rabbit – productive 9 Fish – driven by group work 10 Frog – ability to leap across boundaries 11 Leopard – aggressive and fast 12 Other – please indicate

Figure 5.4: Case study 3: Section 4 after iterations.

The CDT was updated with relevant iterations serving to inform the next case study. An example of the CDT at this stage in the iteration process is provided in Appendix 3.4.

5.2.3 Case study 4 - Alison Millar Soft Furnishings

Alison Millar Soft Furnishings has been trading for sixteen years, with a staff of six full time and five outworkers and also utilises a bank of occasional staff. The business provides made-to-order soft furnishings ranging from bespoke to machine manufactured. Services include: complete soft furnishing products; design advice; measuring and fitting; supply of fabric and fittings. Their client base includes John Lewis PLC, Creative Interiors and Grampian Contracts.

The approach chosen by Alison Millar (owner) was to distribute the CDT questionnaires to staff after she had reviewed them. Millar decided that the complete CDT would be "Too complicated for the staff to fill out", and that: "they [staff] would just ask me [Alison Millar]". It was agreed that Millar alone would complete sections 1, 2 and 3 herself and distribute the remaining section 4 of the CDT to the rest of her staff for completion. Copies of section 4 of the questionnaire were provided.

5.2.3.1 Evaluation of the CDT: Case study 4 participants

After delivery of the CDT questionnaires the owner offered observations regarding the CDT, stating that once completed she [Alison Millar] would report back any information from participants.

Several areas arose as participants worked through the CDT questionnaire. The main comments reported by Millar relate to:

1. Question 1: what does the company do?

Comments: i could get someone to fill out this part.

2. Question 2: what are the market values of the company?

Comments: it would work if we were looking at friendly, helpful, or something like that. Multiple-choice would be better. I will fill out this part too.

3. Question 3 a), b) and c): what visual language do competitors use?

Comments: i could get someone to fill out these parts.

4. Question 4: what are the company's graphic design preferences?

Comments on Symbolism: what does the Nike swish mean? What is that? How would this section work?

Comments on Font: yes, I see the use of fonts.

Comments on Personality Qualities: this would work. The staff could do that. Yes, we would be Industrious Bee.

General comments: this would be too complicated for the staff to fill out. They would just ask me what to put in.

5.2.3.2 Outcome of Case study 4

Comments processed from case study 4 resulted in the following iterations:

1. Question 1: what does the company do?

Changes made: include information clarifying that this question need only be completed once.

2. Question 2: market values.

Changes made: include an accompanying sentence describing key terms: objectives; attributes; ethics and origin in everyday plain English vocabulary (www.plainenglish.co.uk, 2006).

3. Question 2 b) and c): market values.

Changes made: change the type of answers firstly, to multiple choices and then to a rating system, developed during brainstorming sessions.

4. Change the order of sections 3 and 2: it was felt that the less complex areas of the method would be better positioned at the beginning of the questionnaire i.e. section 1: what does the company do and section 2: who their competitors are, incorporating competitors' visual language. This also worked better from a general design layout perspective, as these first two straightforward sections could be included on one page, positioning the more reflective sections 3 and 4 further into the questionnaire. This method of questionnaire construction was adapted from Oppenheim's approach (1992), reported in section: 3.4.5.

5. Question 4: what are the company's graphic design preferences?

Through various brainstorming sessions this section was revisited, resulting in

several iterations. Figure 5.5 details information provided before iterations were made and figure 5.6 details information after iterations.

6. Question 4: what are the company's graphic design preferences?

Category: Personality Qualities. This section has not been reported, as it remained unchanged.

PHASE 2: Case study 4 Before iteration			
Section 4: What are the company's graphic design preferences?			
Terms	Description	Categories	
SYMBOLISM	e.g. graphic identity	1 2 3 4 5 6 7 8 9 10 11 12	Mark Shape Linear Organic Photographic Representational e.g. illustrative Abstract With/without strap-line Typographic solution Single/multi-colour Reproductive suitability usage
LAYOUT	e.g. page, website etc.	1 2 3 4	Minimalistic Contemporary Traditional Structured
COLOUR	e.g. page	1 2 3 4 5 6 7	Red – anger, danger, drama Blue – conservative, medical/clinical, clean Yellow – happy, sunshine, fresh Green – environment, organic, medical/clinical/health Black – strong, dynamic, overpowering White – pure, clean, simple Grey – sombre, subtle
IMAGERY	Pictorial style	1 2 3 4 5	Photographic – full colour etc., style etc. Illustrative – style etc. Geometric – strong, linear, organised Curvilinear – organic, flowing, clutter Coverage – layout % (please indicate)
FONT	Letter style	1 2 3 4 5 6 7 8	Typographic style - traditional Typographic style - contemporary Typographic style - structured Typographic style - organic Typographic style - fun Typographic style - scriptive Typographic style - stately Usage - % on layout (please indicate)
COPY	Text	1 2 3 4	Style of writing (please indicate) Length of text - % on layout (please indicate) Language – within specific business sector (please indicate) Key terms (please indicate)

Figure 5.5: Case study 4: Section 4 before iterations.

PHASE 2: Case study 4 After iteration			
Section 4: What are the company's graphic design preferences?			
Terms	Description	Categories	
SYMBOLISM	Graphic identity	1	Mark – linear (e.g. Nike – swish/tick), organic (e.g. Pure New Wool – symbol), abstract (e.g. Orange mobile phone – where symbol has no direct relationship with product).
		2	Illustration – representational drawing (e.g. BP – flower).
		3	Photographic – realistic picture.
		4	Typographic – Name or acronym (e.g. Arnold Clark; BBC).
		5	Logo supported by name or strap-line (e.g. Cancer Research).
		6	Use existing logo (please include).
LAYOUT	Placement of words and pictures on e.g. page, website etc.	1	Symmetrical – All elements balanced, static.
		2	Asymmetrical – Design off-centred, active.
		3	Multi grid – Complex combination, dynamic.
COLOUR		1	Red – anger, danger, drama
		2	Blue – conservative, medical/clinical, clean
		3	Yellow – happy, sunshine, fresh
		4	Green – environment, organic, medical/clinical/health
		5	Black – strong, dynamic, overpowering
		6	White – pure, clean, simple
		7	Grey – sombre, subtle
VISUALS	Use of pictures/graphics.	1	Strong – bold representation.
		2	Subtle – soft representation.
		3	People oriented.
		4	Product oriented.
		5	Service oriented.
FONT	Letter style	1	Old fashioned – Olde worlde.
		2	Futuristic – mechanical.
		3	Artistic – curving, flowing.
		4	Simple – easy to read.
		5	Elegant – well crafted.
		6	Strong – bold, difficult to ignore.
		7	Free flowing – hand written.
		8	Whimsical – fun.
COPY	(writing) – Message communicated through the printed word as a body of text.	1	Entertain – Provide with amusement.
		2	Educate – Training in a particular subject.
		3	Inform – Give facts or information.

Figure 5.6: Case study 4: Section 4 after iterations. (All categories have been changed apart from the colour category).

The CDT was updated with relevant iterations serving to inform the next case study. A copy of the CDT at this stage in the iteration process is reported in Appendix 3.5.

5.2.4 Case study 5 - David, Florist

David McIntyre owns a florist shop employing seven full time and four casual members of staff. The business has been running for six years.

5.2.4.1 Evaluation of the CDT: Case study 5 participants

Several aspects of the questionnaire required clarification. Comments reported by McIntyre included:

1. Question 2: what visual language do competitors use?

Comments: what do you mean by market values? I make all the decisions; the business is for my own personal satisfaction.

2. Question 4: what are the company's graphic design preferences?

Comments: we [the staff] didn't understand what to do in the diagram. It became clear as we were using it.

Comments on Personality Qualities: this category was misleading: we didn't know that if we chose say 'Giraffe', then we would get a Giraffe as a logo for the business. But when we looked at the descriptions then that made sense and was useful to describe the attributes of what we do.

General comments:

- a) It was useful to get an idea of how it [graphic design] can represent the business.
- b) We couldn't get any customers to fill it [the questionnaire] out. Even people who I thought would do it. They didn't have the time.
- c) I can see that this would be useful for any future design work.

5.2.4.2 Outcome of Case study 5

Comments processed from case study 5 resulted in the following iterations:

1. Question 2: what are the market values of the company?

After discussing the meaning of values with the owner, he was satisfied that nothing required to be changed in this section.

2. Question 1: what does the company do? and Question 2: what are the market values of the company?

Two versions of the CDT were made available: one version to be completed by

key decision makers of the business and one version to be completed by staff and customers.

Changes made: inclusion of a heading at the beginning of the CDT stated that: "To be completed by key decision makers of the business".

The CDT was updated with relevant iterations serving to inform the second graphic designer evaluation. A copy of the CDT at this stage in the iteration process is reported in Appendix 3.6.

5.2.5 Second graphic designer - Silvia Dicke

Silvia Dicke has been working as a graphic designer for ten years, primarily within the small business client sector. The range of clients she has worked with includes the public and private sector, latterly working on web interface design. Appendix 5.2 provides a copy of Dicke's CV.

5.2.5.1 Procedure for second graphic designer evaluation

A copy of the CDT having undergone numerous iterations and drawing from literature and management expertise was sent to the designer for evaluation.

The author emphasised to the designer that an unbiased evaluation of the CDT was essential in order to contribute to the rigour of the research practice. The designer was asked to comment on any aspect of the CDT i.e. concept, structure, terminology and also graphic design evaluation of terminology used.

5.2.5.2 Evaluation of the CDT: Second graphic designer

Comments reported by Dicke are detailed in Figure 5.7.

PHASE 2: Pilot the tool	
COMMUNICATION DESIGN TOOL	
Section	Silvia Dicke: graphic designer evaluation
1	What does the company do?
2	What visual language do competitors use?
a)	Please list the names of key competitors:
b)	Please provide visual information from key competitors:
	1 Look at visual information from more than one category with samples of all categories available. It's important to find out what competitors have and don't have plus the reason for this. I also believe that some small companies won't need the whole range of products.
	2
c)	Please provide additional sources of information – give reasons.
3	What are the market values of the company?
a)	What are the company's OBJECTIVES – What does the company want to do in the future? e.g. vision, mission, aspirations?
b)	What are the company's ATTRIBUTES – What differentiates the company in the market place? Rating re: customer service; product/service quality; relationship handling; technical innovation; imagination; value for money; uniqueness; other.
c)	What are the company's ETHICS – What influences the behaviour of the company? Rating re: integrity; reliability; social responsibility; stakeholder oriented; profit oriented; other.
d)	What are the company's ORIGIN – What are the attributes that have shaped the company in the past?
	Reasons for selecting the information could be listed directly next to the actual item in point 3b.
4	What are the company's graphic design preferences?
	I like the star graph, but would separate the categories into two or three smaller ones: a) The more abstract ones: 'symbolism', 'personality qualities' and 'imagery'. b) The ones concerning the layout category: 'colour', 'copy', and 'font'. c) 'Copy' to me is almost like a category on its own.
SYMBOLISM	Information regarding logo in use as a strong presentation feature: type of logo; logo-image; how many changes over time?
LAYOUT	
COLOUR	
IMAGERY	There is one thing under 'imagery' that made me frown: organic, feminine and clutter! Strong, masculine and organised. I feel that 'imagery' should be named 'style' instead.
FONT	I might keep 'font' more general by renaming it 'typography'.
COPY	'Length of text' in layout should be linked to its purpose. For instance the copy for a website with regards to usability issues should generally be shorter than for print promotion (writing in inverted pyramids). Instead of 'please indicate' I would give several options that can be filled in.
PERSONALITY QUALITIES	I would add a few animals to represent a wider range of 'personality qualities' (fish, frog, leopard etc.) and leave a blank field in case there is no match. It might even be better to create 5 main categories: mammal, bird, amphibian, reptile, fish, and insect and then split each of these into further two. So 'bee' would come under insect. This would leave the audience more options and might result in a closer match.
General comments	I would not list items horizontally, but instead use a circular graph or a star (as in point 4), so no item has visual priority.

Figure 5.7: Evaluation of Communication Design Tool: Second graphic designer.

5.2.5.3 Outcome of graphic designer evaluation

Comments processed from the second scheduled graphic designer resulted in the following iterations:

1. **Question 3: what visual language do competitors use?**

Changes made: the graphic used within the questionnaire to depict examples of visual information sourced from a variety of key competitors was changed to better communicate the varied sources of visual information.

2. **Question 4: what are the company's graphic design preferences?**

Changes made: additional descriptions of all categories within this section were re-evaluated and refined relevant to the graphic designer's comments.

3. **Question 4: Font.**

Changes made: the term typography was perceived as graphic design jargon. Accompanying descriptive text: "letter style" was incorporated into the CDT.

The CDT was updated with relevant iterations serving to inform phase 3. A copy of the CDT at this stage in its development is provided in Appendix 3.4

5.2.6 Additional Input re: iteration process

The author as action researcher carried out a systematic inquiry into all constituent aspects of the CDT mainly through brainstorming sessions throughout the entire process. This is detailed in Figure 5.8. Nomenclature, descriptive text and the structure of the CDT were all considered. Communication, management and marketing models were applied at various stages in the process.

5.2.6.1 Evaluation of the CDT: Brainstorming sessions

Iterations included:

PHASE 2: Pilot the tool		
COMMUNICATION DESIGN TOOL		
Section	Brainstorming sessions	
1	What does the company do?	One person involved in completing this section.
2	What visual language do competitors use?	One person to source in collaboration with other stakeholders.
a)	Please list the names of key competitors:	One person to source in collaboration with other stakeholders.
b)	Please provide visual information from key competitors:	One person to source in collaboration with other stakeholders.
c)	Please provide additional sources of information – give reasons.	One person to source in collaboration with other stakeholders.
3	What are the market values of the company?	<ol style="list-style-type: none"> 1 All decision makers to complete and other stakeholders where appropriate. 2 Change wording to include: Please indicate the level of visual emphasis to be placed on the following ...
a)	What are the company's OBJECTIVES – Vision, mission, aspirations.	Change wording to include: What does the company want to do in the future?
b)	What are the company's ATTRIBUTES – Uniqueness, differentiation.	<ol style="list-style-type: none"> 1 Change wording to include: What differentiates the company in the market place? 2 Include multiple choice categories: service; quality; technical innovation; imagination; value for money; uniqueness; other. 3 Change to scale rating (Oppenheim, 1992).
c)	What are the company's ETHICS – Behaviour, culture, influences.	<ol style="list-style-type: none"> 1 Change wording to include: What influences the behaviour of the company? 2 Include multiple choice categories: integrity; reliability; social responsibility; stakeholder oriented; profit oriented; other. 3 Change to scale rating (Oppenheim, 1992).
d)	What are the company's ORIGIN – Past, present, future.	Change wording to include: What are the attributes that have shaped the company in the past?
4	What are the company's graphic design preferences?	
SYMBOLISM		
LAYOUT		
COLOUR		
IMAGERY		
FONT		
COPY		
PERSONALITY QUALITIES		
General comments	Ensure that an indication of quality is provided.	

Figure 5.8: Evaluation of Communication Design Tool: Various brainstorming sessions

5.2.6.2 Outcome of the brainstorming process

Areas considered from the brainstorming sessions resulted in the following iterations:

1. Question 3: what are the market values of the company?

Changes made: ideally all key decision makers and stakeholders, including customers should complete the CDT. In working with the businesses, it became obvious that the business owner had control over this decision, therefore to encourage a wide completion rate: "All decision makers to complete" was included in the accompanying text within the CDT.

2. Question 3: wording was changed to include: "Please indicate the level of visual emphasis to be placed on the following ...".
3. Question 3 a): wording was changed to include: "What does the company want to do in the future?"
4. Question 3 b): wording was changed to include: "What differentiates the company in the market place?"
5. Question 3 c): wording was changed to include: "What influences the behaviour of the company?"
6. Question 3 d): wording was changed to include: "What are the attributes that have shaped the company in the past?"

The CDT was updated throughout phase 2 of the process, serving to inform phase

3. Appendix 3.6 details the CDT at the start of phase 3.

5.3 PHASE 3: Develop the CDT

This phase involved developing the CDT with a further four case studies and a third scheduled graphic designer, as shown in Figure 5.9. Phase three reports the procedure, evaluation and analysis of the development of the CDT. The CDT evolved at the end of phase three further refined, involving mainly clarification to terms and attempting to avoid the use of jargon.

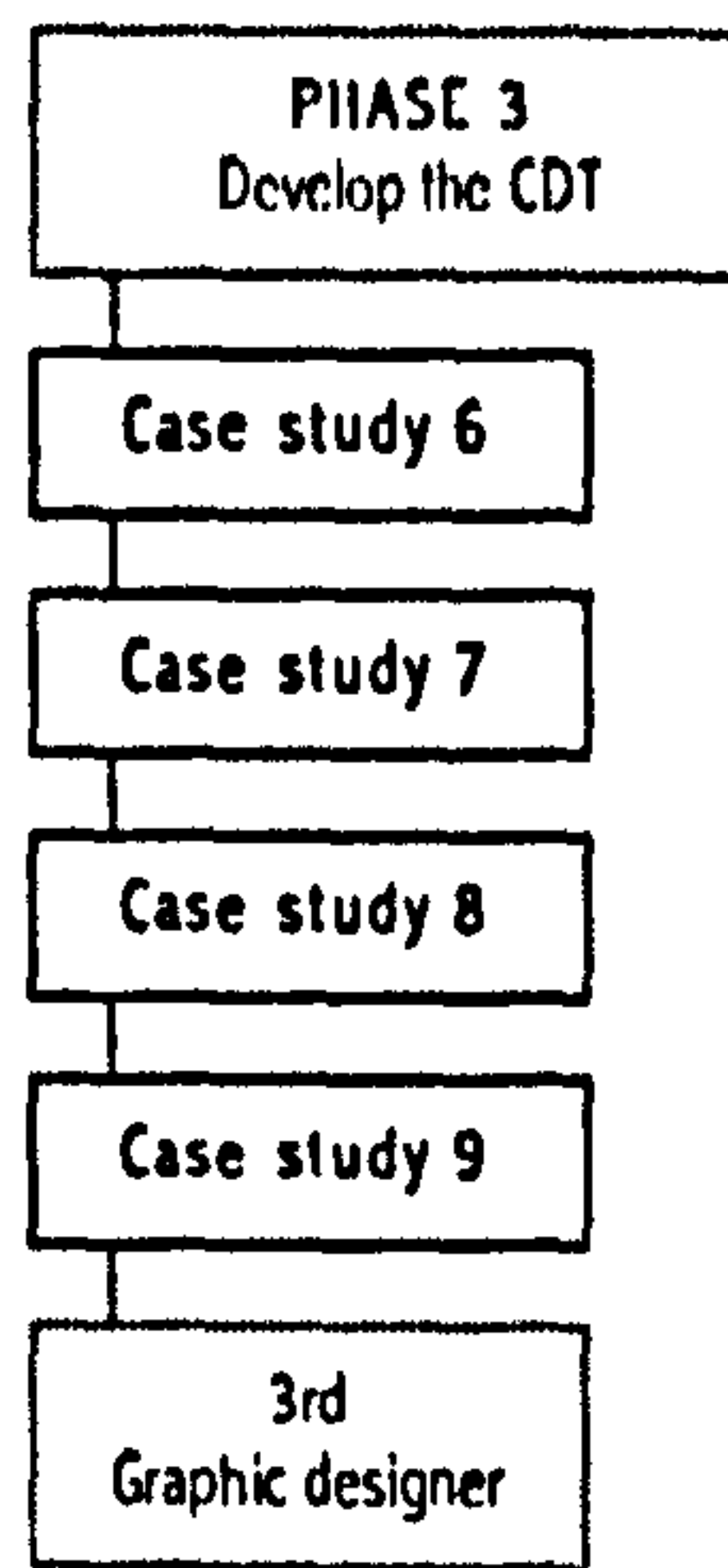


Figure 5.9: Phase 3 of the Communication Design Tool development process.

5.3.1 Procedure for continuing development of the CDT

The CDT was distributed to key members, as business representatives of the remaining four businesses (Case studies 6 - 9). Each key member was asked to involve all stakeholders, including several customers to take part in the process. It should be noted that unlike phase 2 where the CDT was distributed to the first case study, refined and the refined version of the CDT was then presented to the next case study and so on, in phase 3 the same CDT was presented to all four case studies. Refinements were carried out as a result of the completed questionnaires and comments reported. Iterations were made to the CDT, which was then passed on to the third scheduled graphic designer for further evaluation. The author as action researcher facilitated the entire process. Appendix 3.6 documents the CDT at the start of phase 3.

5.3.2 Case study 6 - Physiotherapy group

Aberdeen Physiotherapy is an established family run physiotherapy practice. The business started in 1980 with three physiotherapists and has grown steadily, offering nine physiotherapists and four support administration staff.

The CDT was delivered to the business owner (Jeff Wallace) to be distributed to the thirteen stakeholders, with several extras for customer completion. Follow up

conversations resulted in participant comments that were then reviewed for iteration purposes. These were:

1. Section 1 and 2: only one person to complete?
2. Section 4, Symbolism: what do you mean by that?
3. Section 4: is it the graphic design preferences at present or the ideal graphic design preferences?

5.3.3 Case study 7 - Oilcats, Cataloguing Services

As a support service for the oil industry operating since 1994, Oilcats provide oilfield cataloguing services, employing fifteen staff in total. The company serves the UK energy services market, specialising in data and materials management services for major operating and drilling companies.

The key participant was Kathleen Miller (Operations manager) who agreed to carry out completion of the CDT in collaboration with their Operations Director. A business plan was also provided as an additional source of information that may aid the process. The business already had a professionally designed logo that they were happy with.

5.3.4 Case study 8 - Aberdeen Tool Rental

Aberdeen Tool Rental Group of Companies incorporates seven groups. These are: plant hire; repair services; engineering; fasteners; plant services and hydraulics. Over the seven groups fifty-two staff are employed. Aberdeen Tool Rental Plant Hire (ATR) is the group involved as participants in this research. The plant hire group has been operational since 2001. The Aberdeen group employs 16 within the plant hire company.

The plan was to complete the process involving eight key decision makers within the ATR Group. As the process emerged, Willie Forsyth (Director, ATR) was the only participant in this process. Although this created comparison restrictions, it offered an insight into the difficulties in achieving participant involvement when dealing with live businesses.

Several areas emerged as a result of working through the process. These included:

1. Forsyth stated that he "Would not get staff to fill it [CDT] out as they have no

say in the decision making process. I [Willie Forsyth] would only get those people in the business who drive it”.

2. Upon request, a detailed explanation of the term “graphic design” and what it involved was provided to Forsyth.

3. Forsyth's perception of the outcome of the process would serve to represent “Something that could be passed on to whoever was using graphic design, to stop designs being all over the place”.

5.3.5 Case study 9 - Pentagon Freight Forwarding

Pentagon Freight is a worldwide freight forwarding oil services company established in 1974, with offices worldwide including UK, USA, UAE, Singapore, Kazakhstan, Argentina, Germany, Canada, Hong Kong, Egypt and Australia. The company employ a total of 405 staff, with 23 based in the Aberdeen division. Three key decision makers were involved as participators in the research.

George Booth (Regional Business Development Manager) was the key participant. During the initial meeting it was revealed that although the original logo, developed thirty years ago “worked” in that it achieved customer recognition, it was used “wrongly [sic]”. The logo and graphic design solutions do not follow a consistent “style” throughout the company. Booth explained that: “The logo was supposed to be a pentagon with the sides being equal e.g. in Singapore when you're dealing with Pentagon, it's the same as dealing with it in Aberdeen. In practice it doesn't work that way”.

Comments made by Booth were valuable concerning completion of the CDT. For example:

“It [respondent participation] would only be chosen key decision makers. It wouldn't work if everyone filled it out, it would be too confusing. People either wouldn't bother or wouldn't understand it. It will be put out to key decision makers – people who are interested in the business and who have a say in what goes on. People who I know the business would benefit from their input [sic]”.

5.3.6 Outcome of case studies 6 - 9

Comments regarding the CDT during delivery and discussions prior to collection of completed questionnaires resulted in the following evaluation is detailed in Figure 5.10.

PHASE 3: Develop the method	
COMMUNICATION DESIGN TOOL	
Section	Evaluation from Case studies 6 - 9
1	What does the company do? One key decision maker to complete
2	What visual language do competitors use? One person to source in collaboration with other selected key decision makers.
a)	Please list the names of key competitors: One person to source in collaboration with selected key decision makers.
b)	Please provide visual information from key competitors: One person to source in collaboration with selected key decision makers.
c)	Please provide additional sources of information – give reasons. One person to source in collaboration with selected key decision makers.
3	What are the market values of the company? 1 Selected decision makers to complete and other stakeholders where appropriate. 2 The business plan provides this information (Case study 6 & 7).
a)	What are the company's OBJECTIVES – <i>What does the company want to do in the future?</i>
b)	What are the company's ATTRIBUTES – <i>What differentiates the company in the market place?</i>
c)	What are the company's ETHICS – <i>What influences the behaviour of the company?</i>
d)	What is the company's ORIGIN – <i>What are the attributes that have shaped the company in the past?</i>
4	What are the company's graphic design preferences?
SYMBOLISM	
LAYOUT	
COLOUR	
IMAGERY	
FONT	
COPY	
PERSONALITY QUALITIES	
General comments	<ol style="list-style-type: none"> 1. Some [participants] are more enthusiastic than others (Case study 6). 2. What is Graphic Design? (Case study 8). 3. The resulting information could inform future graphic design (Case study 8). 4. There is something mysterious surrounding how graphic design happens (Case study 9).

Figure 5.10: Evaluation of Communication Design Tool: Case studies 6 - 9.

5.3.7 Third graphic designer - Ian Cargill

The third scheduled graphic designer was asked to evaluate the CDT to complete phase 3 of the iteration process. Ian Cargill has undertaken numerous graphic design projects carried out within the small business client sector. Appendix 5.3 provides a copy of Cargill's CV. Cargill was also involved as the unscheduled graphic designer during phase 2: case study 3 of the research (see section: 5.2.2.2).

5.3.7.1 Procedure for third graphic designer evaluation of the CDT

A copy of the developed CDT was delivered to the designer for evaluation. Emphasis was placed on an unbiased evaluation to contribute to the rigour of the research practice. The designer was asked to comment on any aspect of the CDT i.e. concept, structure, terminology and also any areas of concern within the graphic design section.

5.3.7.2 Evaluation of the CDT: Third graphic designer

Evaluation of the CDT resulted in questioning mainly the use of jargon within the CDT. Terms such as "methodology", "market values" and "explicit", used in the covering information sheet were brought to the author's attention as research jargon that may distance small business participants.

The term "market values" was used within the CDT intentionally encouraged communication between client and designer regarding the meaning of this term. The author acknowledges that the term "business values" is more accurate and in this respect has used it for reporting purposes within this thesis.

The designer also questioned the use of the term "visual language" in section 2 of the CDT: what visual language do competitors use? The designer suggested that the term "visual language" would be acceptable and understood by graphic designers but not small business clients.

5.3.7.3 Outcome of graphic designer evaluation

Cognisance of the use of jargon would influence further development of the CDT. The term “visual language” provided an area suitable for further development in highlighting the language barriers between designer and client, particularly clients new to the design process such as small business clients.

Section 4: what are the company’s graphic design preferences? Support information regarding the Personality Qualities category was offered by Cargill: “If the company was a wild animal what would it be?” to clarify the purpose of the category.

These aspects of the CDT would be borne in mind as areas of future development.

5.4 PHASE 4: Trial the CDT

Trialling the CDT involved case studies 3 - 9 and the fourth graphic designer. This is shown in Figure 5.11.

This process involved obtaining completed CDT questionnaires from all case studies from phase 2 and 3 of the research (case studies 3 - 9), collating the information provided and reporting an analysis of business market values aligned with graphic design preferences. The reports distributed to case studies 3 - 8 are documented in Appendix 2. Case study 9 report is included as an example within the main thesis (see section: 5.4.1).

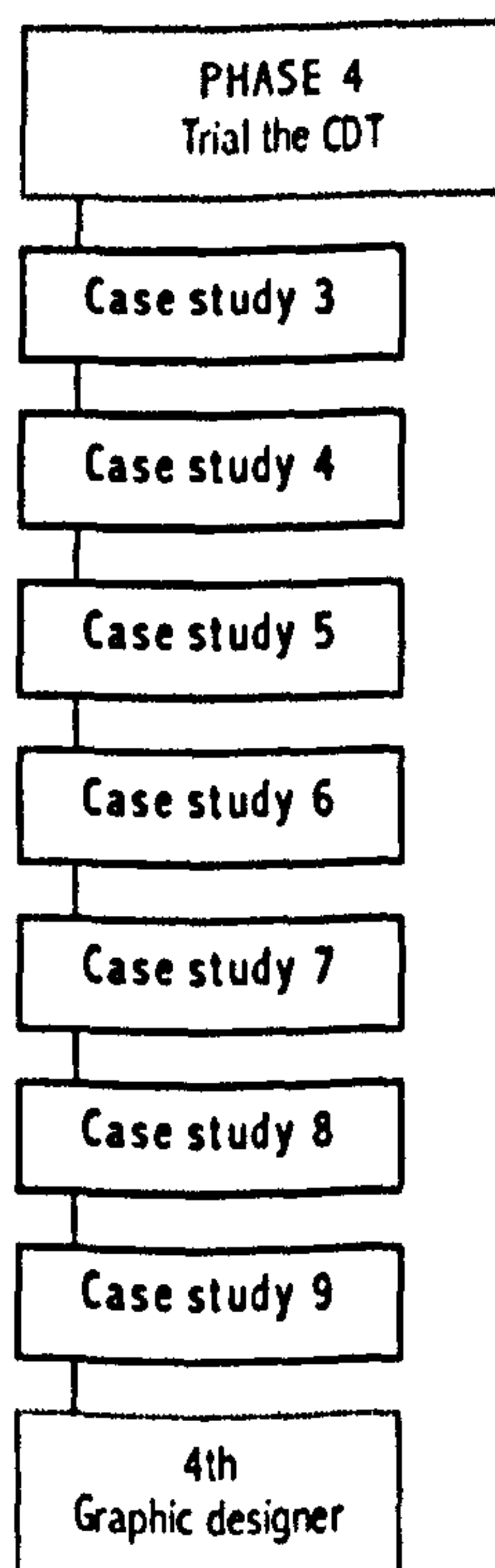


Figure 5.11: PHASE 4: Trialling the CDT.

The report formulated for the MBO business within case study 2 provided a template from which to develop reports serving this phase in the process (see Appendix 2.1). The purpose of the report was to provide a documented analysis of the information gathering graphic design process carried out for each small business client. Therefore, an evaluation of business values and graphic design elements gathered were as a result of participant input. The reports provided an analysis of core business values and graphic design guidelines offering recommendations pertinent to each business. Appendix 2 documents case study 3 - 8 reports.

5.4.1 Reporting back procedure

Each report consisted of an analysis of the CDT completed by small business participants from each case study (3 - 9). Completed information contained in the CDT was then collated and analysed using content analysis. The "pre-brief analysis" and "recommendations" section within the report summarised the outcome and analysis of each small business study, resulting in a set of guidelines to inform the graphic design information gathering process relevant to each business.

Throughout the process, key business representatives made decisions regarding who would complete the CDT. Figures 5.12 - 5.22 provide an example of one of the reports (Case study 9: Pentagon).

REPORT		
Contents:		
1.0	Introduction	2
1.1	Objectives of the study	2
1.2	General Overview of Communication Design Tool	2 - 3
2.0	General information on the business	3
3.0	Market values of the business	3
3.1	Definition of Market Value Terms	3
3.2	Market Objectives	4
3.3	Market Attributes	4
3.4	Market Ethics	4
3.5	Market Origin	4
4.0	Visual language of key competitors	5
4.1	Key competitors	5
4.2	Visual language	5 - 6
4.3	Additional sources of visual information	7
5.0	Graphic design preferences	7
5.1	Symbolism	7
5.2	Layout	7
5.3	Colour	8
5.4	Visuals	8
5.5	Font	8 - 9
5.6	Copy	9
5.7	Personality Qualities	9
6.0	Pre-brief analysis	9 - 10
7.0	Recommendations	10
7.1	Logo update	10
7.2	Design consistency	10 - 11
7.3	Web site	11
8.0	Approval of analysis	11

Figure 5.12: Case study 9 Report: Contents page.

1.0 Introduction

This report relates to your specific business. It deals with the information gathering process carried out by graphic designers within the small business market sector. Generally, information required by graphic designers prior to any project involves an understanding of what the business does, its values, main competitors and where it sits within the market place. The quality and level of information can be difficult for the graphic designer to gather within the small business sector where marketing support is generally too costly for the small business. This implicit information is known within the business but difficult for the graphic designer to access. Without a reasonable understanding of the business, the graphic designer relies on guesswork and intuition to provide synergy between the values of the business and graphic design solutions.

The study focuses specifically on communication processes between client and designer regarding obtaining information on key drivers and particular nuances of the business in order to fully understand and therefore represent the business through visual communication solutions.

1.1 Objectives of the study

1. Investigate methods of communication used to achieve an understanding of small business market values.
2. Formulate a prototype tool to enable graphic designers to facilitate an analysis of small business market values, which will inform the graphic design process.
3. Investigate the effectiveness of the tool in a) the small business market and b) the graphic design industry.

1.2 General overview of Communication Design Tool

The Communication Design Tool, as a questionnaire, has been distributed to a number of local small businesses for completion. The structure of the questionnaire included four general questions requesting information on:

1. The general nature of the business.
2. The market values of the business.
3. The visual language of key competitors.
4. Graphic design preferences.

Each business was asked to complete individual questionnaires by all stakeholders, including customers. At an early stage in the development of the questionnaire it became obvious that only the key decision makers and selected employees would be involved in the process. The reasons for this varied from business to business. In part it reflected a decision based on the difficulties of time and commitment from stakeholders, due to the already heavy workloads experienced in the small business sector. It also related to the owner's perceptions of individuals within their businesses in terms of who had sufficient understanding about the business to fully contribute to the exercise.

Figure 5.13: Case study 9 Report: Page 1.

Your business completed the questionnaire as detailed below:

1. The general nature of the business: *Completed by one key member.*
2. The market values of the business: *Completed by three key members.*
3. The visual language of key competitors: *Completed by one key member.*
4. Graphic design preferences: *Completed by three key members.*

2.0 General information on the business:

This section looks at the general nature of the business in terms of what it does, where it is located and any other relevant information offered.

"Pentagon was established in 1974 to provide international freight and shipping services to the oil and gas sector. With offices in UK, USA, UAE, Singapore, Azerbaijan, Kazakhstan, Argentina, Germany, Canada, Hong Kong, Egypt and Australia. We are ideally placed to service a global market place using air, sea, road and rail services. We offer bespoke solutions to meet specific shipment requirements. We remain a privately owned company operating on a worldwide scale".

3.0 Market value of the business

This section looks at the perceived values of the business, in terms of market competitiveness.

3.1 Definition of Market Value Terms

Market objective: Vision, mission, goals and aspirations of the business.

Market attributes: Differentiation of the business in the market place.

Market ethics: Influencing behaviour of the business.

Market origin: Attributes that have shaped the business.

3.2 Market objectives

"To be recognised as the best in class oilfield freight forwarder. To continue to employ and retain high calibre staff. To provide a seamless service to/from all oilfield locations and increase synergies between pentagon offices".

"Maintain/increase market share within the oil/petrochemical/energy markets. Be known for reliability/capability/adaptability – competitively. Service is our strength, provided by our key assets – our employees. Continue to be perceived locally backed by global coverage. We are synonymous with the supply chain for the oilfield as a company that delivers".

"To be the number one provider in our sector. To continue developing relationships with customers and suppliers alike. To be successful and to be the best".

Figure 5.14: Case study 9 Report: Page 2.

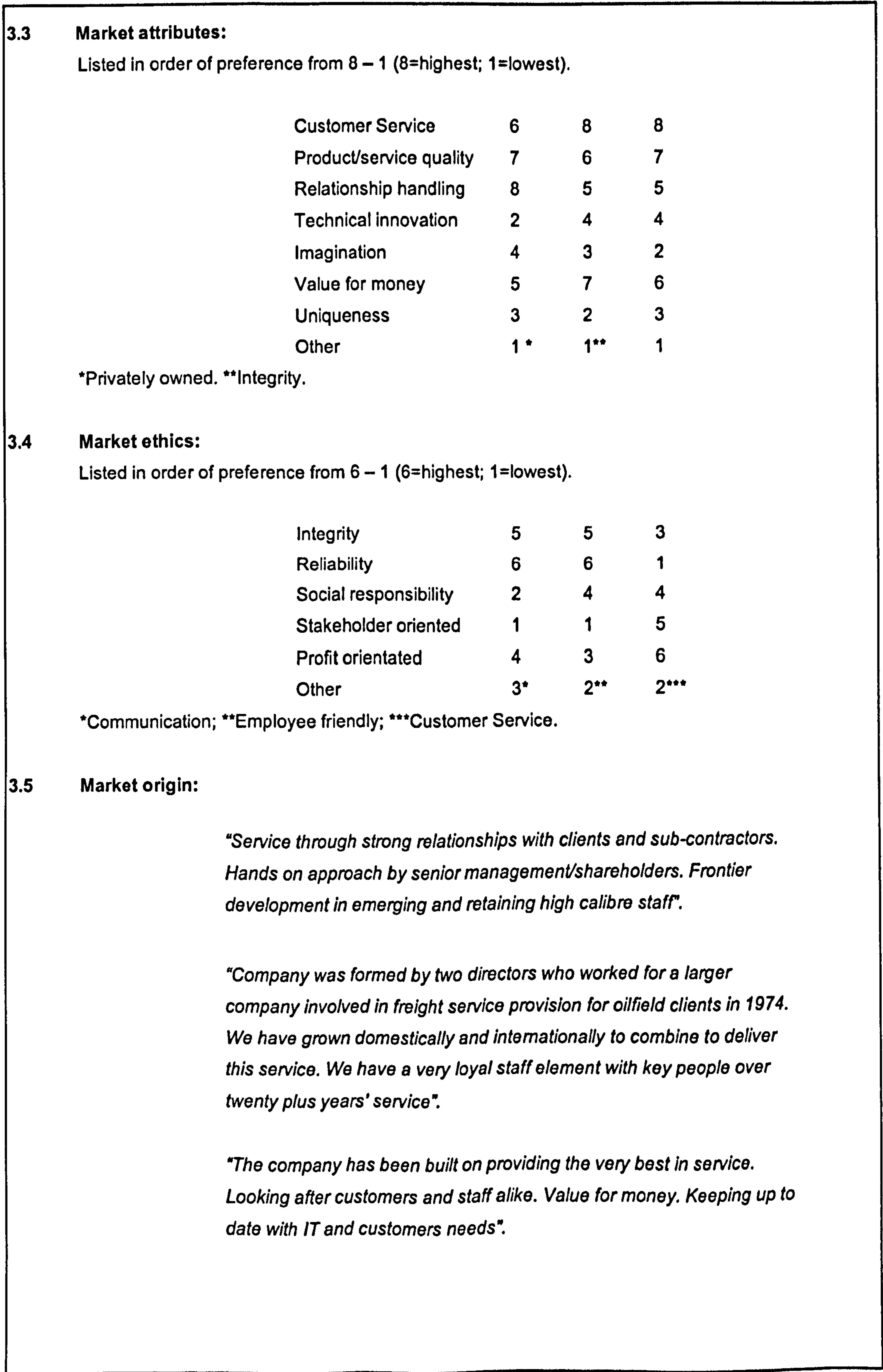


Figure 5.15: Case study 9 Report: Page 3.

4.0 Visual language of key competitors

The visual description of key competitors' graphic design solutions has been analysed by the researcher and is summarised in section 4.2

4.1 Key competitors

- Grampian International Freight
- Petrasco
- EGL
- Panalpina
- Kuehne & Nagel
- Blue Water Shipping

4.2 Visual language

Grampian International Freight: Simple and basic web-design solution. Links work well. Minimum information within the site. Straightforward, strong logo (typeface design).

Grampian International Freight Ltd.
International Logistics



Petrasco: Under the umbrella of the Denholm Group. This well designed site offers an interesting logo (relevant to offshore), an insight into the industry through direct visuals and informative, succinct text. The information contained within this site is clear, easy to read and navigate.



EGL: The web site design representing Eagle Global Logistics has been carried out successfully. It reflects high tech design supported by efficient interactive capabilities. The design represents an easy to navigate, uncluttered representation with interesting graphics tastefully applied. The colours are somewhat more muted than generally used within this industry.



Figure 5.16: Case study 9 Report: Page 4.

Panalpina: A professionally designed site providing various links and “sound bites” of information. The layout and graphics are anchored at the top of the page, providing good readability and access to navigation throughout the site.



Kuehne & Nagel: Highly professionally designed site. Graphics, layout, information and navigation work exceptionally well together. The monitoring function of the site offers excellent customer interaction.



Blue Water Shipping: Design elements have attempted to integrate the functionality of an interactive facility with design. The visual design of the site lacks the professionalism of e.g. Kuehne+Nagel but is at a reasonable standard. The logo combines the name of the company with a graphic, relevant to the name i.e. the water or wave mark within the name blue water.

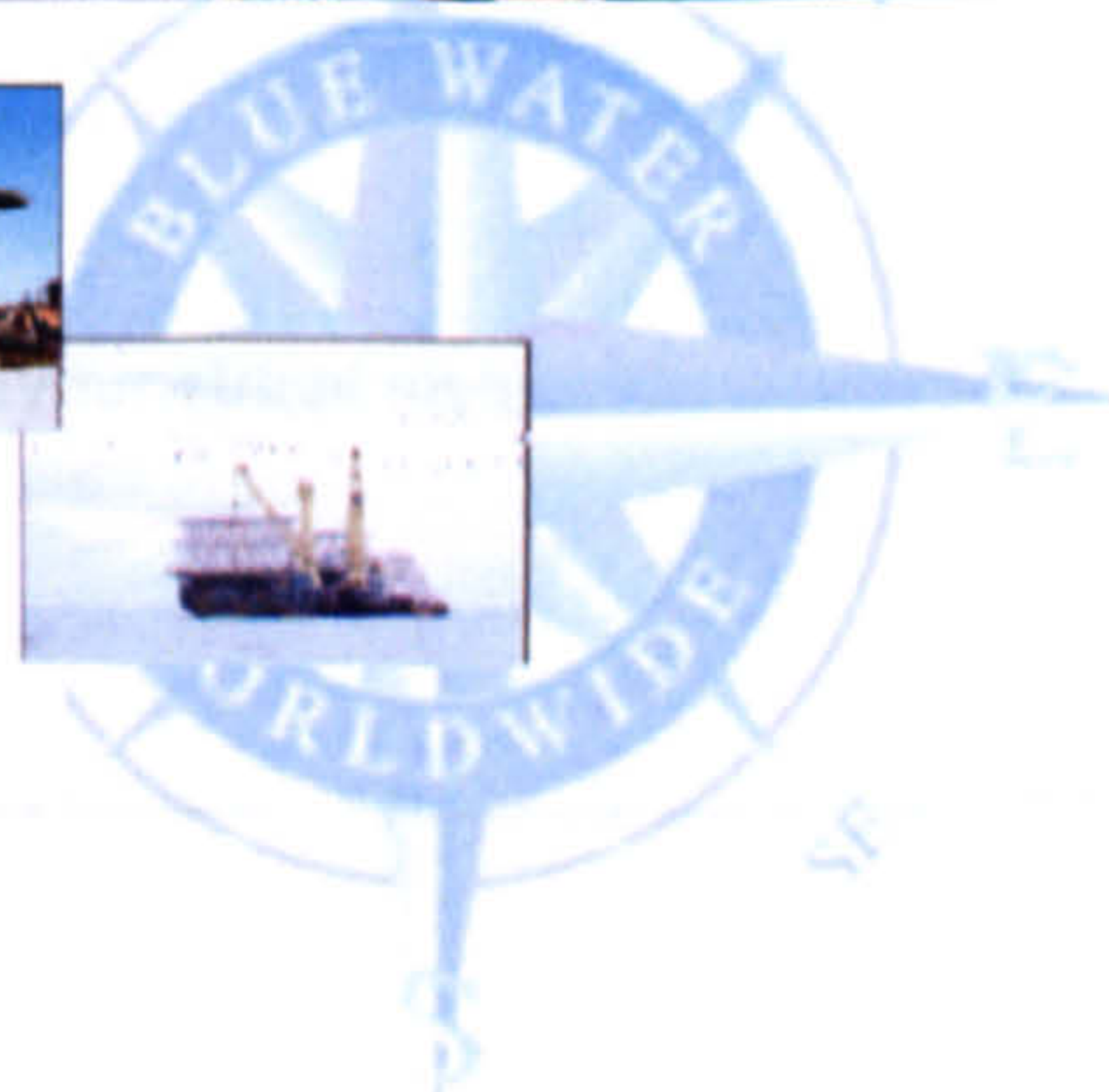


Figure 5.16: Case study 9 Report: Page 5.

4.3 Additional sources of visual information

"www.pentagonfreight.com (new website)".

Enclosed brochures (agreed corporate images)

5.0 Graphic design preferences

This section of the questionnaire looked at the graphic design preferences of the business from its stakeholders' perspective. Three respondent completed this section of the questionnaire. The generic graphic design elements that make up any graphic design solution include symbolism, layout, colour, imagery, font and copy. The personality qualities section within graphic design preferences relates to an interpretation of business qualities, adopting a range of animals as a metaphor for the personality of the business.

5.1 Symbolism - *Graphic Identity.*

Definition of terms:

1. Mark – linear (e.g. Nike-swish/tick), organic (e.g. Pure New Wool – symbol), abstract (e.g. orange mobile phone – where symbol has no direct relationship with the product).
2. Illustration – representational drawing (e.g. BP – flower).
3. Photographic – realistic picture.
4. Typographic – Name or acronym (e.g. Arnold Clark; BBC).
5. Logo supported by name or strap-line (e.g. Cancer Research).
6. Use existing logo (please include).

The results of the data showed that:

One member chose 2: Illustration

Two respondents chose 5: Logo

Conclusions:

The preferred choice of symbol is a logo. One person chose an illustration and this could be incorporated within the logo style.

5.2 Layout - *Placement of words and pictured on e.g. page, website etc.*

Definition of terms:

1. Symmetrical – All elements balanced, static.
2. Asymmetrical – Design off-centred, active.
3. Multi grid – Complex combination, dynamic.

The results of the data showed that:

Three respondents chose 1: symmetrical

Conclusions:

Clearly the preferred layout is that of a balanced symmetrical style.

Figure 5.18: Case study 9 Report: Page 6.

5.3 Colour

Definition of terms:

1. red – anger, danger, drama
2. blue – conservative, medical/clinical, clean
3. yellow – happy, sunshine, fresh
4. green – environment, organic, medical/clinical/health
5. black – strong, dramatic, overpowering
6. white – pure, clean, simple
7. gray – sombre, subtle

The results of the data showed that:

One member chose 1: red and 5: black

Two respondents chose 3: yellow

Conclusions:

Yellow is the preferred colour. One member chose red and black. Further clarification is required as the existing logo uses red and black and it may be that this question has been mis-interpreted.

5.4 Visuals – Use of pictures/graphics.

Definition of terms:

1. Strong – bold representation.
2. Subtle – soft representation.
3. People oriented.
4. Product oriented.
5. Service oriented.

The results of the data showed that

One member chose 1: Strong

One member chose 4: Product oriented

One member chose 5: Service oriented

Conclusions:

A combination of strong, product and service orientated visual representation has been selected. These elements could all be achieved through graphic design solutions.

5.5 Font - letter style.

Definition of terms:

1. Old fashioned – Olde worlde.
2. Futuristic – mechanical.
3. Artistic – Curving, flowing.
4. Simple – Easy to read.
5. Elegant – Well crafted.
6. Strong – bold, difficult to ignore.
7. Free flowing – hand written.
8. Whimsical – fun.

The results of the data showed that:

Two respondents chose 4: Simple

One member chose 5: Elegant

Figure 5.19: Case study 9 Report: Page 7.

Conclusions:

Predominately simple with a touch of elegance is achievable within a carefully selected font style.

5.6 Copy (writing) - message communicated through the printed word as a body of text.

Definition of terms:

1. Entertain – Provide with amusement.
2. Educate – Training in a particular subject.
3. Inform – Give facts or information.

The results of the data showed that:

One member chose 1: Entertain

Two respondents chose 3: Inform

Conclusions:

An informative copy writing style is the preferred choice of the respondents. A contrasting element of entertaining text could be achieved within a document, page layout, presentation etc.

5.7 Personality Qualities

Definition of terms:

1. Lion – ruler
2. Elephant – long-term reliability
3. Giraffe – sources the best
4. Dolphin – anticipating change
5. Bee – skilfully productive
6. Chameleon – ability to merge
7. Owl – wise and knowing
8. Rabbit – productive
9. Fish – driven by group work
10. Frog – ability to leap across boundaries
11. Leopard – aggressive & fast
12. Other – please indicate

The results of the data showed that:

Three respondents chose 2: Elephant

Conclusions:

The personality of this business clearly represents long-term reliability.

6.0 Pre-brief analysis

Summarised objectives of the business are: To be the best service provider in our sector, employing the best and delivering the best. Business attributes are: Customer service and relationship handling. Reliability and profit oriented are the ethics of the business. Two directors' who previously worked for a larger freight service provision company formed the business in 1974. Strong client, sub-contractors, management and shareholder relationships are integral to the origin of the business.

The visual language of competitors reviewed revealed that the quality of design is generally high. The colours blue and red are predominately used within this industry.

Figure 5.20: Case study 9 Report: Page 8.

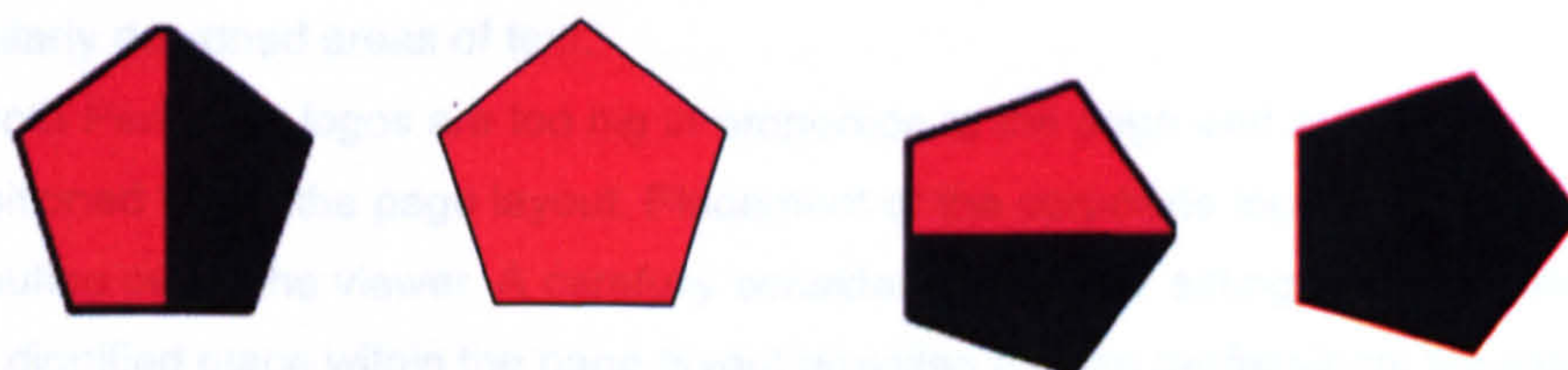
Most sections completed within the Graphic Design preferences were consistent and could be achieved through considered design solutions. The colour section revealed that two respondents chose yellow and one respondent chose red and black. This inconsistent result requires further investigation by the designer.

7.0 Recommendations

This section offers several recommendations that the business may wish to consider.

7.1 Logo update

The concept of the Pentagon representing a five-sided plane and five angles works well. It is clearly important for the logo to be represented true to its original form. The existing logo appears to be elongated, due to the vertical division of colour within its shape. This detracts from its “equality”, and so weakens the concept of its design.



Various considerations are offered:

- Inner area of shape changed to a single colour application, with the main logo retaining red. Apply the textural metal effect as per the “Marine Logistics” sub-brand.



- Site name (PENTAGON) either directly under the bottom side of the pentagon positioned to fit within the outer edges of the pentagon shape.



- Apply the concept used within the “Marine Logistics” design over all areas of the Pentagon group.

7.2 Design consistency

The logo and overall graphic design solutions should be consistent across all areas of communication within Pentagon. Close monitoring of how the logo and graphic design style are implemented is important where a secure image of the company is sought for all stakeholders.

A design style guide relevant to Pentagon could be undertaken and distributed across all areas of corporate communication.

Figure 5.21: Case study 9 Report: Page 9.

7.3 Web site

The new web site is of a high quality of design and technical efficiency. A few observations may further enhance the site. Such as:

- On load up the page is situated within the browser window surrounded by a black border. The percentage of border showing varies from browser to browser, operating system and hardware within each computer. Taking this into account and testing on various set-ups, the black border remains. This detracts from the overall design and I would recommend the web page be scaled to fit most up-to-date browsers, eliminating the aforementioned.
- The layout of pages within the site is information intensive. Combining elements within the page as graphic e.g. the "our services" section, positioned under the banner would allow more space around the other sections of information. In general, more white space is required within the page layout design, allowing the viewer to focus on each individual section of the page without being confused by similarly designed areas of text.
- Both Pentagon logos are too big in proportion to the page and are poorly positioned within the page layout. Placement of the corporate logo need not be shouting out at the viewer. A carefully considered position, sitting in a prominent but dignified place within the page layout provides a more professional solution. Again, consistency is the key to recognition.

8.0 Approval of analysis

Having reviewed the information provided in this report, some feedback would be extremely valuable to further develop the Communication Design Tool. Further discussion regarding the process, results and analysis relevant to your business values will inform and greatly enhance the study.

Figure 5.22: Case study 9 Report: Page 10.

5.4.2 Analysis of case studies 3 - 9

The analysis of cases was based on the collation of information provided by selected participants within each small business case study, as a direct result of completion of the CDT. The author compiled reports, which were then fed back to each business representative for evaluation.

A comparative analysis of the resulting two final sections of the report: a) pre-brief analysis and b) recommendations, across the seven case studies are provided in Figures 5.23 - 5.29. The recommendations section within each report remains at the graphic designer's discretion.

PHASE 4: Evaluation of cases 3 - 9	
COMMUNICATION DESIGN TOOL	
Section in report	Case study 3 – New Management Consultant Company
Pre-brief analysis	As this business is a new start-up, a graphic identity is clearly a focus. The results of this analysis show that there is a disparity within the group in terms of the direction they would prefer to take the design concept of a graphic identity. At this stage, further investigation and discussions are required to ensure that the "right" message is communicated through its symbolism. Terms which runs through the value section are: "quality organisational development and training". This aspect of the business should be given design priority. The business appears to be more people focused, both in its client base and facilitators' skills. Copy writing style and quality is extremely important across all graphic design solutions.
Recommendations	1 High quality graphic design solutions
	2 Visuals
	3 Copy writing
	4 Colour
	5 Graphic identity

Figure 5.23: Analysis of PHASE 4: Case study 3 – New Management Consultancy Company.

PHASE 4: Evaluation of cases 3 - 9	
COMMUNICATION DESIGN TOOL	
Section in report	Case study 4 – Alison Millar Soft Furnishings
Pre-brief analysis	The results of the graphic design preferences section of the questionnaire are fully consistent with the market value section in that there is a mix of traditional and contemporary elements in both areas. The business has traditional values and skills, operating in a contemporary environment. The selection of font style and image description should reflect these values. The happy disposition of the business is represented through yellow and reflects the intimate, friendly and approachable team ethos. The layout required minimal text with the main focus depicting the quality of the product, ideally through photographic images. The visual language of key competitors: John Lewis, Laura Ashley and Archibalds reflects high quality, professionally designed visual communication, applying the principles preferred by the team within the results of the graphic design preferences section of the tool. Ambiance, and to a lesser extent Gatts, are reasonably well represented visually through graphic design. However, both are poorly represented on the web. An illustrative representation of the business through a logo would enhance visual recognition of the business aligned with its values.
Recommendations	1 Photographic product shots
	2 Colour preference
	3 Personality traits
	4 Illustrative symbol

Figure 5.24: Analysis of PHASE 4: Case study 4 – Alison Millar Soft Furnishings.

PHASE 4: Evaluation of cases 3 - 9							
COMMUNICATION DESIGN TO O L							
Section in report	Case study 5 – David, Florist						
Pre-brief analysis	<p>The results of the value section reveal that the business market objective is to maintain/sustain growth. Product/service quality is the main attribute of the business. The ethical focus of the business is reliability and the origin of the business refers to the owner's vision of flowers as an everyday item in the home, before that became a lifestyle change in our society.</p> <p>Larger businesses i.e. Interflora and Flowers Direct offer product visuals and on-line selling. On-line would set your product apart from competitors of similar standing e.g. Nicky Walker and Simply Flowers.</p> <p>In general, the results reveal that the respondents were happy with the existing identity. The obvious colour within your industry is green, although two members sought out new and more vibrant colour selections e.g. red and black. Choice of copy and font selections is varied, with no clear preferences. The nature of your business lends itself to a more visual form of communication through the product. Personality qualities are fully consistent with the nature of the business and individual preferences associated with the members' skills.</p>						
Recommendations	<table border="1"> <tr> <td>1</td> <td>Web site presence</td> </tr> <tr> <td>2</td> <td>Further enhance existing logo</td> </tr> <tr> <td>3</td> <td>Font and visual inconsistencies</td> </tr> </table>	1	Web site presence	2	Further enhance existing logo	3	Font and visual inconsistencies
1	Web site presence						
2	Further enhance existing logo						
3	Font and visual inconsistencies						

Figure 5.25: Analysis of PHASE 4: Case study 5 – David, Florist.

PHASE 4: Evaluation of cases 3 - 9							
COMMUNICATION DESIGN TO O L							
Section in report	Case study 6 – Aberdeen Physiotherapy						
Pre-brief analysis	<p>Generally the physiotherapy industry tends to be well represented graphically when situated within larger medical organisations e.g. BMI. In relation to other similar areas of care i.e. Chiropractor and Osteopath sectors, visual representation of the physiotherapy sector is of a higher quality.</p> <p>In terms of competitors reviewed, the quality of design output is similar. The main concern is that of differentiation between individual businesses i.e. achieving an identity that will enable stakeholders and prospective clients to identify your particular business among others in the sector.</p> <p>The main issue arising from this analysis is the need for a clear identity for your business. Initially, confusion between yourself as: Aberdeen Chartered Physiotherapy and Aberdeen Physiotherapy became evident from the outset. Upon further investigation the "Chartered" profile of your business set it apart from your competitor. Although it is your name, and as such differentiates you from Aberdeen Physiotherapy in name, Aberdeen Physiotherapy also hold chartered status, Furthermore, forms of communication e.g. Yellow Pages and the internet revealed that your competitor appears on the same page, using the same colour theme and size of advertisement as yourselves within the current Yellow Pages, albeit your advertising design is of a more professional quality to that of Aberdeen Physiotherapy in Yellow Pages. Aberdeen Physiotherapy has an active web presence. Under your name (Aberdeen Chartered Physiotherapy) I failed to source a web presence, only that of directory listings from the search engine Google. These were: www.aberdeenphysiotherapy.com www.csp.org.uk www.ultimatedirectory.co.uk/aberdeen/physiotherapy.htm .</p> <p>I discovered that your site is located through another name. This is listed within the Yellow Pages advert as: www.1stbackphysio.co.uk . The need for a name/symbol/identity is clearly evident.</p> <p>The group is generally in agreement with the design preferences for your business. Most are looking for a symbol with which to identify the business. Layout and font require to be presented as a contemporary design. Copy writing style (text) requires to be carefully considered with emphasis on key terms relevant to your industry, language and length of text. Images should be strong, linear and organised. Colours green and blue are consistent and associated with the visual language of your industry.</p>						
Recommendations	<table border="1"> <tr> <td>1</td> <td>Identity</td> </tr> <tr> <td>2</td> <td>Graphic design consistency</td> </tr> <tr> <td>3</td> <td>Copy writing</td> </tr> </table>	1	Identity	2	Graphic design consistency	3	Copy writing
1	Identity						
2	Graphic design consistency						
3	Copy writing						

Figure 5.26: Analysis of PHASE 4: Case study 6 – Aberdeen Physiotherapy.

PHASE 4: Evaluation of cases 3 - 9	
COMMUNICATION DESIGN TOOL	
Section in report	Case study 7 – Oilcats, Oilfield Cataloguing Services Ltd
Pre-brief analysis	The results of the data provided reveal that the business values are fully consistent with the graphic design solutions reviewed. Objectives are clearly defined. Produce/service quality is the attribute. Integrity is the business ethic. Origin is defined as founded and self-funded in 1994 by David Andrews in Scotland. The management has over 65 years experience in the industry. The visual language of your business sits well within your market sector, in terms of graphic design solutions.
Recommendations	1 Graphic design consistency

Figure 5.27: Analysis of PHASE 4: Case study 7 – Oilcats, Oilfield Cataloguing Services Ltd.

PHASE 4: Evaluation of cases 3 - 9	
COMMUNICATION DESIGN TOOL	
Section in report	Case study 8 – Aberdeen Tool Rental Plant Services Ltd
Pre-brief analysis	Business objectives are: Service to clients, first time every-time. New technological equipment. Value for money and product/service quality are the business attributes. Integrity and reliability are the business ethics. The origin of the business dates back to November 2001, when the company was formed as part of the ATR Group. Service to clients and product quality are key values of your business. Concise product information supplied efficiently is a core focus of this business communication to be represented graphically. Strong graphics, product visuals and straightforward copy writing (text) are important considerations within this market sector. An inconsistent quality of design output is evident across this market sector. The predominant colour used graphically within this industry sector is red.* * Information relates to sources identified within section 4.2 of the report).
Recommendations	1 Logo update 2 Monitoring logo style 3 On-line efficiency 4 Colour preference

Figure 5.28: Analysis of PHASE 4: Case study 8 – Aberdeen Tool Rental Plant Services Ltd.

PHASE 4: Evaluation of cases 3 - 9	
COMMUNICATION DESIGN TOOL	
Section in report	Case study 9 – Pentagon Freight Services PLC
Pre-brief analysis	Summarised objectives of the business are: to be the best service provider in our sector, employing the best and delivering the best. Business attributes are: customer service and relationship handling. Reliability and profit orientation are the ethics of the business. Two directors who previously worked for a larger freight service provision company formed the business in 1974. Strong client, sub-contractors, management and shareholders. The colours blue and red are predominately used within this industry.* Most sections completed within the Graphic Design preferences were consistent and could be achieved through considered design solutions. The colour selection revealed that two respondents chose yellow and one respondent chose red and black. This inconsistent result requires further investigation by the designer. * Information relates to sources identified within section 4.2 of the report).
Recommendations	1 Logo update 2 Design consistency 3 Web site

Figure 5.29: Analysis of PHASE 4: Case study 9 – Pentagon Freight Services PLC.

5.4.3 Fourth graphic designer - Ken Gowans

KG: "One of the key benefits of a [CDT] is, in my experience, a real opportunity to improve the communication between the client and the designer."

As a graphic designer and business owner working within the small business client sector for a number of years, Gowans offered relevant experience to the study. Appendix 5.4 provides a copy of Gowans's CV.

Question 1: What are the company's graphic design products?

5.4.3.1 Procedure for the final graphic designer evaluation

KG: "I think that the CDT is a very good tool for the client and the designer to use together. It can be a difficult area to deal with between the two parties."

A copy of the CDT was provided to the designer prior to a semi-structured interview conducted to open up a dialogue concerning the designer's evaluation of the CDT. The interview carried out with this designer was the last stage in the research process prior to requesting feedback from case study representatives. As with all other designer evaluation's, Gowans was asked to comment on any aspect of the CDT i.e. concept, structure and terminology.

5.4.3.2 Evaluation of CDT: Fourth graphic designer

A summary of the evaluation of the CDT regarding each of the four questions within the CDT carried out by the fourth graphic designer is reported below:

Question 1: What does the company do?

KG: "Basically, if they [graphic designers] don't have the information then they can't use it but if they have the information then the opportunity is there to use it or discard it".

Question 2: What visual language do competitors use?

KG: "It [CDT] not only lets you see what kinds of things competitors are saying in their adverts or communication, it lets you see where they're placing adverts, how they target their potential customers. That basically means visual language... so it's vitally important that that research is done because from there you can then begin to build a picture, as a designer, of their business and what makes it tick and what makes it successful and what makes the others successful and it can also perhaps trigger things that others aren't doing that they should be doing. After that, you can then instruct a client. You become in some ways more of a marketing consultant as well".

5.4.3 Fourth graphic designer - Ken Gowans

As a graphic designer and business owner working within the small business client sector for a number of years, Gowans offered relevant experience to the study. Appendix 5.4 provides a copy of Gowans's CV.

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Question 3: What are the market values of the company?

KG: "One of the key benefits of it [CDT] is, in my experience, is that client's, if they're given the right questions, open up eventually and do want to talk about their business... and that information is gold because then when you actually come to design an ad [advertisement], then it will be relevant to the client's business".

Question 4: What are the company's graphic design preferences?

KG: "... it [CDT] would give you the basics e.g. if the corporate colour is blue and you present red or visa versa. That can be a difficult area to deal with between the client and designer. All it's [CDT] doing is that it's another tool that's building up a professional dialogue between the two. It gives the designer the opportunity to find out all about the clients business and equally it gives the client hopefully some insight into the mechanisms of our production and graphic design. So that he [the client] understands the limitations and the attributes of it [graphic design] as well. It also lets you see where he's coming from, again it opens up that discourse [sic]".

5.4.3.3 Outcome of graphic designer evaluation

The graphic designer reported that each section within the CDT was seen as a positive contribution that would enhance the communication process between graphic designer and small business client. No adverse comments regarding jargon or terminology within the CDT were reported.

Additional comments regarding the appropriateness of the CDT to the graphic designer were offered. These comments included:

KG: "I really don't see any downsides to it [CDT] because I think it's something that's greatly needed out there. If anything, it could probably be expanded. Especially the values section...to give them [small business clients] reasons, rather than just numbers.

There's nothing out there as far as I know like that for small businesses. I know that if I had this and I was dealing with clients it would have saved me a lot of headaches. It's amazing the things that go wrong".

5.5 PHASE 5: Request feedback from participants

The final stage in the research process was phase 5, where feedback from participants was requested. This is shown in Figure 5.30.

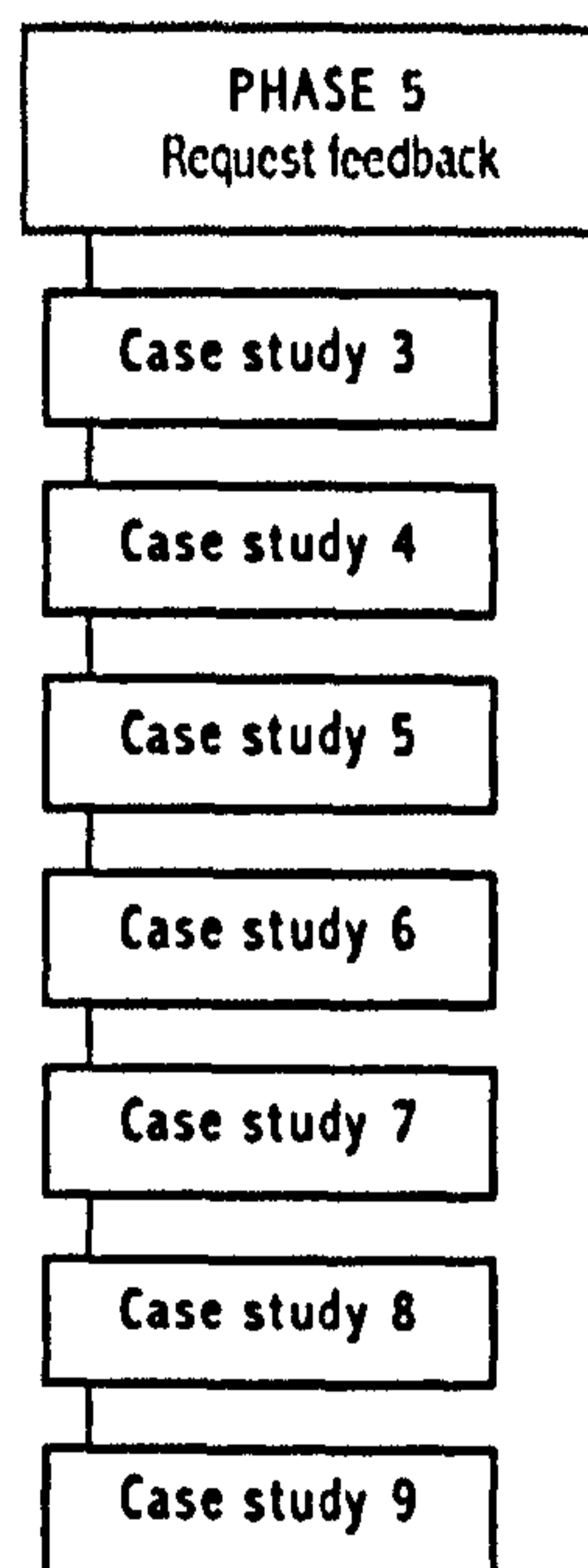


Figure 5.30: PHASE 5: Request feedback from participants.

During a semi-structured interview session with each of the seven business representatives, the author asked two closed questions. These questions were based on:

1. Has working through this procedure provided you with a better understanding of the graphic design process?
2. Is this method [CDT] something that you would use?

All seven small business representatives answered: "Yes" to both questions. All four graphic designers who evaluated the CDT reported that they were in support of the CDT as a more informed process of communication between small business client and graphic designer.

This resulting information validated the research proposition.

5.6 Summary of Chapter 5

The key influences that focus this section involve the development of the CDT through an intensive iteration process in collaboration with seven case studies and three graphic designers.

The processes carried out included:

- Pilot the CDT
- Develop the CDT
- Trial the CDT
- Request feedback from participants

The development of the CDT within this thesis has satisfied the study proposition and fulfilled the requirements of the research aims and objectives.

CHAPTER 6: Outcomes of case studies - Discussion

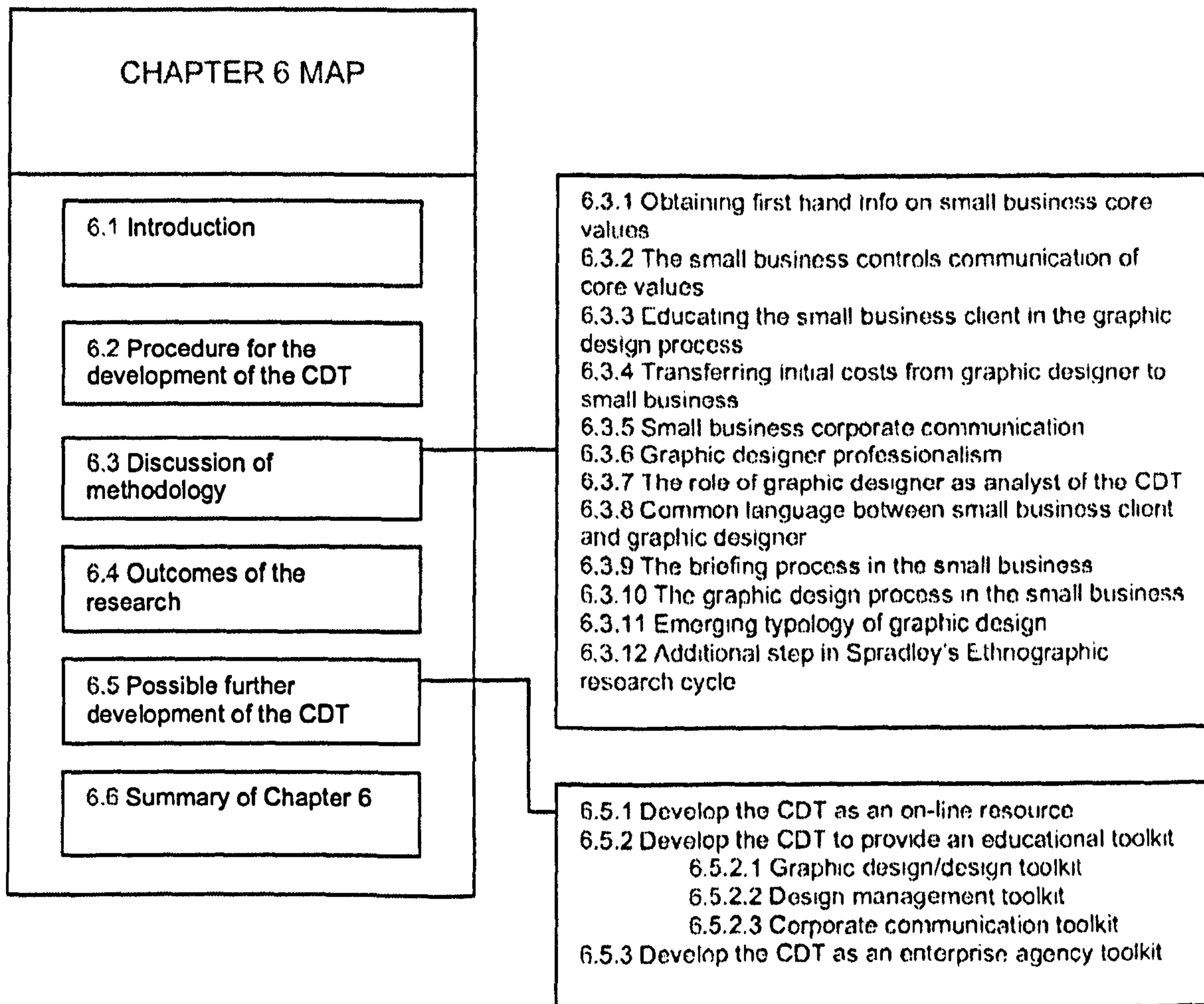


Figure 6.1: Chapter 6, chapter map

6.1 Introduction

This chapter explores the research outcomes in relation to the research proposition, aims and objectives. The main outcomes are presented and key findings reported. The chapter provides an evaluation of the research, reporting a summary of the research analysis and results.

6.2 Procedure for the development of CDT

The procedure used to obtain elucidation of the research proposition and thereafter develop a CDT was carried out through an intensive iteration process involving: a) the author as participant observer, action researcher and facilitator; b) semi-structured interviews with four graphic designers and twelve interviews connected with participating business members; c) four graphic designer evaluations and d) ten businesses within nine case studies. Involvement of the end users as active participants throughout the entire development process of the CDT was central to the research methodology and resulting outcomes.

The research identified that the end users of the method were graphic designers working with small business clients, during the information gathering stage in the graphic design process. Graphic design services can be bought-in by any sector of the market, hence the random nature of small businesses selected for the study.

Also, according to a particular growth stage in small business development, the criteria for small business participant selection included small businesses employing between 10 - 20 members (Story, 2002). In actuality the range of business respondents from the main study (Case studies 3 - 9) varied from 1 to 8 from each business that participated in the research. This was due to the selection process carried out by each of the seven small business representatives after they had agreed to participate in the research.

Graphic designer evaluation was carried out at each phase in the process to ensure that the development of the method was also aligned to graphic designer

needs. In selecting four graphic designers who have experience of working with this client base, an evaluation of the method was carried out from four graphic designers' perspectives at four stages during development of the CDT (see Figure 3.6). One unscheduled graphic designer input was carried out during phase 2: case study 3. The usefulness of four individual graphic designers evaluating a paper-based questionnaire independently ensured that measures were taken towards obtaining an objective, unbiased participant perspective.

A research timeline mapped to the five phases of the research development of the CDT shown in Figure 3.6 provides an overview of the field research carried out. This is depicted in Figure 6.2, presenting a wider perspective of when the research was conducted and what activities took place at particular times as the research developed.

Research respondent	Participation	Interview	Timeframe
Case study 1	3 respondents	3 respondents	30.10.03 – 29.3.04
Case study 2	3 respondents	1 respondent	17.12.04 – 12.1.05
Case study 3	3 respondents	1 respondent	7.2.05 – 5.8.05
Case study 4	7 respondents	1 respondent	7.3.05 – 1.8.05
Case study 5	6 respondents	1 respondent	8.3.05 – 26.7.05
Case study 6	8 respondents	1 respondent	11.3.05 – 28.7.05
Case study 7	2 respondents	1 respondent	15.3.05– 2.8.05
Case study 8	1 respondent	1 respondent	17.3.05 – 27.7.05
Case study 9	3 respondents	1 respondent	21.3.05 – 3.8.05
Graphic designer 1	1 respondent	1 respondent	15.1.05 – 9.2.05
Graphic designer 2	1 respondent	1 respondent	17.2.05 – 10.2.05
Graphic designer 3	1 respondent	1 respondent	7.2.05 – 26.6.05
Graphic designer 4	1 respondent	1 respondent	20.7.05 – 4.8.05

Figure 6.2: Field research participation and timeframe.

6.3 Discussion of methodology

Limitations within the research relate to the nature of the author as participant in the study itself. As the author was involved in the early stages of the enquiry with a previous client (Case study 1: Company A), this may have placed a bias on the nature of that study. The author acknowledges that previous graphic design involvement with Company A provided

the author with a greater level of understanding of their core values and also engendered a sense of loyalty to them. This may have biased the first study, as within this research Company A was the only business that the author had previously been involved with as a graphic designer.

The understanding of Company A's core values that the author brought to the research platform may have impacted on the research validity, as an imbalanced perspective of Company A existed in relation to all other businesses within the research. At the time of carrying out the research this was perceived as a valuable attribute of an ethnographic study. This is described in section: 3.4.1.

On reflection, the author acknowledges that it may have provided a more balanced perspective if all of the businesses were new to the author. A counter argument to this claim is that the research presented an investigation of a phenomena resulting in rich data that otherwise would have been impossible to access. The study presented an un-orchestrated, ethical example and interpretation of the phenomena in question. The study was conducted in this way to encourage an unbiased approach.

The author also acknowledges that on occasions, single analysis can present research limitations to the analysis process (Patton, 2002).

A third research limitation emerged as a result of developing the CDT in collaboration with the small businesses. The author requested that the CDT was to be completed by all stakeholders, "including customers, where possible" written into the questionnaire instructions during phases 2 - 5 of the research (see Appendix 3.6 for a copy of the relevant CDT). The resulting information could provide valuable customer input, representing a more complete picture of core business values. Although several business representatives attempted to achieve customer completion of the method (Case study 4, 5 and 6) this was not forthcoming.

The exclusion of customer input within the study reflects a development of the CDT in line with the collaborating business's needs. Customer inclusion was felt necessary to provide a more complete analysis of small business core values offering an insight into how members of the public perceive the business. On reflection, when formulating an understanding of core business values, internal perception is more

appropriate at this stage of small business development and further development of the CDT should bear this in mind.

6.3.1 Obtaining first hand information on small business core values

The graphic designer is provided with information on small business core values and market competition generated by the small business client as a direct result of using the CDT.

The information gathered to inform the graphic design process, carried out by the small business client emerges directly from its source i.e. selected small business stakeholders. In this respect, the resulting information represents a more considered evaluation of small business values.

Corporate communication methods e.g. Lux's Star method (Van Riel 1992, p.52) and Bernstein's Cobweb method (*ibid*, p.50; Bernstein 1986, pp233 - 238) have been adapted within this study to facilitate an understanding of small business corporate identity.

Although the end purpose of gathering information on the small business within this thesis is to inform the graphic design process, methods adapted have been influenced by corporate communication practices, particularly Bernstein's Cobweb method (Van Riel 1992, p.50). The information gathered as a direct result of using the CDT serves as an important communication platform from which to better inform the graphic design process.

The theory underpinning Bernstein's Cobweb method has been influential in conceptualising the CDT within this research. Of particular interest is the key difference between Lux's Star method and Bernstein's Cobweb method in determining key terms of reference from which resulting information is based. Lux's method applies pre-determined key terms of reference, whereas Bernstein's method advocates that key stakeholders collaborate to determine terms of reference (see section: 4.3.1.6). The act of evolving terms of reference engenders a deeper level of understanding and evaluation and also aligns more closely to the organisational culture and specific stakeholder market sector (Van Riel, 1992).

Bernstein's method (Van Riel 1992, p.50), where stakeholders are provided with a blank sheet from which to generate key terms of reference was considered within this research. Although this concept would have emulated Bernstein's theory, it would also create difficulties regarding facilitation expertise in engaging small business stakeholders in such a time intensive process. Although desirable, the author therefore decided to abandon emulating Bernstein's approach in this way.

It was acceptable within the confines of this research project to develop terms of reference from an initial nomenclature base provided by the author and influenced by communication, management and marketing literature. Terms were developed further with 48 research participants from case studies 3 - 9 and also four graphic designers.

In participating in the research, the end users i.e. small business stakeholders and graphic designers were actively involved in influencing the development of all constituent aspects of the CDT, including terms of reference.

6.3.2 The small business controls communication of core values

As a direct result of using the CDT, the small business is responsible for providing information on core values from selected stakeholders within the business.

In engaging with the CDT, the small business controls information communicated to the graphic designer and by taking this level of control, is also responsible for supplying that information. This can result in a safety mechanism during the communication exchange between client and designer prior to carrying out any design project (see section: 5.2.2.2 for Cargill's comments supporting this point). A sense of empowerment was reported from several small business representatives in undertaking this process.

At the particular stage in the small business's development in terms of: a) design maturity (Walker, 1990); b) development shift into managerial roles (Storey, 2002) and c) growth development stage (Scott and Bruce, 1987) the small business is ideally placed to formulate an understanding of business values, facilitated by the CDT.

All graphic designers reported within this study that at business start-up, the business is not mature enough to understand its place in terms of where it fits in the market. At the stage of the small business's development identified within this thesis, is where the CDT is of most benefit. Figure 6.3 shows how the CDT sits centrally within this process.

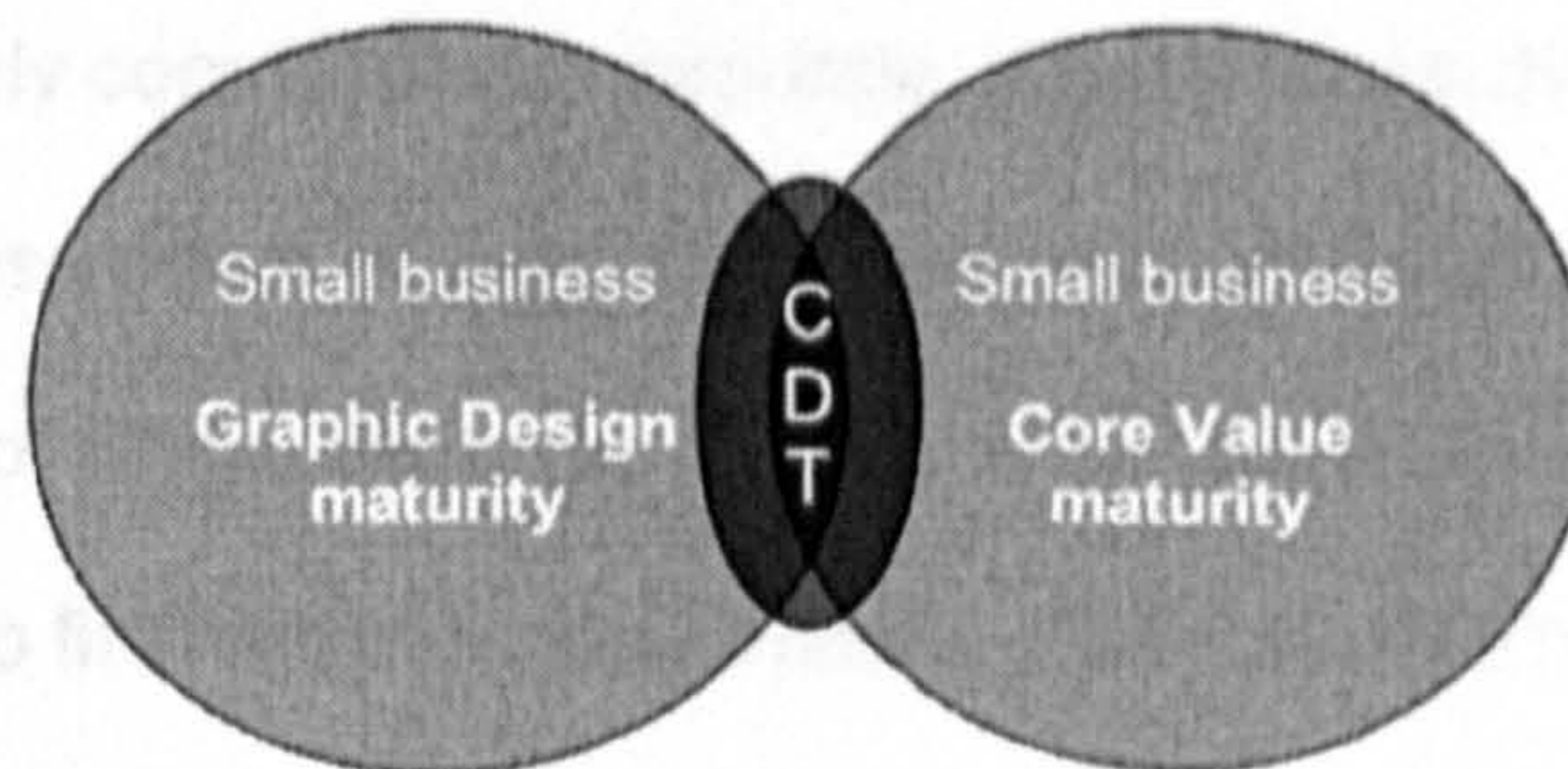


Figure 6.3: Identification of need: the CDT as a method of formulating an understanding of small business core values in relation to level of growth development and design maturity.

Without sufficient understanding of core business values, the communication exchange between small business client and graphic designer is inadequate, leaving the designer to rely on guesswork and intuition. This is reported in section: 4.2. In this respect, the thesis questions the appropriateness of communicating business values through graphic design at business start-up.

In offering an alternative process of communicating core values, the small business is therefore in control of its corporate communication. This research has developed a CDT, one aspect of which involves an evaluation of core values elicited from small business stakeholders.

The filtering process regarding formulating emerging key terms that relate to business values was influenced by corporate communication, management and marketing models, as described in section: 4.3.2. Basic business models selected from these disciplines were applied during the development of the key terms. These are provided in Appendix 4.

A mind map describing the origin of key terms underpinning the market value section of the communication CDT is detailed in Figure 4.3.

The resulting terms within the core business value section of the CDT: objectives; attributes; ethics and origin are not exhaustive. The nomenclature of

business value terminology requires further development out with the scope of this research.

In researching this area, there is a great deal of ambiguity surrounding corporate identity, corporate image and corporate brand (Van Riel 1992, pp29 - 36). The study acknowledges that the mission statement is "plous, predictable" and "repetitive" and cannot be relied on to accurately communicate corporate identity (Olins 2003, p.175).

Although the research has been influenced by medium and large organisational theory, due to the lack of similar literature relating to the small business, these theories are problematic in scaling to fit small business practice (Dickson, 2001; Storey, 2002).

The CDT fills an information gap and represents a more informed method of communication within the small business market sector identified within this research. The research has revealed that information sourced to assist the small business in understanding its core values during its development stage identified within this research is problematic.

The literature reviewed found that although on-line information was available through enterprise agencies at the start of this research enquiry (2003), such as: Small Business Gateway (www.businessgateway.co.uk, 2003), Scottish Enterprise Grampian (www.scottish-enterprise.com, 2003), the Department of Trade and Industry (www.dti.gov.uk, 2003) and the Design Council (www.designcouncil.org, 2003), little information on the design process was found at that time. From 2003 to the time of writing, information grew in respect of general design related areas. Information relating to briefing or methods to gain an understanding of small business values remained generally scarce throughout that period (see section: 2.2.5).

6.3.3 Educating the small business client in the graphic design process

As a direct result of applying the CDT, the small business client gains a deeper level of understanding of the graphic design process.

In working with the small business client, the graphic designer requires to become acquainted with the client throughout the design process e.g. the need to understand the business in terms of aims and aspirations, its market positioning and

who its competitors are. In applying the CDT, the small business is provided with a better understanding of the graphic design process and how design communicates values as a result of a more structured and in-depth communication exchange between client and designer.

As a result of stakeholder completion of the CDT, the small business provides information regarding core values, competitors' visual language and an understanding of graphic design elements. The graphic designer can quickly evaluate the level of design awareness from the information generated by stakeholders.

Inconsistencies regarding matching or miss-matching business values to graphic design elements in terms of visual communication can be flagged up at an early stage in the design process. In this way, the designer can engage with the client to work through areas of potential misunderstanding before any design work is carried out.

Inconsistencies in meaning relate to the language used within particular disciplines (Bernstein, 1986). Visual communication as a language, understood implicitly within the graphic design industry can represent meaning and interpretation that presents difficulties for disciplines out with the visual communication arena. An understanding of the way in which graphic design elements are used to translate values can bridge communication inconsistencies between client and designer (Barthes, 2000; Berger, 1972; Bernstein, 1986; Dickson, 2001; Floch, 2000; Kapferer 1988, 2001; Knapp, 2001; Lury, 1988; Robertson, 2003; Rose, 2003; Shitaro and Webb, 2004 and Morgan and Welton, 2003).

Graphic design translates business values through an implicit visual communication toolkit relevant to graphic design, tailored to the cultural and organisational context of the small business.

The graphic design preferences section within the CDT was formulated to represent a deconstruction of the six constituent elements that combine to make up any graphic design solution i.e. symbolism, layout, colour, visuals, font and copy. In this way the graphic design process becomes accessible to small business stakeholders. It also provides an educational tool from which the graphic designer can clarify alignment (or otherwise) of graphic design elements with core business

values. As part of the design process, the graphic designer has an implicit understanding of visual communication.

The small business client requires to be educated by the graphic designer in order to understand alignment, miss-match or otherwise between graphic elements and business values within the cultural and organisational context of the small business.

As far as the author is aware, this level of design information is not presently available to the small business client. The results of this research reported from all small business representatives that the graphic design information contained in the CDT demystified the graphic design process (see section: 6.3.8). Also, all small business participants and graphic designers welcomed the CDT as a checklist with which to align business values to graphic design elements.

Arguably, it can prove problematic to present a transparent graphic design process in this way. Parallels can be made between the introduction of the desktop computer during the mid 1980s and the subsequent flood of graphic designers in the market place: as a result of a tool made available to the novice, an immediate transformation occurred, projecting the novice into a design professional through user-friendly accessible software and hardware.

The author's perspective is that the tool is worthless unless the user knows how to use it. As a systematic approach to problem solving, the author acknowledges that the CDT requires graphic design training in order to facilitate the process. This is similar to TRIZ (Theory of inventive problem solving) as a systematic approach to problem solving (Altshuller, 1994).

Through an intensive process of evaluation, the user of the TRIZ system works through multiple tasks within the process, resulting in various solutions (*ibid*). The TRIZ system requires to be taught before it can be used.

Although the CDT is basic, in terms of its level of complexity, and also that it could be used by anyone, it does require a level of graphic design experience in order to evaluate, interpret and thereafter communicate more effectively with the small business client.

All four graphic designers reported that in working with the small business client, a great deal of their time was spent educating the client. A transparent process can engender a platform for a deeper level of communication exchange between client and designer beyond the designer educating the client.

The need to create an interdisciplinary skill base where design and business collaborate is one of the issues raised in the Cox Review (Cox, 2005). The role of design is changing and design as a valuable asset to the company bottom-line would raise the profile of the benefits of design in business (www.designcouncil.org.uk, 2006).

Finally, in educating the small business client through engaging with the CDT, a safety mechanism is inadvertently put in place. This occurs as a result of the CDT providing a conduit for aligning graphic design elements with business values e.g. a fun style of font would not align the business values of a funeral directors business.

One graphic designer reported that: "because the small business client's wife liked the colour red, then that was the colour that the logo had to be. It didn't matter that it was completely the wrong colour for that business". The CDT can prove advantageous in mapping graphic design elements to business values, otherwise difficult to explain. A visual semiological system where: "the *meaning* of the picture" is analysed, provides the reader with a deeper understanding of the way in which meaning can be attributed to graphic design solutions (Barthes 2000, pp116 - 130).

Through examples provided by the client within the CDT, the resulting discussion between client and designer engenders a deeper communication platform where meaning or business values attributed to graphic design elements are explored.

6.3.4 Transferring initial costs from graphic designer to small business

The alternative CDT transfers initial costs incurred in gathering information during the graphic design process from graphic designer to the small business.

The small business and not the graphic designer incur the financial cost of gathering information on business values as a result of using the CDT. In this way, the small business gains an understanding of the cost implications of carrying out this research process and therefore becomes more aware of how this information gathering stage in the design process influences the design budget.

The background to the research (see section: 1.1) identifies that during business start-up, the formulation of a business plan is generally carried out. At that time an indication of how marketing can impact on business positioning and growth potential is available to the small business. This is generally provided from business enterprise agencies during assistance at business start-up, including formulating a business plan. Thereafter, the small business relies on sourcing this information independently. Little information is available to the small business regarding this process at the stage of its maturity identified within this research.

This information gap identifies that there is a need for a mechanism to assist the small business in formulating an understanding of its core values. This understanding of small business values not only informs the graphic design process but also serves to better inform the small business itself and its audiences through corporate communication.

6.3.5 Small business corporate communication

As a continuous procedure of information gathering, the small business benefits from maintaining updated information on corporate communication at any given point in time.

As the small business engages with the CDT, a deeper level of understanding of its business values emerges. As all selected business members' input into the CDT, a greater awareness of business values and subsequent communication of those values to other stakeholders emerges.

This is viewed as beneficial within any organisation and can ultimately impact on the competitiveness of the business in the market place (Requirements Capture,

Wootton *et al.*, 1998; Design in Britain, The Design Council, 2003 - 04; Johnson and Scholes, 1993; Van Riel, 1992).

6.3.6 Graphic designer professionalism

Providing an alternative approach impacts on the professionalism of the graphic designer and reflects that professionalism across the design industry as a whole.

The resulting graphic design solution, based on a more informed understanding of the business it represents, reflects not only on the professionalism of the graphic designer in working with the small business client; it also represents the wider design industry, spanning the design profession as a whole and the creative industries in general.

Graphic design is an important first step on the ladder of design maturity (Walker, 1990) and in this respect the small businesses experience of graphic design reflects on the entire design spectrum.

Several comments reported from small business representatives regarding what exactly the role of the graphic designer is within the small business, clarifies that within this research there is a lack of understanding surrounding the graphic designer's role in small business.

One business owner commented on the process carried out within the CDT as: "Wouldn't the graphic designer do all of that [gathering information on business values] anyway?" (Case study 4). This thesis acknowledges that the small business client does not understand the graphic design process regarding the costs incurred in the information gathering stage in the graphic design process (Wootton *et al.*, 1998; The Cox Review, 2005).

The research proposition posited that sufficient understanding of the small business core values is essential to underpin subsequent graphic design solutions. Clearly, there is a need to clarify the role of the graphic designer in small business.

6.3.7 The role of graphic designer as analyst of the CDT

The role of the graphic designer in working with small business clients has emerged as analyst of the CDT.

The experience of the graphic designer is required to interpret the results reported within the CDT. In this way an additional role has emerged as a result of this study.

The CDT gathers information on the business to inform the design process i.e. core values, competitors' visual communication and graphic design preferences. This data is then collated, and the results analysed by an experienced graphic designer and reported back to the small business.

This additional role requires graphic design experience to analyse the collated results of the CDT. This role could be utilised remotely, through on-line support. The resulting costs of this extra role would be minimised in this way. In addition, costs incurred in carrying out this front-end process benefit the business (Wooten *et al.*, 1998).

6.3.8 Common language between small business client and graphic designer

The alternative approach engenders the basis for a common language between small business client and graphic designer.

The CDT engenders the basis for a communication exchange that connects the small business with the language of graphic design. Therefore in using the CDT, the resulting communication exchange crosses disciplines and engenders a platform from which a more common language between client and designer can result.

Dealing with small business respondents throughout the entire engagement with the CDT process, the author was required to explain graphic design terminology to most of the small business representatives. Comments made by small business representatives throughout the development of the CDT questions graphic design terminology. This is reported as:

Case study 3: "What does font mean?".

Case study 4: "What does the Nike Swish mean? What's that?
How would this section work?".

Case study 5: "Bamboosled [sic]! Need you [the author] to talk me
through the design section".

Case study 6: "What do you mean by symbolism?".

Case study 7: "We have a logo, why do we need a symbol?".

Case study 8: "Could you explain what graphic design is, and what
does a graphic designer do?".

Case study 9: "This demystifies graphic design".

The mechanisms of the CDT reflect Bernstein's (1986, p.32) illustration of the communication process, depicted in Figure 6.4.

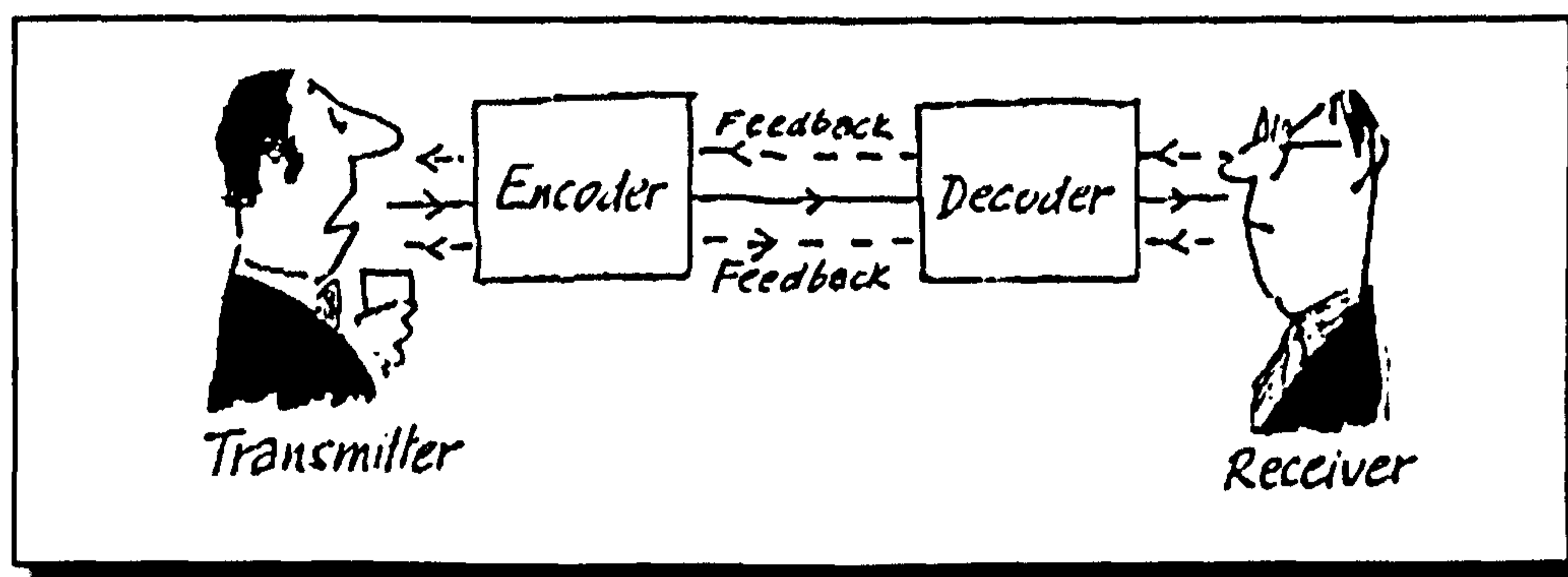


Figure 6.4: Bernstein's example of the communication process. Source: Bernstein 1986, p.32.

6.3.9 The briefing process in the small business

There is no one definitive list of questions tailored for the graphic designer with which to apply to the briefing process, particularly when dealing with the small business client.

According to Goslett (1992, p.30), experience is the main criteria for knowing, "the right questions to ask". Paradoxically, it is generally the inexperienced designer who engages with the small business client.

An interview carried out with one of the designer's (Ian Cargill) revealed the way in which the graphic designer gains an understanding of the small business client's values. Cargill reports that:

Ian Cargill: "Most of the time with most small businesses the process has been one of me [graphic designer] asking them [the client] a particular set of questions to get answers from them. Because generally speaking they're so much in tune with what they do that its all kind of implicit, intuitive stuff. They say: 'Surely you should know about that' when you ask people exactly what it is they do. Get them to explain it, break it down into simple terms of what the company market is, what their values are. It's probably the first time that someone's ever really thought about it. They have to sit down and reflect themselves. I suppose over the years what I've done is really developed a whole series of questions that are based on things that have happened in the past which have supplied pieces of information, or whatever. Little alarm bells ring if they don't tell you this or that or the other. I kind of just go through a series of... I guess it's a semi-structured interview with a client to find out the information from them bit by bit. Or I just get them to talk about their business and then pick out from the conversation what parts that can help and get them to expand on that in some detail. Very rarely, I suppose, now and again I can get a client to give me enough information to work with... By asking them if they can't supply anything about themselves, can they supply anything to me that they feel was the equivalent from one of their competitors, or something like that. Who are they trying to be like? [sic]".

Participant observation research carried out within this study during phase 1: case study 1 elucidated that the briefing process does not provide a basis from which information regarding design concepts remain constant: changes can and are made throughout the design process.

Although the brief sets out technical information, its function is primarily as a project management tool, rather than a method of formulating design concepts that underpin business values. Phillips (2004, p.18) recognises that the design brief is beneficial within a design management context in "partnering" client and designer throughout the creative process.

Another area that emerged as significant within the study in relation to the briefing process was the client-designer relationship. The communication exchange between client and designer is an integral aspect of the briefing process. This is reflected

within comments reported by Cargill within this section, research carried out by Tomes *et al.* (1998) and Bruce and Docherty (1993).

Phillips' (2004) partnering perspective aligned with the importance of the client-designer relationship in understanding the client's core business values could combine to address the research proposition within this study.

Nevertheless, the author would argue that this is a desirable outcome of the design brief, particularly when dealing with client's who are design aware. In re-focusing the design brief as a partnering tool within the small business client context an ineffectual outcome could result, given the small business client's level of design awareness. Also, the nature of the graphic design practice within this sector represents a) a short turn-around and b) a first step on "the ladder of design maturity" (Walker, 1990). In this way, the benefits of client-designer relationship as a method of understanding core business values within the briefing process is not available for either parties.

From a more managerial perspective, the importance of the briefing process is to provide "project controls" and "creative opportunity", according to Boyle (2003, p.33). Boyle (*ibid*) states that: "...a design brief will ... Define the scope for creative opportunity from the design team". The research carried out within the first case study identified that the agreed creative scope described in the brief could be changed and so negated Boyle's evaluation of the brief in terms of "creative opportunity" (*ibid*). This is described in section: 4.2.

This research also acknowledges that at present, the ambiguity concerning exactly what the graphic design brief entails complicates the remit of the briefing process for both graphic designer and small business client. In this respect, it may further complicate the remit of the brief to include an in-depth process from which to make implicit business values explicit.

6.3.10 The graphic design process in the small business

One particular aspect that emerged indirectly as a result of the development of the CDT was that all four graphic designers' confirmed that the component elements that made up the graphic design information gathering stage in the design process were

appropriate i.e. *What does the company do? What visual language do competitor's use? What are the market values of the company? What are the graphic design preferences?*

Also, within the graphic design preference section, all four graphic designers ratified the six individual categories that combine to make up any graphic design solution i.e. symbolism, layout, colour, visuals, font and copy.

Although areas concerning terminology and jargon were questioned and are recognised as an area of further development of the CDT out with the scope of this research, the design process in general remained unchanged. This aspect of the research presented a finding that was not identified from the outset but emerged as the research developed.

6.3.11 Emerging typology of graphic design

One outcome emerged as a result of formulating the case study reports. During data analysis of the reports, a correlation between business sectors and certain graphic design elements emerged. In detailing an analysis of business values aligned to graphic design solutions, the use of certain colours emerged as common to specific business sectors. The main examples of this are:

1. Red in the transport industry (ATR and Pentagon)
2. Blue/green in businesses related to health care (Physiotherapy)
3. Green in horticulture (Florist).

The results reported from the data analysis section 2 and 4 of the CDT from each case study 3 - 9 revealed that consistent patterns emerged between graphic design elements and specific business market sectors. This is described in section: 5.4.2.

Reports fed back visual information relating to question 2 of the CDT: *What is the visual language of key competitors?* Each report provided a contextual analysis of competitors' graphic design solutions within the specific small business market sector (see Appendix 2). This in turn built up a picture of how that particular market sector

applied graphic design elements to communicate values within appropriate market sectors.

The aim of question 2 of the CDT was to establish an understanding of the visual language of key competitors and in this way provide a set of guidelines. This provided the small business with an explanation of the way that graphic design communicates values and also comparative information regarding their particular market sector.

The reports also fed back information from each of the six graphic design elements that make up any graphic design solution within section 4 of the CDT:

Graphic design preferences.

As a result of deconstructing the graphic design elements into six constituent parts and selecting graphic elements that represent small business values, the graphic designer could in this way, communicate more effectively with the small business client. In working with the CDT and uncovering the small business's understanding of graphic design elements that combine to represent graphic design solutions, patterns began to emerge connecting graphic design elements with specific market sectors.

The results of section 2 and 4 of the CDT, across the seven case studies are provided through an analysis of case study reports (see section: 5.4.2). Figure 6.5 details emerging patterns of graphic design elements applied within specific market sectors.

Consistency of graphic design elements used in market sectors: Case study 2 - 9	
Independent financial advisors (Case study 2):	<ul style="list-style-type: none"> • 6 businesses reviewed • All competitors applied the following in their visual communication: <ol style="list-style-type: none"> 1. Blue as the main colour 2. Conservative typography 3. Professional human centred business imagery
Management training consultants (Case study 3):	<ul style="list-style-type: none"> • 6 businesses reviewed • All competitors applied the following in their visual communication: <ol style="list-style-type: none"> 1. Orange and blue as the main colours 2. Bold typography 3. Thought provoking imagery
Soft furnishing manufacturer (Case study 4):	<ul style="list-style-type: none"> • 6 businesses reviewed (including participating business) • All competitors applied the following in their visual communication: <ol style="list-style-type: none"> 1. Mixture of colours aligned to current interior design market trends 2. Mixture of typography aligned to current interior design market trends 3. Mixture of imagery aligned to current interior design market trends
Florist (Case study 5):	<ul style="list-style-type: none"> • 5 businesses reviewed (including participating business) • All competitors applied the following in their visual communication: <ol style="list-style-type: none"> 1. Green as the main colour 2. Organic typography 3. Floral symbolism
Physiotherapy practice (Case study 6):	<ul style="list-style-type: none"> • 8 businesses reviewed (including participating business) • All competitors applied the following in their visual communication: <ol style="list-style-type: none"> 1. Blue/green as the main colour 2. Clean typography 3. Human centred imagery
Management of inventory and procurement content (Case study 7):	<ul style="list-style-type: none"> • 2 businesses reviewed (including participating business) • All competitors applied the following in their visual communication: <ol style="list-style-type: none"> 1. Black as the main colour 2. Simple sans serif typography 3. Machine component imagery
Supplier of plant and equipment (Case study 8):	<ul style="list-style-type: none"> • 4 businesses reviewed (including participating business) • All competitors applied the following in their visual communication: <ol style="list-style-type: none"> 1. Red as the main colour 2. Bold, sans serif typography 3. Geographical imagery
Provider of international freight forwarding services to the oil and gas sector (Case study 9):	<ul style="list-style-type: none"> • 6 businesses reviewed (including participating business) • All competitors applied the following in their visual communication: <ol style="list-style-type: none"> 1. Red and blue as the main colour within the bold, sans serif typography 2. Red and blue as the main colour within the visuals in general 3. Global/ oceanic imagery

Figure 6.5: Results of consistency of graphic design elements used in particular market sectors.

6.3.12 Additional step in Spradley’s Ethnographic Research Cycle

Section 3.4.1 described Spradley’s Ethnographic Research Cycle (1980, p.27) as a refocusing checklist at various stages throughout the research. As a development of

Spradley's model, the research included a further step in the research sequence: request feedback. This development reflected the research approach carried out by Gray (1988, p.280) where the research was not considered concluded until respondent feedback was received.

Similarly, the research carried out within each study was not considered complete until evaluation and feedback from each case study representative was reported. The resulting information regarding participant's evaluation of the CDT concluded the field research. Figure 3.4 (see section: 3.4.1) depicts the inclusion of stage 9: request feedback, as an additional step in Spradley's Linear Sequence in Social Research model (1980).

6.4 Outcomes of the research

By unpacking the research proposition, aims and objectives of the research, an evaluation of whether or not the research achieved what it set out to achieve will be reviewed.

The research proposition remained central to the enquiry (see section: 1.4). Objectives within the study further focused the approach (see section: 1.3).

The researcher clarified that within the research project, problems exist during the communication exchange of small business values between client and graphic designer, prior to any design project undertaken.

In offering an alternative process of communication exchange during the information gathering graphic design process, various outcomes emerged resulting from this investigation. The main outcome that resulted was that a focus shift occurred during the information gathering process, from graphic designer to small business. This was as a direct result of applying the CDT as an alternative process of communication exchange.

Existing graphic design practice involves the designer taking responsibility for gathering information on the small business, as the research has evidenced through interviews with four graphic designers experienced in working with small business clients.

The domino effect of this focus shift impacts on various aspects of the role of graphic design in working with the small business client. These resulting outcomes of the focus shift in the design process are summarised below:

- Obtaining first hand information on the small business
- Initial costs are transferred from designer to client
- The small business controls communication of its core values
- Educating the small business client in the graphic design process
- Corporate communication benefits of maintaining core business value information
- Graphic designer professionalism
- An additional role of the graphic designer as facilitator/analyst of the CDT
- Common language between small business client and graphic designer

6.5 Possible further development of the CDT

Whilst developing the CDT as a paper based document and set of procedures, a number of possibilities for future development have arisen which lie beyond the scope of this project.

Possible areas and future development of the CDT are included here as part of the discussion.

1. Development of the CDT as an on-line resource, tapping into the World Wide Web and resources.
2. Develop the CDT to provide an educational toolkit for the design and corporate communication student.
3. Develop the CDT as an enterprise agency toolkit to assist the small business's corporate communication output.

These points are expanded upon in the following sections: 6.5.1 - 6.5.3.

6.5.1 Develop the CDT as an on-line resource

One outcome of the research identified that the CDT as a paper-based questionnaire, set of procedures and resulting guidelines could be developed into an on-line facility by tapping

into the World Wide Web's (WWW) resources. In this way, business value meanings associated with graphic design elements could be explored from both user and facilitator perspectives. Three possibilities are:

1. Utilising the WWWs extensive resource as a potential graphic design data-base.
2. Improve accessibility and widen the pool of people using the on-line procedure.
3. Ensure a greater level of anonymity that could improve the quality of stakeholder information provided.

6.5.2 Develop the CDT to provide an educational toolkit

The research findings reported that the CDT provided an educational environment for the small business in understanding how graphic design translates business values (see section: 6.3.3). Applying this theory within a design education environment could result in the design student's deeper understanding of a) the relevance of understanding client's needs and b) how to interpret those needs into graphic design solutions across various design disciplines such as product design, interior design, web design, architecture and illustration.

6.5.2.1 Graphic design/design toolkit

The CDT could be incorporated into existing course curricula to compliment design and business students. The CDT toolkit would operate as a structured method of gathering information from the small business client to inform the graphic design process.

Theories underpinning the information gathering stage in the graphic design process are transferable across any design discipline involving the client and the design brief. Other design disciplines such as product design, interior design, web design, architecture and illustration could benefit from the CDT as theoretical underpinning of core business values. In this way, incorporating business theory into the design discipline.

6.5.2.2 Design management toolkit

The research recognises that design management is under utilised within the business sector in general (see section: 2.2.3) and relatively unknown within the small business sector. This is mainly due to the small business's financial constraints and low level of design maturity (Cox, 2005; Walker, 1990). The research also recognises that medium and large business theory can be problematic when applied to small business practice (Storey, 2002).

As a compliment to the design management programme, theories developed within the CDT may benefit the design management student. Underpinning theories involving formulation of core business values and communication of those values into graphic design solutions could benefit the future design manager's understanding of the design process and how design communicates values.

6.5.2.3 Corporate communication toolkit

Further development of the small business core value theory section within the CDT would require more advanced business theories to span medium and large business practice. Graphic design theory would remain the same. The nature of the CDT as an educational toolkit to facilitate an understanding of how design communicates values reflects the semiotic paradigm.

As far as the author is aware, this is a relatively under utilised area in UK education, crossing disciplines between management, communication, marketing and design. The author recognises that as an educational toolkit, underpinning theories would from business and design benefit cross-pollination and engender greater collaboration between disciplines in line with the Cox Review recommendations (Cox, 2005).

6.5.3 Develop the CDT as an enterprise agency toolkit

The growth of design related information within enterprise agencies reviewed within this research (www.scottish-enterprise.com, 2006; www.businessgateway.com, 2006;

www.designcouncil.org.uk, 2006; www.businesslink.gov.uk, 2006; www.dtl.gov.uk, 2006) and the recent Cox Review (Cox, 2005) findings, positions this study as beneficial to the small business sector.

The Cox Review (*ibid*) acknowledges that integration of design into business not only improves business competitiveness, economic development and employment potential, it can also affect business performance dramatically, which in turn influences the UK economy as a whole. The CDT integrates design and business into a single communication discipline that can better communicate business values. In this way the CDT could be further developed in line with the evolving integration of design in business as presented within the enterprise agencies. In this way, the CDT would still require facilitation and analysis by an experienced graphic designer.

6.6 Summary of Chapter 6

This research has found that there is a need for a mechanism to assist the graphic designer to find out what the small business core values are. In providing a mechanism for doing that assists the small business in identifying its values within corporate communication.

Existing communication mechanisms, such as: the design brief and the client-designer relationship fail to provide the designer with an understanding of business values. This is of particular significance within the small business sector.

The key finding of this research is the development of a tool to allow more effective communication between graphic design and small business.

All small businesses that took part in the development, trialling and feedback sessions within the research reported that as a direct result of using the CDT they felt better informed of the graphic design process and also gained a better understanding of the way in which graphic design elements translate business values. All graphic designers involved in the research reported that the inclusion of the CDT would benefit their role in working with the small business client at this particular information gathering stage in the design process.

The emerging role of the graphic designer as facilitator/analyst is discussed and three areas for future research are identified including an on-line version of the CDT, an educational toolkit and an enterprise agency toolkit to assist the small business in corporate communication processes.

CHAPTER 7: Conclusions

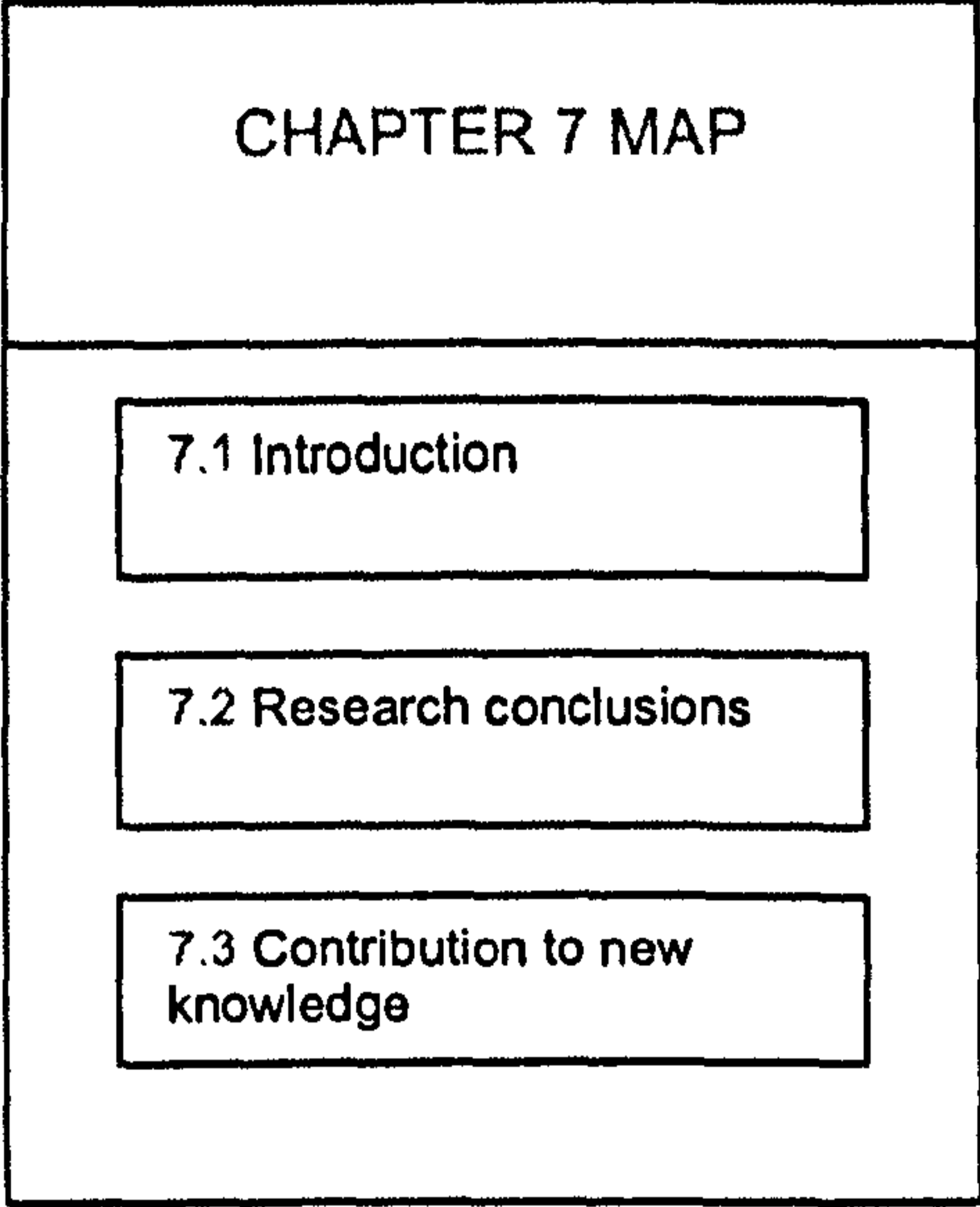


Figure 7.1: Chapter 7, chapter map

7.1 Introduction

This chapter reports conclusions referring to the research proposition, aims and objectives and sets out the contribution that this thesis makes to new knowledge in the field of graphic design and corporate communication in dealing with the small business.

7.2 Research conclusions

Based on the research proposition, aims and objectives, the research conclusions are as follows:

1. Existing graphic design practice when working with the small business client, fails to provide the designer with an adequate understanding of small business's core values and market drivers.

Budget and time constraints placed on the designer, the small business's lack of understanding of the design process and the inability to develop a long-term client-designer relationship tends to diminish the efficiency of the graphic design procedure. An understanding of core business values is essential in underpinning the graphic design information gathering process and subsequent graphic design solutions: if the following graphic design solutions are to be successful in terms of satisfying the client.

2. The research has identified that medium and large business theory cannot be scaled to fit small business practice.

Medium and large business theory involves corporate communication expertise that informs those businesses that are both enlightened in the benefits of corporate identity evaluation and can cover associated costs incurred in the process. Unlike medium and large businesses that acknowledge the need for corporate communication expertise to make implicit values explicit, the small business relies on the graphic designer to provide design solutions aligned to core values. This is usually carried out with minimum input from the small business itself.

Factors that influence the small business's lack of understanding of their core business values include inexperience of the design process, inability to understand how design can improve market competitiveness and financial constraints.

With little input from the small business, the graphic designer relies on experience (if any), guesswork and intuition to provide design solutions for the client. This shortcoming in the design process reflects across the graphic design profession and ultimately on the design industry as a whole.

3. The benefits experienced by more design mature businesses regarding client-designer long-term relationship precludes the graphic designer from developing an understanding of core small business values (Tomes *et al*, 1998; Bruce and Docherty, 1993).
4. Existing communication exchange between client and designer fails to provide the designer with adequate understanding of core business values necessary to underpin the design process. This often results in inappropriate design solutions (phase 1: case study 1).

The research revealed that the small business client had not formulated an understanding of its values at the first point of contact with the graphic designer (Case study 1,2,3,4,5,7,8,9). At this specific stage in the small business's development, where it required design solutions to communicate certain aspects of its business, it did not have the tools with which to formulate an understanding of its core values (Wootton *et al.*, 1998).

5. This aspect of the communication exchange between graphic designer and small business client is specific to this market sector and therefore underlines the need for a mechanism to aid this process. The CDT provides an opportunity for a shift in focus from graphic designer to small business client regarding the information gathering stage in the design process. The CDT therefore provides a solution to both small business client and graphic designer that the small business client can implement as a business development tool.
6. The CDT offers a solution that could be integrated into the design briefing process, resulting in a focus shift from graphic designer to small business client.

In this way, the client is therefore not only involved in providing more apposite information but is also empowered as an active participant in the design process, as a direct result of the CDT. Through implementation of the CDT, the small business client is therefore better educated in the design process at the earliest of stages. This impacts on future design projects, as well as the design practices of the wider design profession.

7. The CDT as a stand-alone process better informs the business of its core values and therefore provides valuable information that can benefit business strategy development, such as: a) the business plan; b) funding applications and c) the design brief. In providing valuable information that can underpin the development of business strategy procedures regarding 8. a), b) and/or c), the CDT provides a prerequisite mechanism that enhances this process. This is of particular benefit as a new business development model.
8. Literature is available to the small business regarding business start-up information in the form of a business plan or funding proposal through enterprise agencies. However, little information is available to the small business on formulating an understanding of business values at the stage of development identified within the scope and context of this research. Information relating to medium and large business theory provides useful forward insights but does not serve to address the small business needs.

The resulting focus shift occurred as the CDT was applied during this research in gathering a body of relevant information generated by selected stakeholder evaluation that would better inform the graphic design process. In so doing forcing the stakeholders to engage in an active, reflective and forward thinking process.

9. The main benefit to the small business was that in formulating an analysis of core business values, all selected stakeholders were involved in the process.

As a result of undertaking this procedure, the analysis reflects how individual stakeholders communicate business values to the business's many audiences. The theory underpinning Bernstein's Cobweb method (Bernstein, 1986; Van Riel, 1992) and Lux's Star method (Van Riel, 1992) in terms of an

evaluation of stakeholder perception serves as an important small business corporate value and corporate communication resource.

10. Benefits identified regarding an alternative procedure of communication exchange during the design process involve the graphic designer being provided with first hand information on the business directly from source.

In this way, the business controls the information provided to the designer and subsequently takes responsibility for gathering appropriate information as specified within the CDT. In providing information on core business values to the designer, the small business takes responsibility for the nature of the information provided and also absorbs costs incurred.

The designer is therefore provided with information that can be used to trace back design concepts aligned to core values *before* they are developed into design solutions.

11. In informing the graphic design process, the CDT is not a prescribed form of communication. The resulting guidelines are offered to inform, not to dictate to the graphic designer. As a result of applying the CDT to the information gathering stage in the design process, the designer can use the information as a basis from which to develop concepts and solutions across a range of graphic design projects, rather than as a definitive formula.
12. The CDT in this respect requires to be analysed by a trained specialist i.e. graphic designer.

7.3 Contribution to new knowledge

A new corporate communication model has been developed that can be used either in conjunction with the front-end of the graphic design process: incorporating all sections of the CDT; or in relation to the business value section of the CDT as a stand-alone aid to the strategic development of the small business sector (see section 3 of the CDT: Appendix 3.6).

In this respect, the contribution that this research has made to new knowledge is through the development of a tool. The tool can be used either by:

1. Graphic designers, applied in a small business context which will significantly improve the graphic design process and subsequent solution, or
2. The small business, applied as an underpinning aspect of strategic business development processes, improving areas such as: writing a business plan, applying for funding and/or the design brief.

The inclusion of business values as a core aspect of the design process specifically within the small business sector represents a significant shift in focus away from the designer as service provider to business partner.

As design educator the tool provides an understanding of how design translates values and in this way provides new knowledge to the small business sector.

A complete version of the CDT is provided in Appendix 3.6.

As a direct result of this new knowledge additional factors support this contribution. These are:

- In providing a method to make small business values explicit, the CDT empowers business stakeholders, improves corporate communication and therefore impacts on the business's growth potential and market competitiveness.
- Empowering the small business client to communicate business values, better informs the graphic design process, reflects well on the graphic design profession and ultimately, the design profession in general.
- The CDT educates the small business client in the graphic design process in terms of: a) the information gathering stage; b) the need to understand what the business is about and c) how design translates values.
- The CDT provides the designer and small business with access to design practices and relevant business theories that have not been put together in this way before. Therefore, potentially enhancing the design process and corporate communication practice.

The significance of this contribution is that the CDT has direct application to the field of design and also business strategy and could be adapted to other contexts e.g. education and enterprise agencies.

CHAPTER 8: Recommendations for future research

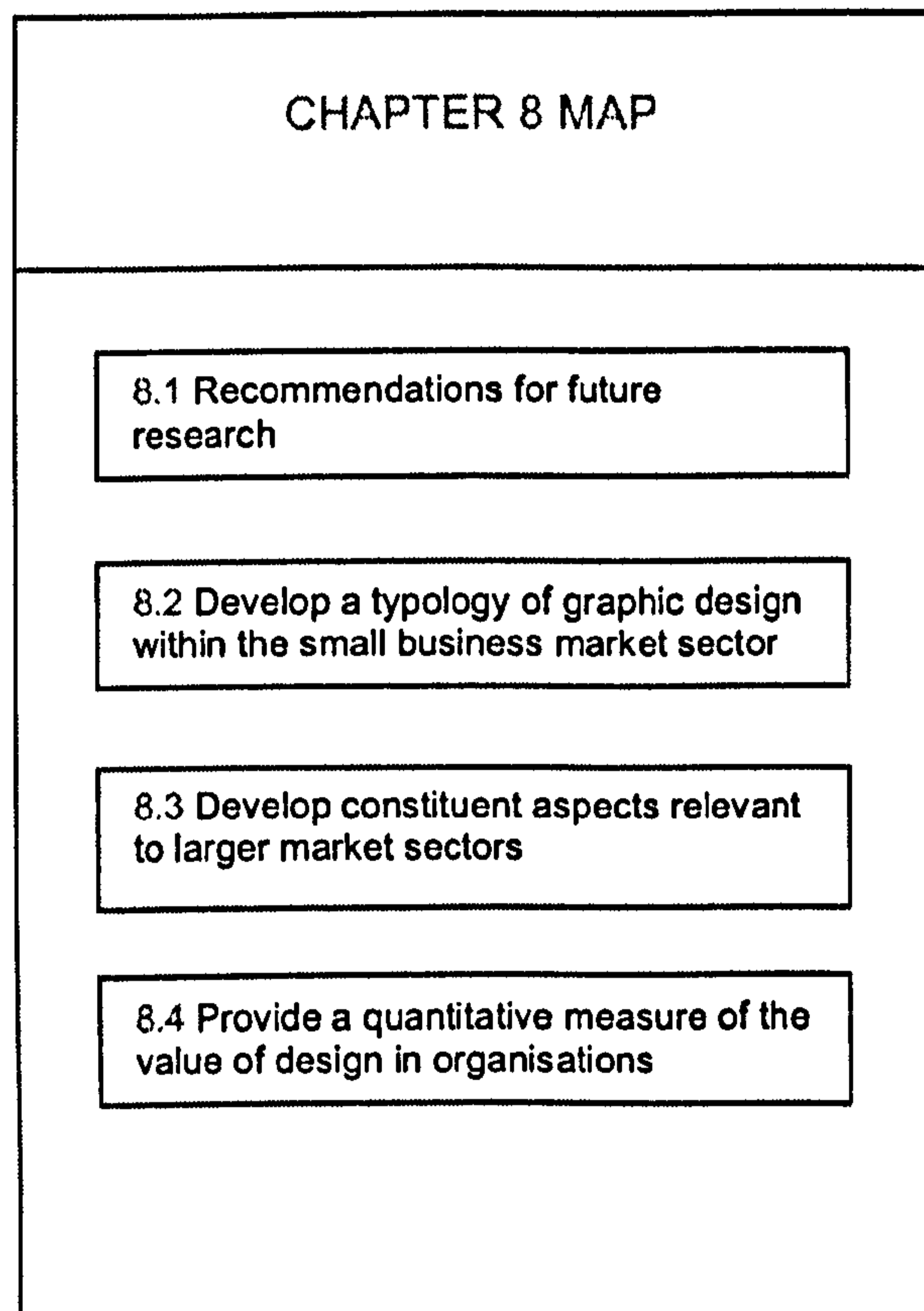


Figure 8.1: Chapter 8, chapter map

8.1 Recommendations for future research

There are three areas that have arisen as part of this study but are beyond the scope identified within the research objectives. These include:

1. Could the potential of the resulting graphic design information relating to small business market sectors, be developed into a typology of graphic design?
2. Could the constituent aspects of the CDT be developed to serve larger market sectors?
3. Is there potential for quantitative research into the value of design in small businesses that compliments the qualitative research carried out?

8.2 Develop a typology of graphic design within the small business market sector

One outcome of the development of the CDT was that patterns began to emerge regarding the deconstructed graphic design elements that were used to represent business values e.g. the colour red was used predominately within the transport industry, while aquamarine represented the health related industries. Figure 6.3 depicts emerging patterns resulting from the case study reports carried out within this research.

Further investigation into this area of mapping business values communicated through graphic design within specific market sectors could prove advantageous as a graphic design database, resulting in a typology of graphic design, reflective of Jones's Grammar of Ornament (1956).

The advantages of providing a typology of graphic design elements, enhanced by the Internet and World Wide Web within an educational environment could impact on the designer's skill base and result in a more professional and closer alignment of graphic design solutions serving the graphic designer and its client base.

8.3 Develop constituent aspects relevant to larger market sectors

The constituent aspects of core business values and competitors visual communication relevant to the small business sector could be developed across the medium and large

business sector.

Consideration regarding the level of a business' design maturity and also its development within the broad range of small, medium and large business categories should be borne in mind. Organisational culture relevant to corporate communication requires to be taken into account when scoping the research further across larger businesses.

8.4 Provide a quantitative measure of the value of design in organisations

Businesses that position design within the corporate strategy acknowledge the value of design in business (Bruce *et al.*, 1988; Cooper and Press, 1997; Wootton *et al.*, 1998; Borja de Mozota, 2003; Cox, 2005; www.sbs.gov.uk/analytical, 2006; www.designcouncil.org.uk, 2006). One aspect of the value of design in business that would convince the business sector of the importance of design would be to quantify its benefit in terms of the businesses bottom-line.

This study has investigated how design translates core business values and in this way provides a qualitative measure of the value of design within the small business. Could further research be developed that would quantify the value of design in business?

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**Appendix 1 – Information sourced from
UK Enterprise Agencies, relating to the design brief and
formulating an understanding of small business values**

Sourcing Information on the graphic design brief and formulating an understanding of small business values

In reviewing UK Enterprise websites from November 2004 to time of writing, information relating to the graphic design brief referred mainly to technical information. Information dealing specifically with understanding small business values through design related areas were not identified in 2004. However, by 2006 this situation changed dramatically. A great deal of information, relating particularly to branding was provided in 2006, especially within the Business Gateway and Business Link websites. The Scottish Enterprise (Gramplan) and Department of Trade and Industry websites remain relatively unchanged in terms of content, although the Department of Trade and Industry website regularly publishes design specific papers. The Design Council website continues to provide the most comprehensive source of design information from the websites reviewed.

An overview of the site map structure and where sources of design information can be found is provided in Figures 1 - 11. The diagrams are depicted in a simple document layout style in order to avoid bias due to visual, architectural or usability issues, which may advantage one site over another. Each diagram presents the structure of the information, detailing where design briefing information is found. This is depicted within the diagrams as a single asterisk (*). General design information is depicted as a double asterisk (**). Where a second box is shown within the diagram, this refers to any links made within the main site, leading on to other possible sources of general design information.

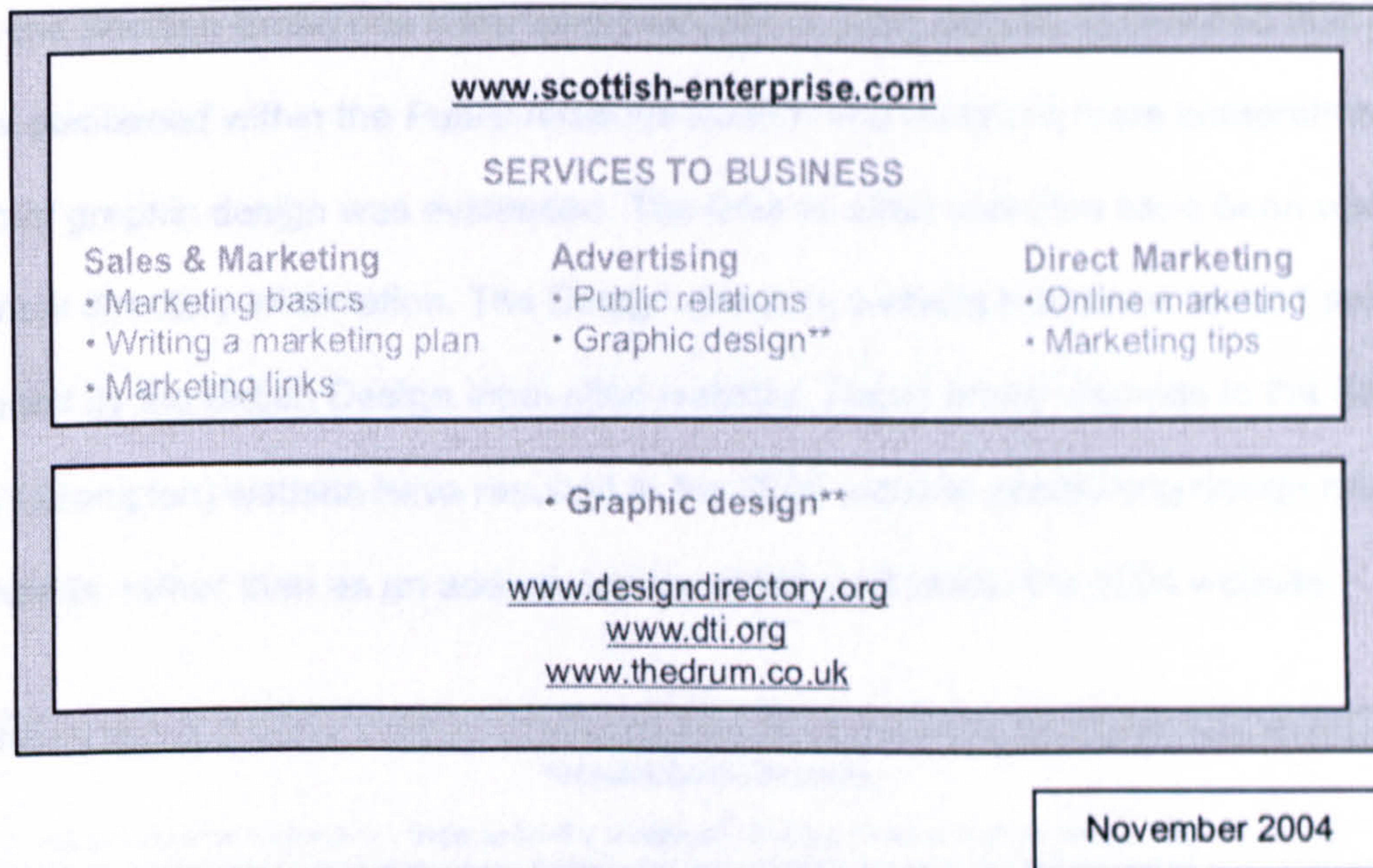


Figure 1: Graphic design briefing information re: Scottish Enterprise (Grampian). Source: www.scottish-enterprise.com, 2004.

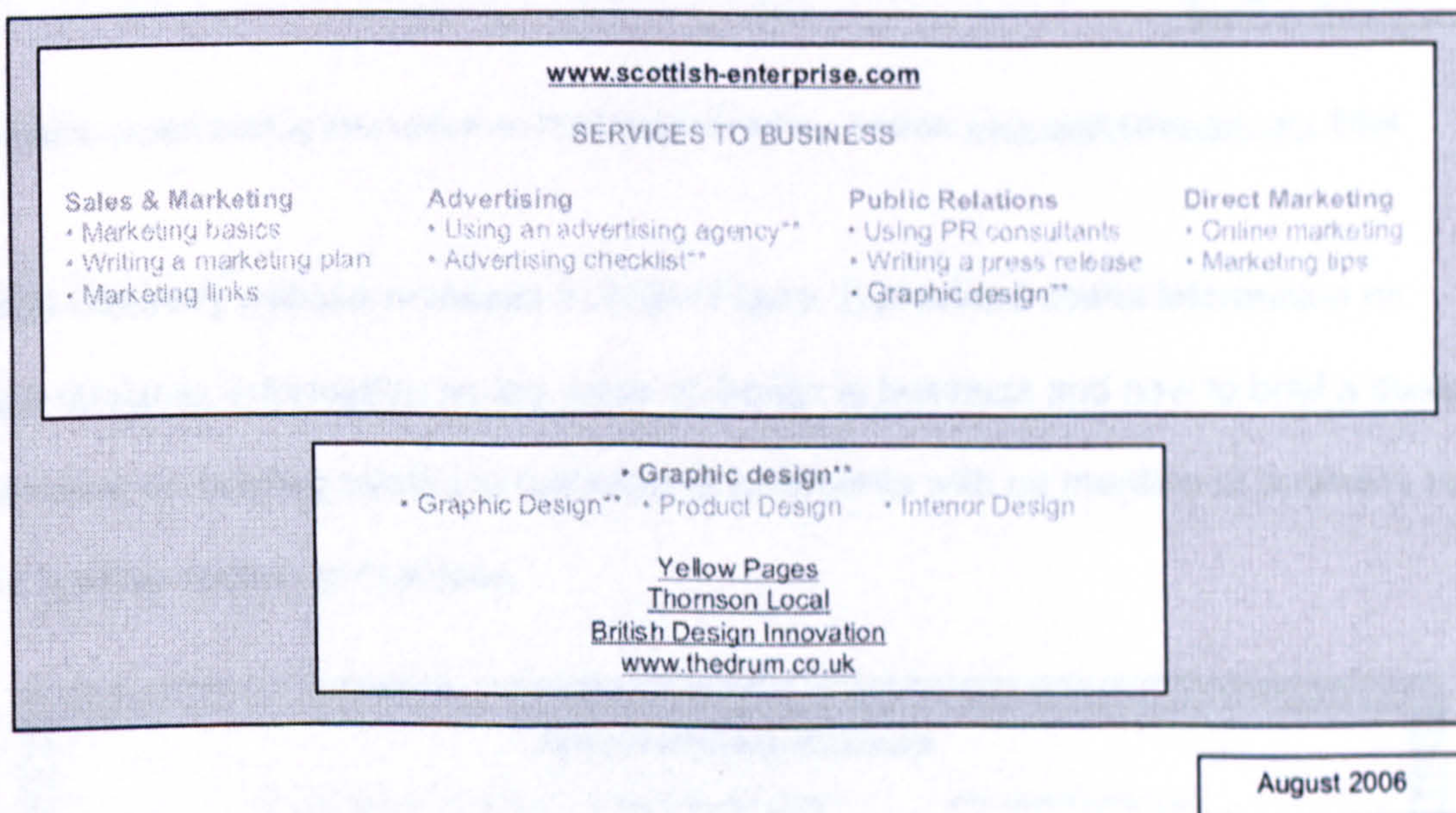


Figure 2: Graphic design briefing information re: Scottish Enterprise (Grampian). Source: www.scottish-enterprise.com, 2006.

Scottish Enterprise (Grampian) provides information dealing mainly with business start-up. In 2004 (Figure 1) graphic design is positioned within the *Advertising* section, with no information found regarding the design brief. However, within the *Graphic design* section in 2004, useful links were provided to: The Design Directory; Department of Trade and Industry and The Drum (Scottish advertising and media publication).

Reviewing the Scottish Enterprise (Grampian) website in 2006 (Figure 2) revealed that graphic design was positioned within the *Public relations* section and therein a more comprehensive description of graphic design was evidenced. The links to other websites have been updated, including local directory information. The Design directory website has since ceased and has been replaced by the British Design Innovation website. These minor changes to the Scottish Enterprise (Grampian) website have resulted in the 2006 website positioning design relevant to business needs, rather than as an add-on service evidenced within the 2004 website.

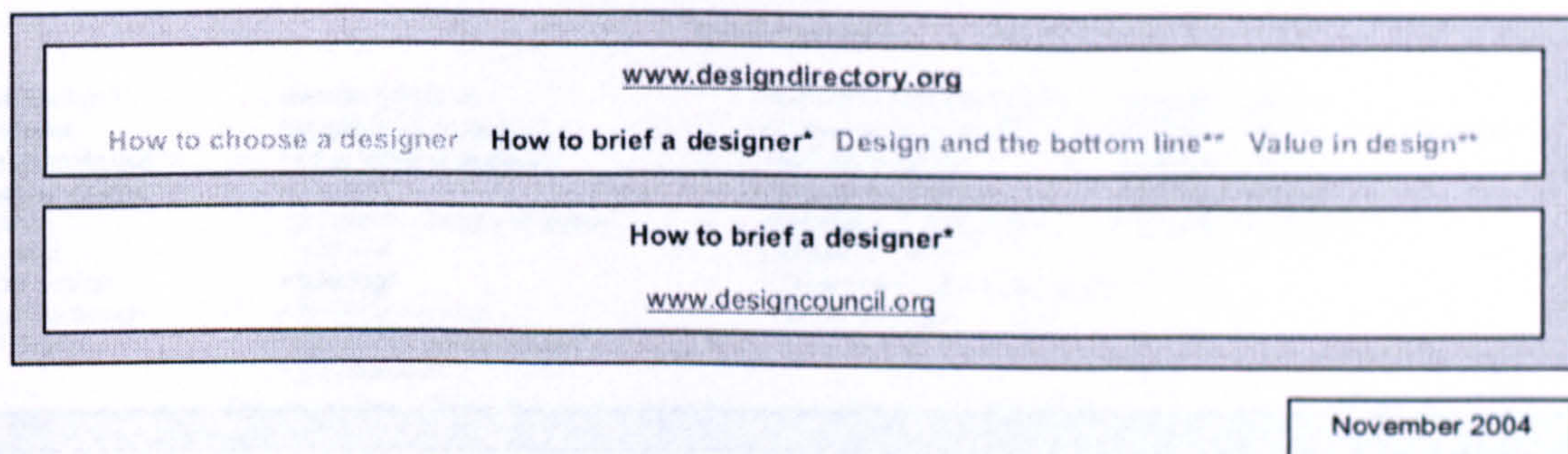


Figure 3: Graphic design briefing information re: The Design Directory. Source: www.designdirectory.org, 2004.

The Design Directory website reviewed in 2004 (Figure 3) provided useful information on selecting a designer, information on the value of design in business and how to brief a designer. The information on briefing related to technical requirements with no mention of business values within the briefing section at that time.

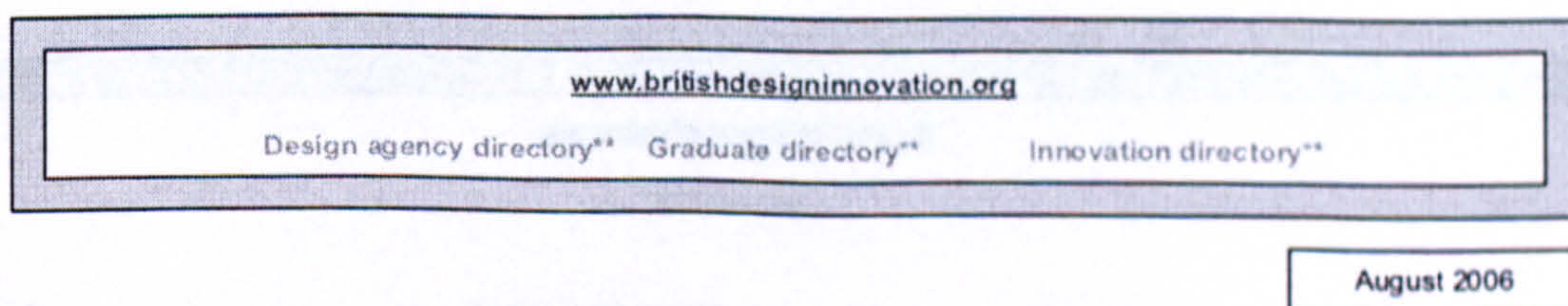


Figure 4: Graphic design briefing information re: Scottish Enterprise. Source: www.britishdesigninnovation.org, 2006.

The Design Directory has ceased to exist, having been replaced by the British Design Innovation organisation. The initial review of this website in 2006 revealed design directory information, as shown in Figure 4. However, navigating further into the website, information relating to general design issues is evident, including various sources of graphic design related information. Nevertheless, no information was found regarding the graphic design brief.

The main source of information on the design brief, including design in general, was found within The Design Council and Business Link websites, as shown in Figures 5, 6, 9 and 10.

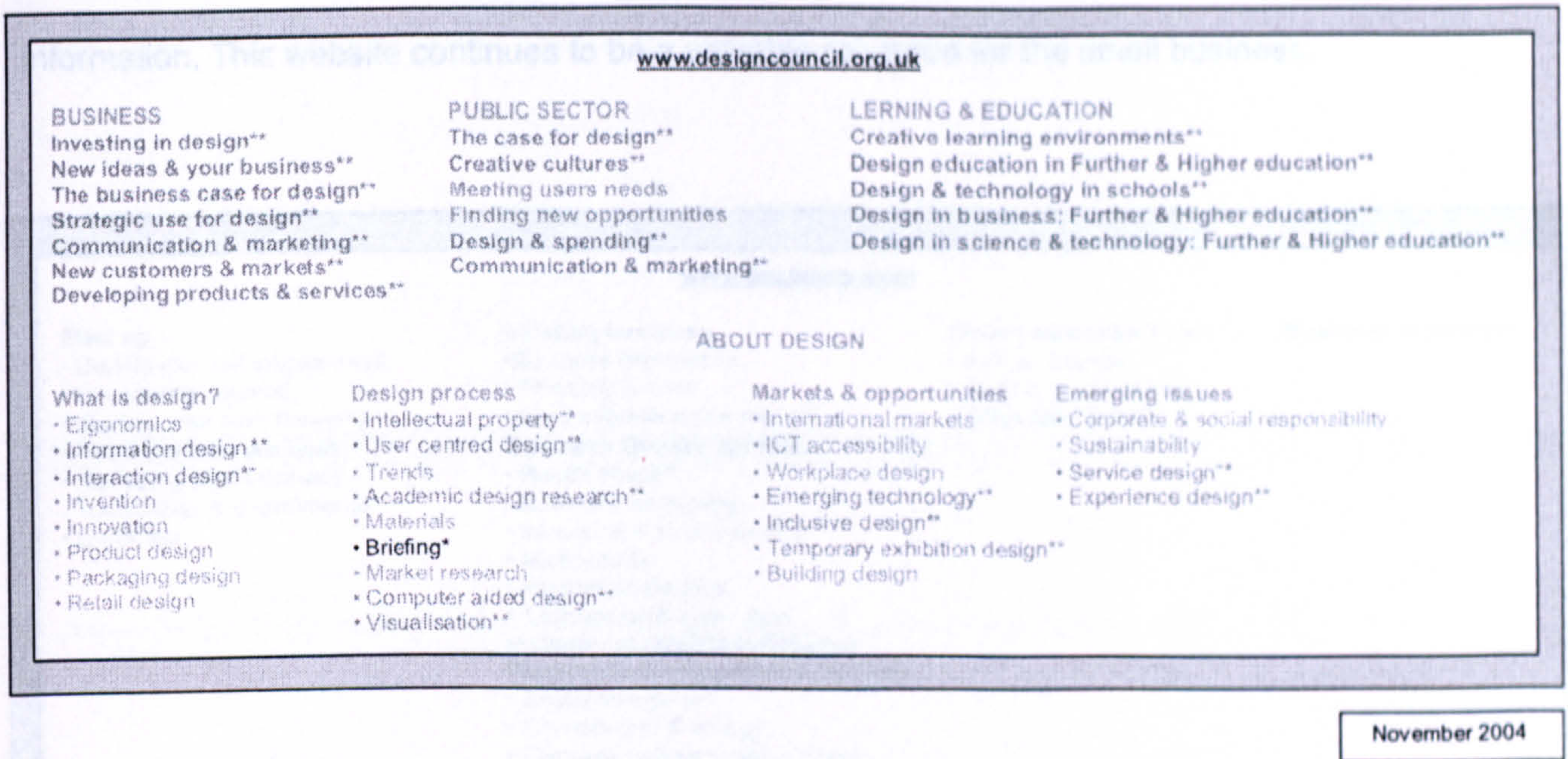


Figure 5: Graphic design briefing information re: The Design Council. Source: www.designcouncil.org, 2004.

The Design Council website in 2004 (Figure 5) provided a comprehensive range of design information from design process, business and educational perspectives. The briefing process was explained in some detail, within the *Design Process* section.

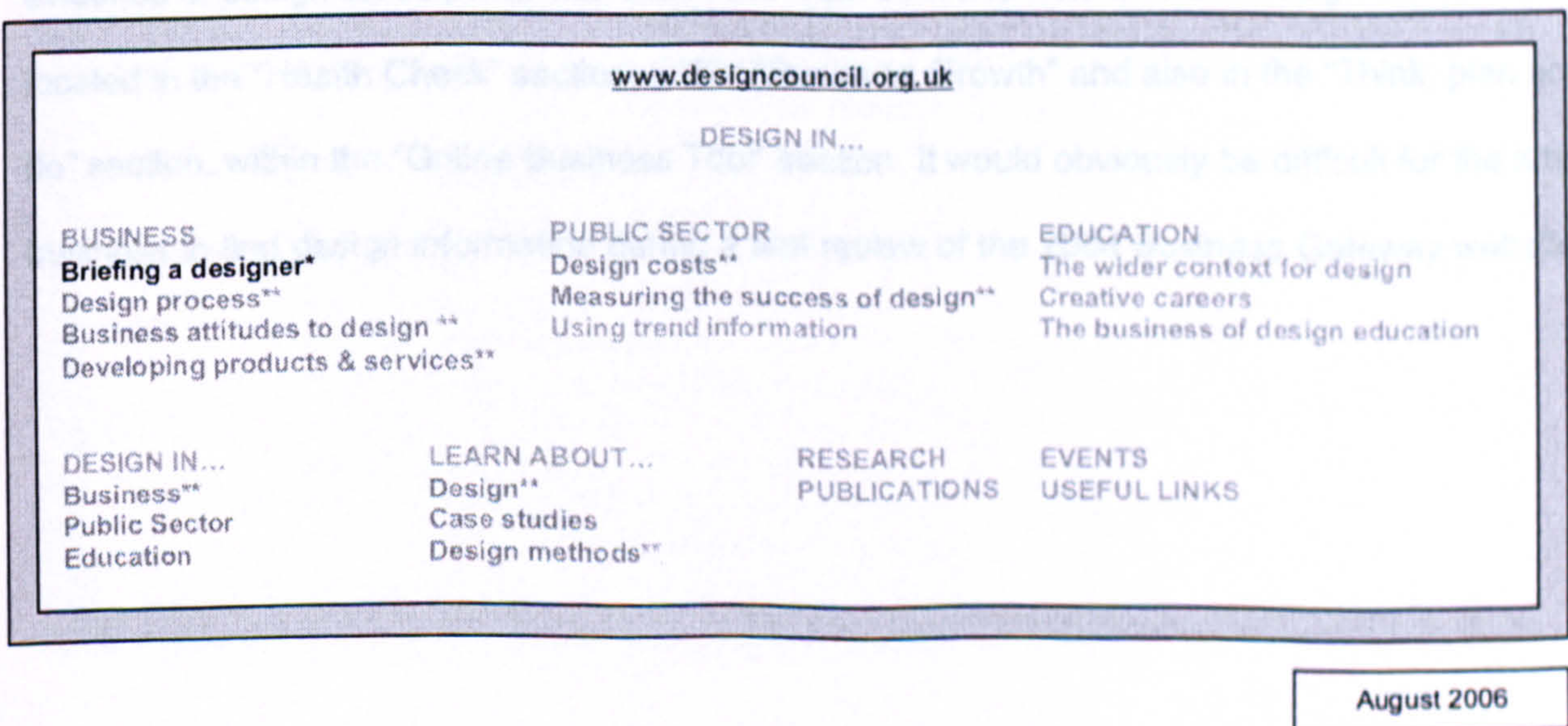


Figure 6: Graphic design briefing information re: The Design Council. Source: www.designcouncil.org, 2006.

The Design Council website in 2006 (Figure 6) positioned "Briefing a designer" directly under the main business section. The graphic design brief is explored within this section, including practical advice on briefing structure and content. The information contained within this website was the most comprehensive of all websites reviewed within this section, regarding design information. This website continues to be a valuable resource for the small business.



November 2004

Figure 7: Graphic design briefing information re: Business Gateway. Source: www.businessgateway.com, 2004.

In 2004 the Business Gateway website (Figure 7) revealed little design information, with no evidence of design areas presented within the main sections. The areas of design were found located in the "Health Check" section, within "Business Growth" and also in the "Think, plan and do" section, within the "Online Business Tool" section. It would obviously be difficult for the small business to find design information during a first review of the 2004 Business Gateway website.

www.bgateway.com

START UP; FINANCE & GRANTS; TAXES; RETURNS & PAYROLL; EMPLOYING PEOPLE; HEALTH; SAFETY & PREMISIS; IT & E-BUSINESS; SALES & MARKETING; GROWING YOUR BUSINESS; NEWS & EVENTS; SERVICES.

START UP Sales & Marketing Promote your business <ul style="list-style-type: none">• Promotion on a budget• Promote your USP**• Branding & Design**• Use the Internet• Advertising**• Direct mail	SALES & MARKETING Market planning Marketing action <ul style="list-style-type: none">• Pricing• Building a Brand**• Design**• Writing an advert.• Distance selling regulations• Press releases Online marketing Sales planning Sales action Case studies	GROWING YOUR BUSINESS Vision** Business planning Innovation Strategy** How to grow Protecting your business Ideas Case studies
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August 2006

Figure 8: Graphic design briefing information re: Business Gateway. Source: www.businessgateway.com, 2006.

In contrast, the 2006 Business Gateway website (Figure 8) featured a variety of design related areas. The terminology has since emerged as more professional in terms of business speak, featuring "Vision, Strategy and Branding" as key terms applied across the design related areas within the website.

www.businesslink.gov.uk

STARTING UP; FINANCE & GRANTS; TAXES, RETURNS & PAYROLL; EMPLOYING PEOPLE; HEALTH, SAFETY, PREMISIS; EXPLOIT YOUR IDEAS; IT & COMMERCE; SALES & MARKETING; INTERNATIONAL TRADE; IMPROVE YOUR BUSINESS; BUY OR SELL A BUSINESS; INYOUR SECTOR.

SALES & MARKETING
Advertising, branding & design

- Introduction
- The business benefits of design**
- How businesses use design**
- Make design part of your business strategy**
- Product development
- The design process*
- Maximise the success of your design projects**
- Use design to win new customers & markets**

November 2004

Figure 9: Graphic design briefing information re: Business Link. Source: www.businesslink.gov.uk, 2004.

The Business Link website provided the most comprehensive source of information for the small business in 2004 (Figure 9), particularly start-up businesses. Design in general provided a large part of the "Sales and marketing" section within the website. The section relating to "The design process" within the Business Links website was found by navigating firstly through "Sales & marketing" and then "Advertising, branding & design". Information relating to the design process was then found within the third level of the website under the section "Using design in your business". In 2004, basic information on "branding, strategy and design in businesses" was included within the website.



August 2006

Figure 10: Graphic design briefing information re: Business Link. Source: www.buisnesslink.gov.uk, 2006.

Again, design has been given a more prominent position within the structure of the Business Link 2006 website over the review period (Figure 10). The areas of design in business featured in both sections "Exploit your ideas" and "Sales and marketing". Practical aspects of information relating to start-up graphic design requirements were provided. Also, information on branding was described from a business start-up perspective. However, there was no information available within the 2006 site regarding the design brief.

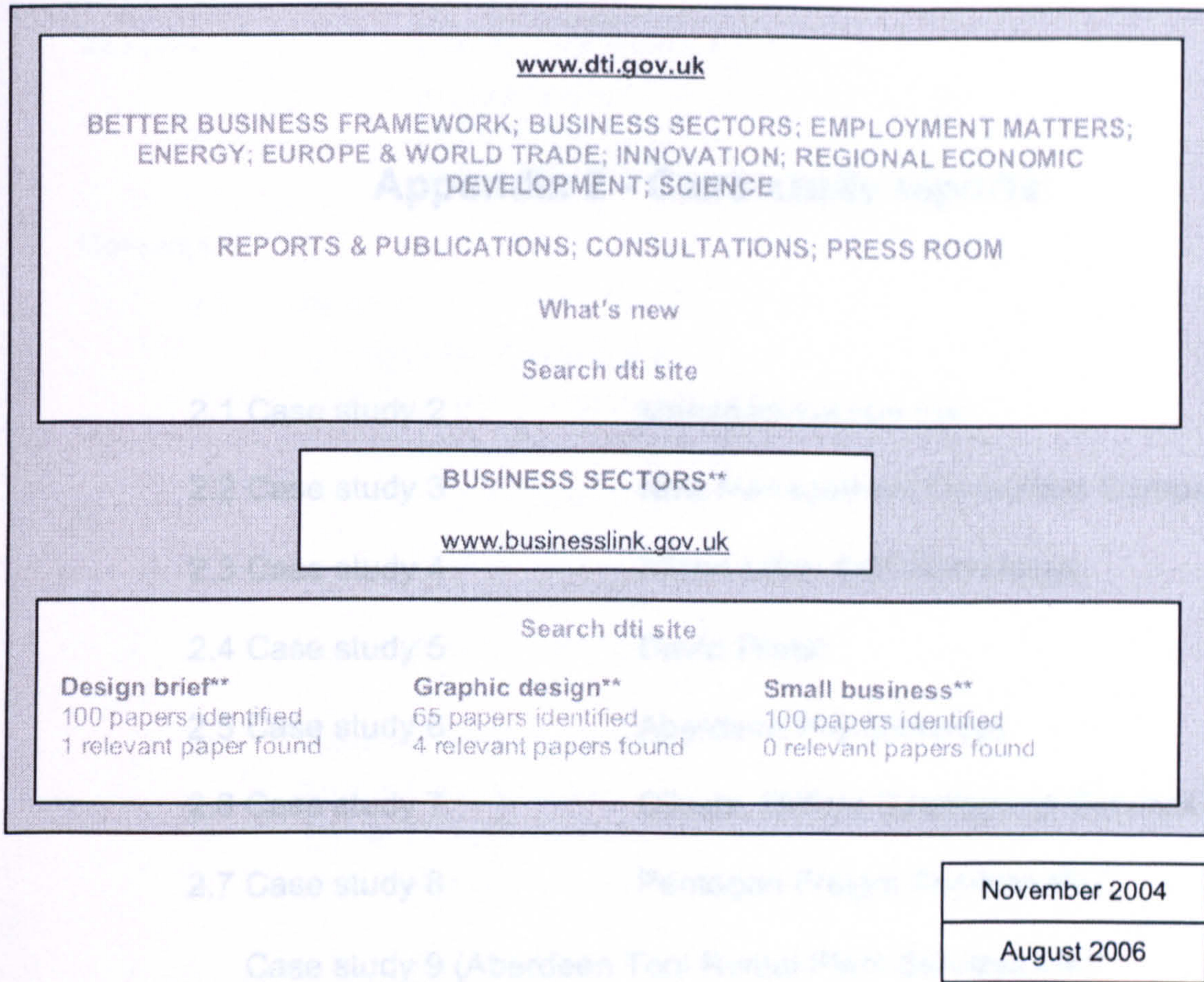


Figure 11: Graphic design briefing information re: Department of Trade and Industry. www.dti.gov.uk, 2004 - 2006.

Information on graphic design was not immediately evident within the main areas of the Department of Trade and Industry website when reviewed from 2004 to 2006. In 2004, located in the "Business sectors" section, a link existed to the Business Link website (Figure 11). However, within the "search dti site" section, various Portable Document Files (PDF) containing design related papers were available. In 2006, a website search relating to the key words: design brief; graphic design and small business revealed four relevant papers regarding graphic design and one paper containing information on the design brief, found from a total of two hundred and sixty five papers available. The information within these four design publications was detailed, written in an academic style and relevant to the SME market sector in general.

Appendix 2 - Case study reports

2.1 Case study 2	Management buy out*
2.2 Case study 3	New Management Consultant Company
2.3 Case study 4	Alison Millar Soft Furnishings
2.4 Case study 5	David Florist
2.5 Case study 6	Aberdeen Physiotherapy
2.6 Case study 7	Oilcats, Oilfield Cataloguing Services Ltd
2.7 Case study 8	Pentagon Freight Services PLC
Case study 9 (Aberdeen Tool Rental Plant Services Ltd)**	

*Case study 2 report was the first report formulated during the early development of the Communication Design Tool. The structure of this report differs from all other case study reports and is therefore presented in its complete form.

** Case study 9 is reported in full within Chapter 5. Please refer to section: 5.4.1. pp100 - 110 (Figures 5.11 - 5.21).

- Case study reports 3 - 9 follow a template described in section: 5.4.1. Case study 3 is presented in its entirety while case studies 4 - 9 exclude sections: 1.0, 1.1 and 1.2 to avoid repetition.
- Section 8: Approval of Analysis from each report (case studies 3 - 9) has been referred to in the thesis as "Request Feedback". The date of each report referred to the date that the report was delivered to each case study representative.

2.1 Case study 2 Management buy out Report

22.12.04 **Director: Andy Cumming**
Scott-Moncrieff Life and Pensions Ltd
25 Bothwell Street
Glasgow G12 0TB

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4.0	Proposal of further work	5

1.0 Introduction

Meeting with Andy Cumming, Raymond Ellis and Jennie Ellis re: breakaway new business venture as Independent Financial Advisors (IFAs).

1.1 Objectives of the meeting

- New business proposals
- Exploration of design requirements/solutions

1.2 General overview of Market Values

An initial question was asked of all: **"What are the market values of the business?"**

- Jenny*
- Trustworthy (face).
 - Presentation skills are much better compared with similar IFA's.
 - Quality of service is tailored to meet the clients' needs.

- Raymond*
- IFAs have a bad reputation in the market place i.e. they provide unethical advice, miss-sell to clients and can be driven by hooks or fee structure.
 - We don't use jargon.
 - We educate our clients.
 - Adopt strong managerial approach.
 - The image we have in the market is: Value for money; advice; ongoing relationship and servicing clients' portfolio through remaining in contact.
- Andy*
- We are communicators.
 - Our clients must not feel that our new business is "taking a step down" from the previous step up.
 - Two tier system of client base: 1. Ongoing referrals from professionals in the market i.e. accountants, lawyers, insurance brokers and 2. word of mouth.
 - Practical and realistic.
 - Care.
- General input*
- Client bank involves categories of clients defined by level of wealth. These are:
 - A. High net worth clients who are further serviced by two reviews per annum.
 - B. High net worth clients who are further serviced by one annual review.
 - C. Clients who are serviced.
 - Recurrent income provides long term funding structure.
 - Perception of trust when dealing with large company versus reality of trust from small company.
 - FSA recommendations (1988) provide: 1. Disclosure document (who we are) and 2. Fee structure and costs.

1.3 Definition of Market Value Terms

Market objective: Vision, mission, aspirations.

Market attributes: Uniqueness, differentiation.

Market ethics: Behaviour, culture, influences.

Market origin: Past, present, future.

1.3.1 Market objectives:

- A good job that the client understands and has the opportunity to participate in.
- Quality advice.
- Turn the situation around on unethical reputation building on client trust.
- Realistic price for a job of work, including return visits.
- Honest, good job.
- Simple language conveying trust, confidence, warmth, comfort, and security.
- Reassurance, warm fluffy feeling, integrity.

- Raymond**
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 - We don't use jargon.
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- Reassurance, warm fluffy feeling, integrity.

1.3.2 Market attributes:

- Don't want to be the biggest, but do want to be the best.
- Not uniform with other IFA's.
- Three stages of our process involves wealth creation protection, management and preservation.

1.3.3 Market ethics:

- Compliance document provides interpretation of business practices.
- People in the new business are the most valuable aspect.
- Pro-active perspective re: internal motivation for staff.
- Non-compromising integrity.
- Brutally honest approach.
- Advice tailored to each client's needs.
- Due diligence performed over market place that repositions narrow market stream resulting in client benefit.

1.3.4 Market origin:

Past:

- IT inefficient.
- Poor visual representation.
- General IFA reputation of client misuse invaded the market.
- False aspirations.
- Strong managerial influences.
- Hard working.
- High integrity.

Present:

- IT efficient.
- Improvement in visual representations.
- Pride.
- Value for money.
- Strong business management systems.

Future:

- Development of IT provision.
- Secure existing client base.
- Continue to build relationship with other professional bodies.
- Maintain quality and integrity of business, without compromise.
- Not market share driven. Focus on stability, sustainability of existing client base i.e. controlled organic growth.

Summary of key market value terms offered by Raymond: Quality, integrity and reliability.

2.0 Market Value Analysis of Terms

This process involved identifying, summarising and defining the key terms presented during the initial discussion process carried out with Andy, Raymond and Jennie.

2.1 Key terms identified:

- Trustworthy
- Service tailored to client needs
- Educate client
- Value for money, practical and realistic
- Ongoing relationship
- Care trust
- Fee structure
- Quality advice
- Ethical reputation
- Integrity – non-compromising
- Research ongoing practices (due diligence)
- IT efficient, now efficient
- Trading stability
- Pride
- Management acumen
- Sustainable market share

2.2 Key terms summarised

- Non-compromising integrity
- Quality based on understanding and experience in the market place. Offering holistic, practical and realistic advice (service).
- Fee structure is client driven and transparent
- Relationship building reflects sustainable market share approach

2.3 Definition of Key terms

- Integrity – driven by a holistic, practical and realistic approach
- Quality of service – underpinned by multidisciplinary experience (IFA, management, IT).
- Transparent ethical practice – client driven fee structure
- Strong client relationship – regular review process
- Sustainable client base – controlled organic growth

3.0 Translation

This process involves firstly, facilitating discussions to make the implicit market values of a company explicit and secondly, analysing the visual language used in the Independent

Financial Advisor market sector and lastly, define design guidelines specific to the new IFA Company.

These three processes combine to form the basis of instructing any graphic design service instructed by the new company as a pre-design brief analysis.

3.1 Key terms defined

- Integrity – driven by a holistic, practical and realistic approach
- Quality of service – underpinned by multidisciplinary experience (IFA, management, IT).
- Transparent ethical practice – client driven fee structure
- IT efficient – utilising bespoke industry software
- Strong client relationship – regular review process
- Sustainable client base – controlled organic growth

3.2 Graphic Design elements

A review of the graphic design elements used within the IFA sector include:

- Dunedin Independent (Edinburgh)
- Blythswood Consulting (Glasgow)
- Fraser Spy (Glasgow)
- Mckenna, Gladstone Walker (Glasgow)
- Aithieson and Colegrave (National)
- Moore Stephens (UK)

An analysis of the visual language used in the Independent Financial Advisor market sector will be based on the above companies.

4.0 Proposal of further PhD work

Graphic design elements (section: 3.2) will be analysed. This will provide a review of competitors' visual communication, as provided by the new company. The new company design guidelines will develop from an understanding of the key market values, analysis of competitors' visual communication and an interpretation of design influences, such as:

SYMBOL	<ul style="list-style-type: none">• Shape• Photographic representation• Illustrative
IMAGERY	<ul style="list-style-type: none">• Photographic style• Illustrative style• Other concepts
COLOUR	<ul style="list-style-type: none">• Strong, subtle, textural
COPYWRITING	<ul style="list-style-type: none">• Style
TYPOGRAPHY	<ul style="list-style-type: none">• Style attributes
LAYOUT	<ul style="list-style-type: none">• Traditional, contemporary

2.2 Case study 3 New Management Consultant Company Report

**5.8.05 Managing Director: Vic Baxter
BUSINESS WORKOUT
10 Ashley Park Drive
Aberdeen AB10 6SE**

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1.0 Introduction

This report relates to your specific business. It deals with the information gathering process carried out by graphic designers within the small business market sector. Generally, information required by graphic designers prior to any project involves an understanding of what the business does, its values, main competitors and where it sits within the market place. The quality and level of information can be difficult for the graphic designer to gather within the small business sector where marketing support is generally too costly for the small business. This implicit information is known within the business but difficult for the graphic designer to access. Without a reasonable understanding of the business the graphic designer relies on guesswork and intuition to provide synergy between the values of the business and graphic design solutions.

The study focuses specifically on communication processes between client and designer regarding obtaining information on key drivers and particular nuances of the business in order to fully understand and therefore represent the business through visual communication solutions.

1.1 Objectives of the study

1. Investigate methods of communication used to achieve an understanding of small business market values.
2. Formulate a prototype tool to enable graphic designers to facilitate an analysis of small business market values, which will inform the graphic design process.
3. Investigate the effectiveness of the tool in a) the small business market and b) the graphic design industry.

1.2 General overview of Communication Design Tool

The Communication Design Tool, as questionnaire, has been distributed to a number of local small businesses for completion. The structure of the questionnaire included four general questions requesting information on:

1. The general nature of the business.
2. The market values of the business.
3. The visual language of key competitors.
4. Graphic design preferences.

Each business was asked to complete individual questionnaires by all stakeholders, including customers. At an early stage in the development of the questionnaire it became obvious that only the key decision makers and selected employees would be involved in the process. The reasons for this varied from business to business. In part it reflected a decision based on the difficulties of time and commitment from stakeholders, due to the already heavy workloads experienced in the small business sector. It also related to the owner's perceptions of individuals within their businesses in terms of who had sufficient understanding about the business to fully contribute to the exercise.

Your business completed the questionnaire as detailed below:

1. The general nature of the business: *Completed by three key members.*
2. The market values of the business: *Completed by three key members.*
3. The visual language of key competitors: *Completed by one key member.*
4. Graphic design preferences: *Completed by three key members.*

2.0 General information on the business:

This section looks at the general nature of the business in terms of what it does, where it is located and any other relevant information offered.

It should be noted here that this business is a new start up business. The business is at the early stages of deciding on an identity and name. In this respect a full analysis relevant to the information contained within questionnaire may not be conclusive.

"Alternative approach to training and presentation delivery, offering fresh vibrant and relevant training solutions to the commercial and corporative community. Providing quality to quality businesses ensuring the best practice is maintained and ensured, to all".

"Provision of high quality training and development opportunities for organisations. Located in Aberdeen but not restricted to area".

"Based in Aberdeen it will leverage the wide range of trainers, facilitators, O.D. specialists and the like who have agglomerated? Here and each have something special to offer in their expert area".

3.0 Market value of the business

This section looks at the perceived values of the business, in terms of market competitiveness.

3.1 Definition of Market Value Terms

Market objective: Vision, mission, aspirations.

Market attributes: Uniqueness, differentiation.

Market ethics: Behaviour, culture, influences.

Market origin: Past, present, future.

3.2 Market objectives:

"To offer organisational development and training that goes beyond the standards and quality of conventional consultancies. To bring together a broad range of services capable of offering flexible solutions to organisations".

"To be best at training. Take training a step further. Support the top end of the business, providing a quality service and solution".

"To effect sustainable positive changes in key areas of corporate and personal performance".

3.3 Market attributes:

"The trainer's personal motivation, hunger for success, not necessarily for financial gain. Encouraging, understanding, creating horizons. Innovation and inspirational. Encouraging".

"A unique combination of skills – high quality training and consultancy provision. Ability to bring together different permutations of skill sets – highly flexible and adaptable. Ability to work on the 'growing edge'".

"Specialists that not only know given topic – but have applied unique twist to it".

3.4 Market ethics:

"Structure and methodology to be clearly determined by value base. Integrity and transparency. Quality".

"The feeling of wanting, involvement, belief in the visual professional belief in achieving the best with the best from the best".

"Best of the best. Will only engage if client deserves us and is serious".

3.5 Market origin:

"A germ of an idea that's grown out of a desire to work with individuals and organisations in a way that takes people out on to their 'growing edge'".

"Rooted in life experience combined with topic excellence, skimmed from the boiling surface of the crucible of learning".

4.0 Visual language of key competitors

The visual description of key competitors' graphic design solutions has been analysed by the researcher and is summarised in section: 4.2

4.1 Key competitors

- McKinsey
- JMW
- www.shirlaws.biz
- Ideation
- Innovators
- Strategists

4.2 Visual Language

McKinsey: Clearly a key player within the "global supply and demand for offshoring services". Their web presence is highly professionally executed, offering state of the art web design technology that works i.e. interactive exhibit, video overview and audio article.

McKinsey & Company



Client Service

Ideas

JMW: the visual design of this site communicates a highly professional, state of the art company. Colours are predominately blue and orange, with a subtle distorted background graphic that evokes a sense of mystique.

jmw



Our clients
take on big challenges.



Shirlaws: Professionally designed web presence involving human centred design focus. A direct approach to getting information across to the viewer by "sound bites" is evident.

Shirlaws

Love business.



It's your business. It's your baby.

Ideation: Companies reviewed include: Niku; Idea Space; Applied Marketing Science. Niku (Ideation) provide an information laden web presence. Systems and processes feature largely on this technically design-focused site. Idea Space presents a sensory human centred design focus within its web presence. Group focus through team building and workshops are featured largely. The site is not as professionally designed as either McKinsey or Shirlaws. Applied Marketing Science is a reasonably well-designed site, which is information heavy.

Applied
Marketing
Science, Inc.



Innovators: Sites reviewed include: Home office information about innovators and Young Entrepreneurs start-ups. This site is an information-based site with many links within each page. The site is well designed for what it is and reflects the presentation of a portal site.



Strategists: Information Strategists and Brand Strategists (incorporating Design Consultants) were two web-based areas that were reviewed. The Information Strategists site is poorly designed and reflects an unprofessional site map. The Brand Strategists site is obviously designed by designers. Minimum text and graphics, organised in a clever and interesting manner displays the site as carefully thought out and highly professionally designed.



4.3 Additional sources of visual information

Summary: "MDT brochure enclosed holds a number of the courses/course titles that we may consider – but logo is antithesis of what we want (!!)"

5.0 Graphic design preferences

This section of the questionnaire looked at the graphic design preferences of the business from its stakeholders' perspective. Three respondents completed this section of the questionnaire. One questionnaire did not include the Personality qualities section at the time of completion; therefore only two respondents completed this part of the Graphic design preferences section. The generic graphic design elements that make up any graphic design solution include symbolism, layout, colour, imagery, font and copy. The personality qualities section within graphic design preferences relates to an interpretation of business qualities, adopting a range of animals as a metaphor for the personality of the business.

5.1 Symbolism (e.g. graphic identity)

Definition of terms:

1. mark
2. shape
3. linear
4. organic
5. photographic
6. representational e.g. illustrative
7. abstract
8. with/without strap-line
9. typographic solution
10. single/multi-colour
11. reproductive suitability
12. usage

The results of the data showed that:

One person chose 2: shape

One person chose 4: organic & 6: representational

One person chose 1, 2, 6, 8, 11 & 12: refer to above

Summary:

There is no preferred symbol. A consistency runs through 2: shape and 6: representational.

Conclusions:

As this business is at the early stages of developing their identity, it is understandable that no clear symbol preference is emerging.

5.2 Layout (e.g. page, website etc.)

Definition of terms:

1. minimalistic
2. contemporary
3. traditional
4. structured

The results of the data showed that:

All respondents chose 2: contemporary

Summary:

Clearly all respondents agree on the layout depicted as contemporary.

Conclusions:

A contemporary layout applied across all graphic design solutions is required.

5.3 Colour

Definition of terms:

1. red – anger, danger, drama
2. blue – conservative, medical/clinical, clean
3. yellow – happy, sunshine, fresh
4. green – environment, organic, medical/clinical/health
5. black – strong, dramatic, overpowering
6. white – pure, clean, simple
7. grey – sombre, subtle

The results of the data showed that:

One person chose 2: blue - conservative, medical/clinical, clean; 4: green-environment, organic, medical/clinical/health and 6: white – pure, clean, simple.

One person chose 4: green-environment, organic, medical/clinical/health and 6: white – pure, clean, simple.

One person chose 6: white – pure, clean, simple.

Summary:

The preferred colours are split between white, green and blue (in order of preference).

Conclusions:

As these colours are all within the cool spectrum of the colour wheel,* it may be that a combination of these colours would work e.g. aquamarine blue or petrol blue sitting on a predominately white background.

5.4 Imagery (pictorial style)

Definition of terms:

1. photographic – full colour etc., style etc.
2. illustrative – style etc.
3. geometric – strong, linear, organised
4. curvilinear – organic, flowing, clutter
5. coverage – layout % (please indicate)

The results of the data showed that:

One person chose 2: illustrative and 3: geometric – strong, masculine, organised.

One person chose 2: illustrative.

One person chose 3: geometric – strong, masculine, organised.

Summary:

The preferred imagery representing the business is equally split among respondents between illustrative and strong, geometric, linear and organised.

Conclusions:

The above combination of illustration, represented through a strong, geometric, linear, and organised form could easily be collectively represented.

5.5 Font (letter style)

Definition of terms:

1. traditional
2. contemporary
3. structured
4. organic
5. fun
6. scriptive
7. stately
8. usage - % on layout (please indicate)

The results of the data showed that:

One person chose 1: traditional

Two respondents chose 2: contemporary

Summary:

The font preference is that of a contemporary representation. However, traditional, has also been selected by one member. Generally these fonts are opposites.

Conclusions:

These two styles of font could be combined together within a page layout e.g. Garamond, which as a traditional Serif font is an acceptable, easy to read font for the main text within a page layout. Combine this with e.g. Frutiger, a Sans Serif font, for headings and both could work together.

5.6 Copy (text)

Definition of terms:

1. style of writing (please indicate)
2. length of text - % on layout (please indicate)

3. language – within specific business sector (please indicate)
4. key terms (please indicate)

The results of the data showed that:

All respondents choose 1: style of writing (please indicate)

Summary:

The preferred application of copy is the style of writing. One respondent also indicated that text should be clear and succinct, represent 50 – 60% of the layout, be applicable across sectors and provide key terms such as: flexible, edge, adaptable and quality.

Conclusions:

Text is clearly an important aspect of any visual communication solution within this business and so should be prioritised over all written material.

5.7 Personality Qualities

Definition of terms:

1. Lion – ruler
2. Elephant – long-term reliability
3. Giraffe – sources the best
4. Dolphin – anticipating change
5. Bee – skilfully productive
6. Chameleon – ability to merge
7. Owl – wise and knowing
8. Rabbit – productive
9. Fish – driven by group work
10. Frog – ability to leap across boundaries
11. Leopard – aggressive & fast
12. Other – please indicate

The results of the data showed that:

One respondent chose 3: Giraffe – sources the best and 4; Dolphin – anticipating change.

One respondent chose 4: Dolphin – anticipating change.

Summary:

The selected personality qualities are split into two general areas: Dolphin and Giraffe.

Conclusions:

Anticipating change is an integral aspect of this businesses ethos. Giraffe – sources the best, could be described as “a given” from the business conception and throughout its development.

6.0 Pre-brief analysis

As this business is a new start-up, a graphic identity is clearly a core focus. The results of this analysis show that there is a disparity within the group in terms of the direction they would prefer to take the design concept of a graphic identity. At this stage, further investigation and discussions are required to ensure that the “right” message is communicated through its symbolism. Terms which run through the values section are: “quality organisational development and training”. This aspect of the business should be

given design priority. The business appears to be more people focused, both in its client base and facilitators' skills. Copy writing style and quality is extremely important across all graphic design solutions.

7.0 Recommendations

This section offers several recommendations that the business may wish to consider.

7.1 High quality graphic design solutions

Given the nature of the business, study results and an assessment of key competitors, it is extremely important that the highest output of graphic design is sought. Consistency across all areas of visual communication should be borne in mind for future briefing.

7.2 Visuals

The results of the study reveal that visuals which encapsulate the human centred approach of this business. This relates both to client and facilitator i.e. clients are special and so to are the skills of the facilitators.

7.3 Copywriting

All text (or copywriting), in terms of content, style and quality requires careful sourcing and critical assessment.

7.4 Colour

The colour blue is predominately used in this industry.* A blue theme sitting on a white background, with provision for white space, would result in a professional solution.

* McKinsey & Company; Shirlaws; Niku; Idea Space.

7.5 Graphic Identity

A suggested graphic design solution may take the shape of a strong, simple symbol or typographic solution with a "twist". A direct, clear and clever identity, executed by the highest quality of graphic design, would mirror the ethos of the businesses values.

8.0 Approval of analysis

Having reviewed the information provided in this report, some feedback would be extremely valuable to further develop the Communication Design Tool. Discussion regarding the process, results and analysis relevant to your business will inform and greatly enhance the study.

2.3 Case study 4 Alison Millar Soft Furnishings Report

1.8.05 Owner: Alison Millar
ALISON MILLAR SOFT FURNISHINGS
Unit 8 Cults Business Park
Station Road
Cults
Aberdeen AB15 9PE

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Your business completed the questionnaire as detailed below:

1. The general nature of the business: *Completed by the business owner.*
2. The market values of the business: *Completed by the business owner.*
3. The visual language of key competitors: *Completed by the business owner.*
4. Graphic design preferences: *Completed by six members of the business.*

2.0 General information on the business:

This section looks at the general nature of the business in terms of what it does, where it is located and any other relevant information offered.

"The business has been trading for fifteen years. The first eight years at Frederick Street Business Centre and now at Cults Business Park. We make up soft furnishings, providing a full service to customers from design help, measuring, make up and complete fitting service, also providing fabrics and fittings. We also make up for John Lewis, Creative Interiors and Gramplan Contracts"

3.0 Market value of the business

This section looks at the perceived values of the business, in terms of market competitiveness.

3.1 Definition of Market Value Terms

Market objective: Vision, mission, aspirations.

Market attributes: Uniqueness, differentiation.

Market ethics: Behaviour, culture, influences.

Market origin: Past, present, future.

3.2 Market objectives:

"To provide a service to customers which excels their expectations by meeting their needs promptly, efficiently and accurately, whilst remaining friendly and approachable".

3.3 Market attributes:

"As a small team we are able to give personal service, providing options larger companies cannot afford to give, cutting out the middle man".

3.4 Market ethics:

"The customer is important, meeting their individual needs and budget is put first".

3.5 Market origin:

"The company has evolved from a service provider for a larger company to become a business providing its own level of service to individuals as well as companies".

4.0 Visual language of key competitors

The visual description of key competitors' graphic design solutions has been analysed by the researcher and is summarised in section 4.2

4.1 Key competitors

- Ambiance
- John Lewis
- Archibalds
- Gatts
- Laura Ashley

4.2 Visual Language

Ambiance: A local interior design service provider. Ambiance runs its business from a shop located in St. Swithin Street in Aberdeen. It offers bespoke interior design services on an individual basis.

Visual language: Professionally represented through shop front and interior and in graphic design solutions. However, its website is "under construction" and does not display any indication of its visual representation.



John Lewis: John Lewis PLC, Aberdeen is a large department store that has an in-store furnishing fabrics department, serving the North East of Scotland since 1988. Although Alison Millar Soft Furnishings is a key supplier of bespoke and machined soft furnishings, it is also a competitor.

Visual language: Professional, high quality reproduction, full colour, contemporary consistent design.



John Lewis

Archibalds: Archibald's home furnishings has been trading in Aberdeen for a number of years. Due to downscaling its curtain-making department it lost a number of trained curtain makers, one of who is now a key employee at Alison Millar, Soft Furnishing. Archibald's supply many of the hotels in the North East and throughout the UK. Archibald's has recently been bought by Vogue.

Visual language: Professionally executed, traditional design adopting Vogue styling.

Gatts: An Aberdeen based interior services business. Primarily offering French polishing, upholstery, furniture repairs and interior design.

Visual language: Reasonably well designed graphics. A delivery van provides an additional source of advertising through livery design. Although its graphic design is reasonably well designed, its website cannot be accessed beyond the home page which includes minimal information.



Laura Ashley: Laura Ashley is a predominantly UK wide lifestyle store, offering home and fashion products. They operate a soft furnishing facility, using their own fabrics. Located alongside John Lewis PLC within the Aberdeen Bon Accord Centre.

Visual language: High quality, country cottage style. Traditional design employing seasonal colour themes.

LAURA ASHLEY



4.3 Additional sources of visual information

"Letterhead, business cards, compliments slips. I like the texture of the paper, colour of paper, colour of text and text type. Chosen to be soft and calming. MacIntosh style type – artistic quality- strongly influenced by MacIntosh and personal admiration of his work and style".

5.0 Graphic design preferences

This section of the questionnaire looked at the graphic design preferences of the business from its stakeholders' perspective. Six respondents completed this section of the questionnaire. The generic graphic design elements that make up any graphic design solution include symbolism, layout, colour, imagery, font and copy. The personality qualities section within graphic design preferences relates to an interpretation of business qualities, adopting a range of animals as a metaphor for the personality of the business.

5.1 Symbolism (e.g. graphic identity)

Definition of terms:

1. Mark
2. Shape
3. Linear
4. Organic
5. Photographic
6. representational e.g. illustrative

7. abstract
8. with/without strap – line
9. typographic solution
10. single/multi – colour
11. reproductive suitability
12. usage

The results of the data showed that:

Two respondents chose 6: representational e.g. illustrative

One person chose 2: shape

One person chose 10: single/multi-colour

One person chose 11: reproductive suitability

Summary:

The preferred symbol representing the business is illustrative and easy to reproduce.

Conclusions:

An illustrative symbol represented using one colour would provide a recognisable logo for the business. Single colour reproduction is the simplest and most cost effective method of printing.

5.2 Layout (e.g. page, website etc.)

Definition of terms:

1. minimalistic
2. contemporary
3. traditional
4. structured

The results of the data showed that:

One person chose 1: minimalistic

Two respondents chose 2: contemporary

Two respondents chose 3: traditional

Summary:

The preferred layout representing the business is mainly split between contemporary and traditional, as above. A minimalist layout has also been selected. This is generally more acceptable within a contemporary layout.

Conclusions:

The combination of contemporary and traditional can be achieved within the layout. By using traditional elements within a minimalist layout a contemporary presentation is achieved.

5.3 Colour

Definition of terms:

1. red – anger, danger, drama
2. blue – conservative, medical/clinical, clean
3. yellow – happy, sunshine, fresh
4. green – environment, organic, medical/clinical/health
5. black – strong, dramatic, overpowering

6. white – pure, clean, simple
7. grey – sombre, subtle

The results of the data showed that:

One person chose 2: blue - conservative, medical/clinical, clean

Five respondents chose 3: yellow – happy, sunshine, fresh

Summary:

The preferred colour representing the business is yellow.

Conclusions:

Yellow is clearly the preferred choice for your business. Providing a colour theme predominately yellow with a touch of blue evokes a happy, clean and fresh visualisation.

5.4 Imagery (pictorial style)

Definition of terms:

1. *photographic – full colour etc., style etc.*
2. *illustrative – style etc.*
3. *geometric – strong, linear, organised, curvilinear – organic, flowing, clutter*
4. *coverage – layout % (please indicate)*

The results of the data showed that:

Two respondents chose 1: photographic – full colour etc., style etc.

Two respondents chose 2: illustrative – style etc.

One person chose 3: geometric, strong, linear, organised

Summary:

The preferred imagery representing the business is mainly split between photographic and illustrative. A strong, geometric, linear and organised imagery has also been chosen.

Conclusions:

The above combination of photography and illustration could easily be represented together. A dynamic graphic design solution is required to ensure that a strong, geometric, linear, organised description of the images is achieved. Cost implications for photography and full colour printing would need to be considered.

5.5 Font (letter style)

Definition of terms:

1. traditional
2. contemporary
3. structured
4. organic
5. fun
6. scriptive
7. stately
8. usage - % on layout (please indicate)

The results of the data showed that:

Three respondents chose 2: typographic style - contemporary

Three respondents chose 6: typographic style – scriptive

Summary:

The preferred Font is equally divided between contemporary and scriptive.

Conclusions:

These two styles of font could be combined within a contemporary script style of font. The designer can supply examples to confirm.

5.6 Copy (text)

Definition of terms:

1. style of writing (please indicate)
2. length of text - % on layout (please indicate)
3. language – within specific business sector (please indicate)
4. key terms (please indicate)

The results of the data showed that:

One person chose 1: style of writing (please indicate) – “simple and clear”.

Four respondents chose 2: length of text - % on layout (please indicate)

One person chose 4: key terms (please indicate) – no information provided.

Summary:

The preferred application of copy is the length of text within the page layout. This varied between 15%, 20% and 25%.

Conclusions:

Text should remain minimal within any page layout.

5.7 Personality Qualities

Definition of terms:

1. Lion – ruler
2. Elephant – long-term reliability
3. Giraffe – sources the best
4. Dolphin – anticipating change
5. Bee – skilfully productive
6. Chameleon – ability to merge
7. Owl – wise and knowing
8. Rabbit – productive
9. Fish – driven by group work
10. Frog – ability to leap across boundaries
11. Leopard – aggressive & fast
12. Other – please indicate

The results of the data showed that:

Two respondents chose 2: Elephant – long-term reliability

Two respondents chose 5: Bee – skilfully productive

One person chose 6: Chameleon – ability to merge

One person chose 8: Rabbit – productive

Summary:

The selected personality qualities are split into three general areas: Elephant, Bee and Rabbit. One additional area has also been selected: Chameleon.

Conclusions:

Bee and Rabbit personalities are closely linked through their productive nature. This implies that the qualities of this business are represented through skilfully productive members, offering long-term reliability with an ability to merge with clients' needs across projects.

6.0 Pre-brief analysis

The results of the graphic design preferences section of the questionnaire are fully consistent with the market values section in that there is a mix of traditional and contemporary elements in both areas. The business has traditional values and skills, operating in a contemporary environment. The selection of font style and image description should reflect these values. The happy disposition of the business is represented through yellow and reflects the intimate, friendly and approachable team ethos. The layout requires minimal text with the main focus depicting the quality of the product, ideally through photographic images. The visual language of key competitors: John Lewis, Laura Ashley and Archibald's reflects high quality, professionally designed visual communication, applying the principles preferred by the team within the results of the graphic design preferences section of the tool. Ambiance, and to a lesser extent Gatt's, are reasonably well represented visually through graphic design. However, both are poorly represented on the web. An illustrative representation of the business through a logo would enhance visual recognition of the business aligned with its values.

7.0 Recommendations

This section offers several recommendations that the business may wish to consider.

7.1 Photographic product shots

Given the nature of the business, study results and an assessment of key competitors, photographic product images would provide a competitive edge.

7.2 Colour preference

The results of the study reveal that the colour yellow is the preferred choice. The yellow/blue theme represented through product shots would emphasise this business's colour preference.

7.3 Personality traits

Personality traits and market values reveal that a key driver of the business is the intimate, approachable, highly skilled team who provide high quality and excellent friendly service. This interpretation should be represented consistently throughout future graphic design solutions.

7.4 Illustrative symbol

A logo, reproduced as a single colour illustration is recommended. The company is well known within its market sector and having been in business for fifteen years, a symbol may provide a greater indication of the business values at this stage in its maturity.

8.0 Approval of analysis

Having reviewed the information provided in this report, some feedback would be extremely valuable to further develop the Communication Design Tool. Further discussion regarding the process, results and analysis relevant to your business will inform and greatly enhance the study.

2.4 Case study 5 David, Florist Report

26.7.05 Owner: David McIntyre

**DAVID, FLORIST
39 - 43 Thistle Street
Aberdeen AB**

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Your business completed the questionnaire as detailed below:

1. The general nature of the business: *Completed by the business owner.*
2. The market values of the business: *Completed by the business owner.*
3. The visual language of key competitors: *Completed by the business owner.*
4. Graphic design preferences: *Completed by five members of the business.*

2.0 General information on the business:

This section looks at the general nature of the business in terms of what it does, where it is located and any other relevant information offered.

"Retail florist. Sell flowers, plants, vases, interior décor items. In business since 1981. Provide good quality gift flowers with current design influence but emphasis on good taste – no gimmicks."

3.0 Market value of the business

This section looks at the perceived values of the business, in terms of market competitiveness.

3.1 Definition of Market Value Terms

Market objective: Vision, mission, goals and aspirations of the business.

Market attributes: Differentiation of the business in the market place.

Market ethics: Influencing behaviour of the business.

Market origin: Attributes that have shaped the business.

3.2 Market objectives

"Stay in the present premises, maintain current turnover until proprietor's retirement".

3.3 Market attributes:

Listed in order of preference from 8 – 1 (8=highest; 1=lowest).

Customer Service	7
Product/service quality	8
Relationship handling	2
Technical innovation	2
Imagination	5
Value for money	6
Uniqueness	4
Other	-

3.4 Market ethics:

Listed in order of preference from 6 – 1 (6=highest; 1=lowest).

Integrity	5
Reliability	6

Knowies:	Simple	Social responsibility	3
	graphic	Stakeholder oriented	2
		Profit orientated	4
4.3 Additional sources of		Other	-

3.5 Market origin:

"I started the shop before flowers were seen as an everyday purchase in this country and I've tried to market them as something you would have at home in the way that curtains (e.g.) or other home décor would be marketed".

4.0 Visual language of key competitors

The visual description of key competitors' graphic design solutions has been analysed by the researcher and is summarised in section 4.2

4.1 Key competitors

- Local florists: Nicky Walker; Simply Flowers
- Marks & Spencer
- Supermarkets
- Companies providing door deliveries online



4.2 Visual language

Local florists: Nicky Walker: Contemporary and minimalistic well-designed presentation throughout shop front, advertising and literature. No web presence.

Simply Flowers: Strong linear logo design theme running throughout all forms of literature and advertising. Simple presentation, reflecting a contemporary style.

Marks & Spencer: Well-designed UK wide product situated within the Marks & Spencer brand.



Supermarkets: Similar to M & S, the product reflects the profile of the respective brand of the supermarket concerned.

Companies providing door deliveries on line:

Flowers Direct and Interflora provide an image intensive web presence, encouraging on-line sales. It is difficult to differentiate between these two particular sites, as they are almost identical in design.

Flower Vogue: Reasonably strong design incorporating an illustrative logo and whimsically presented name. Local independent. No web presence.



Knowles: Simple execution of logo. Basic layout and visual graphic design solutions. No web presence.



4.3 Additional sources of visual information

"See websites for: Flowers Direct, Interflora and Yellow Pages for: Flower Vogue, Knowles".

5.0 Graphic design preferences

This section of the questionnaire looked at the graphic design preferences of the business from its stakeholders' perspective. Six respondents completed this section of the questionnaire. The generic graphic design elements that make up any graphic design solution include symbolism, layout, colour, imagery, font and copy. The personality qualities section within graphic design preferences relates to an interpretation of business qualities, adopting a range of animals as a metaphor for the personality of the business.

5.1 Symbolism - Graphic Identity.

Definition of terms:

1. Mark – linear (e.g. Nike-swish/tick), organic (e.g. Pure New Wool – symbol), abstract (e.g. orange mobile phone – where symbol has no direct relationship with the product).
2. Illustration – representational drawing (e.g. BP – flower).
3. Photographic – realistic picture.
4. Typographic – realistic picture.
5. Logo supported by name or strap-line (e.g. Cancer Research).
6. Use existing logo (please include).

The results of the data showed that:

Two respondents chose 1: Mark

One person chose 2: Illustration

One person chose 3: Photographic

Two respondents chose 5: Typographic

Summary:

Mark and typographic solution are preferred within the group. Illustration and photographic symbol has also been chosen.

Additional information:

"I like to use a Grecian pillar as I use them for display and they have the kind of design qualities I like – also the 'David' is as I sign my name which emphasises the 'personal' side of the business".

"For symbolism I have chosen 3 - photographic, as I think a picture of our many unusual flowers would be stunning and effective for example an Orchid or Strelitzia. I do like David's current design though, as it's unusual. I'm dubious that most flower shops have pictures of flowers and don't know if a flower would be striking and make you pay attention. This is why I chose red. I was thinking a vivid pink or a deep red. A striking colour. I think David's signature puts a personal touch to the design and like it very much, so I would keep that, may be

changing the colour. If the background colour was vivid it would have to stand out”.

“1-influenced by recognisable symbols of large companies”.

Conclusions:

Various preferences have been chosen within this group. The existing logo is acknowledged as unique, individual and relevant. However, a desire to enhance this is evident. No respondent chose to keep the existing logo.

5.2 Layout - Placement of words and pictured on e.g. page, website etc.

Definition of terms:

1. Symmetrical – All elements balanced, static.
2. Asymmetrical – Design off-centred, active.
3. Multi grid – Complex combination, dynamic.

The results of the data showed that:

- Five respondents chose 1: Symmetrical – all elements balanced, static.
- One person chose 2: Asymmetrical – Design off-centred, active.

Summary:

The majority chose a symmetrical layout. One person chose asymmetrical.

Additional information:

- “Symmetrical and balanced, with a bit of a twist”.*
- “1- symmetry is tidy”.*

Conclusions:

Balance is clearly the preferred layout choice. This may reflect the affinity with design balance within floral art.

5.3 Colour

Definition of terms:

1. red – anger, danger, drama
2. blue – conservative, medical/clinical, clean
3. yellow – happy, sunshine, fresh
4. green – environment, organic, medical/clinical/health
5. black – strong, dramatic, overpowering
6. white – pure, clean, simple
7. grey – sombre, subtle

The results of the data showed that:

- One person chose 1: Red – anger, danger, drama.
- Five respondents chose 4: Green – environment, organic, medical/clinical/health.

Summary:

Green is the preferred choice. One person chose red.

Additional information:

"Green – obviously".

"4 - although I like black more. Green seems likely".

Conclusions:

Green is the natural choice for this industry. An interest in a more dynamic colour to represent the business i.e. red/black may prove interesting to develop further.

5.4 Visuals – Use of pictures/graphics.

Definition of terms:

1. Strong – bold representation.
2. Subtle – soft representation.
3. People oriented.
4. Product oriented.
5. Service oriented.

The results of the data showed that:

Two respondents chose 1: Strong – bold representation.

One person chose 2: Subtle – soft representation.

Two respondents chose 4: Product oriented.

One person did not choose from this section.

Summary:

Strong and Product oriented was chosen equally by two respondents. One respondent chose Subtle.

Additional information:

"Prefer striking – product/service oriented".

"Copy and Visuals. 3 – just get the point across".

Conclusions:

Strong, product oriented visuals are fully consistent with the business values. The choice of subtle visuals is inconsistent with other respondents' results in this category. Further investigation by the designer would reveal the precise nature of the subtle style of visuals preferred.

5.5 Font - letter style.

Definition of terms:

1. Old fashioned – Olde worlde.
2. Futuristic – mechanical.
3. Artistic – Curving, flowing.
4. Simple – Easy to read.
5. Elegant – Well crafted.
6. Strong – bold, difficult to ignore.
7. Free flowing – hand written.
8. Whimsical – fun.

The results of the data showed that:

One person chose 2: Futuristic – mechanical.

Three respondents chose 4: Simple – easy to read.

Two respondents chose 7: Free flowing – hand written.

Summary:

Most respondents chose simple, as the preferred font. Two members of the group chose free flowing and one member chose Futuristic.

Additional information:

"Organic/hand written".

"4- clear cut and no fuss I feel is preferable".

Conclusions:

A combination of a predominately simple (easy to read), free flowing (hand written) font can be achieved. However the Futuristic style of font is inconsistent with the other members' preferences within this group.

5.6 Copy (writing) - message communicated through the printed word as a body of text.

Definition of terms:

1. Entertain – Provide with amusement.
2. Educate – Training in a particular subject.
3. Inform – Give facts or information.

The results of the data showed that:

One person chose 1: Entertain – Provide with amusement.

One person chose 2: Educate – Training in a particular subject.

Three respondents chose 3: Inform – give facts and information.

One person did not choose from this section.

Summary:

Most respondents chose inform as the preferred choice of copy. One member chose entertain and one member chose educate.

Conclusions:

A predominately informative copy style can be achieved, incorporating an entertaining and educational element within the text.

5.7 Personality Qualities

Definition of terms:

1. Lion – ruler
2. Elephant – long-term reliability
3. Giraffe – sources the best
4. Dolphin – anticipating change
5. Bee – skilfully productive
6. Chameleon – ability to merge
7. Owl – wise and knowing
8. Rabbit – productive
9. Fish – driven by group work
10. Frog – ability to leap across boundaries
11. Leopard – aggressive & fast
12. Other – please indicate

The results of the data showed that:

Two respondents chose 3: Giraffe – sources the best.

Three respondents chose 5: Bee – skilfully productive

One person chose 12: Other – Uniqueness, involvement of one person.

Individuality in terms of symbols of reference i.e. Greek fluted, Ionic columns and personalised signature of owner (first name only).

Summary:

Half of the respondents chose Bee – skilfully productive. Two members chose Giraffe – sources the best, with one member choosing a unique, individual quality.

Additional information:

"I want to emphasise uniqueness and the involvement of one person. The pillar we use is based on two antique ones in the shop and my signature".

"5 – cleverness".

Conclusions:

The personality qualities of this business are predominately a skilfully productive team who sources the best product. A unique element is clearly evident from the owner's values and vision.

6.0 Pre-brief analysis

The results of the value section reveal that the business market objective is to maintain/sustain growth. Product/service quality is the main attribute of the business. The ethical focus of the business is reliability and the origin of the business refers to the owner's vision of flowers as an everyday item in the home, before that became a lifestyle change in our society.

Larger businesses i.e. Interflora and Flowers direct offer product visuals and on-line selling. On-line would set your product apart from competitors of similar standing e.g. Nicky Walker and Simply Flowers.

In general, the results reveal that the respondents were happy with the existing identity. The obvious colour within your industry is green, although two members sought out new and more vibrant colour selections e.g. red and black. Choice of copy and font selection is varied, with no clear preferences. The nature of your business lends itself to a more visual form of communication through the product. Personality qualities are fully consistent with the nature of the business and individual preferences associated with the members' skills.

7.0 Recommendations

This section offers several recommendations that the business may wish to consider.

7.1 Web site presence

Although the business has a web presence, it could be used more effectively and represent the values of the business through a higher quality of design concept and visual presentation.

7.2 Further enhance existing logo

No respondent selected to keep the existing logo within the Symbol section of the questionnaire. Enhancing the logo whilst retaining its conceptual integrity may be beneficial to keep abreast of the market place. The application of a stronger/different colour or background is suggested.

7.3 Font and visual inconsistencies

Given the nature of the business and the results within this section, one respondent has chosen the opposite preference in both the Font and Visual section of the questionnaire. Further investigation by the designer is required to clarify the reason behind these choices, given from the same person.

8.0 Approval of analysis

Having reviewed the information provided in this report, some feedback would be extremely valuable to further develop the Communication Design Tool. Discussion regarding the process, results and analysis relevant to your business will inform and greatly enhance the study.

2.5 Case study 6 Aberdeen Physiotherapy Report

28.7.05 Owner: Jeff Wallace

**ABERDEEN CHARTERED PHYSIOTHERAPY CENTRE
25 Craigton Road
Mannofield
Aberdeen AB15 7SU**

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Your business completed the questionnaire as detailed below:

1. The general nature of the business: *Completed by two key members.*
2. The market values of the business: *Completed by five key members.*
3. The visual language of key competitors: *Completed by one key member.*
4. Graphic design preferences: *Completed by nine key members.*

2.0 General information on the business:

This section looks at the general nature of the business in terms of what it does, where it is located and any other relevant information offered.

"25 years in business. Located in Aberdeen's West End. Provides high quality physiotherapy delivered promptly, efficiently with sympathetic attention to individual needs".

Please also refer to 2002 Business Plan for period 1.12.02 – 30.11.03

3.0 Market value of the business

This section looks at the perceived values of the business, in terms of market competitiveness.

3.1 Definition of Market Value Terms

Market objective: Vision, mission, goals and aspirations of the business.

Market attributes: Differentiation of the business in the market place.

Market ethics: Influencing behaviour of the business.

Market origin: Attributes that have shaped the business.

3.2 Market objectives:

"To provide 'high' quality physiotherapy treatment to patients. Keep skill level high by using in-services and attending sources to pass on information i.e. good communication".

"Refer to "Objectives" from Business Plan carried out December 2002".

"Provide highly effective patient centred care. Right person, right place, right time".

"Continue to provide high quality physiotherapy service to the standards patients need. To expand the remit of the practice to meet trends in physiotherapy practice innovation".

3.3 Market attributes:

Listed in order of preference from 8 – 1 (8=highest; 1=lowest).

Customer Service	6	6	6	2	8
Product/service quality	8	8	8	1	7

Relationship handling	2	5	5	7	5
Technical innovation	1	2	2	6	2
Imagination	3	3	3	5	3
Value for money	7	7	7	3	6
Uniqueness	5	4	4	4	4
Other	4	-	-	-	-

3.4 Market ethics:

Listed in order of preference from 6 – 1 (6=highest; 1=lowest).

Integrity	4	6	3	4	1
Reliability	5	5	2	5	3
Social responsibility	6	4	1	6	2
Stakeholder oriented	2	2	4	2	5
Profit orientated	3	3	N/A	1	4
Other	1	1	-	-	-

3.5 Market origin:

"Family business, which has grown in size over the years through quality of care, reliability, excellent value for money and generally high standards".

"Family run business. Paternal type? management structure. Genuine patient focussed care".

"Family. Commitment. Patient centred".

"Hands on treatment. Effective treatment. Personal/individual. Friendly/casual atmosphere".

4.0 Visual language of key competitors

The visual description of key competitors' graphic design solutions has been analysed by the researcher and is summarised in section 4.2

4.1 Key competitors

- Banks of Dee Physiotherapy
- Aberdeen Sports & Spinal Injury Clinic (named by two respondents)
- Albyn Hospital (named by two respondents)
- Aberdeen Physiotherapy* (named by three respondents)
- Chiropractor businesses
- Osteopath businesses

* Same name as yourselves

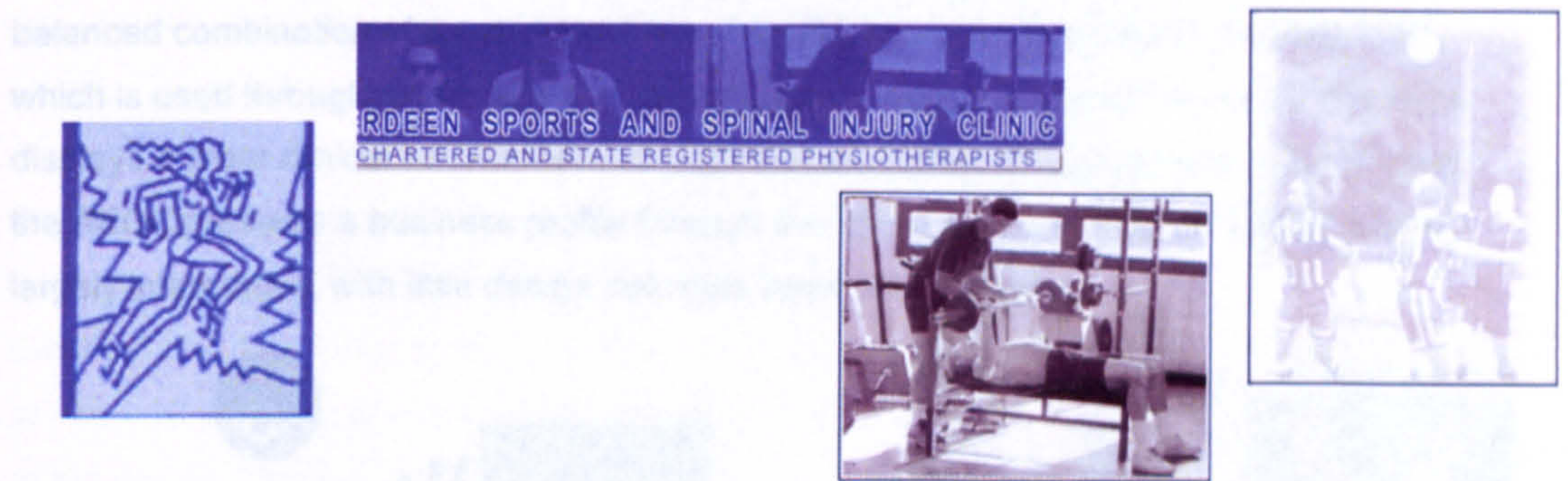
4.2 Visual language

Banks of Dee Physiotherapy: A local Sports and Injury Clinic run by two chartered physiotherapists. The design of their visual communication reflects an early attempt at a

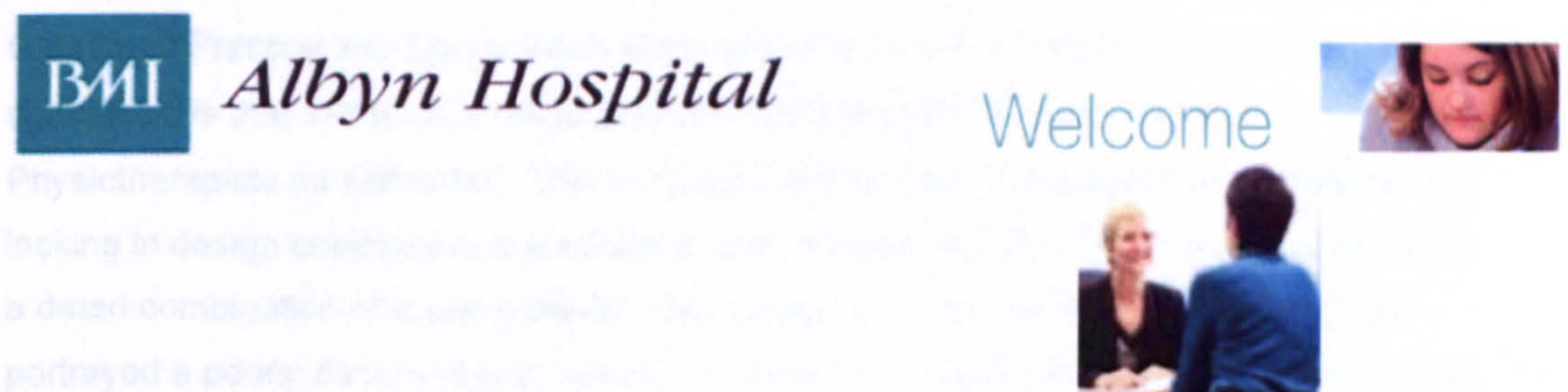
professional design solution. The relevant areas are included i.e. logo, layout, visuals and text but it is not put together in a well-designed manner. The logo attempts to capture the "local-ness" of the business by using the colloquial Banks O'Dee name. However it is a clumsy representation of a graphic identity.



Aberdeen Sports & Spinal Injury Clinic: A mix of design concepts have been used throughout visual communication reviewed. This represents a fragmented business, unsure of its identity and therefore portrays a lack of confidence from prospective clients. All designs reviewed represented a mix of graphic design solutions.



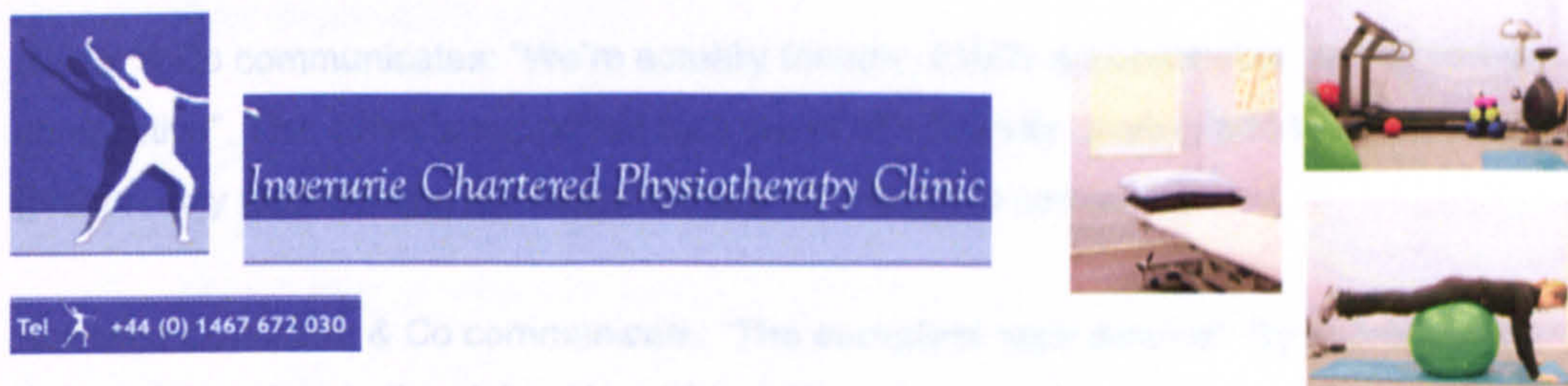
Albyn Hospital: Albyn Hospital sits within BMI healthcare. The BMI graphic design solutions are of a highly professional nature. Contemporary people centred visuals, easy to read text. Well-positioned page layouts and excellent use of space and colour, which promotes a sense of, calm and caring.



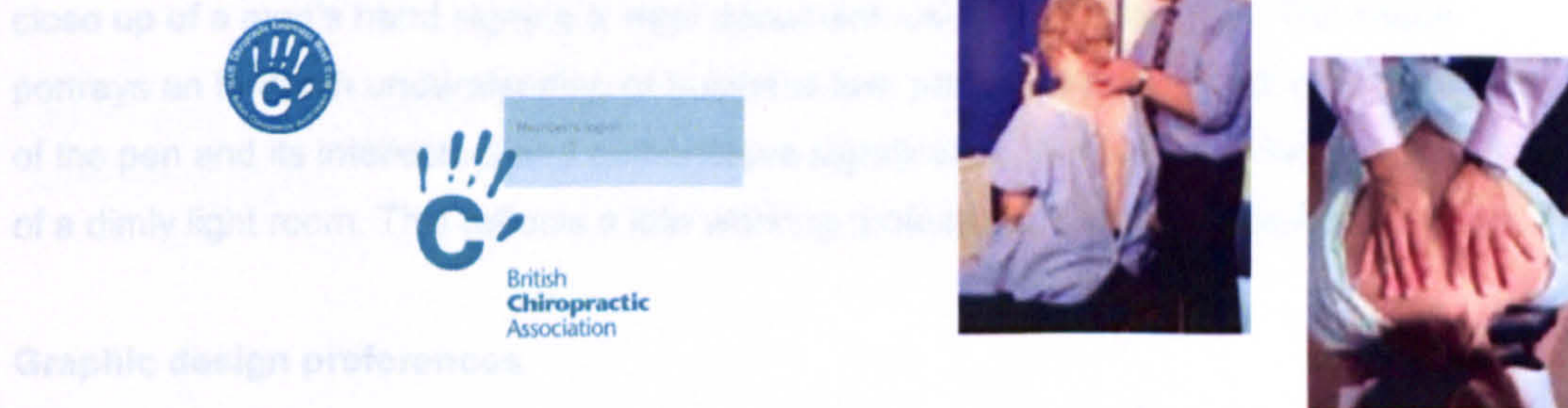
Aberdeen Physiotherapy: Reasonably well designed solutions across a range of reviewed materials. The logo is childlike in nature and requires re-designing. The web site suggests a welcoming interpretation of this business depicting a business that cares for its clients. This has been carried out through the use of bold shapes of flat colour framing the page and moving within it, retaining the child like, simple design quality throughout.



4.3 *Inverurie Chartered Physiotherapy Clinic:* In researching other Chartered Physiotherapists in the Aberdeen area this business emerged. The web site is well designed and worth looking into. The logo used illustrates clearly the nature of the business, although I am not convinced by the typeface chosen for the name. The layout, use of images, placement and readability of text works well within this site.



Chiropractors: The British Chiropractic Association, AECC and the General Chiropractic Council web sites were reviewed. Both the BCA and AECC were well designed with a balanced combination of graphics and text. The BCA however presented a strong logo, which is used throughout the site and invokes strong association with the BCA. The BCA displays a more clinical environment through the application of aquamarine blue whereas the AECC presents a business profile through the use of a strong blue. The GCC site is largely informative, with little design concepts applied.



5.2 *Graphic design preferences:* This section of the questionnaire looked at the graphic design preferences of the respondents. *Osteopaths:* The General Osteopath Council, the British osteopath Association and Osteopath Practice and Sports Injury Clinic web sites were reviewed. The overall conclusion is that this area is not as well designed as either Chiropractors or Physiotherapists (in particular). The GOC provided the best-designed site, although it was lacking in design concepts and provided a more informative site. The BOA site presented a dated combination of visual material, logo design and text layout. The OP & SIC site portrayed a poorly designed site, relying on clip art, too much information and poor lay out on the page.

5.1

Symbolism (e.g. graphic design)

Definition of terms:

- 1. mark
- 2. shape
- 3. image
- 4. graphic
- 5. photograph
- 6. representation e.g. sculpture
- 7. abstract
- 8. with/without text - the
- 9. typographic solution
- 10. single/multi - colour
- 11. illustrative suitability



4.3 Additional sources of visual information

“Quickly looking through sources in Yellow Pages. I found these stood out from the page: Baxter & Co.; Aberdein Considine & Company; McDougall & Co. Could it be the personal touch?”. All three designs incorporate photographic visuals, which support the values communicated within each business.

Baxter & Co communicates: “We’re actually friendly, EVEN approachable, and of course competitive”. This claim is supported by a visual of a friendly, smiling and knowing female (presumably representing an image of the staff within the company).

Aberdine Considine & Co communicate: “The complete legal service”. By emphasising the word complete in the claim, also refers to the visual reference depicting an image of an understanding man, with a look of empathy. The man is listening intently to a woman who has her head bowed down, implying that she has some perplexing and highly sensitive information, which is proving difficult for her to communicate. The man is representative of a solicitor and the out-of-focus woman is representative of a client.

McDougall & Co also supports written communication by visual interpretation. Their claim is that they are a “COMPREHENSIVE BUSINESS LAW SERVICE”. The visual depicts a close up of a man's hand signing a legal document, using a fountain pen. The image portrays an in-depth understanding of business law, portrayed through not only the quality of the pen and its intellectual and authoritative significance, but also that the setting is that of a dimly light room. This reflects a late working professional, evoking traditional values.

5.0 Graphic design preferences

This section of the questionnaire looked at the graphic design preferences of the business from its stakeholders' perspective. Three respondents completed this section of the questionnaire. One questionnaire did not include the Personality qualities section at the time of completion; therefore only two respondents completed this part of the Graphic design preferences section. The generic graphic design elements that make up any graphic design solution include symbolism, layout, colour, imagery, font and copy. The personality qualities section within graphic design preferences relates to an interpretation of business qualities, adopting a range of animals as a metaphor for the personality of the business.

5.1 Symbolism (e.g. graphic identity)

Definition of terms:

Definition of terms:

1. mark
2. shape
3. linear
4. organic
5. photographic
6. representational e.g. illustrative
7. abstract
8. with/without strap – line
9. typographic solution
10. single/multi – colour
11. reproductive suitability

12. usage

The results of the data showed that:

- One person chose 1:
- Three respondents chose 2:
- One person chose 3:
- Four respondents chose 6:

Additional information:

"1. Mark – influenced by my belief that the patients will associate the excellent service they receive with a brand mark and easily recognise it in the future".

Summary:

The predominant preference is a representative symbol (illustrative). All other categories could be included to fit with this preference.

Conclusions:

A logo as a representational symbol would encourage an identity, which may not include words. This would set the business apart from its local competitors and unify the group practice.

5.2 Layout (e.g. page, website etc.)

Definition of terms:

1. minimalistic
2. contemporary
3. traditional
4. structured

The analysis of the data showed that:

- Two respondents chose 1:
- Three respondents chose 2:
- One person chose 3:
- Three respondents chose 4:
- One person chose 6:
- (One person selected both 2 & 4)

Additional information:

"2. Contemporary – influenced by my belief that the layout should reflect the practice as being contemporary.

Summary:

Structured and contemporary were selected equally between six out of the nine respondents. One person chose minimalistic. One person chose traditional.

Conclusions:

Both structured and contemporary selections compliment one another. Minimalistic also works with the structured and contemporary layout style. A traditional layout is inconsistent with the other respondents' preferences.

5.3 Colour

Definition of terms:

1. red – anger, danger, drama
2. blue – conservative, medical/clinical, clean
3. yellow – happy, sunshine, fresh
4. green – environment, organic, medical/clinical/health
5. black – strong, dramatic, overpowering
6. white – pure, clean, simple
7. grey – sombre, subtle

The results of the data showed that:

Two respondents chose 2:

One person chose 3:

Four respondents chose 4:

One person chose 5:

One person chose 8:

Additional information:

"4. Green – influenced by my belief that the qualities associated with the colour, described overleaf, best reflect the nature of the service".

"8. Our purple works better".

Summary:

A strong preference for green is revealed within the group. Blue reflects the choice of two respondents. Individual respondents each chose purple, black and yellow.

Conclusions:

Combining green and blue may be an option for your business. These colours generally reflect health (green) and business (blue) sectors.

5.4 Imagery (pictorial style)

Definition of terms:

1. photographic – full colour etc., style etc.
2. illustrative – style etc.
3. geometric – strong, linear, organised
4. curvilinear – organic, flowing, clutter
5. coverage – layout % (please indicate)

The results of the data showed that:

One person chose 2:

Eight respondents chose 3:

Additional information:

"3. Geometric – influenced by the idea that people will easily associate the service we provide with a clear, bold shape".

Summary:

Most respondents preferred a geometric style of imagery. One respondent chose an illustrative style.

Conclusions:

A strong linear and organised imagery style is clearly the preferred choice for this business.

5.5 Font (letter style)

Definition of terms:

1. traditional
2. contemporary
3. structured
4. organic
5. fun
6. scriptive
7. stately
8. usage - % on layout (please indicate)

The results of the data showed that:

Three respondents chose 1:

Five respondents chose 2:

One respondent chose 6:

Additional information:

"2. Contemporary – same reason as Layout".

Summary:

Most respondents chose contemporary. Traditional was chosen by one third of the group. One member chose scriptive.

Conclusions:

The combination of fonts selected works extremely well across most communication requirements. Applying a contemporary font (Sans serif) on headings and sub headings when little text is used works very well with a traditional (Serif) font for the body copy i.e. the main reading part of the text on a page. It is easier to read a quantity of text when it includes a Serif. Using a scriptive font as an accent graphic, as you would with an accent colour, can bring interest to the design. It must be borne in mind that the scriptive font should be used sparingly.

5.6 Copy (text)

Definition of terms:

1. style of writing (please indicate)
2. length of text - % on layout (please indicate)
3. language – within specific business sector (please indicate)
4. key terms (please indicate)

The results of the data showed that:

Five respondents chose 1:

One person chose 2:

One person chose 3:

Three respondents chose 4:

(One person selected both 3 & 4)

Additional information:

"4. key terms – influenced by the idea that potential patients/ customers will associate certain term (for instance, 'professions', 'care', 'therapeutic') with the service they desire".

Summary:

Most respondents chose style of writing. Three respondents selected key terms. The other two respondents chose length of text and language.

Conclusions:

Consideration of the style of writing is important for this business. Key terms have been identified as an influential factor in meeting clients' needs and desires. Both length of text within any communication should be borne in mind, as should the language used within a given market sector.

5.7 Personality Qualities

Definition of terms:

1. Lion – ruler
2. Elephant – long-term reliability
3. Giraffe – sources the best
4. Dolphin – anticipating change
5. Bee – skilfully productive
6. Chameleon – ability to merge
7. Owl – wise and knowing
8. Rabbit – productive
9. Fish – driven by group work
10. Frog – ability to leap across boundaries
11. Leopard – aggressive & fast
12. Other – please indicate

The results of the data showed that:

Five respondents chose 2:

Three respondents chose 5:

One person chose 8:

One person chose 12:

Additional information:

"2. Elephant – influenced by the qualities which the elephant is supposed to reflect, as I believe these are the qualities which the practice itself should reflect".
"12. Other – person not animals".

Summary:

Most respondents chose Elephant. Three members chose Bee. One respondent chose Rabbit. The remaining respondent preferred that the selection related to people qualities and not animal qualities.

Conclusions:

Long-term reliability (Elephant) is clearly an integral aspect of continued client base, particularly given the health implications and benefits offered within this

market sector. Skilfully productive (Bee) and productive (Rabbit) are clearly a given within the skill base of the service provided.

6.0 Pre-brief analysis

The results of the analysis reveal that:

Objectives:	Provide high quality physiotherapy treatment.
Attributes:	Product/service quality is the main focus. Customer service and stakeholder orientation are also important.
Ethics:	Social responsibility and stakeholder orientation are equally key. Integrity is also significant.
Origin:	Grown from family run business.

Generally, the physiotherapy industry tends to be well represented graphically when situated within larger medical organisations e.g. BMI. In relation to other similar areas of care i.e. Chiropractor and Osteopath sectors, visual representation of the physiotherapy sector is of a higher quality.

In terms of competitors reviewed, the quality of design output is similar. The main concern is that of differentiation between individual businesses i.e. achieving an identity that will enable stakeholders and prospective clients to identify your particular business among others in the sector.

The main issue arising from this analysis is the need for a clear identity for your business. Initially, confusion between yourself as: Aberdeen Chartered Physiotherapy and Aberdeen Physiotherapy became evident from the outset. Upon further investigation the "Chartered" profile of your business set it apart from your competitor. Although it is in your name, and as such differentiates you from Aberdeen Physiotherapy in name, Aberdeen Physiotherapy also hold chartered status. Furthermore, forms of communication e.g. Yellow Pages and the internet revealed that your competitor appears on the same page, using the same colour theme and size of advertisement as yourselves within the current Yellow Pages, albeit your advertising design is of a more professional quality to that of Aberdeen Physiotherapy in Yellow Pages. Aberdeen Physiotherapy has an active web presence. Under your name (Aberdeen Chartered Physiotherapy) I failed to source a web presence, only that of directory listings from the search engine Google. These were:

www.aberdeenphysiotherapy.com

www.csp.org.uk

www.ultimatedirectory.co.uk/aberdeen/physiotherapists.htm

I discovered that your site is located through another name. This is listed within the Yellow Pages advert as: www.1stbackphysio.co.uk. The need for a name/symbol/identity is clearly evident.

The group are generally in agreement with the design preferences for your business. Most are looking for a symbol with which to identify the business. Layout and font require to be presented as a contemporary design. Copy writing style (text) requires to be carefully considered with emphasis on key terms relevant to your industry, language and length of text. Images should be strong, linear and organised. Colours green and blue are consistent and associated with the visual language of your industry.

7.0 Recommendations

This section offers several recommendations that the business may wish to consider.

7.1 Identity

Select a name and graphic identity for your business.

7.2 Graphic design consistency

Review your range of communication solutions and ensure that all areas present a consistent graphic representation, relevant to your business values.

8.0 Approval of analysis

Having reviewed the information provided in this report, some feedback would be extremely valuable to further develop the Communication Design Tool. Discussion regarding the process, results and analysis relevant to your business will inform and greatly enhance the study.

2.6 Case study 7 Oilcats, Oilfield Cataloguing Services Ltd Report

**28.7.05 Operations Manger: Kathleen Miller
OILFIELD CATALOGUING SERVICES LTD
Clydesdale Bank Buildings
Oldmeldrum
Aberdeenshire AB51 0AY**

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8.0	Approval of analysis	7

Your business completed the questionnaire as detailed below:

1. The general nature of the business: *Completed by one key member.*
2. The market values of the business: *Completed by two key members.*
3. The visual language of key competitors: *Completed by two key members.*
4. Graphic design preferences: *Completed by two key members.*

2.0 General information on the business:

This section looks at the general nature of the business in terms of what it does, where it is located and any other relevant information offered.

“OILCATS specialises in classifying, cleansing and enhancing and managing standardised inventory and procurement content to industries worldwide. In addition to cataloguing management services OILCATS also provide a full range of inventory audit and materials management services.

Oilfield Cataloguing Services was founded in 1994, sold to ASCO in 1988 and was repurchased in 2001. In 2003, OILCATS LLC opened an office in Houston.”

3.0 Market value of the business

This section looks at the perceived values of the business, in terms of market competitiveness.

3.1 Definition of Market Value Terms

Market objective: Vision, mission, goals and aspirations of the business.

Market attributes: Differentiation of the business in the market place.

Market ethics: Influencing behaviour of the business.

Market origin: Attributes that have shaped the business.

3.2 Market objectives:

- *Maintaining customer loyalty and satisfaction*
- *Product Quality, delivery and service*
- *Continuous improvement of the Quality Management System*
- *Teamwork and standards of excellence”.*

3.3 Market attributes:

Listed in order of preference from 8 – 1 (8=highest; 1=lowest).

Customer Service	5
Product/service quality	8
Relationship handling	4
Technical innovation	6
Imagination	2
Value for money	3
Uniqueness	7
Other	-

3.4 Market ethics:

Listed in order of preference from 6 – 1 (6=highest; 1=lowest).

5.5

Definition of terms:		
1.	Integrity	6
2.	Reliability	2
3.	Social responsibility	3
4.	Stakeholder oriented	5
5.	Profit orientated	4
6.	Other	-

3.5 Market origin:

“Oilfield Cataloguing Services was founded and self-funded in 1994 by David Andrews in Scotland. The Management has in excess of 65 years experience in the industry”.

4.0 Visual language of key competitors

The visual description of key competitors’ graphic design solutions of Intermat has been analysed by the researcher and is summarised in section 4.2

4.1 Key competitors

“Don’t really have key competitors because the nature of our work is so specialized and we operate in a niche market”.

4.0 Visual language

Intermat Solutions: A professionally designed web presence. The product is combined as a textural graphic element within the site and is cleverly used individually to code and navigate throughout the layout. The site is text/information heavy.



4.3 Additional sources of visual information

“Our web address is: www.oilcats.co.uk”.
“Potentially Internet (US based) company: www.intermat.com”.

5.0 Graphic design preferences

This section of the questionnaire looked at the graphic design preferences of the business from its stakeholders’ perspective. Six respondents completed this section of the questionnaire. The generic graphic design elements that make up any graphic design solution include symbolism, layout, colour, imagery, font and copy. The personality qualities section within graphic design preferences relates to an interpretation of business

qualities, adopting a range of animals as a metaphor for the personality of the business.

5.5 Symbolism – *Graphic identity.*

Definition of terms:

1. Mark – linear (e.g. Nike-swish/tick), organic (e.g. Pure New Wool – symbol), abstract (e.g. orange mobile phone – where symbol has no direct relationship with the product).
2. Illustration – representational drawing (e.g. BP – flower).
3. Photographic – realistic picture.
4. Typographic – realistic picture.
5. Logo supported by name or strap-line (e.g. Cancer Research).
6. Use existing logo (please include).

The results of the data showed that:

Two respondents chose 1: Mark

Conclusions:

The preferred choice is Mark.

5.6 Layout – *Placement of words and pictures on a page e.g. page, website etc.*

Definition of terms:

1. Symmetrical – All elements balanced, static.
2. Asymmetrical – Design off-centred, active.
3. Multi grid – Complex combination, dynamic.

The results of the data showed that:

Two respondents chose 3: Multi-grid

Conclusions:

The preferred layout representing the business is that of multi grid.

5.7 Colour

Definition of terms:

1. red – anger, danger, drama
2. blue – conservative, medical/clinical, clean
3. yellow – happy, sunshine, fresh
4. green – environment, organic, medical/clinical/health
5. black – strong, dramatic, overpowering
6. white – pure, clean, simple
7. grey – sombre, subtle

The results of the data showed that:

Two respondents chose 2: Blue

Conclusions:

Blue is clearly the preferred choice for your business.

5.2 Visuals – *Use of pictures/graphics.*

Definition of terms:

1. Strong – bold representation.
2. Subtle – soft representation.
3. People oriented.
4. Product oriented.
5. Service oriented.

The results of the data showed that:

Two respondents chose 1: strong

Conclusions:

The preferred choice is a strong, bold, visual representation.

5.5 Font (letter style)

Definition of terms:

1. Old fashioned – Olde worlde.
2. Futuristic – mechanical.
3. Artistic – Curving, flowing.
4. Simple – Easy to read.
5. Elegant – Well crafted.
6. Strong – bold, difficult to ignore.
7. Free flowing – hand written.
8. Whimsical – fun.

The results of the data showed that:

Two respondents chose 4: simple

Conclusion:

The preferred font is simple – easy to read.

5.6 Copy (writing) - message communicated through the printed word as a body of text.

Definition of terms:

1. Entertain – Provide with amusement.
2. Educate – Training in a particular subject.
3. Inform – Give facts or information.

The results of the data showed that:

Two respondents chose 3: Inform

Conclusions:

The preferred application of copy is to inform – give facts or information.

5.7 Personality Qualities

Definition of terms:

1. Lion – ruler
2. Elephant – long-term reliability
3. Giraffe – sources the best
4. Dolphin – anticipating change
5. Bee – skilfully productive
6. Chameleon – ability to merge
7. Owl – wise and knowing
8. Rabbit – productive
9. Fish – driven by group work
10. Frog – ability to leap across boundaries
11. Leopard – aggressive & fast
12. Other – please indicate

The results of the data showed that:

Two respondents chose 11: Leopard

Conclusions:

The Leopard – aggressive and fast is the preferred choice of personality qualities that best represent this business.

6.0 Pre-brief analysis

The results of the data provided reveal that the business values are fully consistent with the graphic design solutions reviewed. Objectives are clearly defined as:

- *Maintaining customer loyalty and satisfaction*
- *Product Quality, delivery and service*
- *Continuous improvement of the Quality Management System*
- *Teamwork and standards of excellence*.

Product/service quality is the attribute. Integrity is the business ethic. Origin is defined as founded and self-funded in 1994 by David Andrews in Scotland. The management has over 65 years experience in the industry." The visual language of the your business sits well within your market sector, in terms of graphic design solutions.

7.0 Recommendations

This section offers several recommendations that the business may wish to consider.

7.1 Graphic Design Consistency

Ensure consistency of graphic design solutions across all forms of business communication.

8.0 Approval of analysis

Having reviewed the information provided in this report, some feedback would be extremely valuable to further develop the Communication Design Tool. Discussion regarding the process, results and analysis relevant to your business will inform and greatly enhance the study.

2.7 Case study 8 Aberdeen Tool Rental Plant Services Ltd Report

27.7.05 Director: Willie Forsyth

**ATR PLANT SERVICES LTD
1 Howemoss Drive
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Your business completed the questionnaire as detailed below:

1. The general nature of the business: *Completed by Operations Director – Willie Forsyth.*
2. The market values of the business: *Completed by Operations Director – Willie Forsyth*
3. The visual language of key competitors: *Completed by Operations Director – Willie Forsyth.*
4. Graphic design preferences: *Completed by Operations Director – Willie Forsyth*

2.0 General information on the business:

This section looks at the general nature of the business in terms of what it does, where it is located and any other relevant information offered.

"ATR Plant Services supply plant and equipment to various industries throughout the UK. Generators, air compressors and access equipment are our main product lines, with sales, service and rentals included. Located in Dyce, we have traded for three years".

3.0 Market value of the business

This section looks at the perceived values of the business, in terms of market competitiveness.

3.1 Definition of Market Value Terms

Market objective: Vision, mission, goals and aspirations of the business.

Market attributes: Differentiation of the business in the market place.

Market ethics: Influencing behaviour of the business.

Market origin: Attributes that have shaped the business.

3.2 Market objectives

"Service to clients, first time every-time. New technological equipment".

3.3 Market attributes:

Listed in order of preference from 8 – 1 (8=highest; 1=lowest).

Customer Service	8
Product/service quality	8/7
Relationship handling	7
Technical innovation	6
Imagination	5
Value for money	8
Uniqueness	5
Other	-

3.4 Market ethics:

Listed in order of preference from 6 – 1 (6=highest; 1=lowest).

Integrity	6
Reliability	6
Social responsibility	4
Stakeholder oriented	4
Profit orientated	4
Other	-

3.5 Market origin:

"New company formed November in 2001, and from part of the ATR Group".

4.0 Visual language of key competitors

The visual description of key competitors' graphic design solutions has been analysed by the researcher and is summarised in section: 4.2

4.1 Key competitors

- Aggreko UK
- Coates Rentair
- Kolfor Plant

4.2 Visual language

Aggreko UK: Professionally designed web presence. The design reflects a strong, straightforward image. The logo is depicted as simple, contemporary, bold typeface. Depicted in metal. The graphics and navigation area are isolated at the heading. The remainder of the layout is information intensive.



"Inspiring confidence in our customers worldwide with our rental energy solutions."

Coates Rentair: A poorly designed insight into this company via the Internet. Cannot access the site proper therefore only information on the company provided through an industry specific web portal (Kellysearch).



Kolfor Plant: Reasonably well-designed site. Minimum information, basic application of images.



5.3 Colour

Definition of terms:

1. red – anger, danger, drama
2. blue – conservative, medical/clinical, clean
3. yellow – happy, sunshine, fresh
4. green – environment, organic, medical/clinical/health
5. black – strong, dramatic, overpowering
6. white – pure, clean, simple
7. grey – sombre, subtle

The results of the data showed that:

6: White was chosen

Conclusions:

A predominately white colour, representing pure, clean and simple is preferred.

5.4 Visuals – Use of pictures/graphics.

Definition of terms:

1. Strong – bold representation.
2. Subtle – soft representation.
3. People oriented.
4. Product oriented.
5. Service oriented.

The results of the data showed that

4: Product orientated was chosen

Conclusions:

Product shots are to be the main visual focus for this business.

5.5 Font - letter style.

Definition of terms:

1. Old fashioned – Olde worlde.
2. Futuristic – mechanical.
3. Artistic – Curving, flowing.
4. Simple – Easy to read.
5. Elegant – Well crafted.
6. Strong – bold, difficult to ignore.
7. Free flowing – hand written.
8. Whimsical – fun.

The results of the data showed that:

4: Simple was chosen

Conclusions:

An easy to read, simple font is required.

5.6 Copy (writing) - message communicated through the printed word as a body of text.

Definition of terms:

1. Entertain – Provide with amusement.
2. Educate – Training in a particular subject.
3. Inform – Give facts or information.

The results of the data showed that:

3: Inform was chosen

Conclusions:

Informative copy style reflects the copy writing needs of this business.

5.7 Personality Qualities

Definition of terms:

1. Lion – ruler
2. Elephant – long-term reliability
3. Giraffe – sources the best
4. Dolphin – anticipating change
5. Bee – skilfully productive
6. Chameleon – ability to merge
7. Owl – wise and knowing
8. Rabbit – productive
9. Fish – driven by group work
10. Frog – ability to leap across boundaries
11. Leopard – aggressive & fast
12. Other – please indicate

The results of the data showed that:

8: Rabbit was chosen

Conclusions:

Productive is the personality quality of this business.

6.0 Pre-brief analysis

Business objectives are: *"Service to clients, first time every-time. New technological equipment"*. Customer service, Value for money and product/service quality are the business attributes. Integrity and reliability are the business ethics. The origin of the business dates back to November 2001, when the company was formed as part of the ATR Group.

"Service to clients" and "product quality" are key values of your business. Concise product information supplied efficiently is a core focus of this businesses communication to be represented graphically. Strong graphics, product visual and straightforward copy writing (text) are important considerations within this market sector.

An inconsistent quality of design output is evident across this market sector. The predominant colour used graphically within this industry is red (see section: 7.4).

7.0 Recommendations

This section offers several recommendations that the business may wish to consider.

7.1 Logo update

The logo is outdated. An update of the logo, retaining the integrity of the symbol but upgrading its presentation would greatly enhance its visual standing within this industry. As part of the ATR Group, it may be worth considering developing a sub-branding style throughout the Group.

7.2 Monitoring logo style

Close monitoring of how the logo is presented across all communications within the Group is paramount in order to retain the consistency of image throughout. A style guide could be developed and made available throughout the Group in an attempt to address the need for consistency.

The general graphic design style, applied to all areas of visual communication, is equally integral to a businesses unified presentation of what it does and how it does it i.e. its market values. In this respect a style guide could be set up in an attempt to unify not only the logo style but also all aspects of visual communication.

7.3 On-line efficiency

Web based competitors were reviewed regarding an insight into the visual language within your industry. It was found that on-line sites varied in terms of quality of visual design, technical usability and interactive efficiency. The ATR site is poorly designed both visually and technically e.g. the site is visually dated, due mainly to the logo style and basic, uninspiring visuals. The page layout is cluttered with too much text (viewers prefer concise "sound bite" style of text on-line). Several attempts at accessing the ATR Aberdeen Tool Rental link were unsuccessful. Therefore the values applied on a one to one basis across the ATR Group are weakened by the web presence.

A re-design of the ATR web site is necessary to remain true to its core values. This can be achieved through enlisting a web designer fully briefed with this information and the technical ability to create a fully efficient on-line presence.

7.4 Colour preference

As previously recorded, the predominant colour for your industry is red. The logo colours within the business are red, black and white. This is one of the most recognisable strong colour combinations within Western culture. These colours can change the effect of peoples perceptions through careful thought into how strong the colours are and how they sit in relation to one another within a page layout.

In this respect I would recommend that the use of your business colours be thought through more carefully to be used with purpose deriving from a design theory, which mirrors the values of the business.

8.0 Approval of analysis

Having reviewed the information provided in this report, some feedback would be extremely valuable to further develop the Communication Design Tool. Discussion regarding the process, results and analysis relevant to your business will inform and greatly enhance the study.

Appendix 4 - Business models

4.1 Corporate communication models

4.2 Management models

4.3 Marketing models

4.1 Corporate communication models

1. Bernstein's Cobweb method provides an evolving evaluation of corporate values (Bernstein, 1986; Van Riel, 1992). Bernstein's method serves as a communication tool, providing an assessment of the perceived internal values of the organisation (agreed upon by decision makers) and then distributed within the organisation to be completed by all internal staff. Figure 4.1 depicts the method before it is used and Figure 4.2 depicts the method after use.

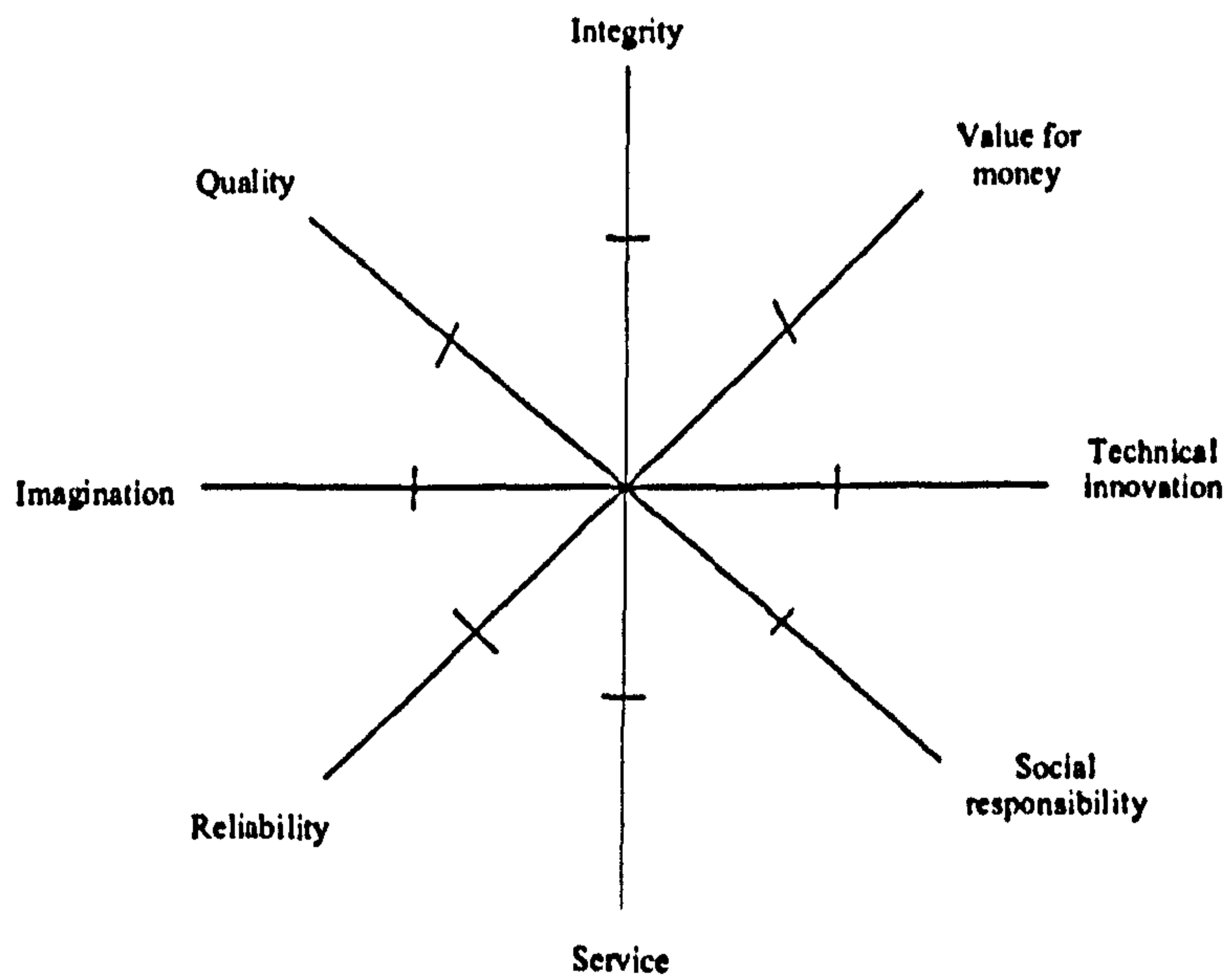


Figure 4.1: Bernstein's Cobweb Method *before* discussion. Source: Van Riel 1992, p.49.

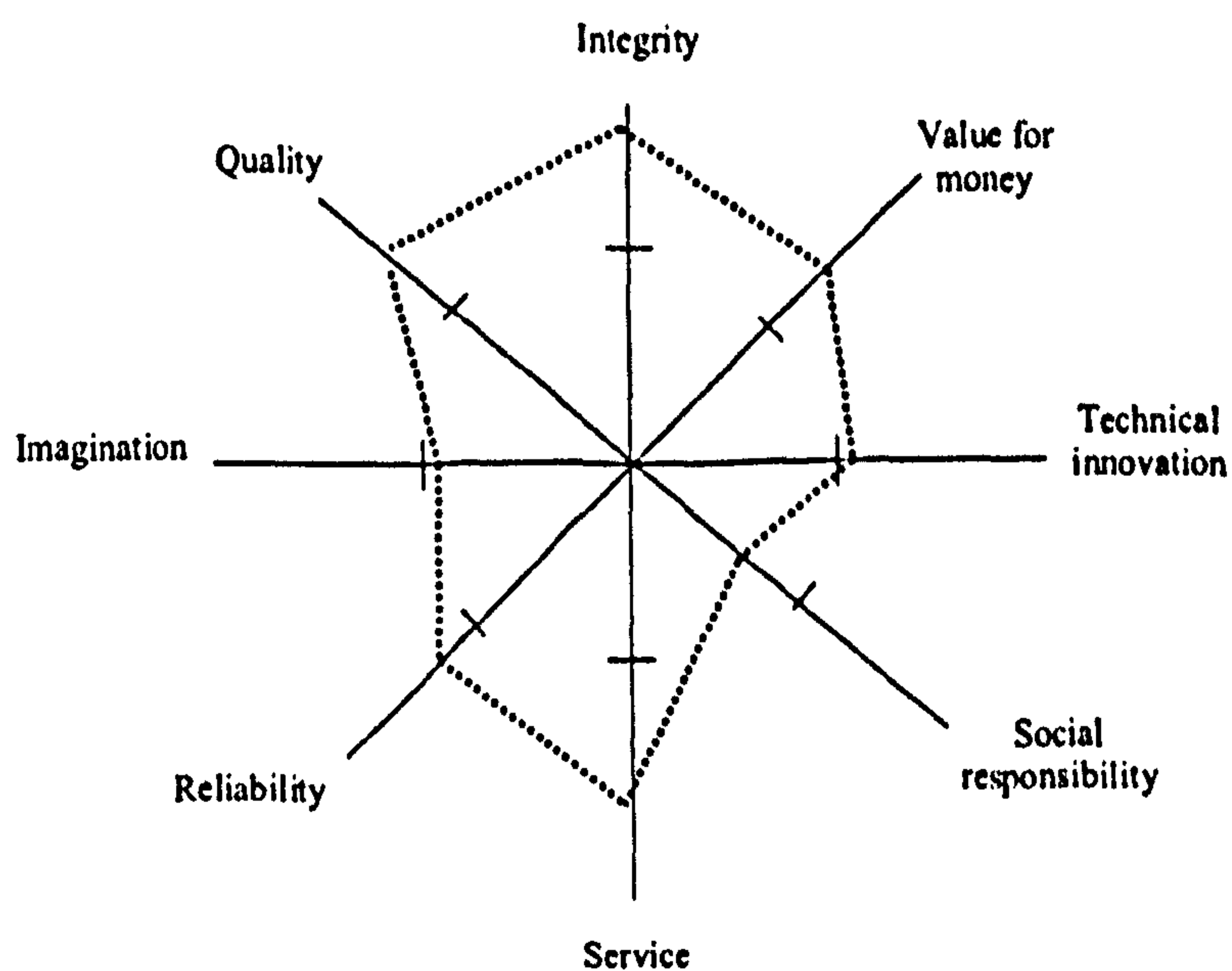


Figure 4.2: Bernstein's Cobweb Method *after* discussion. Source: Van Riel 1992, p.50.

2. Lux's Star method (Van Riel 1992, p.52) is similar to Bernstein's Cobweb method (*ibid*, p.50) in terms of encouraging a communication platform for internal and/or external stakeholder discussion. The main difference between the two methods is that Lux's star method begins with a pre-determined set of attributes. The pre-determined attributes of Lux's star method are shown in Figure 4.3.

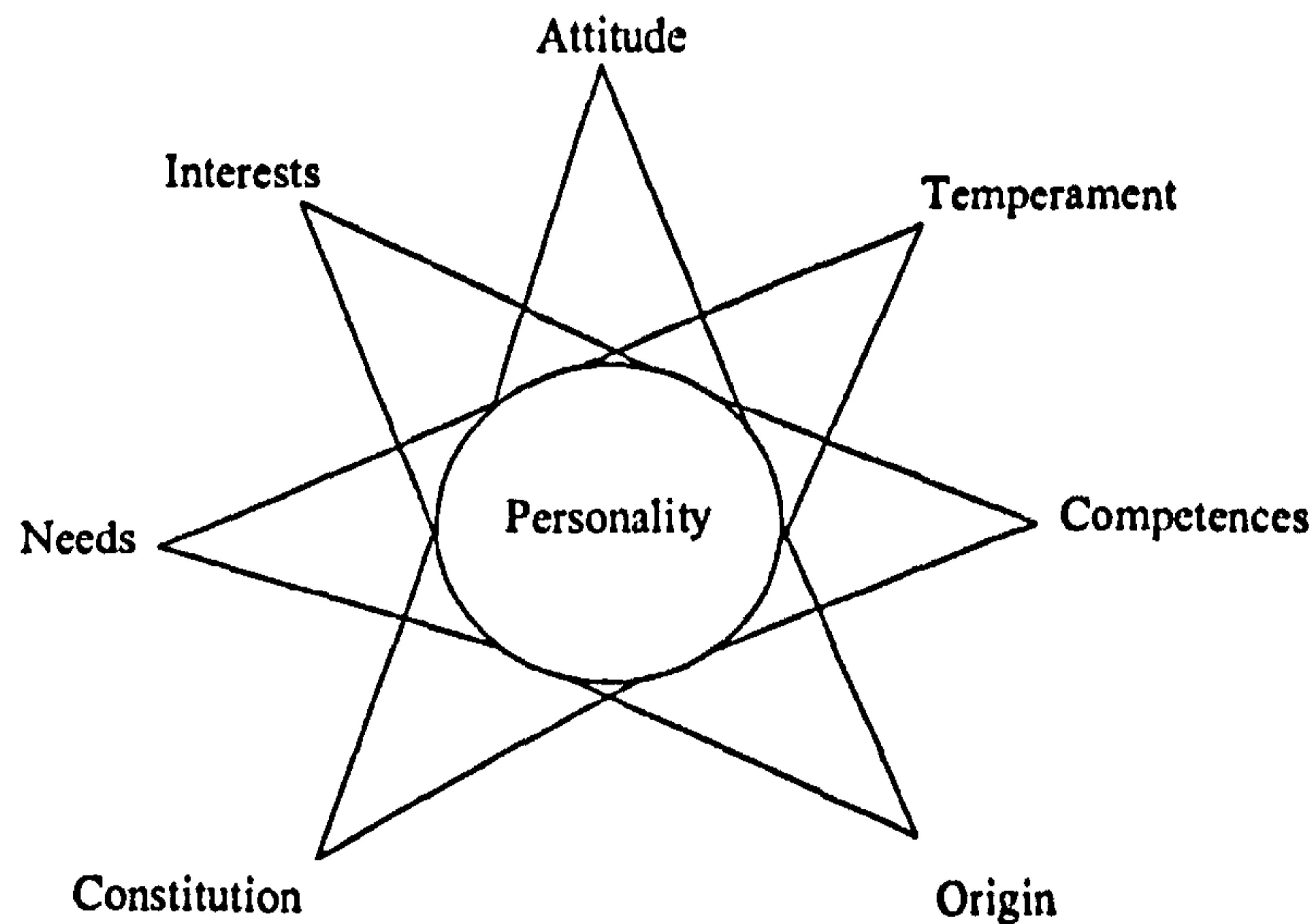


Figure 4.3: Lux's Star Method. Source: Van Riel 1992, p.52.

Lux, influenced by Guilford (1954), believed that the seven areas: attitude, temperament, competences, origin, constitution, needs and interests, represent distinguishing business personality attributes that are evident in all businesses in order to evaluate the business identity (Van Riel, 1992).

4.2 Management models

1. SWOT (Strength, weakness, opportunity and threat) analysis "provides a mechanism for systematically thinking through the extent to which the organisation can cope with its environment" (Johnson and Scholes 1993, p.151).

2. PEST (Political/legal, economic, socio-cultural, technological) analysis offers an evaluation of the environmental areas that are relevant to an organisation at a given point in time (Johnson and Scholes, 1993). PEST analysis functions as an evolving method of tracking changes in the organisation in line with environmental influences, as detailed in Figure 4.4.

1. What environmental factors are affecting the organisation?
2. Which of these are the most important at the present time?
In the next few years?

Political/legal Monopolies legislation • Environmental protection laws • Taxation policy • Foreign trade regulations • Employment law • Government stability	Economic Business cycles • GNP trends • Interest rates • Money supply • Inflation • Unemployment • Disposable income • Energy availability and cost
Socio-cultural Population demographics • Income distribution • Social mobility • Lifestyle changes • Attitudes to work and leisure • Consumerism • Levels of education	Technological Government spending on research • Government and industry focus of technological effort • New discoveries/development • Speed of technology transfer • Rates of obsolescence

Figure 4.4: PEST analysis of environmental business influences. Source: Johnson and Scholes 1993, p.82.

3. Porter (1980, 1985), concerned with techniques that could analyse industries and competitors, recognises that there are five competitive forces that determine industry profitability. Porter's Five Forces (Porter, 1980) are listed as:

1. The potential of new entrants into the industry.
2. The bargaining power of customers.
3. The threat of substitute products.
4. The bargaining power of suppliers.
5. The activities of existing competitors.

Porter established the concept of the value chain, where a business gains competitive advantage through carrying out activities in the value chain more cheaply, or in a more effective manner than those of their competitors (Porter, 1985). The value chain is determined through an understanding of how the individual business performs and interacts internally and externally.

4. The Balanced Scorecard approach (Kaplan and Norton, 1996) builds on the Total Quality Management approach (Oakland, 1989) where feedback concerning internal business process of outputs is measured. An additional aspect of the Balanced Scorecard approach is where feedback concerning business strategy outcomes is measured. As a management system of measurement, the aim is to establish a clearer understanding of the business from various perspectives. The four perspectives of the Balanced Scorecard are:

- The Learning and Growth Perspective
- The Business Process Perspective
- The Customer Perspective
- The Financial Perspective

Central to the focus of the Balanced Scorecard approach is the vision and strategy of the business. A “double-loop feedback” allows a retrospective perspective but also provides a capability for future predictions. This is shown in Figure 4.5.

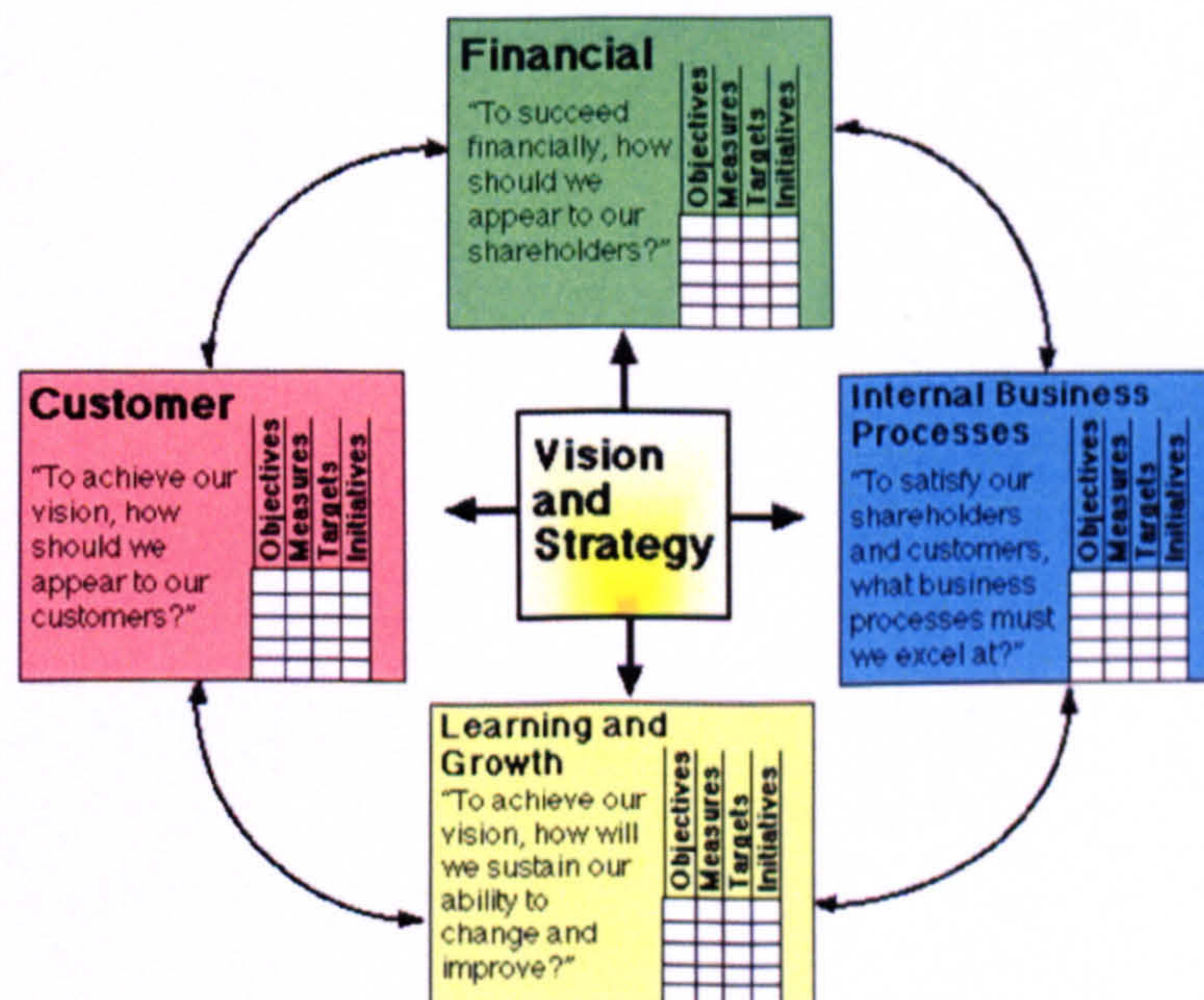


Figure 4.5: Balanced Scorecard (Kaplan and Norton, 1996). Source: www.balancedscorecard.org, 2006.

4.3 Marketing models

1. The 4-Ps of the marketing mix involve: product, price, promotion and place. The aim of the marketing mix is to provide the right “mix” in order to satisfy or exceed customer expectations in relation to its competitors (Jobber 1995, pp14 - 15).

2. Fishbein and Ajzen's model of reasoned action is based on "an analysis of customer beliefs and attitudes to brand attributes" (Jobber 1995, p.71). This is depicted in Figure 4.6.

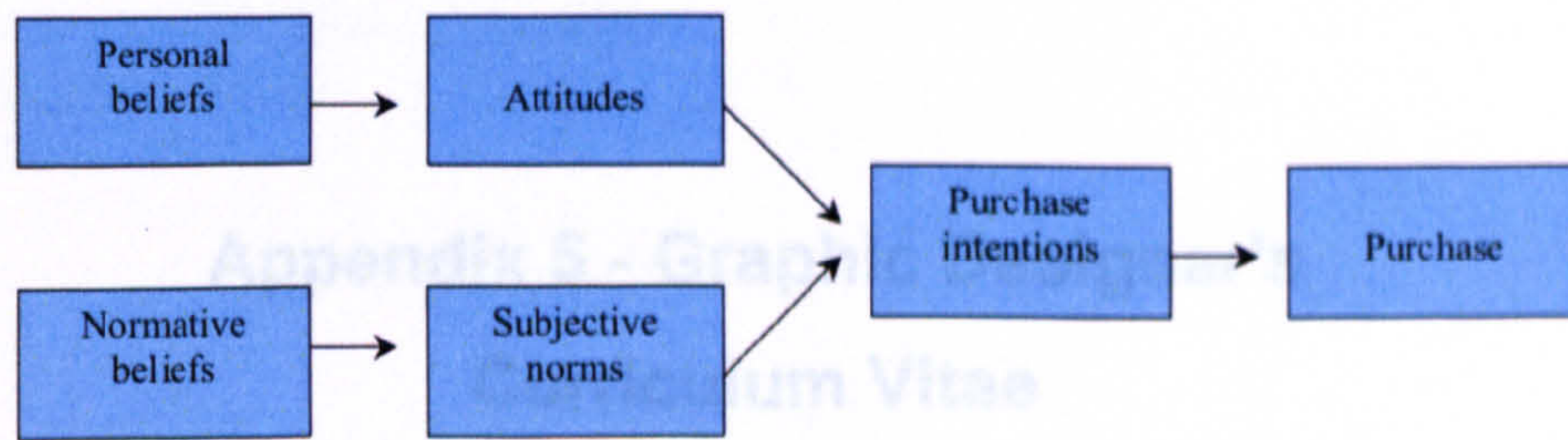


Figure 4.6: Fishbein and Ajzen model of reasoned action. Source: Jobber 1995, p.71.

5.1 Rae Alexander

5.2 Silvia Dicks

5.3 Ian Craig

5.4 Ken Gowans

Appendix 5 - Graphic Designer's Curriculum Vitae

5.1 Rae Alexander

5.2 Silvia Dicke

5.3 Ian Cargill

5.4 Ken Gowans

5.1 Rae Alexander

Curriculum Vitae

Personal details

Rae Alexander
Brunnmattstrasse 31, 5600 Lenzburg, Switzerland
Home: 00 41 (0)62 891 53 92
Mobile: 078 871 74 65
British

Education

1993- 1997

Edinburgh's Telford College, Edinburgh

Higher National Diploma - Design & Typography for Print

1978-1981

Hamilton College of Education, Hamilton

Diploma in Education - major subjects Art & Science

1972-1978

Duncanrig Secondary School, East Kilbride

Higher Grade: English, French, Art, Mathematics, Geography, Engineering Drawing

O'Grade: Arithmetic, Statistics

sbec: Typing/Secretarial Certificate

Languages

English (native tongue)

German

French

COMPUTER SKILLS

Design

Indesign 4

Photoshop 9

Illustrator 12

Pagemaker 6.5

General Business Software

Microsoft - Excel

Microsoft - Word

Microsoft - PowerPoint

Website Design

Macromedia - Dreamweaver 3

Macromedia - Flash 4

Adobe - GoLive

WS-FTP Pro

Platforms

Apple MAC

PC - Windows

Career history

2003-2005.1.1 Bürkert Contromatic AG, Int HQ, Hünenberg, CH-Zug
Senior Graphic Designer

Working for the Operative Marketing Dept. producing corporate communication publications, product catalogues, quarterly newsletter, intranet graphics and advertisements.

- Efficiently manage and coordinate design production from concept through completion.
- Work closely in team, integrating effortlessly into workflow to consistently meet deadlines
- Coordinate print production, ensuring top quality end result.

2001-2003 Tangerine Communications/WYBO, CH-8050 Zurich
Senior Graphic Designer

Individual design responsibilities

- Promotional website design for Dominick Bank, PRS Group and Tangerine.
- Assisted in the development of ABB's website.
- Promotional brochures for ABB High Voltage brochure, ABB Global Trainee Program leaflet.
- ABB Export Bank Annual Report 2003.
- Corporate identity development and brand awareness skills.

Participated in team projects to efficiently produce annual reports, quarterly financial reports and quarterly technology magazine for ABB.

2000-2001 Fruitcake, CH-8600 Dubendorf
Graphic Designer

Applied Graphic Design skills for printed publications. Main client responsibilities included:

- Marketing campaign "Der Landebote" - involved photo shoots, advertisement creation and direct mailings.
- Autonomous responsibility for AIESEC image brochure and Perfect Immobilien AG promotional brochure

1997-2000 Giraffe Designs, Edinburgh
Proprieter/Art director

Start up of Graphic Design business specialising in corporate communications. Experience gained - art direction, account handling, marketing, financial management and quality control. Major clients were Siemens, Honeywell and Scottish Power.

1993-1997 Edinburgh University, Edinburgh
Graphic Designer

Worked closely with programmers and education personnel to create graphic concepts for multimedia educational software packages. Provided materials to supplement the software packages, instruction manuals, teaching aids, and marketing materials. Responsible for production coordination.

1992-1993 Macam Photometrics, Livingston, Scotland
Desktop Publisher

Successful application based on solid artistic portfolio. Employed to design company brochure. Responsible for coordinating print production. Organised and supervised photo shoot presentation documents

1987-1992 Gregory Balkan School of English, CH-2000 Neuchatel
English Teacher

Taught English as a foreign language from beginner to advanced level.

1982-1992 Education Dept., Strathclyde Region, Scotland
Teacher

Responsible for the education of children between the ages of 5 and 12. Qualities acquired in teaching include highly developed skills in planning, organisation, multi-tasking and diplomacy.

Print Experience

Annual reports, Brochures, Direct marketing, Magazine design, Newsletters, Leaflets etc. Corporate identity – including logo creation, business stationery, visual identity guidelines and company literature.

Multimedia

Website design

e.g. www.abb.com www.dominckco.ch www.prspremchand-group.com

Educational computer programmes, Company presentation CDs,

Production Supervision

On press checking and proofing

5.2 Silvia Dicke

Curriculum Vitae

Silvia Dicke

Personal Information

Address: Tree Tops, Highlands Lane, Woking, Surrey, GU22 9PU
Phone: 01483 763 072, mob 07901753865
Date of Birth: March 27, 1966
Nationality: German

Career History

Present:

Director of Zeitenart Ltd, Woking Creative Services & training for DTP and multimedia applications

Training Consultant for web and DTP applications for Sunsol Ltd, Edinburgh

- Jan 2000 – Apr 2003 Head of Design Services
Sunsol Ltd, 52 Albany St, Edinburgh
- Responsibilities:
- training Web design and usability strategies
Management of the training department and delivery of courses
Print design & pre-press preparation
Concept development & brand creation/corporate identity
Illustration & typography for different media
Digital photography for feature images and e-commerce
- Sept 2002 – Jan 2003 Part time lecturer for electronic publishing and internet related workshops
Delivered for master students and staff of Napier University, Edinburgh
- Jul 1999 – Jan 2000 Web page designer on a freelance basis
'Electra ACT', Edinburgh
- Sep 1997 – Dec 1999 Technical support agent for Adobe software Adobe, Sykes, Edinburgh
Delivered in German, English and French
- Aug 1996 – Sept 1997 Graphic designer & video editor for SATV Video Productions, Edinburgh
- May 1996 – Sept 1996 Production assistant for two publishing companies
'Editions' & 'Time of your Life', Edinburgh
- Oct 1995 – Dec 1995 Researcher for 'Scottish Business Insider Magazine'
'Insider Publications' & 'Glasgow Enterprise', Edinburgh
- Sep 1995 Special Contract, 'National Trust for Scotland', Design Department, Edinburgh
- 1994 – 1995 Illustrator & researcher
Archives of the archaeological museum, Münster, Germany

Software Skills

Adobe Photoshop, Illustrator, PageMaker, InDesign, Acrobat, Premiere
Macromedia Fireworks, Dreamweaver, Flash, Freehand, Director
Microsoft Word, PowerPoint, Excel, Access, Outlook
QuarkXPress, C2 Content Management System, HTML

Education & Qualifications

Qualified Feb 1994	Degree in graphic design/visual communication 'University of Applied Sciences ', Münster, Germany
	Certificate of Proficiency as a graphic technician 'Laumanns Printers and Publishers', Lippstadt, Germany
1999	Adobe Certified Expert for Adobe Illustrator

Additional Experience

1991 – 1995	Lecturer for evening classes in various organisations in Germany
1994	Various exhibitions, management and participation
1994 – 2001	Layout & design for 8 editions of a local German almanac
Nov 1994	Presentation of an animation video at the 'Festival Theatre', Edinburgh

Languages

Native German, fluent English, French, Spanish, basic Dutch

References

Available on request

5.3 Ian Cargill

Curriculum Vitae

Ian CARGILL, DA PgD FCSD

Course Leader Graphic Design

Academic & Professional Qualifications

1970 DA Design & Craft, Gray's School of Art
1971 Post Graduate Diploma, Gray's School of Art

Employment Experience

1971-82 University of Aberdeen - Television Service Designer
1982-85 Design Consultant
1985-86 Creative Director, Quill Design & Marketing
1986-91 Subject Leader, Graphic Design
1991-93 Design Director, RGIT/RGU Corporate Identity Programme
1993-95 Lecturer, Visual Communication
1995-2003 Director, 50K Design Management
2003-2004 Course Development Leader in Visual Communication
2004- Course Leader BDes Hons Graphic Design

Main Subject / Interest Area

Visual Communication
Design Strategy and Management

Related Public Output

Corporate Identity Implementation - RGU
RGU University Launch Campaign
Prospectus Design - RGU 1986 - 2002
Prospectus Design - University of Aberdeen 1996 - 1999
Offshore Oil Exhibition Design - RGU 1999 / 2001
Glasgow Garden Festival - RGU Interactive Stand
Shell International - Y2K Global Campaign
Film production design - TVP Ltd
International Brochure suite - Trade Partners UK (DTI)
Corporate literature - Univation Ltd
Corporate design for:
Baker Atlas
Stewart Group
Aberdeen University
Grampian Health Board
Scottish Adoption Association
North of Scotland Teaching Co
Arts in Partnership
Aberdeen Artists' Exhibition
"Being There" Publication for GF Smith

Committees / Advisory Boards

Past

Publicity and Advertising Liaison Committee
Institute Prospectus Working Group
Information Technology Committee
Faculty Advisory Board - BSc (Hons) Architecture Review
Faculty Advisory Board - BA/BA (Hons) Publishing Studies Validation

Student Handbook Working Group
Student Recruitment & Marketing Sub Group
VLE Working Group (Current)

Research / Consultancy / Professional Practice

Past

Research:
Coordinator of Research Cluster - Design Innovation
Member of Design Cluster - Making Sense

Professional Practice:

Corporate Identity/Design Projects, including: Four Cafe Bar Projects for R Fitzgerald Associates; Ghillie and Glen, Smoked Food Exporters; Meston Reid, Accountants; M3 Associates; Leanteam Associates; Itcoa Ltd; Highland Stoneware Ltd; Halcon Ltd; UDD Ltd; Aberdeen Artists Society.

Film & Television set and graphic design for independent producers TVP and John Doran Productions; Theatre design and publicity for ARC Theatre Company and Aberdeen University. Illustration for SCM Press and Aberdeen University Press

Current

Telemedicine Research Project
"Sheepdog" Research Project

Past Chairman of Delta Group, Educational Television Association.
Past Area Chairman, Association of Educational Designers

Professional Body Membership

Fellow of the Chartered Society of Designers

5.4 Ken Gowans

Curriculum Vitae

KEN GOWANS MFA

6 Moraypark lane, Culloden, Inverness, Scotland IV2 7RJ

Experience and Skills

- Relating critical studies as the basis for art and design practices
- Practitioner in visual communications, conceptual art and interdisciplinary practice
- MFA/PhD research methodologies
- Understanding of higher education course structures and desirable learning outcomes
- Presentation skills using visual aids (Power Point) in an educational environment
- Taking the lead role in collaborative projects within the MFA course leading to highly successful outcomes for both the university and external client
- Process and rationale of curatorial practices
- Strategic planning and project management
- Artwork production utilising methodologies and methods of both traditional craft and computer (Illustrator, Photoshop, In-Design, Pagemaker, QuarkXpress, Freehand, Microsoft Word, Power Point plus a range of ancillary processing
- Operation of print-down frame, CT & contact plate making processes

Education

- | | |
|-------------|--|
| 2004 – 2005 | Master of Fine Arts Degree
Gray's School of Art
The Robert Gordon University, Aberdeen, Scotland |
| 2000 – 2001 | Certificate In Social Science
Open University
Milton-Keynes, England/Dundee, Scotland |
| 1977 – 1979 | City and Guilds Certificate In Reprographic Techniques (with Merit)
Duncan of Jordanstone College of Art
University of Dendee, Dundee, Scotland |
| 1970 – 1975 | Dundee Secondary Schools Certificate In English, Arithmetic, Physics (with Merit)
Chemistry, Geography and Technical Drawing
Stobswell Secondary School/Morgan Academy
Dundee, Scotland |

Training/Supervisory Experience

- Training entry level designers, production artists and darkroom assistants
- Supervision of all creative and support staff
- Facilitation, collaboration and supervision of externally sourced creative services
- Effective use of time management skills

Employment

2004 – 2004	Creative Director Heyday Communications, Saskatoon, Saskatchewan, Canada
2001 – 2003	Freelance Creative Director/Advertising Consultant Saskatoon, Saskatchewan, Canada
1990 – 2001	Creative Director/Advertising Consultant Gowans Design, Kirriemuir, Angus, Scotland
1988 – 1990	Creative Director Glamis Design, Dundee, Scotland
1987 – 1988	Account/Art Director Garth Parker Design, Dundee & Perth, Scotland
1982 – 1987	Senior Advertising Executive Thomson International Newspapers, Inverness & Aberdeen, Scotland
1980 – 1982	Advertising Sales Executive Highland News Group, Inverness, Scotland
1977 – 1981	Graphic Designer Tayside Health Board, Dundee, Scotland
1975 – 1977	Trainee Graphic Designer Watson & Philip, Dundee, Scotland

Personal Interests

Art, photography, music, travel and fly-fishing

Referees

Supplied upon request