

35th EMAC Conference Paper
Sustainable Market Leadership
Athens Greece, 2006, 23-26 May

Drs. Wim Jurg

Open University of the Netherlands

wim.jurg@ou.nl

Validity of Branding Constellations

An Innovative Technique to Identify Branding Problems

Track Indication

Product and Brand Management

Keywords

Market Research

Metaphor

Problem Identification

Systems Constellation

Abstract

The machine metaphor and the organism metaphor are useful systems metaphors to identify branding problems. However, these metaphors are verbal, while most of the knowledge that brand decision makers have of their brand is implicit. The branding constellation technique is an innovative non-verbal systems metaphor that might bridge this branding problem identification gap. Explorative research revealed its face validity: brand decision makers generated many new, important, actionable ideas to tackle their branding problem; besides, they consider the technique to have enhanced their brand systems thinking; and finally, they regard their branding problem clarified. This was confirmed by observing marketing experts.

1. Introduction

Garbage in, garbage out: unless marketing problems are well identified, it is unlikely that good marketing solutions are found (Zikmund, 2003). The result is a considerable marketing research waste (Gibson, 2000). However, marketing research pays little attention to problem identification (Butler, 1995). Besides, identifying marketing problems is difficult since most are *soft* or messy: they are hardly definable mismatches between what is and what could be (Gibson, 1998). Checkland & Scholes (2005) report systems metaphors are appropriate for problems of this kind. Generally, systems metaphors such as machine and organism are used to identify marketing problems, but often without realizing their limitations (Callingham & Baker, 2001). Metaphors help marketing decision makers to understand the - big - part of their preconscious experience that is not processed semantically through conscious consideration (Zaltman, 2003). Dealing with human preconscious experiences using non-verbal elicitation techniques is common practice in qualitative marketing research (Chandler & Owen, 2002). However, most problem identification techniques are verbal as brainstorming, lateral thinking, synectics, and ZMET (Zaltman's Metaphorical Elicitation Technique).

This paper presents part of a study on a non-verbal elicitation technique that uses a non-verbal systems metaphor to identify branding problems, named *branding constellation*. It focuses on branding problems as these need more attention in marketing (Lehmann, 2002). The branding constellation is directed at preconscious experiences of brand decision makers that are stored in structures like Front-Back and In-Out; structures that are often referred to as mindsets or cognitive maps (Van der Vorst, 2004). As new techniques should demonstrate their relevance to real-life problems (Checkland & Scholes, 2005), the study addressed real-life branding problems. Because new topics require support from field experts (Remenyi et al, 1999) the focus is on the opinions of marketing field experts concerning the usefulness of the branding constellation to identify branding problems. Usefulness is conceptualized as the synthesis of its reliability and its validity (Kerlinger & Lee, 2000). This paper focuses on the opinions of marketing experts regarding the validity of the technique, termed *face validity* (Aaker, 1996).

In section 2 the branding constellation process is briefly described, and section 3 covers the research method. Section 4 presents the face validity findings, and section 5 closes this paper with a discussion and implications.

2. Branding Constellations

Branding constellations apply the systems constellation group technique (Schlötter, 2005; Gminder, 2005) to identify branding problems. The branding constellation process consists of ten phases that can be identified by the mnemonic *PIPIMAVIDI*. In the *Preparation*, a brand decision maker formulates a preliminary research question on the most important branding problem, defines abstractly up to five (groups of) elements and/or persons that play a key role in the problem, and conceptualizes a modification of the brand program to tackle the problem. In the *Interview*, the brand decision maker states this question and chosen core brand factors to a facilitator and a group of 'strangers', without mentioning the brand name not to influence them cognitively. Meanwhile, the facilitator tries to ascertain whether the decision maker's bodily signals align with what he or she says. In the next phase, the *Projection*, the decision maker intuitively chooses people from this group to symbolize key factors in the problem, and positions them in the room on a place that feels intuitively right. These people are called *stand-ins*. Then there is a quiet moment to see and feel preconscious attributions, distances, and directions between these factors. This Projection constellation shows the brand decision maker a spatial metaphor of his or her perspective on the branding problem.

Subsequently, in the *Initial Questioning*, the facilitator asks stand-ins how they feel, and to whom they feel attracted or want to turn away from. In the *Modification*, the decision maker introduces a tentative change in the brand program into the constellation, such as replacing the current logo by a new one, or bringing in a line-extension. Next follows *Another Questioning*, in which stand-ins are asked if and - if so how - their emotions have changed. In the *Vision*, the facilitator and the brand decision maker find out where and under what conditions this change improves the relationships in the constellation. Finally, the brand decision maker him or herself stands in the places of the stand-ins and experiences the Vision constellation from within: the *Inside* phase. Next, group members share their experiences in a *Dialogue*. The branding constellation closes with the *Ideation* phase, in which the facilitator stimulates the decision maker to express new, actionable, leverage (small changes with big effects) ideas on how to tackle the problem.

3. Research Method

Validity is generally conceptualized as whether the subject that was intended to be measured was actually measured (Easterby-Smith et al, 2002). In this study *face validity* is addressed as the degree to which marketing experts have the opinion that the technique helps to clarify branding problems. In studies on problem identification techniques like brainstorming and synectics most often *effectiveness* and *efficiency* are used to consider their validity, interpreted as the number and quality level of generated ideas (Furnham, 2000). But consequences beyond generating ideas are stated to be important too, such as supporting organizational memory and supporting an attitude of wisdom (Sutton & Hargadon, 1999). *Good problem identification* was specified in this study as generating new, actionable, leverage ideas, and *consequences beyond generating ideas* as enhanced brand systems thinking (Osborn, 1957; Senge, 1990; Desai, 2002). Ultimately, for the branding constellation to have face validity as a problem identification technique, marketing experts should judge it positively on its ability to clarify branding problems. This resulted in three explorative study questions:

1. Do experts have the opinion that the technique helps to clarify branding problems?
2. Do they consider that it generates many good ideas on how to tackle the problem?
3. Do they think that it enhances brand systems thinking?

As experiencing generates a better understanding than reading (Miles & Huberman, 1994), marketing experts were offered the opportunity to experience the technique. The *sample method* was a combination of purposeful, experiential, and snowball sampling (Mason, 2002). Every expert who applied was welcome to join the marketing expert forum on a constellation conference, but acknowledged marketing experts were invited personally by e-mail and at marketing conferences. All were asked to bring colleagues. Besides, brand decision makers of acknowledged brands, were invited to realize a constellation. The first forum conference took place in November 2002, the second in October 2003, and the third in November 2004. As the presence of experts might influence findings (Kerlinger & Lee, 2000), three alternate settings were considered to account for this effect: the first other conference setting covered decision makers who all wanted to identify a branding problem; the second comprised decision makers in a brand lay forum; and the third employed a different facilitator. Thus, the research method was an explorative multiple case study design (Yin, 1994).

The 2004 marketing forum conference was limited to two branding constellations, as the 2002 forum conference had shown that three constellations was too much, and two was considered the minimum required, to experience a new technique (Senge, 1990). The Preparation was done by e-mail by the researcher for transparency reasons, and was kept to a minimum.

The first 2004 decision maker who applied had not experienced the technique before, but was intrigued by an article on the 2002 forum conference she had edited for her leading Marketing Magazine. She wanted to explore the need for further modifications on her recently transformed magazine. In the Preparation she identified as core decision factors: the current, modified magazine; current readers (already reading the unmodified magazine); zap-articles and well-covered articles; fast readers and serious readers as target groups; and the editing office. The second 2004 constellation was applied for by the director of a leading Training Company on work councils, who had done a constellation in 2003 on 'how customers related to her brand renaming'. She did not do a Preparation this time as she already experienced it in 2003. The 2004 forum sample consisted of 22 marketing experts who had joined a constellation conference before and 10 who had not.

This paper limits its scope to opinions as generated by a questionnaire issued directly after the constellations, an e-mail questionnaire the day after, and a personal interview with decision makers on evaluated and adopted ideas. The direct questionnaire consisted partly of open questions on ideation. First, three categories were distinguished in a content analysis on the level of branding problem clarification according to the marketing forum: *Clarified*, *Limited Clarified*, and *Not Clarified*. Next, four quality categories were differentiated in an ideation content analysis: *Good Ideas* (new, actionable, leverage), *Limited Ideas* (rather vague), *No Ideas*, and *No Answer*. The e-mail questionnaire included six scoring items (with comments) on enhanced brand systems thinking: more awareness of the branding reality, new perspective on brand element relationships, more awareness of implicit brand knowledge, clearer brand vision, more profound experience of the brand as a system, and enhanced scenario thinking (Senge, 1990; Desai, 2002). This paper focuses on the four core phases of constellations: Interview, Projection, Modification, and Vision. The opinions of the decision makers are distinguished from the opinions of the forum members as the decision makers' problems were constellated, and thus they had a different perspective on these problems. As a difference in constellation role might influence the opinions of the forum, the roles are differentiated too: *audience* (experts who observed) and *stand-ins* (experts who symbolized a brand factor).

4. Findings

First, the ideation by the decision makers is presented. Then, the forum opinions are shown on ideation. Next, the opinions on enhanced brand systems thinking are considered. Judgments on the degree that the technique has clarified the problems close this section on findings.

Ideation by Magazine Brand Decision Maker

The Interview clarified to the Magazine decision maker that directors and the 40-year-old magazine history may play a major role too. The Projection made it clear that her own editing office and the current readers have a difficult position in the brand system (Appendix 1). It also made her aware that the current leverage factor was to get a better overview of internal and external consequences of the Modification process, and to improve the relationship between the editorial office and the directors. The Vision strengthened her implicit idea of a magazine for fast readers and another for serious readers. Overall, she specified 14 good ideas in the questionnaires and 11 evaluated and adopted ideas in an interview six weeks later.

Ideation by Training Company Brand Decision Maker

The Training Company decision maker stated that she wanted to clarify an internal brand organization problem. She distinguished in the Interview as core factors: the new name; three internal 'market groups' coded 1, 2, and 3; the brand decision maker (herself); the board; and a new internal market group as a possible modification in the brand organization.

The Projection constellation helped her realize that she herself was neither focused on the new brand name nor on the board. Besides, she became aware of the positive leverage power of market group 2, and of the problematic position of market group 1 who seemed to take care of the relationship with the board (Appendix 2). The Modification constellation of a new internal market group created a powerful positive dynamic that made her confidence in her internal brand reorganization grow. Furthermore, she got a new idea on her own role as becoming more supportive, instead of more controlling. Overall, she specified seven good ideas in the questionnaires and three evaluated and adopted ideas in an interview six months later.

Ideation by Marketing Experts Forum

Tables 1 and 2 present the quantity and quality of generated ideas by the forum of marketing experts to tackle the problems of the Magazine and the Training Company respectively, as stated in the questionnaires directly after the two branding constellations.

Table 1 Quantity and Quality of Ideas Generated by Experts to Tackle the Magazine Branding Problem

Roles Phase / Quality	Audience (N=25)				Stand-Ins (N=9)		
	Good	Limited	No Idea	No Answer	Good	Limited	No Idea
Interview	72 % (18)	16 % (4)	12 % (3)	-	n. a.	n. a.	n. a.
Projection	72 % (18)	4 % (1)	20 % (5)	4 % (1)	78 % (7)	-	22 % (2)
Modification	76 % (19)	12 % (3)	4 % (1)	8 % (2)	89 % (8)	-	11 % (1)
Vision	100 % (25)	-	-	-	100 % (9)	-	-
n. a. = not available as not asked							

Table 2 Quantity and Quality of Ideas Generated by Experts to Tackle the Training Company Problem

Roles Phase / Quality	Audience (N=26)				Stand-Ins (N=8)		
	Good	Limited	No Idea	No Answer	Good	Limited	No Idea
Interview	69 % (18)	23 % (6)	4 % (1)	4 % (1)	n. a.	n. a.	n. a.
Projection	50 % (13)	4 % (1)	38 % (10)	8 % (2)	50 % (4)	-	50 % (4)
Modification	85 % (22)	4 % (1)	8 % (2)	4 % (1)	75 % (6)	-	25 % (2)
Vision	92 % (24)	-	8 % (2)	-	100 % (8)	-	-
n. a. = not available as not asked							

Tables 1 and 2 shows that especially the Vision phase generated good ideas on how to tackle the problem in both constellations for almost all marketing experts in the forum; however, most experts generated good (new, actionable, leverage) ideas in the other main constellation phases too. There neither seems to be a big difference in forum opinions between the two constellations, nor between audience members and stand-ins who symbolized a brand factor.

Enhancement of Brand Systems Thinking

Both decision makers stated and illustrated that their constellation stimulated ideas on brand element relationships, made them more aware of their implicit brand knowledge and feelings, cleared their brand vision, helped them to experience the brand as a system, and enhanced scenario thinking. Table 3 presents means and standard deviations of the brand systems thinking enhancement aspect scores on both branding constellations by the marketing forum, on a straight numerical scale from 1 (abominable) to 10 (excellent) as filled out in the e-mail questionnaire the day after the branding constellation conference.

Table 3 Marketing Forum Experts' Scores on Six Aspects of Enhanced Brand Systems Thinking

Enhancing...	Brand as Relationships	Brand Knowledge Awareness	Experiencing Brand System	Brand Reality Awareness	Brand Vision	Scenario Thinking
Mean (N=34)	8.2	8.2	8.1	7.7	7.3	6.8
Standard dev.	0.9	1.1	1.2	1.3	1.4	2.1

According to Table 3, the 32 marketing forum experts have the opinion that the branding constellations enhanced the decision makers' brand systems thinking considerably. The data show that the marketing forum experts attributed especially high scores - with high agreement - to brand systems thinking in terms of relationships between elements, enhancing brand knowledge awareness, and experiencing the brand as a system.

Level of Branding Problem Clarification

Both brand decision makers hold the opinion that the branding constellation has highly clarified their branding problem. Table 4 presents an overview of data collected from the audience of the marketing forum, showing their opinions about the level that the decision makers' problems were clarified (the stand-in experts were asked different questions here).

Table 4 Problem Clarification to Audience in Magazine and Training Company Constellation

Problem Clarification	Clarified	Limited Clarified	Not Clarified
<i>Magazine (N=25)</i>	92 % (23)	4 % (1)	4 % (1)
<i>Training Company (N=26)</i>	62 % (16)	15 % (4)	23 % (6)

Table 4 shows that 92% of the marketing forum experts in the audience role consider the Magazine branding problem clarified, while 62% felt the same about the Training Company branding problem. The experts related the fact that the Magazine branding problem was more clarified than the Training Company's to the Magazine Decision Maker's more thorough Preparation as expressed during the Interview.

5. Discussion and Implications

The findings show that it is worthwhile for brand decision makers who want to sustain brand leadership to use branding constellations to obtain many good ideas to tackle their branding problems, to enhance their brand systems thinking, and to clarify their branding problems. Similar results were found on branding constellations regarding other leading brand problems, both in the forum conferences of 2002 and 2003 as well as in the other conferences. There do not seem to be significant differences in opinions between experts joining for the first time and experts already familiar with the technique. The fact that both decision makers applied spontaneously and that 22 experts returned, and all conscientiously filled out all the direct and e-mail questionnaires again, is another indicator of its value. The technique appears to match the way marketing in general - and branding in particular - is already accustomed to thinking in terms of brands-as-people (Seguela, 1982; J. Aaker, 1997). Besides, it seems to fit the plea to generate more scientific insights about brand decision makers' minds on soft, ill-structured branding problems (Zaltman, 1997; Hackley, 1999). For instance, all branding constellations seem to underline the role of the brand decision maker as a spider - or fly - in an internal and external web (Panigyrakis & Veloutsou, 2000).

Though face validity is generally considered as the lowest form of validity, it is an important first validation step (Shocker & Zaltman, 1977; Sykes, 1991). Next, a more conclusive study would consist of an experiment in which problem identification using branding constellations is compared with using other branding metaphors and/or problem identification techniques as brainstorming, lateral thinking, synectics, and ZMET. As Zaltman (1997b) states that the frontiers of scientific knowledge are found especially at the intersections between fields, connecting the technique to science know-how on for instance brain theory, branding theory, and creativity theory may broaden its understanding and development. Given the challenges and opportunities affecting brand management (Shocker, Srivastava, and Ruekert 1994; Panigyrakis & Veloutsou, 2000), the future for research in this area seems promising.

Appendix 1: Projection Phase in 2004 Magazine Branding Constellation

To give the reader an impression on how branding constellation work, this appendix presents some explorative relationships between the picture of the Projection constellation, evoked emotions in the stand-ins, and generated ideas on the Projection constellation as mentioned by the Magazine brand decision maker in the questionnaire directly after the branding constellation.

In her Projection phase, the Magazine brand decision maker positions one by one the stand-ins in the room that she has chosen for Current readers (C), Directors (D), the Editorial office (E, the office to which the brand decision maker belongs), the 40 year-old existing Magazine (M), the Reformed magazine (R), Well-covered articles (W), and Zap-articles (Z).

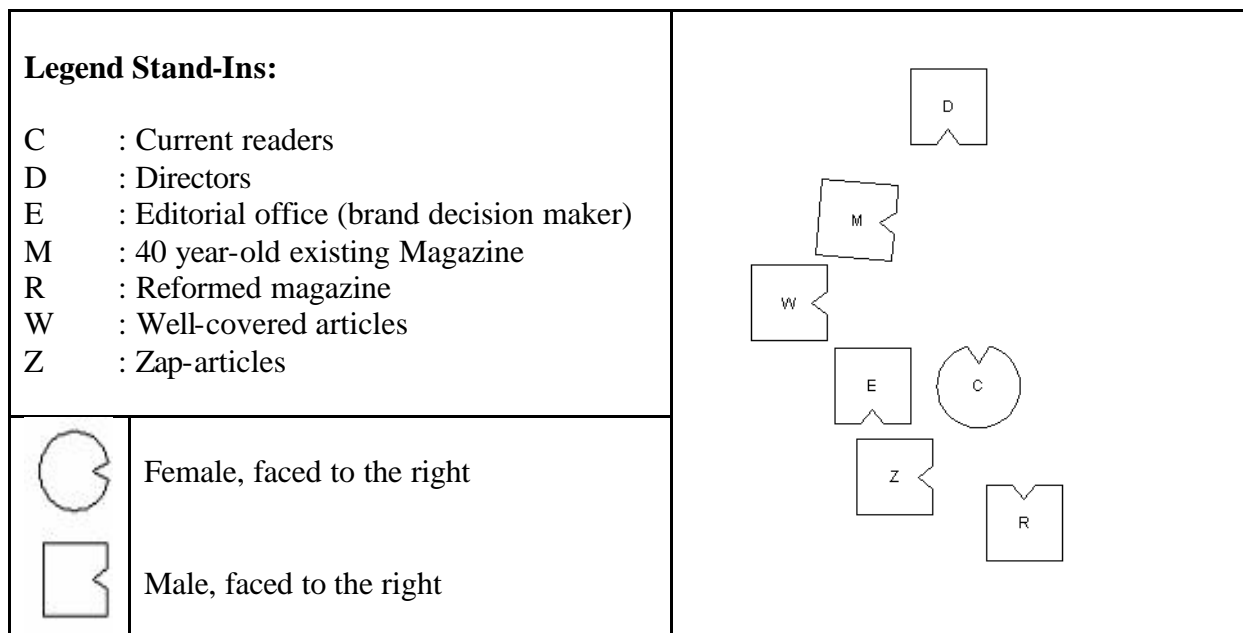


Figure 1 Projection Constellation of Magazine Brand Decision Maker

The stand-in of the Editorial office (E) and the stand-in of the Current readers (C) do not feel at ease in the Projection constellation. The stand-in of the Editorial Office (E) feels blocked by the stand-in of the Zap-articles (Z), and does not have an overview of the situation from this position. Both the blocked feelings as well as the lack of personal overview are recognized by the Magazine brand decision maker.

Besides, the stand-in of the Directors (D) can hardly see the stand-in of the Reformed Magazine (R). The stand-in of the Current readers (C) feels in the way of the stand-in of the Directors (D), and experiences the stand-in of the Reformed magazine (R) behind her back. This might have made the Magazine decision maker aware of the improvable relationship with the current readers and with the directors on the transformation of the Magazine.

Appendix 2A: Projection Phase in 2004 Training Company Branding Constellation

To give the reader an impression of how constellations develop, Appendix 2A and 2B show some explorative relationships between the development of the Projection constellation picture, evoked emotions in the stand-ins, and generated ideas on the Projection constellation as stated by the Training Company brand decision maker in the questionnaire directly after the branding constellation.

First, the Training Company decision maker positions the stand-ins of the Brand name (BL), the stand-in of her own function, the Director (D), and the stand-in of the High board (H).

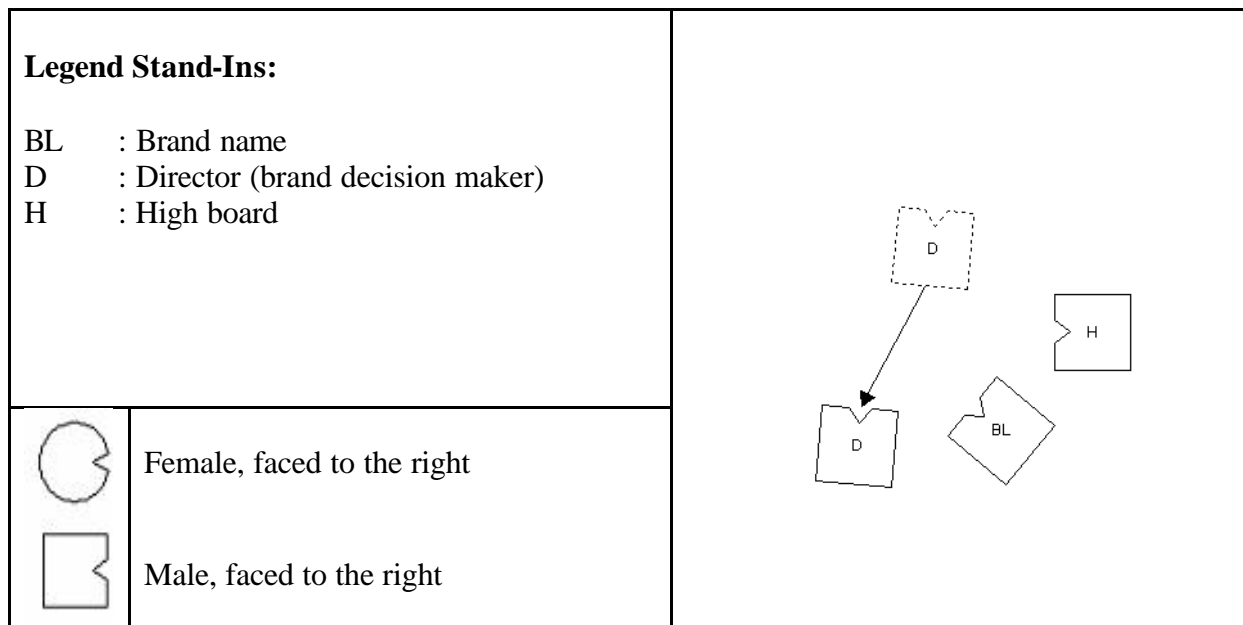


Figure 2 Initial Projection Constellation of Magazine Brand Decision Maker

As their mutual positioning does not feel right for these three stand-ins, the facilitator asks the stand-in of the brand decision maker (D, the Director) to do a big step backwards, which feels better for all three stand-ins. This Projection might have shown the Training Company decision maker that she needs to have more attention for the brand name and the high board.

Appendix 2B: Projection Phase in 2004 Training Company Branding Constellation

Next, the Training Company brand decision maker positions the three internal market groups (M1, M2, and M3) in relation to the three already placed stand-ins.

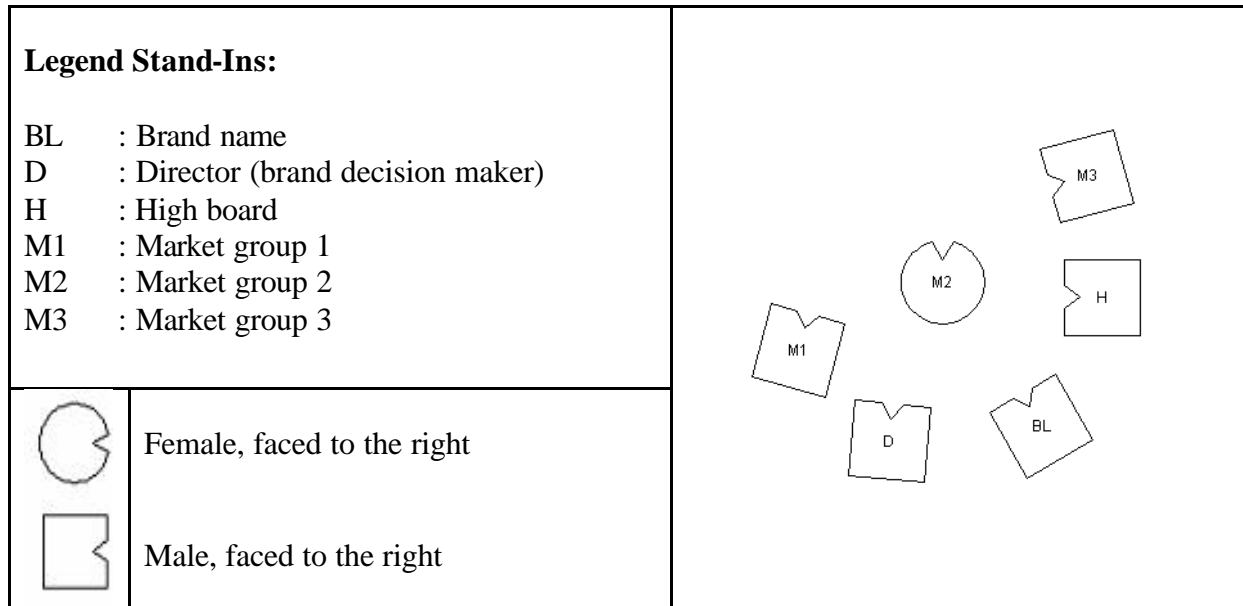


Figure 3 Complete Projection Constellation of Magazine Brand Decision Maker

The stand-in of internal Market group 1 (M1) feels unhealthy responsible for the relationship with the stand-in of the High board (H). This is recognized by the Training Company brand decision maker.

The stand in of internal Market group 2 (M2) is the only female in the group of stand-ins. This stand-in is positioned by the Training Company brand decision maker on the place the decision maker had just before put the male stand-in of her self (D). This part of the Projection constellation might have clarified to the Training Company brand decision maker the internal leading role she might attach to market group 2.

The combination of these two might have generated the idea to the Training Company brand decision maker of becoming more supportive, instead of more controlling, towards the internal market groups.

References

- Aaker, J. L. (1997), Dimensions of brand personality, *Journal of Marketing Research*, Aug97, 34 (3), 347/56.
- Arndt J. (1985), On Making Marketing Science More Scientific: Role of Orientations, Paradigms, Metaphors, and Puzzle Solving, *Journal of Marketing*, Summer85, Vol. 49 Issue 3, 11-23.
- Butler P. (1995), Marketing problems: From analysis to decision, *Marketing Intelligence & Planning*, 12 (2), MCB University Press Limited 4-12.
- Callingham M. & T. Baker (2001), An innovative unified brand and market measurement system for strategic investment decisions, *International Journal of Market research*, 43 (3), 291-320.
- Checkland P. & J. Scholes (2005), *Soft Systems Methodology in action*, John Wiley & Sons, Chichester / New York / Brisbane / Toronto.
- Desai P. (2002), Methods beyond interviewing in qualitative market research, Book 3 in G. Ereaut, M. Imms, & M. Callingham (eds), *Qualitative Market Research*, (7 volumes), London, Sage.
- Downs R. M. & D. Stea (1973), *Image and environment - Cognitive mapping and spatial behavior*, Aldine Publishing Company, Chicago.
- Easterby-Smith, M., R. Thorpe & A. Lowe (2004), *Management research - An introduction*, SAGE Publications, London / New Delhi / Thousand Oaks, Second edition.
- Gibson L. D. (1998), Defining marketing problems, *Marketing Research*, 10 (1), 4-12.
- Gibson L. D. (2000), Quo Vadis, marketing research?, *Marketing Research*, 12 (1), 36-41.
- Gminder C. U. (2005), Using the management constellation as tool for corporate sustainability, *International congress and innovation fair "Sustainable management in action"*, University of Geneva, 19 - 20 September.
- Hackley C. E. (1999), Tacit knowledge and the epistemology of expertise in strategic management, *Journal of Marketing*, 33 (7/8), 720-735.
- Kepner C. H. & B. B. Tregoe (1965), *The rational manager - A systematic approach to problem solving and decision making*, McGraw-Hill Book Company, New York / San Francisco / Toronto / London / Sydney.
- Kerlinger F. N. & H. B. Lee (2000), *Foundations of behavioral research*, Fourth Edition, Thomson Learning, Wadsworth.
- Lakoff G. & M. Johnson (1999), *Philosophy in the flesh - The embodied mind and its challenge to Western thought*, Basic Books, New York.
- Lehmann D. R. (2002), What's on marketers' minds?, *Marketing Management*, Nov/Dec, 11 (6), 16-20.
- Mason J. (2002), *Qualitative researching*, Second edition, SAGE Publications, London/New Delhi.
- Miles M. B. & A. M. Huberman (1994), *Qualitative data analysis*, SAGE Publications, London/New Delhi.
- Morgan G. (2005/1943), *Images of organization*, Sage Publications, Thousand Oaks, California.
- Osborn A. F. (1963), *Applied imagination - Principles and procedures of creative problem solving*, Third revised edition, Charles Scribner's Sons, New York.
- Panigyrakis G. G. & C. A. Veloutsou (2000), Problems and future of the brand management structure in the fast moving consumer goods industry, *Journal of Marketing Management*, 16 (1-3), 165-184.
- Remenyi D., B. Williams, A. Money & E. Swartz (2005), *Doing research in business and management - An introduction to process and method*, SAGE Publications, London/New Delhi.
- Schlötter P. (2005), *Vertraute Sprache und Ihre Entdeckung - Systemaufstellungen sind kein Zufallsprodukt - der systemische Nachweis*, [Trusted speech and its discovery - System constellation are no coincidence product], Carl Auer Verlag, Heidelberg.
- Seguela J. (1982), In which the brand-object becomes the brand-person, *Journal of Advertising*, 1, 169-176.
- Shocker A. D., R. Srivastava, & R. W. Ruekert (1994), Challenges and opportunities facing brand management: An introduction to the special issue, *Journal of Marketing Research*, May94, 31 (2), 149-158.
- Sireci S. G. (1998), The construct of content validity, *Social indicators research*, 45 (1-3), 83-117.
- Sutton R. I. & A. Hargadon (1996), Brainstorming groups in context: Effectiveness in a product design firm, *Administrative Science Quarterly*, Dec, 41 (4), 685-718.
- Sykes W. (1991), Taking stock: issues from the literature on validity and reliability in qualitative research, *Journal of the Market Research Society*, 33 (1), 3-12.
- Van der Vorst R. (2004), *Branding - A system theoretic perspective*, Amsterdam.
- Yin R. K. (1994), *Case study research design and methods*, Sage Publication Thousand Oaks, London, New Delhi.
- Zaltman G. (2002), Hidden minds, *Harvard Business Review*, 80 (6), 26-28.
- Zaltman G. (1997a), Rethinking market research: Putting people back in, *Journal of Marketing Research*; 1997, 34 (November), 424-437.
- Zaltman G. (1997b), Breaking out of the box: Meaning and means, *Advances in Consumer Research*; 1997, 24 (1), 12-14.
- Zaltman G. (2003), *How customers think*, Harvard Business School Press, Boston, Massachusetts .
- Zikmund W.G. (2003), *Essentials of marketing research*, Thomson South-Western, Mason, Ohio.