Designing Brand Evolution Strategies:

Co-creating sustained brand value and holistic experience with consumers.

By

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Abstract:

In a progressively digitally interactive society, the relationship consumers have with brands is shifting, requiring a deeper understanding of how to co-create brand meanings with consumers. Consumers are utilizing social media to share their experiences with brands, often derailing carefully crafted brand messages. It is becoming increasingly important for brand managers to learn how to effectively evolve their brand to maintain relevancy and flexibility in this ever-changing atmosphere.

Understanding consumer perceptions and touchpoints of brand interaction will help brand managers design effective brand evolution strategies. Several theoretical models are examined to help describe the complex system of interactions, particularly those involving virtual experiences. Introduced to help frame this understanding is a new model of the "Brand Interaction Space", which acknowledges that brand meaning and experience is a co-created construct between the organization and the consumer. Through co-creative strategies, brand managers can work with consumers to develop a symbiotic partnership in which both parties derive enhanced brand value.

Incorporating "designerly" methods into the brand management structure, as well as creating a centralized brand team to serve as a connective force within the organization, will help align organizations holistically to fulfill a shared vision and brand promise. A heuristic process for implementation is presented.

Key words: Brand, Brand Interaction Space, Co-creation, Evolution, Digital, Social Media, Design, Strategy

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Writing a thesis can be a lonely activity; hours spent silently pouring over research, tapping away at the keyboard late at night, attempting to drag thoughts out of the depths of your brain, while the world carries on around you. It is lonely, but one never completes this endeavor alone.

Bearing that in mind, I would like to express my most sincere gratitude to the following people:

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Introduction:

It is becoming apparent that with the advent of increased connectivity and communication, brands can be rapidly damaged due to the lack of responsiveness on the part of brand management teams. Brand messages are struggling to resonate with the ever more sophisticated consumers who have elevating expectations and are not shy about expressing their opinions in public forums. This unsolicited public review is confusing perceptions of the brand and is often contradictory to the carefully crafted advertisements and brand messages that are tightly controlled by brand managers. "Brand-building" is typically approached though a "copy-paste" consistency method, which is causing brands to be static, unengaging and irrelevant to consumers. Furthermore, consumers' trust in brands has eroded as more corporations are seen as faceless, selfish entities. There is a distinct need for brand management to adopt new methodologies to brand-building and brand strategies in order to respond proactively to these influences.

This paper explores "Designing Brand Evolution Strategies" and the critical importance a brand evolution strategy has on co-creating sustained brand value and holistic experience with consumers. It proposes that a brand is an interaction system between organizations and consumers that needs to be an evolving system, which expresses core values and meanings that resonate with consumers, and is directed by way of symbiotic, co-creative partnerships. A new model is introduced to help frame an understanding of the Brand Interaction Space, as well as a heuristic framework for implementing new brand strategy methodologies into organizations. Trained as a designer, the author recognizes the value of "designerly" skill-sets and abductive thinking in the process of developing brand evolution strategies that are consumer-centered and holistically aligned with the organizational objectives.

The research approach utilized is an adaptation of Hugh Dubberly's "model of the creative process" (Dubberly, 2009a), Fig 1. This is an iterative process of observing what is occurring in the situation, reflecting on these observations generating an analysis of the situation, and then designing a response to the analysis. This research makes use of literature review and personal interview to gather relevant perspective in order to synthesize analysis and produce insight.
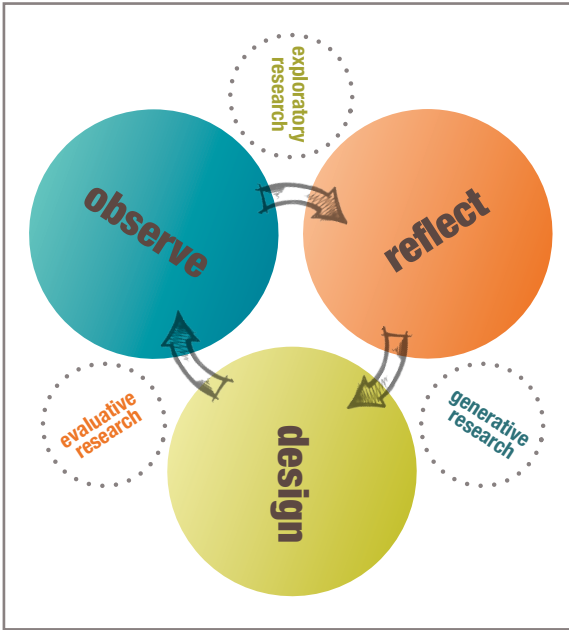
Figure 1: Creative Process model, adapted from Hugh Dubberly

The first section, *Mapping the Terrain*, outlines the situation brands are facing today. Observed are the changing dynamics of brand value and digital infusion as well as the affects these dynamics are having on brands. Challenges presented by these dynamics are reflected upon. Through design thinking these challenges are reframed into opportunities within the situation brands are facing.

The second portion, *Modeling the Interaction*, examines the definition of brand evolution and co-creative partnerships. Theoretical concepts relevant to understanding the interactions that impact consumer perception about and experiences with brands are surveyed. A new model is introduced to represent the existence of a Brand Interaction Space, in which brand experiences and meanings are co-created between the organization and consumer. This model is beneficial to visualizing the interaction of brand touchpoints and experience spaces.

Lastly, in *Implementing New Methods*, this paper addresses the integration of brand evolution and co-creative principles into an organization. Barriers to implementation are discussed. Abductive thinking, the impact of a "designerly" approach, and creation of a learning organization are proposed as tactics to address the barriers and new obligations of brand management. To conclude, a process framework is outlined for the implementation of integrating new approaches to designing brand evolution strategies into an organizational structure.

Section 1: Mapping the Terrain

1.1 Observe

So, Who Needs Brands These Days?

We are all aware by this point that brands are a source of intangible value that can yield significant consumer loyalty, market position and financial rewards. CEO's and marketers alike push "brand building" as a critical strategic endeavor. But in general brand managers seem to be having trouble maintaining control over their brand's reception by consumers. Traditional marketing and brand-building techniques, such as conventional advertising and brand messaging, are failing to engage consumers and have impact on consumer behavior. The lauded benefits of a brand: trust, differentiation, memorability, increased financial returns, and positive, intangible qualities, seem to be losing their shine. Consumers now regard brands with skepticism, indifference, and anticipation of empty promises.

Some organizations are able to continue to deliver on the expectations of their brand and are earning great rewards from this success. Apple's brand valuation grew 130% within a 12-month period to surpass other tech leaders such as Google, Microsoft, and IBM. This happened concurrently with the loss of their "Visionary Leader" Steve Jobs, the introduction of the Kindle Fire, thought to be a stiff rival to the iPad, and lukewarm reviews of the "new iPad" (Wild, 2012). Yet still, when the new iPad was released, there were lines out the doors and loyal consumers craved the latest Apple product. This is impressive to say the least, but one has to wonder if this trajectory can continue and how long can the Apple brand sustain its perceived and financial value.

One of the key traits of the Apple brand is its successful relationship with consumers. Relationships between brands and consumers today tend to be superficial and impersonal, making an emotional commitment from consumers for a brand hard to achieve. "(Brands) do very little… to create a co-equal, honest relationship that feels personally and not algorithmically generated" (Hanft, 2012). Mass marketing efforts lack a direct impact on individual consumers and do not feel personalized enough to warrant a loyal commitment.

Consumers are harshly evaluating the value equation offered by organizations through their brands compared to their expectations. Brands that have trouble creating an emotional connection with consumers are at risk of abandonment by their consumer-base.

Infusion of Digital Media

From Facebook to Twitter, blogs, Pinterest, and Amazon reviews, anyone who can connect to the Internet can find a public forum to express their opinions. As simple as a "like", "retweet" or pin, or as elaborate as an amateur restaurant review evaluating environment, service, cost as well as the meal, consumers have appropriated the medium as a means to inform and share their experiences with products, services and the brands that represent those offerings. Hoffman & Novak describe this new communication model as being many to many (as cited by Varadarajan & Yadav, 2002) with both organizations and consumer-users sharing information. Through this activity, consumers are becoming more active and taking control of information available to other consumers, as well as providing feedback to organizations about the brand actions and product satisfaction:

> The ease with which buyers can spread the word about a firm (both favorable and unfavorable) has spurred a new type of buyer activism. Buyers are sharing experiences with one another and, increasingly, expect that firms will pay attention and respond appropriately (Varadarajan & Yadav, 2002, p. 308).

According to a survey of 672 companies across 10 sectors conducted by Interbrand, 68% of firms believed that they are ahead of the curve when it comes to their digital strategy, although 56% of those companies lack a social media policy. Additionally, a quarter of respondents do not solicit feedback from consumers to inform strategies for digital experiences. Finally, only 53% are monitoring for negative messages about their brand (Mancini, 2012). A 2010 Nielsen study of Global Trends in Online Shopping indicated that 41% of online shoppers would share negative experiences or product reviews in online forums ("Global Trends in Online Shopping," 2010), which further warrants the need for disciplined brand management in online media. It seems that many organizations are not

only lacking control of their brand presence in digital media, they are likely unprepared to fully utilize the potential for partnerships between brands and consumers and the benefits of these relationships.

On September 18, 2011, Netflix announced that it would be dividing its DVD-based business from its streaming service into a new brand called Qwikster. This action had been preceded by a price hike of 60% just a few months prior. While the price hike received approximately 12,000 comments about the action, the response to the Qwikster announcement was considerably greater: within 24 hours Netflix's comment section of its blog had received 24,000 new postings, the most popular of which were generally negative in nature, consisting of promises to cancel and tones of hatred. An analysis of the nearly 90,000 tweets posted in the first 24 hours after the announcement showed 43% were negative, and only 12% agreed with the decision. Further analysis of these tweets provided information about how the explanation of the decision was perceived, opinions about the name "Qwikster", and the disapproval of the service split (Carr, 2011). Less than a month later, Netflix announced that it had decided to abandon the split and would keep the services provided together under the Netflix brand.

In July, prior to the price increase, the stock price was trading on the NASDAQ index at approximately $305 per share, and although the increase caused the stock to begin a downward fall, following the announcement of Qwikster the stock tumbled to about $130 and continued the downward trend, bottoming out at $63.85 on November 25, 2011 (Netflix.com, 2012).

Netflix, considered a brand success by many, failed to utilize their consumers to gain feedback about these decisions and broke the trust that the consumers had in the organization, leaving the door open for other competitors to gain ground. Through the use of social media, disappointed consumers were able to immediately express their frustrations and aggregate into a collective mass that Netflix could not ignore. Consumers were no longer silent individuals quietly defecting, the results of which would have been

seen some time later; they were vocal and active, telling Netflix exactly what they thought; demanding immediate action and inciting others to do the same.

This cooperative effort from consumers is just one of the ways that utilization of the Internet has shifted the power from brand messages to consumers. Another effect is the ability for consumers to easily find real time comparisons. Due to the ubiquitous nature of mobile devices, consumers are able to wander into a retail outlet for the physical experience of shopping but instantly compare the price and selection to online sources, scouring for a better price, inventory or product feature. According to a study by the Pew Research Center's Internet & American Life Project, in 2011 half of all holiday shoppers who owned cell phones utilized their cell phone in-store to aid their purchase decisions. This included calling a friend, checking product reviews and comparing prices with online resources (Smith, 2012). Retailers are forced to choose between matching a lower price and losing a sale all together. Dubbed 'showrooming', this behavior is leading to attempts by brick-and-mortar retailers to pressure vendors into providing distinct offerings for each channel or to aid in price matching against online retailers (Zimmerman, 2012). Brands and retailers alike are failing to create meaningful shelf impressions that create confidence in the consumer's mind that she is getting the best possible offering at a competitive price. This effect is not just limited to retail shopping experiences, it is also apparent in services since a consumer would be able to utilize her mobile device to seek out different service providers or compare reviews on the fly.

Geographic boundaries are also being broken down as consumers can shop globally with a few clicks in a search bar. Zia Daniell Wigder, a senior analyst with Forrester Research, relates that by 2010 one-quarter of the U.S. population had ordered online from international sources (as cited by Deveau, 2010). The ease of access to brands that consumers previously would not have interacted with allows the consumer to find products and services that they truly desire and are the best match for their unique preferences. Niche providers are able to connect to a widely distributed audience in order to provide well-matched offerings for individuals (Varadarajan & Yadav, 2002), while large brands are forced to create an offering that appeals less specifically but to a mass

market. Consumers can now afford to be selective of the brands they decide to affiliate with, and utilize the symbolic meanings of their choices to build a unique personal identity. They are not just another number in the mass, but an individual who is joined with like-minded individuals to form a collective group of enthusiasts.

Pinterest, a social media site where users "pin" images to categorized pinboards, allows users to display products and ideas that they like and have already, through the act of a public display, decided to affiliate themselves with. A "Pinner" can follow other users' boards and in turn be followed by others who share similar preferences. Products displayed on pinboards have effectively received an endorsement, and are often quickly dispersed throughout both a close social network since friends often follow each other's boards, and a disconnected user group, who happen upon posted images and then choose to connect by following a board or user. Many of the images are sourced from blogs, creating a double-layer of endorsement (the blogger, who often claims some degree of expertise, and the pinner). As users tend to only post things they like, they can quickly find social affiliation with other users who share preferences. The wide geographic breadth of Pinterest users allows for the possibility to loosely connect globally with individuals who share interests and preferences. This connection unlocks access to brands previously limited to smaller geographic regions, which allows for the discovery of brands that an individual may have never have been exposed to, but for which they could already have a preference.

In February 2012, Shareaholic provided data that demonstrated that Pinterest drove more traffic to third-party sites than Twitter, despite Twitter having ten times more users (Aronica, 2012). Pinterest, as a service provider, declares it is their mission "to connect everyone in the world through the 'things' they find interesting. We think that a favorite book, toy, or recipe can reveal a common link between two people…Pinterest is connecting people all over the world based on shared tastes and interests" (Pinterest, 2012). However, this mission coupled with user-generated content positions the brand Pinterest in strategic position to provide insight in consumer preference and patterns of interest.

Finally, what happens when a consumer is unable to find an offering or brand that they feel is a good match for them? This is where brands that allow consumers to co-create their products or experience have found success. Dubbed by Jenny Floren as the "Innovation Generation," Millennial consumers have a strong natural desire to be creators. Facing a difficult economic situation with limited job options, Millennials are significantly more likely to decide to be entrepreneurs and create their own business (Floren, 2010). It will be imperative for brands to develop strategies that are flexible and incorporate a co-creative partnership with these young consumers in order to deliver brand experiences that resonate with their values. According to Hoffman and Novak, organizations should be seeking a "communication environment where a meaningful, more interactive conversation with customers becomes possible" (as cited by Varadarajan & Yadav, 2002). These conversations hold the possibility of insight into unmet user needs, rapid feedback about new concepts and creating a more customized experience with consumers (Varadarajan & Yadav, 2002). Due to the relatively low cost to reach out to consumers and establish a dialog within the digital domain, it is foolish for brand managers to ignore the opportunity to utilize this relationship.

1.2 Reflect

The Challenges Facing Brands Today

With consideration of the topics previously discussed, three main factors are currently providing challenges for brand management: consumer perception and expectation, connectivity and access, and management of holistic experience and meaning.

Consumer Perception and Expectation

According to John Gezerma and Ed Lebar, brands are struggling to bridge a gap between the financial value that Wall Street has assigned to them and the perceived value consumers see in a brand. While brand value's contribution to shareholder value has increased from 5% to 30% over the past thirty years, perceived value from a consumer's view has dramatically decreased. Factors such as trust, likeability, and awareness have dropped by 50%, 12% and 20% respectively over the past 9-13 years. Even perceived

quality, the base level expectation of a branded offering, has dropped by 24% over the past 13 years (Gerzema & Lebar, 2008). While many marketers and CEO's are pushing the brand bandwagon, expressing that they see "brand building" as one of the most strategically critical components to creating sustained value for an organization, it appears that consumers are not finding a platform they desire to join. They are increasingly susceptible to offerings from other organizations and more distrusting of advertisements and marketing messages, making the establishment of consumer loyalty even harder to achieve than it has been in the past.

"Brand credibility refers to the extent to which the brand as a whole is perceived as credible in terms of three dimensions: expertise, trustworthiness, and likability" (Hoeffler & Keller, 2002). As reflected by Gezerma and Lebar, trustworthiness and likability values have decreased, challenging an organization's credibility. They describe the source of "consumer malaise" in terms of three factors: excess market capacity (too many choices), lack of creativity (not differentiated enough), and loss of trust. Brands, like Apple, who have succeeded in overcoming these three components have a forward moving "energy" that generates significant consumer interest and loyalty (2008).

Part of the complication of overcoming consumer malaise is that consumer expectation continues to increase. Consumers seem to naturally expect the grass to always be greener, and are prepared to abandon brands that fail to deliver new value. Consistent and continuous delivery of new value, in the form of offering innovations, is expensive and difficult to sustain. However, brand management that creates a perception of the ability to consistently create new value can help a brand weather the spaces between new offerings or missteps. Defining credibility further, Keller and Aaker (1992, 1998), include the "extent to which consumers believe that a company is willing and able to deliver products and services that satisfy customer needs and desires" (as cited by Keller & Lehmann, 2006). The credibility of these perceptions and beliefs about a brand create brand equity that is reinforced by the networked associations of memorable brand interactions, (Erdem & Swait, 1998), which can be derived from both tangible and intangible sources. Brands can be utilized as signals to consumers about market position and credibility of product

claims (Erdem & Swait, 1998). Strong brand equity can yield significant value to organizations through the sustained interest and loyalty of consumers (Keller, 1993).

Brands often rely on creating desire through emotional connection and tapping into the consumer's idealized self. "The common ground among companies that have built great brands is not just performance. They recognize that consumers live in an emotional world. Emotions drive most, if not, all of our decisions" (Webber, 1997). With individuals relying on emotional feelings to help guide their selection, it is necessary for a brand to build trust with the consumer so that they will feel secure with their choice and continued loyalty. A brand that fails to deliver on expectation, fails to renew the consumer's trust. "Trust is a function of the brand messaging lining up with the consumer's actual interaction with the product or service" (Prahalad, 2011). This trust is also a result of the consumer's perceptions of the brand and supporting organization as a whole, including corporate practices and social responsibilities.

Because of transparency provided by increased access to information, business actions serve as signaling methods to consumers and reflect on the authenticity of a brand's meaning. These signals should reflect the core values espoused by the organization and be in harmony with brand messages in order to build trust with consumers. Reflecting about expectations for brands in 2012, Interbrand observes that consumers and brands are both coping with difficulties presented in uncertain economic times:

> The worldwide economic downturn, exacerbated by governmental
> ineffectiveness and corporate misdeeds [has] shaken consumer trust in
> large institutions, including those companies that manufacture and sell
> national brands. People…are asking questions…about the companies, stores
> and brands they patronize: 'how are my favorite brands conducting
> themselves in the marketplace? Where are they sourcing raw materials?
> How socially and environmentally responsible are they?' Brand behavior will
> be held accountable, and consumers will vote with their wallets. (2012, p. 4).

If the corporate practices are misaligned with the public expectations of the brand, it becomes difficult for trust to form. Consumers who decide to be loyal to a brand want to

have a sense of sustainability in the brand's future existence, as well as feel that the brand is socially responsible. New and existing brands are finding that consumers expect to align themselves with brands that share their core values, and they are holding brands accountable for their actions, particularly in uncertain times. Speaking to the creation of new brand concepts, Jonathan Ford, Creative Partner of Pearlfisher Design, says, "Brands should think about how they fit into the broader culture and society" (2011). Other signals that consumers are paying attention to include the work culture of the organization, working condition of manufacturing partners, and ecological impact.

Connectivity and Access

Characteristics of the challenge brands face in the area of connectivity and access concern the ubiquitous nature of information and bridging of distant spaces through digital media. Social connectivity enhanced through digital means is influencing the spread and sharing of brand information.

Smart phone usage is projected to penetrate just under half of the US population by 2015, over 156 million individuals (eMarketer, 2011). Its ever-present nature lends the mobile phone to being a centralized source for information gathering and social connection. This access, anytime-anywhere, has profound influence on the behaviors of consumers. They are able to check and compare offerings very easily and inexpensively. They are able to negotiate pricing in-store or order and have the offering delivered in little to no time through overnight shipping or direct download. Consumers are able to utilize peer review to determine the quality of offerings, and if this review is directly linked to a peer-social group then the consumer can evaluate how the offering compares to their social identity.

Social media also allows consumers to share their own experiences with brands in a quick, efficient manner. Many purchases are being publicized on social media websites, encouraging others within the social network to make the same purchase. This publicized consumption forces a consumer to consider if the perception of the brand is in alignment with the values of her social reference group. In a report released by Vivaldi Partners, "social currency" describes this level of sharing of brand information throughout social

networks within the everyday lives, which emphasizes the need for brands to be relevant and have engaging experiences that individuals want to share (Joachimsthaler, 2010). Having a high-level of social currency would indicate that a brand has managed to insert itself within the everyday narrative of consumer's lives.

Being connected through the Internet allows consumers to shop globally, creating more competition and more opportunity for a consumer to select an alternate offering. A consumer can search easily for a brand or product that truly connects with them rather than a mass-market offering. This, however, is a source of increased competition and excess capacity. Brands need to create differentiation to establish a distinct place in the market, but can also provide a heuristic to aid in the consumer's choice.

Constant contact through online advertisement and emailing can create consumer boredom. They may find the daily offers to be annoying and cluttering their lives. It becomes easier to ignore brand messages when consumers are so frequently exposed to them. According to Haque, "the cheaper interaction gets, the more connected consumers can talk to each other — and the less time they have to spend listening to the often empty promises of firms" (Haque, 2008). Consumers are becoming better equipped to filter out messages that have no meaning or relevance in their life. Because of the increased quantity of these messages, it seems that these filters have become more precise and focused requiring more individualized levels of message nuance to make an impact.

Holistic Experience and Meaning
Creation of holistic experiences and meanings throughout the brand experience space and organizational system add further complexity to brand management. Every touchpoint for a brand-to-consumer interaction is an opportunity to exhibit brand values and reinforce meaning. This should include all aspects of service, product, and experience. In an article entitled Missed Opportunities, Yohn illustrates that beyond the commonly acknowledged brand touchpoints, such as packaging, websites and advertising, brands actually have hundreds of touchpoints in which consumers can interact. While at Sony, she identified over 240 touchpoints. Further she relates that these more subtle touchpoints offer

valuable opportunities to send brand messages that "reflect the core values of the brands and convey a sense of the brands' personalities" (Yohn, 2011).

Holistic alignment of brand meaning provides stability in consumers' perceptions that allows brands to generate new methods of conveying meaning and providing satisfaction to consumers. Rockwell interprets brand meaning as resulting from the outcome of brand interactions. Consumer satisfaction is based in the experiential outcome of a brand interaction framed within individual expectations of the interaction with brand touchpoints (Rockwell, 2008). Brands need be consistent in all realms of experience, physical as well as virtual, providing experiences that are equally rich in engagement. Brands that do not invest in creating holistic online experiences are missing an opportunity to create more value and enhanced consumer experience.

Businesses should strive to align their internal values with their external publicized brand values. For example, brands that espouse socially conscious positions such as ecologic sustainability, but are found to have a parent organization that does not actually maintain sustainable practices, are creating a misaligned message and will appear inauthentic to consumers. Corporate Societal Marketing (CSM) programs are being utilized to connect with consumers on a more emotional level through participation in activities that connect brands to the societal needs that exist beyond the needs satisfied by a product or service offering. According to Hoeffler and Keller, CSM programs are being initiated because organizations are beginning to understand that a "consumers' perceptions of a company as a whole and its role in society can significantly affect a brand's strength and equity" (Hoeffler & Keller, 2002). Association with a social cause can help emphasize a brand's commitment to shared values and connect with consumers in a deeper more meaningful way.

Finally, regarding the delivery of new value to consumers, brand strategy and innovation strategy need to be in holistic alignment to have a consistent brand journey. Organizations who innovate without synchronicity to consumer perceptions about the brand risk the possibility of leaving their loyal consumers behind or breaking their trust. Brand strategy can inform innovation strategy by providing a visionary framework that is based in

consumer insights and co-created brand meanings. Innovation that is in alignment with brand strategy provides the much-needed new value that maintains consumer interest. As described by Abbing and Van Gessel, providing innovative offerings and value fulfills a brand promise, but for the innovation to be most impactful it needs to be focused and have direction that enforces the consumer's perceptions about the brand (Abbing, 2008). Understanding the latent perceptions and meanings of a brand from a consumer's perspective as derived through their interactions with touchpoints, helps the creation of brand evolution strategies that aren't out of sync with the values most cherished by consumers.

When we put these factors together the challenge facing brands is that they need to possess the ability to remain relevant and provide sustained value for both the organization and the consumer. This is, perhaps, the age-old challenge that brands always face, but if this challenge is reframed, it will highlight a few key requirements for future brand management.

1.3 Design
The Opportunity Offered to Brands Today
As a "designerly" approach, these challenges can be reframed as opportunity for brands, specifically the opportunity to remain relevant by providing sustained value for both organizations and consumers by designing brand evolution strategies through co-creative user partnerships.

In order for a brand to remain relevant it needs to be a continuously evolving system. By designing a brand evolution strategy, a brand can adapt to the changes that occur in the social and cultural context in which it exists, but do so within a consistent framework of core values and meanings that resonate with consumers.

Larry Keeley describes brand relevance as "the degree to which the brand has somehow managed to find a dimension of everyday life that some people care about deeply" (Keeley,

2001). When relevance is considered as suggested by Keeley, it returns the focus of brand strategy to individuals, not just consumers, but people who interact with brands and offerings throughout everyday life rather than just at the moment of purchase or usage. It speaks to the need to have a holistic-system of brand management with all actions of the organizations supporting the brand meaning. Relevance also indicates a need to continuously evolve, to keep up with the changing culture in which the brand exists. A brand must develop a strategy that is flexible in execution to be able to adapt to changes and market opportunities, but speaks to core values that remain consistent and provide a guiding principle for the actions of the organization.

At Hallmark® Dorothy Colgon, director of Brand Essencing (personal interview, April 12, 2012), describes this guiding principle as an "aspirational vision":

> Our vision is aspirational, which means that you never reach it but you want it out there… Ours is to be the company that 'provides a more emotionally connected world by making a genuine difference in every life, every day'.

The aspirational vision provides a framework to consider future actions for the brand against. It focuses on how the brand seeks to serve individuals in intangible ways, but it needs to be brought into action through tactics that interact directly with the consumers. Hallmark has been working to evolve their brand meaning into abstracted, intangible associations by seeking to facilitate connections between people. This is a critical component to their strategic organizational sustainability. Hallmark is traditionally known for greeting cards, but as that market thins due to changes in the way people communicate (i.e. text messages, e-cards, or social media) it has become imperative to expand the associations of the brand in the consumers' mind beyond the specific product format that the organization was built upon.

Another organization that appears to be taking steps to make this evolution is Starbucks®, who dropped the word "coffee" from their brand name, and removed words entirely from their logo in the most recent redesign. Howard Schultz, CEO of Starbucks explains, "this new evolution of the logo does two things that are very important: it embraces and

respects our heritage, and at the same time evolves us to a point where we feel it's more suitable for the future" (Schultz, 2011). These signals seem to indicate a belief that their brand transcends one product format (Interbrand, 2012), and isn't even necessarily tied to specific words. It's a symbol, a representation of a unified experience and intangible ideas such as "a third place" or "hospitality". Scott Bedbury, Senior Vice President of Marketing, explains that Starbucks is transitioning "to a view that will allow us to say that Starbucks' role is to provide uplifting moments to people every day" (Bedbury, n.d.). The complexity lies in determining what evolution and expansion supports and adds value to the brand rather than diluting the message.

Brand evolution needs to provide sustained value to both the organization and the consumer. This in mind, it becomes important to consider the consumer's role in this determining direction. As we saw with Netflix, an attempt to evolve the business offering and disengage the DVD service from the core brand (the service upon which Netflix created its brand value) was poorly received by a consumer-base who had very little trouble utilizing digital media to band together and turn into a virtual, raging mob. Ostensibly, a choice to evolve away from a business model that requires more overheads, to one that would be potentially more profitable for Netflix and ultimately more convenient for consumers must have seemed like a no-brainer. With the explosion in YouTube® traffic, utilization of online streaming, ubiquitous interaction with digital media, and 21.5 million US customers (out of 23.8 million, subscription number approximated based on an April 2011 announcement by Netflix) already streaming content from Netflix, it would be very easy to assume that Netflix's loyal consumer base would be ready to begin this transition.

It's hard to discern if the approximately 50,000 initial negative comments were an accurate representation of the desires 23.8 million subscribers or if a panicked response to the "mob-mentality" demonstrated in social media motivated Netflix to reverse course and "do what our consumers say they want". In the following quarter, Netflix lost only 800,000 subscribers (Pepitone, 2011). While any loss is undesirable, the real loss has been to the brand equity and the trust between the Netflix brand and the consumer base,

coupled with the subsequent loss in stock value as a result of the lack in confidence. While Netflix is also having challenges with licensing agreements creating more financial woes, they have lost their place as market leaders and have been unable to reverse the hemorrhage and clean-up their version of a Gulf oil spill.

If a (relatively) small group of consumers, who chose to express their discontent in online forums (without necessarily desiring to take further action) can have such a tremendous influence over the trajectory of the organization, then it stands to reason that brands who want to sustain their value and continue to be relevant to consumers need to find a way to partner with their consumers to gain critical insight to direct their strategies.

A co-creative partnership with brand consumers offers the prospect of moving brand consumers beyond loyalty into a mode of partnership, where brands are able to utilize loyal consumers as partners to explore and identify positive future opportunities (Sanders & Stappers, 2008). This also reinforces loyalty from consumers through increased engagement and a perceived stake in the future of the organization.

Eckersley describes the benefits of utilizing a "deep dive" method to gain insight through interacting directly with the consumer's experience with brands. Among the benefits is a greater qualitative understanding of how a brand fits into the consumer's world, allowing brand managers to "see connections, spot disconnects, and imagine opportunities to better serve (the consumer)"(Eckersley, 2004). He relates the importance of crafting a brand experience filled with meaning derived from the surrounding culture to maintain relevance and build a bond with the consumers interacting with the brand.

How does a brand evolution strategy influenced by principles of co-creation reframe the three challenge factors into potential opportunity for brands?

Consumer Perception and Expectation
A brand evolution strategy influenced by co-creative principles can provide the opportunity to build positive symbiotic relationships with consumers and create shared values and meanings that strengthen brand loyalty and move consumers to a place where

they feel pride in advocating for a brand. A co-creative brand evolution strategy can help generate consumer perceptions about their importance to the organization and help the organization determine how best they can serve their consumers by understanding their lives and needs intimately. It can help gain insight into positive future brand scenarios to explore through understanding the expectations consumers have about an organization and plotting well-informed journeys to future endeavors.

Connectivity and Access

A brand evolution strategy can utilize digital communication portals to create dialogues with consumers about the brand and to help facilitate connections between people around the shared brand values and interests. This can create meaningful commitments to brands though integration of brand interactions into the everyday lives of consumers.

Brand managers can utilize the digital domain to obtain insight, prototype brand directions and acquire feedback to guide corporate strategy and learn about the unexpressed desires and perceptions of consumers. Organizations can acquire honest, unsolicited data about their brands and offerings as well as about competitors' offerings. The relatively low expense of interactions in the digital domain offers the opportunity to create more individualized experiences and personal service.

Being connected to the Internet allows consumers to shop globally, searching for brands and offerings that are desirable instead of satisficing. An online shopping arena opens up greater possibility for customized offerings that are tailored to suit individualized preferences. Brands that utilize this connectivity can create more loyalty through greater personal service.

Holistic Experience and Meaning

Through a brand evolution strategy brand managers can utilize new realms of experience to create new value for consumers and the organization. They can create systems that have intrinsic emotional value that inspires consumers, employees and shareholders, aligning all around a shared vision. A holistic system can be used to build an abstract network of associations that allows flexibility in execution of corporate tactics within a

consistent framework. This can guide the brand to be responsive and adaptive instead of rigid and vulnerable to the changing environment.

Section 2: Modeling the Interaction

2.1 Observe

In order to create value from these opportunities, an organization will need to design a brand evolution strategy that accomplishes two key components:

1) The creation of core values and meanings that resonate with consumers and can be acted on in a holistic and authentic manner—abstract perceptions, ideas and feelings shared by the organization and the consumer gives the brand flexibility in tactics within a consistent framework.

2) The evolution of relationships with consumers towards a symbiotic partnership.

A quote commonly attributed to Charles Darwin metaphorically illustrates that "It's not the strongest of the species that survives, nor the most intelligent that survives. It is the one that is most adaptable to change" (ThinkExist.com Quotations. "Charles Darwin Quotes," 2012).

What does brand evolution mean?

An effectively evolving brand needs to be adaptive and proactive rather than reactive. It needs to be a learning-system that adapts to remain relevant to the consumers and not limit an organization's ability to modify its offering to sustain its business viability. This is supported by Interbrand's position that a brand is a "living business asset" (Interbrand, 2011). According to Craig Stout of Interbrand, nearly all of the brands in their Best Global Brand assessment have embraced constant evolution of their brand, as a means to maintain relevance in the continually changing market and consumer needs. Stout outlines four principles that define an evolving brand mindset: anticipating and creating consumer desire, incorporate and participate in dialogue with consumers, design a living flexible brand expression, and create a culture that embraces change (Stout, n.d.). As earlier exemplified by Hallmark and Starbucks, one key factor in creating strategic brand

evolution is to communicate abstract, intangible brand meanings in order to create a consistent framework of expectations that is not statically tied to one product platform. The best way to create an evolving brand is to intimately understand the existing perceptions of consumers, and potential consumers, in order to determine how your brand can create more meaningful relationships with them. Many marketer's will refer to "owning the customer", but this mindset should be reconsidered as creating great meaningful relationships with individuals.

Another metaphorical illustration, also commonly attributed to Charles Darwin, reminds us that "In the long history of human kind…those who learned to collaborate and improvise most effectively have prevailed" ("Charles Darwin Quotes," 2012).

What does a co-creative brand partnership mean?
Considering that two of the four principles outlined by Stout are very closely tied to having an intimate understanding of the lives and latent needs of consumers, as well as acknowledging the existence of a meaningful dialogue with consumers (Stout, n.d.), it stands to reason that a successful brand evolution strategy utilizes co-creation as a critical component. Co-creation should not be understood to mean doing exactly what the consumer tells you, but instead it should be thought of as finding ways to work with consumers to gain insight into their unmet needs, desires and aspirations. Co-creation, according to Sanders and Stappers, is considered to be "any act of collective creativity". To be most effective we want to move beyond using the consumer as a "passive object of study" (Sanders & Stappers, 2008), to a method where the consumer actively contributes to the creation of value for the brand and influences brand evolution strategy. Further, Varadarajan and Yadav assert that "buyer activism" could hold beneficial possibility "when a responsive firm harnesses buyers' ideas and sentiments to address existing problems and develop new initiatives" (Varadarajan & Yadav, 2002).

Eckersley emphasizes the importance of understanding the cultural framework that a brand exists within, as well as how the culture created by consumers impacts the experience surrounding a brand interaction, "the customer plays a vital, willing role in

making that (experiential) vibe real… he is the final arbiter and co-creator of your brand's value" (Eckersley, 2004). In applying co-creative principles, a brand serves as a framework of interactions for consumers to create their own experiences and meanings (Ismail, Melewar, Lim, & Woodside, 2011), but guides them to a fulfilling place. Dubberly and Evenson acknowledge that it is through touchpoints that a consumer will interact with a producer, and ultimately create an impression representing the brand meaning (Dubberly & Evenson, 2008). An individual ultimately owns his own experience; a brand manager can only shape the touchpoints of interaction in order to influence meaning. A brand would effectively serve as a scaffold for users to create value.

2.2 Reflect

Applying Theoretical Models to Understand the Interaction

Models are utilized to help visualize complex systems and understand how elements interact. According to Dubberly, "Models describe relationships: parts that make up wholes; structures that bind them; and how parts behave in relation to one another" (Dubberly, 2009b). The three areas of opportunity highly relate to existing theoretical models and concepts. By interpreting these opportunities through existing frameworks a new model expressing the brand interaction space, where consumers and organizations share brand meaning and experience, can help frame the context influencing brand evolution strategies developed through co-creation.

Consumer Perception and Expectation

According to Marty Neumeier, "a brand is a person's gut feeling about a product, service or organization. It's a gut feeling because brands are defined by individuals, not companies, markets or publics. It's what they say it is" (Neumeier, 2005). In order to gain an understanding of how consumer perception and expectation is formed, concepts about communication, perception and the interpretation thereof, expectation, and how this relates to fulfilling a consumer's needs, will be examined.

A brand's purpose is to represent the sum total interpretation of all signals communicated by an organization. Traditionally, brand management has relied on a basic formula of the Shannon-

Weaver communication model; see Figure 2, where the organization would transmit messages to consumers through advertising, visual identities, or other reasonably controlled methods. The consumer would interpret these messages and generally feedback was provided in the purchase or non-purchase of an offering. Feedback about success of a product or campaign was often delayed and interpreted by sales results some time later. As previously discussed, Netflix fell victim to the increased speed of communication provided through social media, and feedback amassed very quickly with detrimental consequences. Further adding complexity to the control of brand communications, social media has led to the communication flow changing from being fairly direct and controlled to an uncontrolled *many-to-many* model, see Figure 2 (Hoffman & Novak as cited by Varadarajan & Yadav, 2002). Many individuals are now rapidly sharing messages about brands and offerings, and these peer-reviews are often seen as more reliable than the brand generated messages.
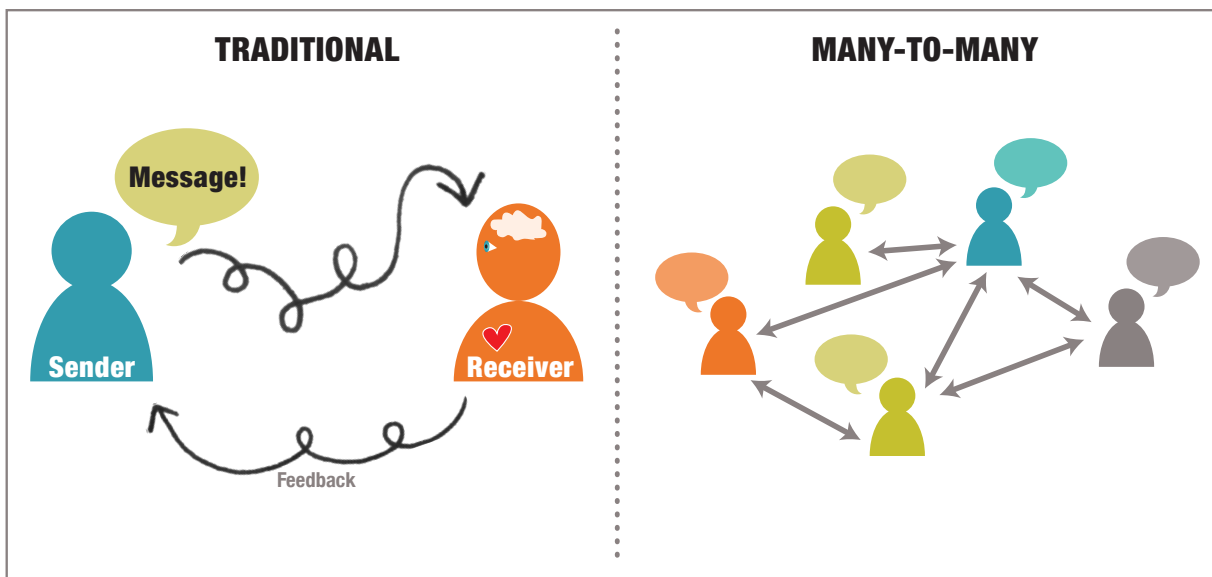

Figure 2: Traditional Communication model, adapted from Shannon-Weaver Communication model, compared to a Many-to-Many model based on Hoffman & Novak's concept

These peer communications create networked associations that are affecting the perceptions an individual will have about a brand. This is reflected in my simplified model based on my understanding of Marlana Coe's work about perception and meaning, see Figure 3 (Coe, 1996). Illustrated is the input of sensory data in the form of brand messages that recall networked

associations within memory. This recall and liked associations create perceptions that are interpreted through individual, social and cultural frameworks to yield meaning. According to Robinson, perception frameworks are created at three levels: individual, social and cultural, each lens having a different influence on a person's creation of understanding and meaning (Robinson, 1994).
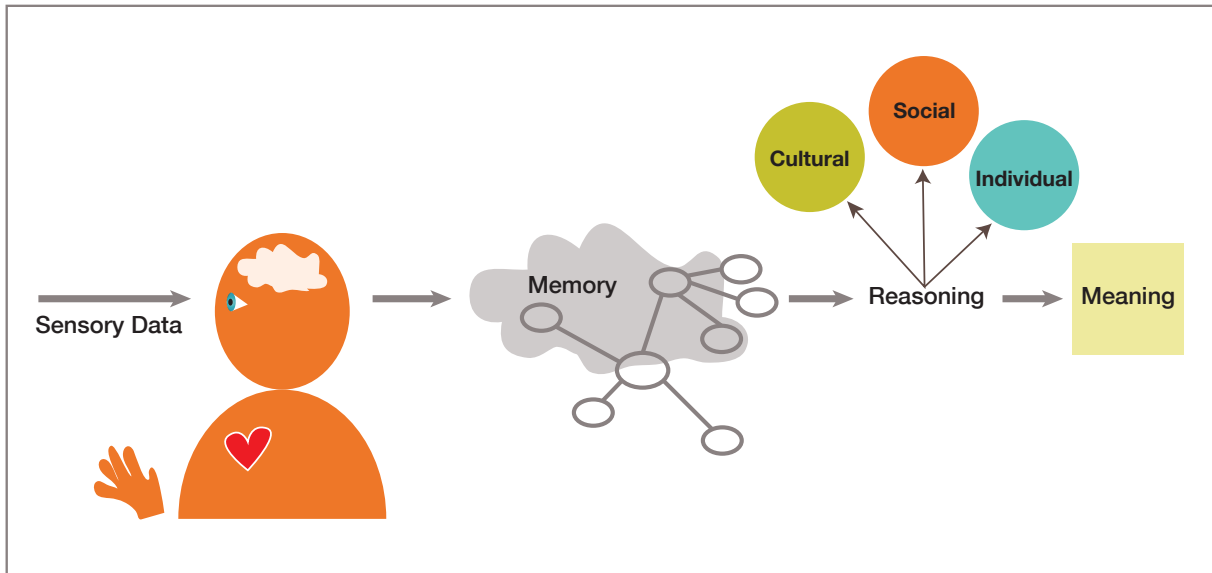

Figure 3: Sensory-Perception-Meaning model based on work by Marlana Coe and Rick Robinson

These meanings are interpreted on an individual level through Maslow's Hierarchy of Needs, Fig. 4. An individual will determine which level of need is satisfied by the brand interaction. The expectation of need fulfillment often determines a level of ultimate satisfaction derived from a brand interaction. If a product is expected to deliver satisfaction of a lower level need and is able to attain that purpose, then it has successfully satisfied the need. However, part of the purpose a brand serves is to fulfill the basic need and then exceed the expectation due to the emotional associations a branded product possesses compared to a non-branded product. Brands that are able to generate associations with higher levels of Maslow's hierarchy of needs help consumers to feel more fulfilled and socially secure by fulfilling esteem and self-actualization needs.
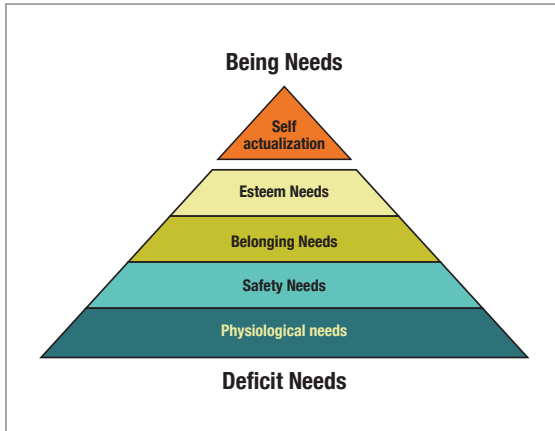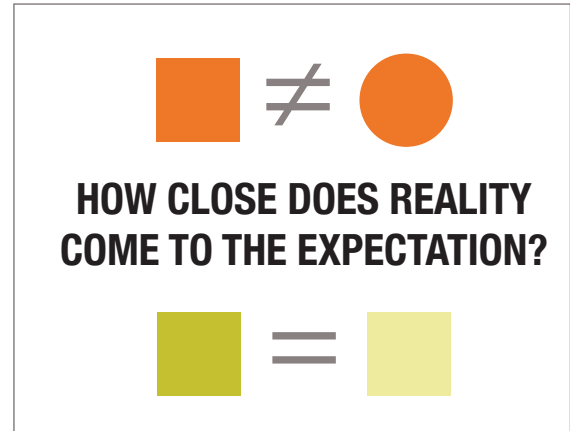
Figure 4: Maslow's Hierarchy of Needs model

Figure 5: Expectation Compared to Reality model

Successful brand messaging happens when actualization of brand interactions meet consumer expectations to a satisfactory level. A satisfactory brand interaction is dependent on how close a brand experience comes to the expectation, (Rockwell, 2008), see Figure 5. However, in order to fully engage consumers, it is best if reality exceeds the consumer's expectations. Brand expert Stanley Hainsworth, who is responsible for building the strength of the Starbucks brand, states that "the best brands are those that create something for consumers that they don't even know they need yet" (as cited by Millman, 2011).

Connectivity and Access

The importance of understanding the impact connectivity and access has on a brand is expressed by Waly Olins, "branding is a profound manifestation of the human condition. It is about belonging, belonging to a tribe, to a religion, to a family. Branding demonstrates that sense of belonging" (as cited by Millman, 2011). Since brands have meanings that are understood at a social and cultural level, they effectively serve as signals about an individual's social identity. According to Elliott and Wattanasuwan, a brand creates a symbolic projection of who the individual is, and how she believes she fits into social cultural or would like to be perceived within social culture (Elliott & Wattanasuwan, 1998). Conspicuous consumption, through public postings on social media sites about recent purchases, forces an individual to carefully consider how purchases and brand selections reflect upon her individual identity. There is a dynamic interplay in the desire to create a unique, individualized identity while still being accepted by her social reference group.

Small-world network theory, as interpreted sociologically by Clay Shirky, illustrates that small social networks are linked to larger networks through the connection of nodes, or individuals who serve as interconnections between disparate small networks, Fig. 6. Highly connected individuals can perform valuable roles for brands by sharing positive brand messages throughout a larger, more diverse social and cultural network (Shirky, 2009). Considered in the context of social media, where many individuals are both very tightly and loosely connected to considerably more individuals than they typically interact with on a physical basis, brands that create memorable, engaging experiences for consumers stand to benefit if individuals are motivated to share that positive experience. An individual can be connected to individuals around the world with reasonably limited connections, amplifying the ability for a brand to find a larger audience.
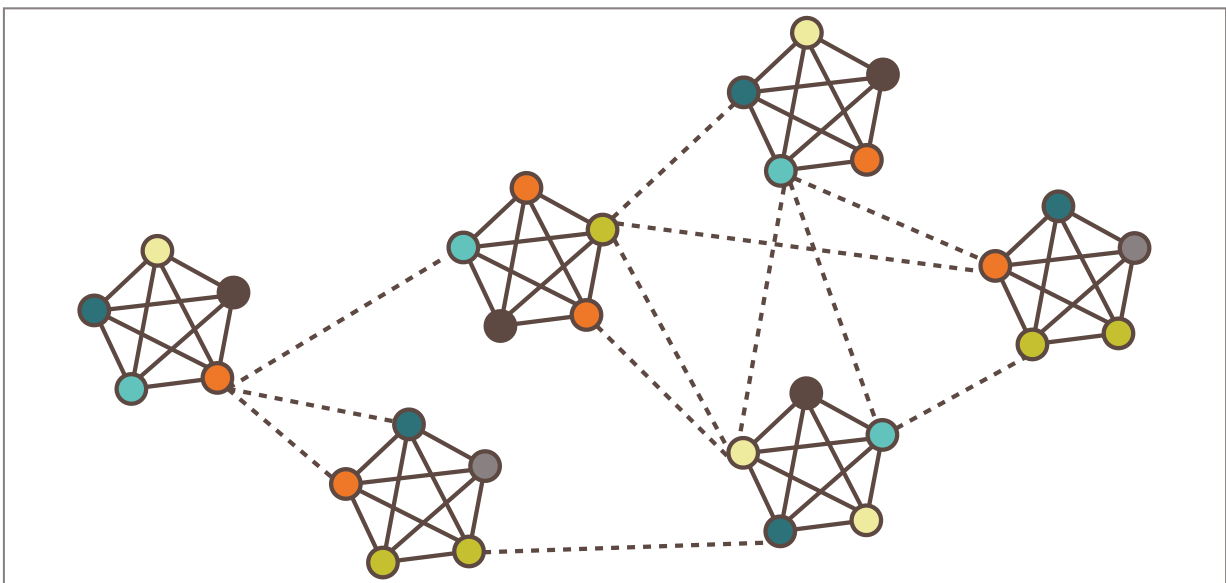

Figure 6: Small-World Network model, adapted from Clay Shirky

With this connectivity in mind, when examining the interaction of an individual with a digital interface, it can be understood that she is actually interacting with social and cultural groups that exist and live beyond that interface, see Figure 7. Virtual brand communities can form through social media portals. Sharing media websites, such as Pinterest, create a public identity through an individual's "pinned" images. This public pinboard allows other individuals, to whom an

individual may have no "real world" connection, to choose to connect based on shared preferences in areas such as fashion, style, personality, attitude, goals, and aspirations. An individual can gain social "clout" based on the number of followers who are interested in her curated collection. Depending on the depth of those shared preferences Pinterest becomes a hotbed of making connections between individuals who have already identified that they have similar interests, but no immediate relationship. A brand can effectively jump into new social groups to whom they may have had no access to previously.
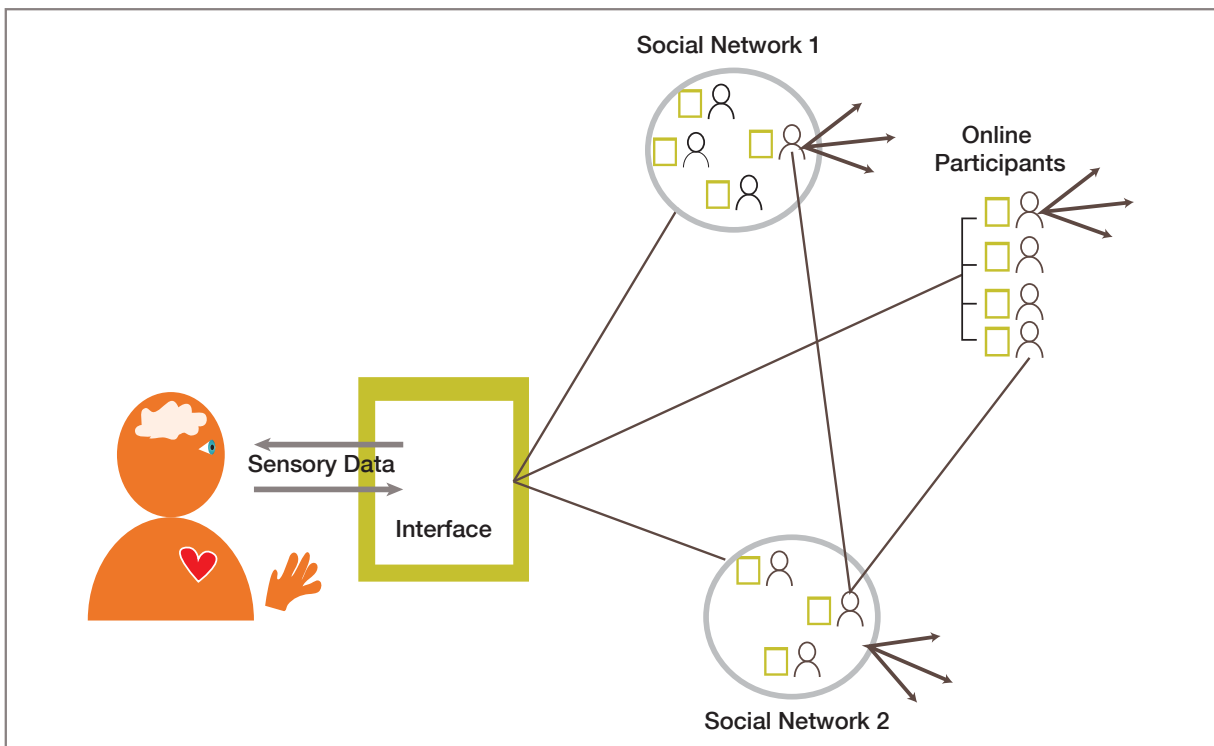
Figure 7: Social Connection Beyond the Interface model

It is this space between interfaces, or "Interspace", defined by Terry Winograd as "a space where people live, rather than an 'interface' within which they interact" (Winograd, 1997), see Figure 8, that needs to be considered by brand managers with the same level of regard and attention as physical space and experience is typically considered. This is a space where many activities can occur and brand interactions that were once thought impossible in a physical domain can be realized.

Figure 8: Interspace, the space between interfaces, based on the work of Terry Winograd
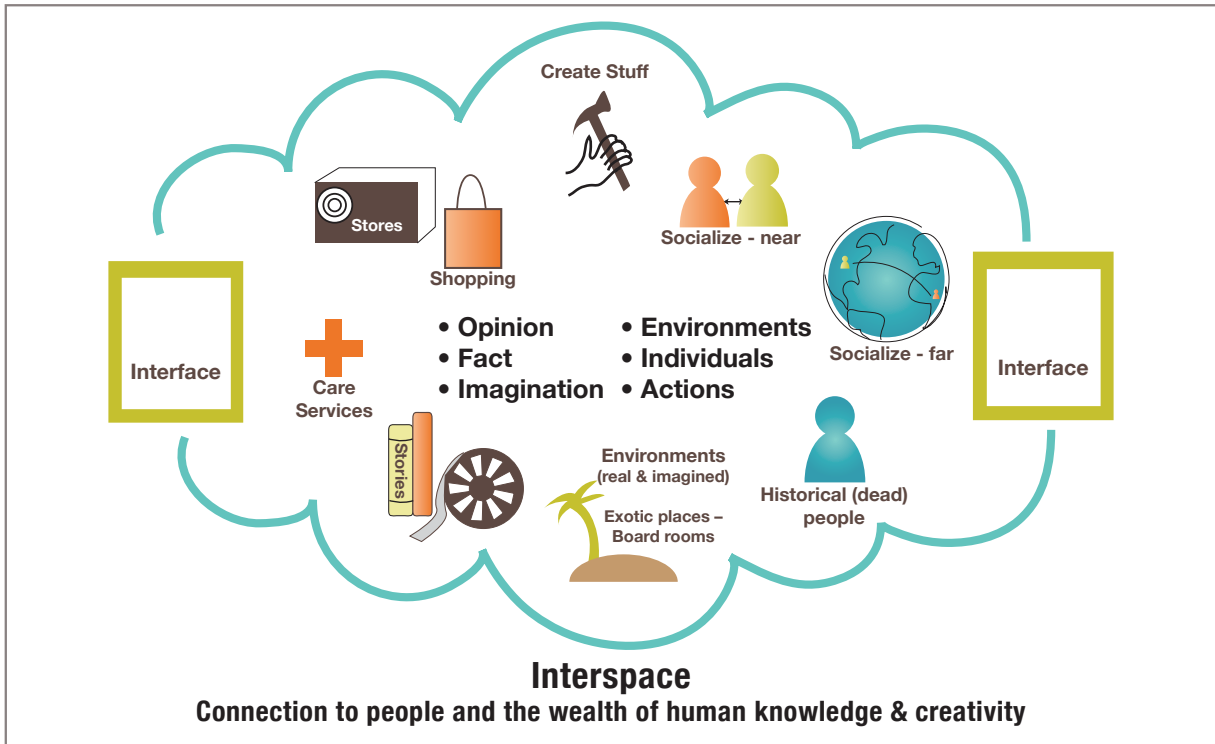
Holistic Experience and Meaning

Creation of a brand experience is not simply about creating something cool or superficial, it is about influencing the meaning a consumer will find in a brand. Grant McKracken observes, "When we create brands, we're engaged in a process of 'manufacturing' and 'managing' meaning" (as cited by Millman, 2011). As previously discussed, the interaction with touchpoints is how a consumer will gather information about a brand and evaluate the brand's place within their life. Holistic brand management attempts to create consistency so that a consumer is able to refine a clear perception about the brand.

When managing brand experience touchpoints holistically it is important to understand the dimensions that define different experience environments, and how these factors affect an experience. Pine and Korn propose that there are eight distinct realms of experience, or a "Multiverse", in which consumer value can be created, see Figure 9. By manipulating the axial variables that define each realm, Time, Space and Matter (atoms) and their opposites: No-time, No-space and No-Matter (bits), distinctly different experiences can be created and shared by

consumers and brands. Total reality is a construct of time, space and matter, while total virtuality is a construct of it's opposite, no-time, no-space, no-matter (Pine & Korn, 2011). A flexible brand expression, created through a brand evolution strategy, provides consistency in experience by focusing on the intangible brand meanings, but is adaptable to the specific factors that define the experience environment.
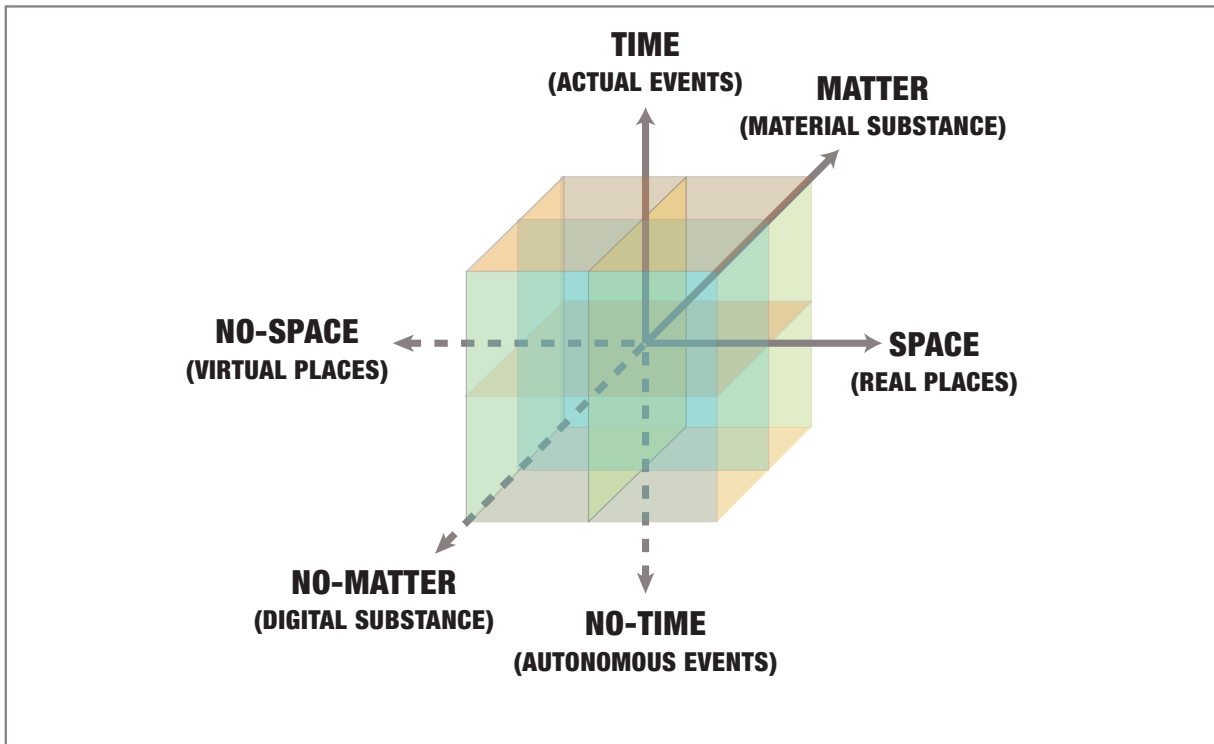

Figure 9: Multiverse model, adapted from Pine & Korn

Virtual-based realms allow for a consumer to utilize trials of digital products before completing a purchase, or even create virtual representations of the product within a digital model of a physical environment to aid in decision-making and increase the likelihood of satisfaction with the final purchase decision. Virtual experience environments also increase the ability for a consumer to co-create her product, through methods such as mass-customization, and then have a physical product delivered that reflects their individuality. In addition to creating actual offerings in each realm, virtuality-realms can offer brand managers a space in which to prototype brand experiences and receive feedback from consumers to help guide strategy. The critical thing to remember is that different touchpoints need to be designed in harmony with

the holistic brand system in order to reinforce expectations, fortify meaning and provide satisfying brand experiences. Inconsistencies in experiential quality can muddle a consumer's perception of a brand and erode trust.

As brand managers work to develop new brand experiences within realms in which they have little expertise, they should continue to consider existing theories that describe the human-factors dimensions of customer experience. Gentile, Spiller and Noci outline six dimensions of customer experience: a sensorial, an emotional, a cognitive, a pragmatic, a lifestyle, and a relational component, Fig. 10 (as cited by Ismail et al., 2011). Consideration of human-factors dimensions helps create experiences that are more engaging and fulfilling. Engaging experiences increase the likelihood that a consumer will be able to recall the brand that satisfied their needs and desires. An offering can satisfy the need, but if the consumer cannot recall which brand supplied the offering at the critical point of re-purchase, then the brand has failed to connect and is more likely to lose the consumer to a competitor.
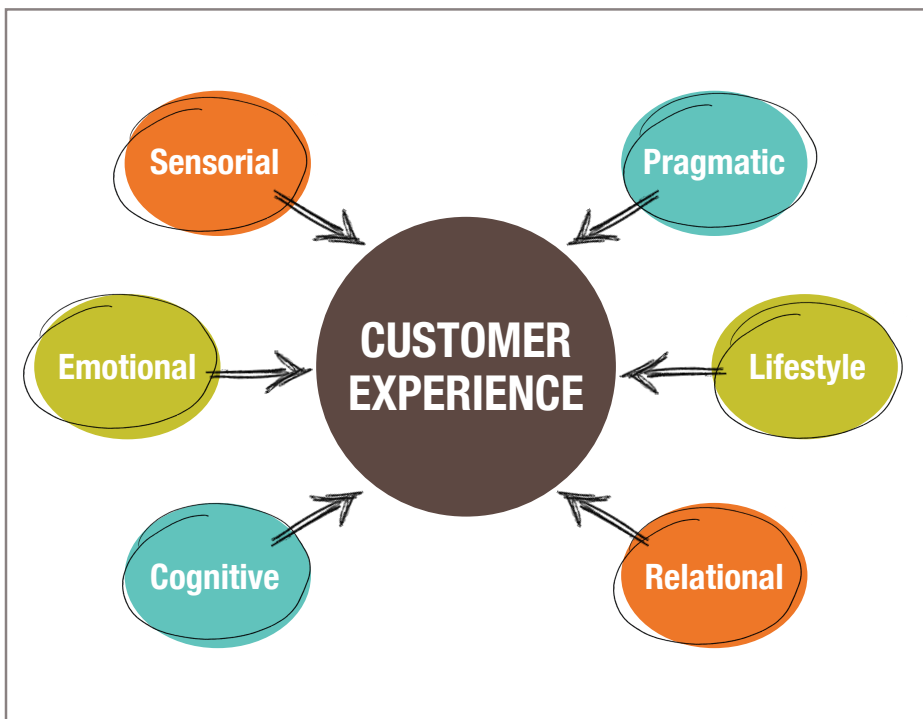

Figure 10: Six Human-factors of Customer Experience model

Further as we consider how and where experience occurs for consumers, it is necessary to regard brand meaning as a construct of perceptions guided by an individual's framework shaped by schemata. Palmer informs us that an individual's schemata influences frameworks utilized in the interpretation of new information and helps her understand the relationship between new and old information (Palmer, 2010). Additionally, Robinson explains,

> Perceptions are built on interpretations, and interpretation is the process of cobbling together bits and pieces of information into a coherent whole…assumptions, knowledge, biases, and prior experience actively shape understanding. We call the mechanism guiding the assembly of bits of experience into an image a *framework* (Robinson, 1994).

Schemata and frameworks are influenced by social and cultural factors (Palmer, 2010; Robinson, 1994), so an experience will always have a unique perspective to each individual. For a brand it is the social and cultural dimensions that help shape a mutually accepted brand meaning. This meaning is formed by all brand entities and experiences encountered by an individual, so working to provide as holistic an experience as possible will reinforce brand meaning and avoid misunderstandings, see Figure 11.
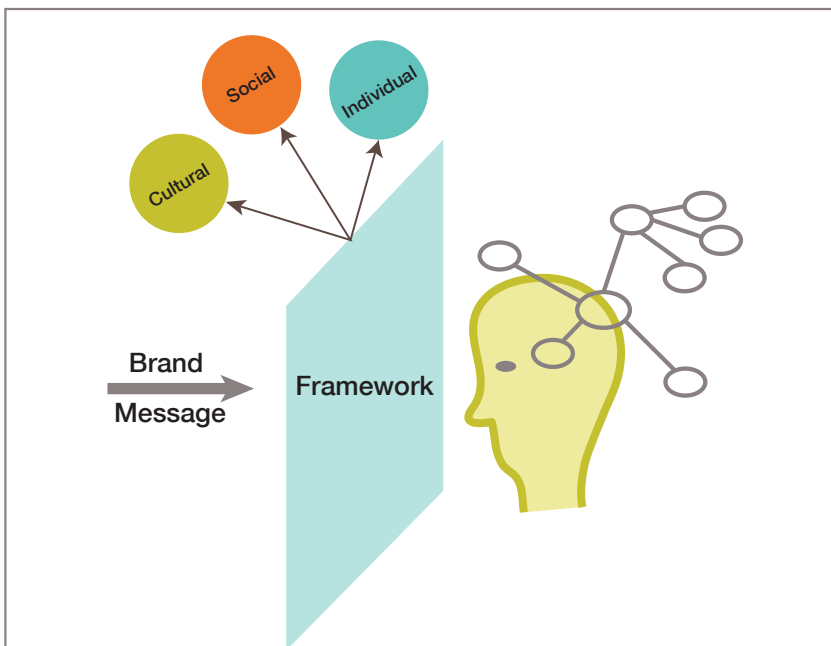

Figure 11: Perception Frameworks and Meaning model

However, when developing a brand evolution strategy, the focus should not be on the actual touchpoint, but on how consumers interpret the brand through touchpoints to create meaning within their lives and give form to the experiences (Robinson, 1993). This requires brand managers to be mindful of how their brand reflects upon and is positioned within culture and how brand selection reflects upon an individual. Focusing on brand meaning creates a conceptual framework where execution can still be adapted to changes in the culture and environment within which the brand exists, but the brand concept remains intact. For example, when McDonald's opens outlets in India, the brand would be poorly received in a Hindu culture if brand meaning were too firmly established around a product platform of hamburgers instead of a fun youthful spirit and convenient access to food. Brands that are too closely tied to a particular product platform need to design an evolution strategy of intangible associations in order to prevent future irrelevance. Implementing this evolved meaning holistically maintains stability and consumer trust.

2.3 Design

Modeling the Brand Interaction Space

The interaction of these three areas of opportunity: consumer perception and expectation, connectivity and access, and holistic experience and meaning, within existing conceptual and theoretical frameworks provides the opportunity to create a new model representing the interaction space shared by brands and consumers.

The purpose of this model is to acknowledge the existence of a brand interaction space that is shared between an organization and a consumer. It can be utilized to map and frame interacting elements of the brand system, and can be employed when designing brand evolution strategies. The model can enlighten brand strategists as to the alignment and interaction of key elements within the brand system, and aid in understanding factors that influence a consumer's perception about the brand.

The foundation of the model is two primary contributing participants, the organization and the consumer, Fig. 12. Brand interaction and subsequent meanings are shared constructs that are influenced by surrounding elements.
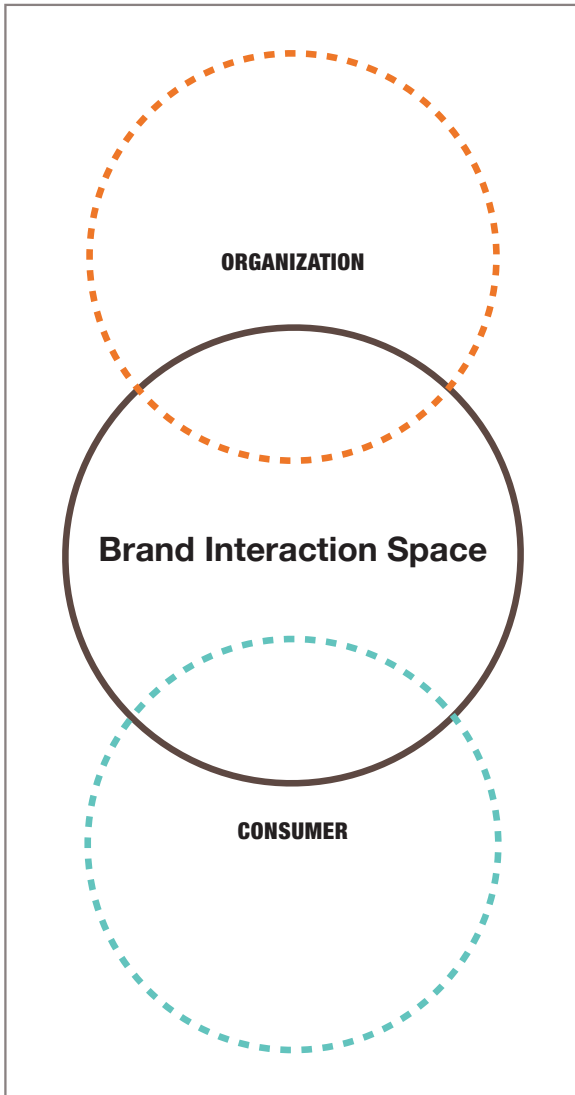
Figure 12: Brand Interaction Space model, contributing participants
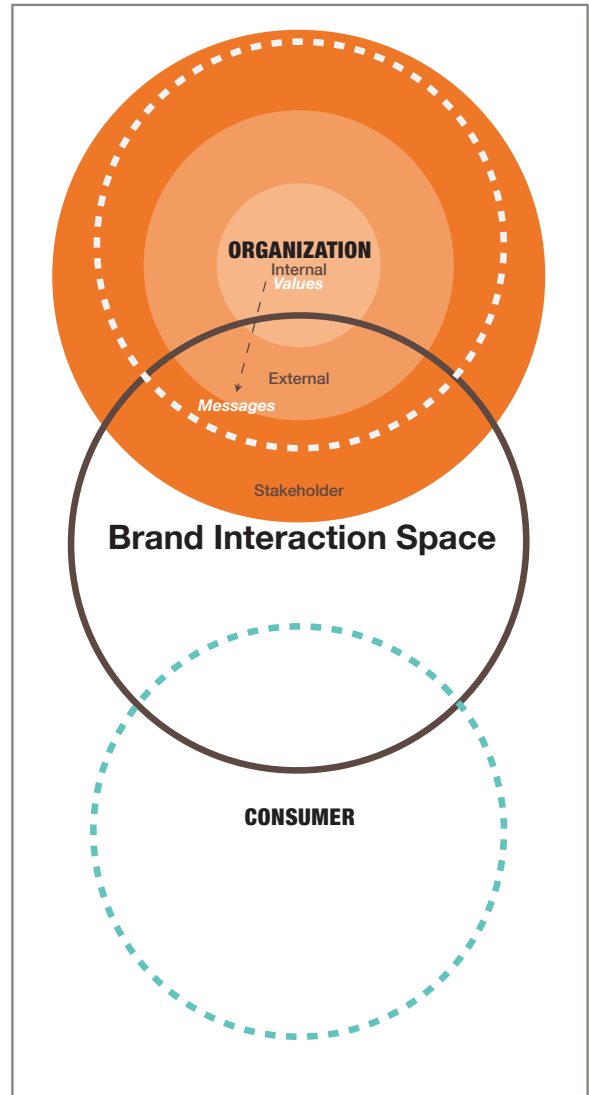
Figure 13: Brand Interaction Space model, organization elements

The organization projects brand messages to guide perceptions about the brand, Fig. 13. The organization is influenced in its decisions by its internal culture, external representations, and stakeholders. These messages convey intended brand meanings that the organization would like for a consumer to interpret and share. Internal corporate values should be in alignment with these messages to create an authentic brand.

The consumer's perception is a result of sensory data and experiences encountered with the brand. These can be messages conveyed from the organization directly, or indirectly from circumstance and surrounding environments, Fig 14. The brand meaning is mediated through individual, social and cultural reference lenses to evaluate and interpret salience of the brand messages to the individual. It is informed by the social and cultural connections an individual has, as well as peer-to-peer messages conveyed about the brand. Within the brand interaction space, meaning and values are a shared construct of these three reference lenses: individual, social and cultural. Each individual's specific meaning, gives way to the accepted shared meaning created in the brand interaction space, but ultimately it is the individual who decides relevance.
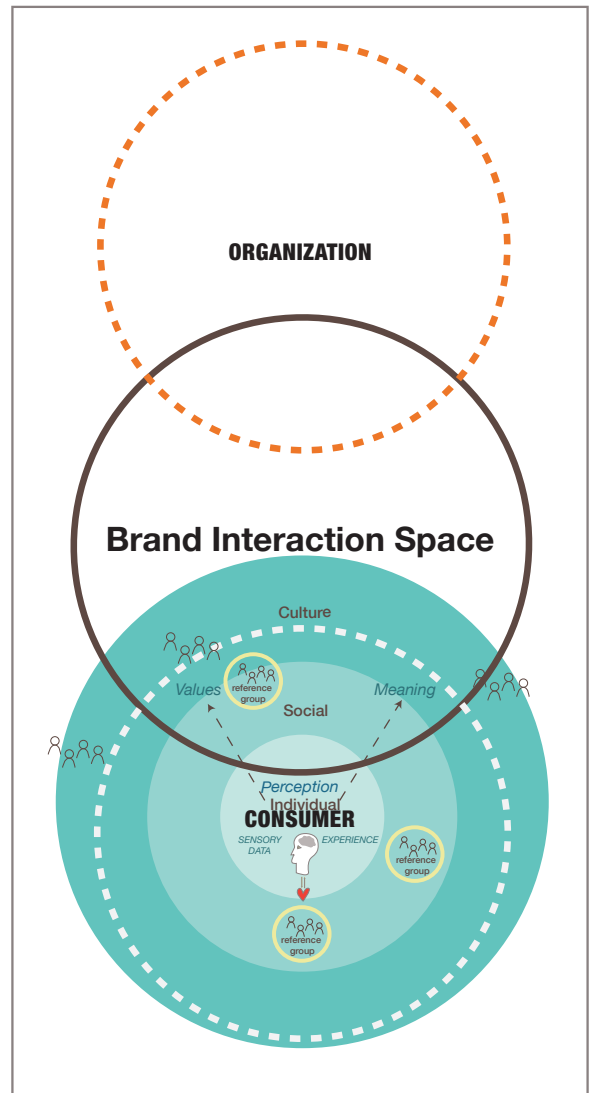
Figure 14: Brand Interaction Space model, consumer elements

The brand interaction space is a co-created space between the contributing participants, Fig. 15. In this space exists the brand meaning and serves as a framework for all touch-points to align with. These touch-points can exist in virtual or real spaces, and need to be managed with consideration to the variables and differences in customer experience within each realm. These touchpoints need to be designed with thoughtfulness of the human-factors that define experience. Touchpoints are positioned within the brand interaction space based on their relative salience to each participant and realm of experience.

33

ORGANIZATION
Internal
Values

trouble-shooting service

cust. service

website

Retail enviro

External

Messages

stock market

ads & PR

Seeing brand in enviro

news media

Stakeholder

Brand Interaction Space

= touchpoint

Culture

Seeing brand on others

peer review

Values

reference group

Meaning

Social

social media

sponsored events

virtual service

physical product

direct service

Perception

Individual

CONSUMER

SENSORY DATA

EXPERIENCE

reference group

reference group

VIRTUAL   REAL

Figure 15: Brand Interaction Space model

What can be interpreted from this model is that a brand's meaning is the gestalt of all interactions an individual has with a brand, as mediated through social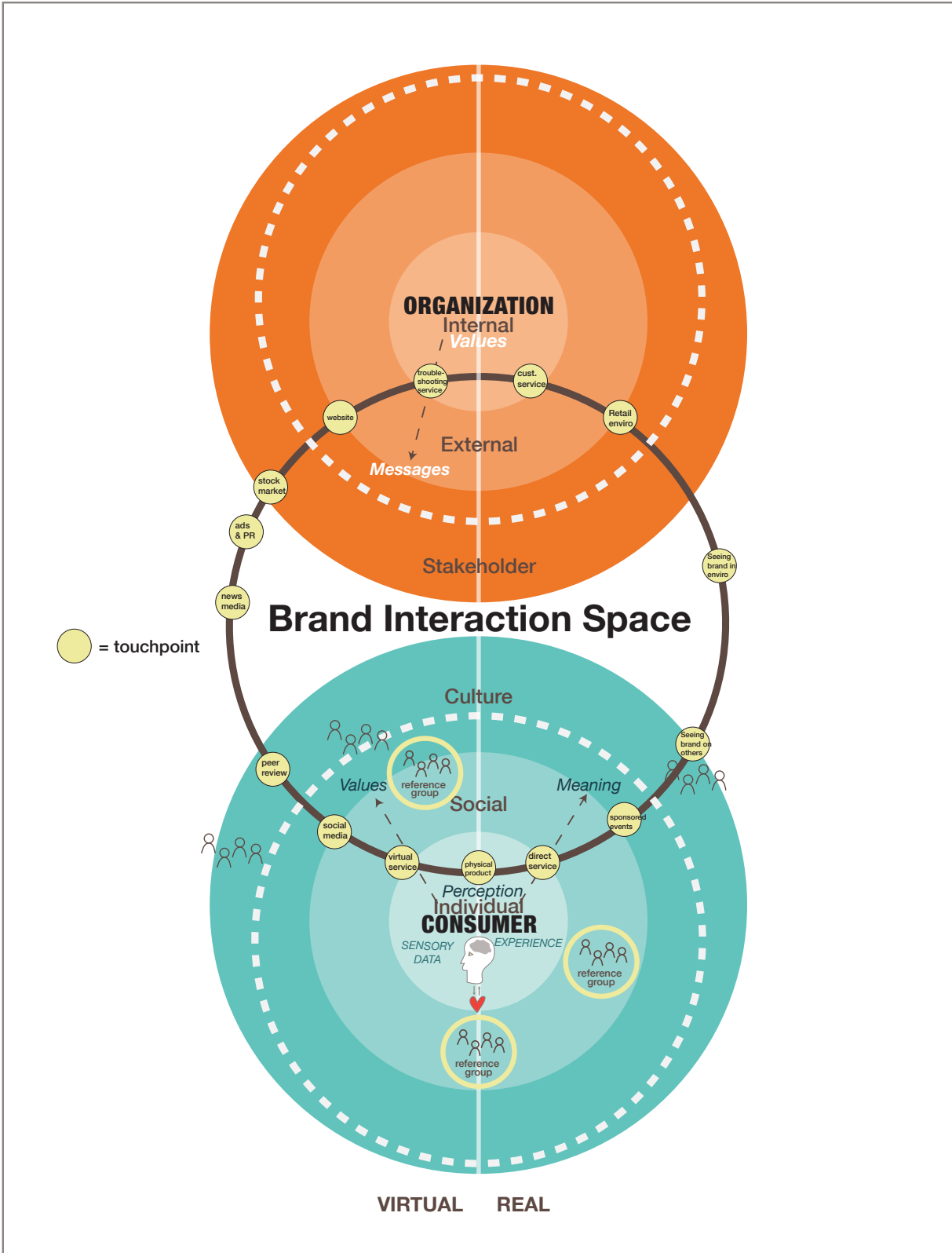 and cultural reference lenses. When a brand's meaning is defined as a function of interactions, a brand becomes an active, living being instead of a passive, static entity. In agreement with this position, Stout proposes that organizational leaders need to regard a brand with respect to its living qualities that require nurturing and room to grow (Stout, n.d.). Every touch-point for a brand-to-consumer interaction is an opportunity to exhibit brand values and reinforce meaning. Abstracted brands have more flexibility with how they can be presented, as long as the core values and perceptions still shine through. An active, living brand can evolve and flourish. It can form connections and create emotional bonds with individuals. People accept growth and change in things they perceive to have living qualities.

Section 3: Implementing New Methods

Equipped with an understanding of a brand as an interaction space, and potential benefits of creating an evolving brand that is influenced by co-creative principles, a plan can be designed to implement these principles into organizations.

3.1 Observe

What are the barriers?

As discussed before, brands are considered one of the most critical strategic assets an organization can have, both in financial terms and in consumer-relationships. For some organizations their brand is a critical success factor and is seen as a source of strategic advantage over non-branded and other competitors' products. Brands are a big investment in both time and money, however it has also been observed that there is a gap in how consumers perceive this brand advantage and the regrettable results of overestimating the brand value. It seems apparent that brand managers should utilize new thinking and approaches as they work to develop brand evolution strategies to address this obstacle. The first factor to consider is what prevents a brand manager from trying new approaches.

With so much at stake, the risk in making changes to brand management and strategy is high and it would be comfortable to continue to do what you "know" works. Looking backward for a

reliable solution creates an impression of safety and security. The problem is that consumers aren't looking backward for solutions; they are looking forward. Brands that have a forward moving energy (Gerzema & Lebar, 2008) reap the benefits of consumer interest and are already poised to provide sustained and increased value with future endeavors. Organizations will need to develop a forward-moving orientation that seeks to find new opportunities in possibilities, instead of relying on past efforts to maintain consumer engagement. While designers are ready-armed with "valid" solutions that could provide new opportunities, it is difficult for an organization to accept the inherent risk of pursuing new, unproven territory.

Another factor that is inhibiting brand managers from introducing new methods is a poor understanding of the condition of their brand and the impressions consumers have about the brand. Existing brand evaluation tools, such as those provided by the American Marketing Association, are self-evaluative and lack a holistic understanding of the consumer perceptions and interactions. When you give yourself a self-assessment, there is already a bias in place, and generally you want to give yourself a good grade. Bias aside, a good "grade" on an assessment may indicate that something is going right, but how do you understand why the brand strategy is successful and which factors are most strongly resonating with the consumers and have future relevance? The ability to accurately gauge your brand's health is one step in the right direction, but an organization that has a limited view of the source of failure or success will find it difficult to make successful decisions that sustain the brand. Metaphorically speaking, accurately identifying heart disease is a good start, but identifying the sources of the disease helps formulate the proper course of treatment. Furthermore, most of these evaluation tools are based on events that have happened in the past and are of questionable relevance to the future circumstances.

Co-creative evaluations shift the perspective into the realm of the consumer and would seek to gain insight and understanding of their perceptions as the outcome of the assessment rather than a quantitative score. Sanders proposes that an appropriate method for co-creative research follows a "Do-Say-Make" technique where a researcher would assess a consumer experience with a brand by observing what consumers are doing, interviewing to discover what they are saying, and discovering what consumers are creating (Sanders, 2002). In other words, research

designed to learn about the consumer's brand perceptions should be looking for the behaviors and meaningful interactions a consumer has with a brand in order to gain insight about how the brand fits into a consumer's life. This research also generates empathy for the consumer, and illuminates consumer aspirations that could be fulfilled by evolving the brand to provide new dimensions. It should not be expected for a brand to do specifically "what the customer says to do", but instead to utilize this valuable insight when developing an evolution strategy that also incorporates the internal organizational needs and perspective. Remember, what is desired is a symbiotic partnership that benefits both participants.

This co-creative partnership is worrisome for most organizations because it requires them to cede some of their control over the brand. However, as we already explored, the brand is naturally a co-created construct that an organization over which the organization can only exert limited control, and possibly less control now than ever before. To reconcile these concerns with the reality of the situation, an organization will need to realign the brand vision throughout the entire organization and build a brand management and strategy team that is centralized and integral rather than a sub-division of marketing.

This alignment with a centralized team will help the brand vision infuse throughout the entire organization, and encourage the holistic system discussed previously. Dorothy Colgon, Hallmark, describes one of the biggest challenges that her brand essencing team has been confronting is

> the shift from all the years of (product) format thinking to big picture idea, (what do we) stand-for thinking, how do we get it to a high enough level that something can be approved and consistent across (the whole organization). Even in-house consistency can be a challenge. Different businesses have different goals, different objectives. At times those can work against each other, (personal interview, April 12, 2012).

For large, complex organizations, it can be a long process to transition into a new mindset and behaviors that work together for the shared vision without being rigid and limiting. Traditionally, alignment has been achieved by following a rigid set of brand "rules", but these rules can often limit the flexibility that is needed to have a living, evolving brand where each

organizational member and touchpoint is able to fulfill the brand values and meaning in response to changing circumstances. Speak informs us, "living the brand engages the entire organization in a brand-building process… Brand enthusiasts throughout the organization become the strongest advocates for upholding the brand's values" (Speak, 2000). Having the entire organization intrinsically understand the brand values and meaning helps individuals to be able to determine which actions, behaviors and decisions resonate and strengthen the brand meaning. "Living the brand is the result of infusing the organization with a rich understanding of the brand's values and encouraging behaviors that are consistent with the brand's values" (Speak, 2000).

A centralized brand team should act as the connective tissue bringing divisions together in understanding of the brand vision. By connecting with the entire organizational culture, the brand team can plot a course for future brand evolution that is informed by the objectives and decisions being made in diverse departments. Conversely, the actions pursued by these different divisions can find holistic alignment and support through a centralized brand team coordinating diverse objectives.

A centralized brand team will need to expand to include diverse perspectives and skill-sets that are not traditionally included on a brand management team housed in the marketing division. New skills will include the ability to gather and synthesize complex qualitative data into elegant solutions. This team will be constantly solving problems and creating pathways for the brand journey. They will need to be flexible; open to new possibility and evolution of the brand they are responsible for. In particular, this means that the team will need to be able to tolerate the inherent uncertainty of working with a future orientation. It will be important for this team to be able to communicate and share the narrative throughout the divisions and help them align with the brand vision.

Many organizations will opt to rely on an outside consultancy to manage the brand experience and strategy. While utilizing an outside team of experts has some benefit in the form of new perspective, fostering an internal brand expertise allows an organization to be most proactive, most knowledgeable of consumer and market, and most holistically aligned with the entire corporate culture. When this internal alignment is coupled with the external brand-patrons in a

symbiotic partnership, the organization is prepared to evolve into a living brand that grows with the surrounding environment.

3.2 Reflect

Abductive Thinking and a "Designerly" Approach

Roger Martin, dean of Rotman School of Management, recognizes that the best solutions arise from a combination of both reliability and validity mindsets (Martin, 2009). As previously mentioned, a reliability mindset is oriented to look to the past for proof of future viability and success. In contrast, validity mindsets are concerned with pursuing justifiable solutions for the future based on trends and signs that they see happening contemporaneously, but for which they have little tangible evidence of success because the outcome is determined by future events. This balanced reliability-validity approach proposes that reliability-oriented mindsets need to be open to opportunity provided by valid suggestions in order to be forward-moving, proactive, and create the most potential for future growth. Validity-oriented mindsets, on the other hand, need to utilize prototyping methods or other approaches to test their hypotheses to gain reliable data that could indicate future potential and gain the necessary support to yield success.

Martin proposes that an abductive thinking approach incorporates this balanced mindset. Abductive thinking, a concept originated by Charles Sanders Peirce, centers around what "could be" and seeks to explore the opportunities that are possible in future events (Martin, 2009). Abductive thinking is rooted in practices typically utilized in the design discipline; hence it is often referred to as "design thinking". According to Martin these practices are critically important to the innovation process and the creation of new value for organizations (Martin, 2009). To fully employ abductive thinking, it is beneficial to understand the difference in a "designerly" approach.

As adapted from Nigel Cross, a "designerly" approach (Cross, 2001) has the following characteristics:

- seeks to solve ill-defined problems, or problems in which it is difficult to grasp all of the influencing factors,
- displays behaviors employed in inventing things of value that do not exist yet,

- utilizes solutions-focused strategies and problem solves through synthesis and conjecture— a designer has to produce a practicable result within a timeframe based the information available at that time, however incomplete; therefore intuition plays a key role in decision-making. These results are often derived through generative and convergent modes of solution-creation and testing,
- is confident in the ability to define, redefine and change course as the problem-space changes.
- is concerned with how things 'ought to be' instead of 'how they are',
- displays the ability to communicate and interpret different levels of abstraction, including conceptual modeling, sketching, and prototyping.

As we compare this list of traits to the new skill-sets needed by a centralized brand team, we see that many of the functions can be addressed through the addition of designers as strategic partners, who through their education and training are already in possession of these skills. Designers have often been included to develop the graphic elements of a brand's visual identity, but they should be utilized for their creative problem-solving skills to help develop the forward-oriented evolution strategy. Brigitte Borja de Mozota describes four powers of design that are useful in management practice as: design as a differentiator, an integrator, a transformer, and as good business (de Mozota, 2006).

A designerly-approach to brand evolution strategy yields rewards because it is user-centered, solutions-focused, and adaptive in execution. User-centered design methods produce an empathetic perspective that is focused on the individual who interacts with the product or brand (Brown, 2008), and designers are typically concerned with developing outcomes that are engaging and consistent with an appropriate conceptual framework. Constant consideration of the potential that lies ahead and creating visualizations of this potential, primes the stage to create a journey with the consumers into a shared future. Designers utilize prototyping methods to test new solutions and are familiar with a generative-iterative process of development rather than rigid adherence to a static protocol (Brown, 2008). This reduces the risk of validity-oriented endeavors by receiving valuable feedback to help troubleshoot any missteps. While it is

impossible to be totally certain about the future, a designerly approach should help orient the brand in the right direction.

Learning Organizations

For brand evolution to become natural and continuous it needs to be nurtured within an adaptive environment. Peter Senge asserts, "Learning organizations continually enhance their capacity to realize their highest aspirations" (Senge, 1990). Further he provides these idiosyncrasies of a learning organization:

- Systems thinking—the ability to see the parts and the whole and understand the interactions between them.
- Personal mastery—encouragement of members to increase their level of proficiency and become life-long learners.
- Mental models—the ability to understand and challenge existing mental models to allow for the creation of new models, challenging the status quo.
- Shared vision—alignment around a common mission or vision of the future; recall Hallmark, which is working to align all business areas around their brand "aspirational vision" of helping to create emotional connections between people.
- Team learning—a capacity for coordinated action. This is critical in the implementation of a holistic brand system.

Organizations that want to sustain their brand's value and relevance through an evolving brand strategy will need to adapt their internal culture to be flexible and comfortable with change. A learning organization develops nimble employees who can actualize the brand vision through an innate understanding of what is "right" for the brand experience.

3.3 Design

A Heuristic Strategy for Implementation

Based on considering brands as an interaction space that needs to be constantly evolving and influenced by co-creative principles, the author proposes the following heuristic framework to implement a designerly approach to strategizing brand evolution and management, see Figure 16. This framework is a strategic overview, rather than a prescriptive formula, because specific tactics will vary with each organizational situation.
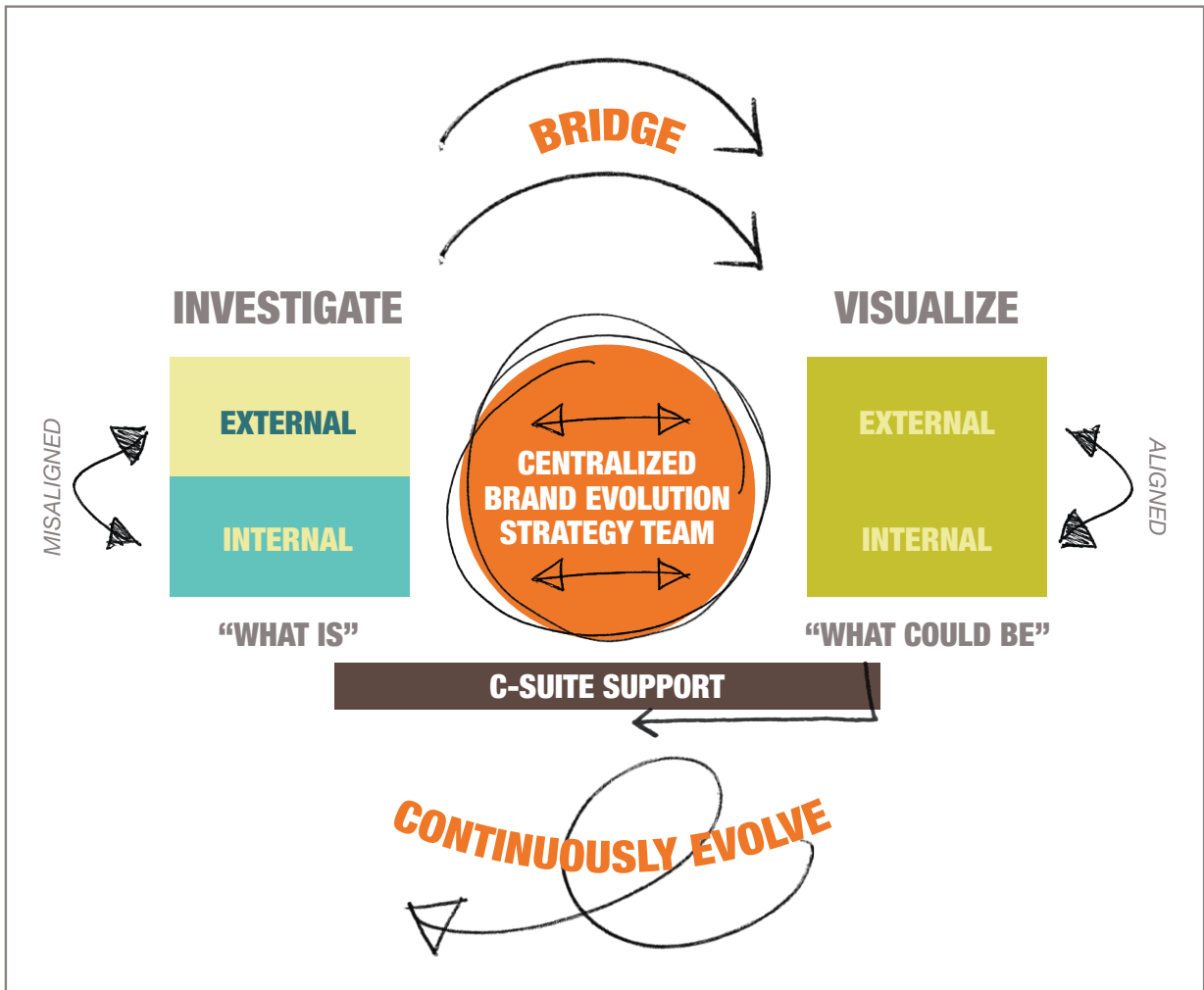
Figure 16: Implementation Process model

C-Suite Support

The first stage is to gain the support of the senior management. It is likely that they will already have a desire to grow brand value, but they will need to have a clear understanding of what is at stake if new tactics are not employed for the creation of brand evolution strategies. They need to be informed about the changing dynamics of culture and communication, and what affect these are already having on strong brands. Basic social media practices, such as simply having a Facebook page, will not be sufficient when digital experience realms grow more sophisticated. The team should have direct access to the C-Suite to guarantee organizational alignment and support for the changes and endeavors that the brand team will pursue.

Form a Team

A centralized brand strategy team needs to be established. It should have access to all areas of corporate function to understand possible influences a holistic brand strategy could have on each area. Particularly critical linkages need to be formed with teams working on innovation, marketing, sales and design. This team would be best served by a cross-functional array of members who are committed to utilizing designerly methods to explore the brand evolution space. As discussed previously, these designerly methods will help guide the team to holistic solutions. Another critical component of this team is to have an individual skilled in crafting unique brand stories to help communicate findings and direction. This team will also serve as the organization's brand "champions" and will be tasked with sharing the vision throughout the organization.

Internal-External Investigation

Next a brand audit needs to be conducted to fully understand the existing brand perceptions and gaps. An internal audit needs to include the perceptions of the employees and not be a self-reflective survey, but an open dialogue about where they see the brand is succeeding and failing and if the corporate practices align with desired brand perceptions.

External audits will require a deep dive approach with both loyal consumers and ideal consumers. The brand strategy group should utilize co-creative, user-research methods to gain insight, and visualization methods such as scenario building and prototyping to envision the aspirational future, or potential futures. It is always a good idea to visualize a variety of scenarios to help create strategies that can be adaptive to many different influences.

Bridging to a Future Vision

A strategy needs to be developed to bridge "what is" to "what could be". Where is the desired green pasture, how do we get there and bring our consumers along with us? This strategy needs to be evolutionary rather than revolutionary, we are seeking to have our consumers come with us on the journey, not shock them into abandoning our brand.

Implementing the strategy will require a great deal of finesse. Change is hard, but through the visualization techniques the brand evolution strategy team can help communicate internally and

externally values the brand will uphold and help them see the future possibilities. The entire organization will need to be educated about the brand meaning and how to act to honor this vision.

Test, Learn, Revise

A brand evolution strategy is not a "one and done" process. It needs to be treated as a continually adapting endeavor; one that tries different tactics, reflects on the outcomes, and revises to incorporate the learning that has occurred. The aforementioned idiosyncrasies of a learning organization can be adopted to address this need. Employees and loyal consumers alike will need to be empowered to share in the endeavor of creating sustained value. Both are critical components to the successful implementation of a holistic, adapting brand evolution strategy. A mutually beneficial partnership will help sustain a brand's value into the future.

Conclusion:

First, it is necessary to reiterate that the ultimate desire for future brand management should be to create brands that are engaging and relevant; brands that are capable of sustaining and creating new value for organizations and consumers. Under current conditions brands are failing to connect with consumers and provide the sustained value that is traditionally rewarded by consumer loyalty. It is essential to recognize that the communication model around brand messages has shifted from being organization-controlled to being shared between peers using digital media. It has become critical for brands to be future-oriented and develop a brand evolution strategy to help create a proactive, adapting brand system that is not only capable of managing challenges presented by changes in the surrounding culture, but capable of creating new value and opportunities within those challenges.

Co-creation with consumers can be utilized to gain insight into unfulfilled desires and to encourage feelings of partnership in loyal brand consumers. Through an understanding of a brand as a co-created interaction space, filled with touch-points in both real and virtual experience realms, brand strategists can learn to utilize consumers as partners in the creation of brand value. In order to have deeply embodied brand meanings and values, each touchpoint in the brand experience needs to reflect these meanings and create holistic experiences. Meanings are shared constructs that exist within the brand interaction space.

Currently, organizational structure and culture are preventing brand management teams from being most effective. Organizations will need to realign to centralize a brand team that can serve as a connecting force between disparate departments and objectives. Utilizing a designerly approach and creating a learning organization will help manage brand evolution strategies by considering "what could be" and by handling ill-defined problems. A designerly approach will help brand managers to prepare for constant adaptation and reframing of the brand within changing environments. A learning system will coordinate the organization around a shared vision and create the capacity to execute in a coordinated fashion.

Implementing these new methods into an organization will require dedication. A centralized brand evolution strategy team, supported fully by senior management, will perform internal and external investigations seeking to understand the existing perceptions about the brand. Utilization of co-creative methods to gain insight, and visualization techniques to envision the future will help define a strategy that bridges the gap between "what is" and "what could be". The strategy needs to be openly communicated to empower employees and consumers to be partners in the journey forward. Finally, evolution never stops; brand managers need to continually iterate to refine and adapt their approach.

Because this area of research is so timely, with rapidly changing dynamics, this paper has benefitted from the use of non-academic sources, in the form of industry blogs, online journals, and conversations with experts in the field. Further research under more rigorous circumstances would certainly serve to verify the assertions proposed. Future research should endeavor to examine the internal tactics utilized by organizations that appear to be successfully managing evolving brands. This paper has looked at brands that are effectively providing sustained value to consumers and reaping the rewards, brands that are working on this evolution process, and brands that are struggling from a lack of consumer partnership. It would be of benefit to study these brands again in the future to discover which ones are still struggling and which are thriving. Additionally, experimentation with co-creative techniques in brand management would illuminate methodologies that deliver positive outcomes.

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