Graphic Design and Corporate Identity

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A Thesis

in

The Special Individual Program

Presented in Partial Fulfillment of the Requirements
For the Degree of Doctor of Philosophy at
Concordia University
Montreal, Quebec, Canada

January 1989

ISBN 0-315-49119-1

ABSTRACT

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Concordia University, 1989

Corporate identity is the sum of (A) a sense of personal investment in the unity and objectives of the organization on the part of its individual members, and (B) a recognition of the organization's uniqueness by external publics. A strong corporate identity is regarded as significant for the achievement of organizational goals. Therefore corporate identity design, the coordination of the visual presentation of organizations (in which graphic elements such as symbols, print design and signs are major components), is an important manifestation of corporate strategy. Its main purposes are: to legitimate the position of the management group, to foster a shared sense of group identity amongst the organization's members, and to maximize the organization's distinctiveness in its environment.

The objective of this study is the contextual examination of the role of identity design in organizations, using Bell Canada and the Canadian Government Federal Identity Program as case histories.

Organizational history, characteristics and policies are shown to be important for the description of the following issues: the methods adopted and the problems encountered, the relationship between identity programs and corporate change, and the roles of participant groups. Interviews with designers, consultants, design managers and executives from Canada, Britain and the United States provide additional information on the implementation, functions and position of identity programs within organizations.

The literature of organization theory and culture provides useful concepts, both of the social definition of identity and of organizational cultures as symbolic discourses shaped by authority relations. This study shows that the chief concern of design in this context is not aesthetic; it is used to control presentation and to communicate. Identity design synthesizes organizational attributes and values and seeks to promote corporate goals and ideology through the use of visual symbols and visual order. Design's importance is shown to be cultural, as it focuses and interprets identity within organizations and increases their impact within the ambient culture.

Acknowledgements

Any serious design study is difficult to undertake within the parameters of existing Ph.D. programs, and I would therefore like to express my appreciation of the adventurous approach at Concordia, where the Special Individual Program makes this kind of interdisciplinary study feasible. I am very grateful to Professors W.L. Gardiner, J. German and J. Smucker, whose different perspectives were invaluable, and without whose advice and assistance this project would not have been possible.

I would also like to thank Mr. Gerry W. Bethel, Acting Director, Information Policy, at the Treasury Board of Canada, Ottawa, and Mr. Ed O'Brien, Assistant Director, Advertising and Promotion, Bell Canada, Montreal for assuring the cooperation of their organizations with this study. All the professionals associated with corporate identity design who were interviewed, or otherwise helped with my research, were very generous with their time and interest:
Jean-Patrick Amisse, Claude Béique, Clive Chajet, Theo Dimson, Jim Donoahue, Tom Ford, Charles Harris, F.H.K. Henrion, Burton Kramer, Roland Lavoie, Davis Masten,

Colin McMichael, Jean Morin, Wally Olins, Lorne Perry, Lise Potvin, Paul Strongitharm, Ulrich Wodicka, and Chris Yaneff.

Finally, my thanks to Jennifer Trant for proof reading and help with the computer, and for her patience and support.

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Chapter 1

Introduction

Though corporate identity design is initially an expensive exercise, all major corporations and many government organizations invest in it. Identity design is an important visual feature of the corporate environment in which we live, as ubiquitous as advertising. However, research can not isolate or quantify its effect, either on profits or on public relations, and it has been dismissed by critics as an expression of executive vanity. This study seeks to clarify the concept and methodology of corporate identity design. It therefore describes the elements of corporate identity, and design's role in establishing and promoting it.

Design in an industrial context is the activity of organizing materials, concepts and processes to meet a set of pre-determined requirements. These design aims, whether the products of the activity are objects or communications, are always economic, perceptual, and ultimately behavioral, as profit, image and maximized control over response are central issues for business. Even large, non-profit organizations are intimately involved with image and control. In organizations, the three chief concerns of graphic communications design - information, identification and persuasion (Hurlburt, 1981: 22), are therefore inextricably connected. Clearly, as the identity being promoted is sponsored by management, the communication is from the top down and has an ideological dimension. The chief reason for the universality of corporate graphic systems is neither marketing nor long-term cost benefits (though both of these factors are often cited); it is primarily cultural, concerned with the framing and affirmation of group identity.

Identity may be summarized as an awareness of uniqueness and continuity (based on experience and abstractions such as goals and values, described in Chapter 2). Visual presentation of largely invisible characteristics is so important for their perception that identity and visual identity are often synonymous. The terms "corporate identity", "visual identity" and "corporate image" tend to be used indiscriminately, as if interchangeable. R. H. Beck helps to define visual identity's function in creating recognizable form:

> Our definition of the term "visual identity" would be: the characteristic visible manifestations of an organization and its activities- as used by its publics for the purpose of identification. (in Blake, 1971: 7).

A connection between visual identity and corporate purpose, linking appearance with strategy, is suggested by London-based design consultant Wally Olins, for whom the visual aspect "...is a part of the deeper identity of the group, the outward sign of inward commitment, serving to remind it [the organization] of its real purpose" (1978: 15). The identity of an organization is therefore the product of the values, goals and attributes of the organization and their conscious projection. The organization's image is the perception of its identity held by the audience. This is influenced not only by the organization's actions and public relations, but also through a range of corporate artifacts (such as products or graphics) which function as symbols for order, uniqueness and continuity.

Perceived identity has always been important for the internal cohesion of organizations and for their recognition as defined groups by those outside. Though this paper is concerned with graphics (the dominant vehicle of corporate identity), all kinds of artifacts, from products to architecture, can play a major role in identity formation. Both Adrian Forty (1986) and Olins (1978) cite many early examples of corporate identity design, from the dress codes of the Catholic church and the use of art by Renaissance princes, to nineteenth century railway companies and the Third Reich:

> Of all the ways in which design can influence the way in which we think, the only one to have been acknowledged widely has been its use to express the identity of organizations. Empires, armies, navies, religious orders and modern corporations have all used design to convey ideas about what they are like both to insiders and to the outside world. (Forty, 1986: 222).

In modern organizations, this has led to corporate identity design being seen as an integral part of strategy and a valuable public relations tool. The technological capacity, complexity, size and power of organizations have all grown, together with their bureaucratization. There has been a corresponding growth of uncertainty in their direction and internal and external relations, which has lead to a concern with the appearance of uniqueness, unity and purpose, often referred to as personality (Olins, 1978; Bernstein, 1884; and Fogleman, below). Images play a major role in the social definition of identity, and perceived corporate identity is the product of consistent visual presentation. James K. Fogleman, design director of the CIBA corporation, spoke in 1953 of the "need for integrated design, or a controlled visual expression of a corporate personality, which plays a large role in achieving corporate identity" (quoted in Meggs, 1983: 428).

In the typical cycle of identity design described in this study, an identity program is instigated by top management and evolves as follows. External consultants are hired to analyse the activities, the structure and the current image of the corporation. This analysis is followed by the formulation of design solutions, and a close liaison develops between consultants and internal coordinators as the program is applied across the whole organization. Implementation is a long-term process and the program has to respond to change continually. Corporate identity design therefore becomes a visual representation of the development of an organization; they grow together. Identity design programs become inseparable from the broader cultural process of identity development.

Premise

From the introduction it follows that the chief concern of corporate identity design is not aesthetic. Though visual appeal is important in making such programs function more effectively, their main purposes are cultural. They reinforce the position of the management group, foster a shared sense of group identity amongst the organization's members, and maximize the group's distinctiveness in its environment. Design is used to control presentation and to communicate, not to decorate. Graphic design plays an important cultural role in organizations by focusing and interpreting corporate identity for internal and external publics.

Methodology

This study aims to establish the assertion made in the premise that identity design has an important cultural role to play in organizations and their environment. Though this is impossible to quantify, an examination of the following areas will delineate theories, assumptions, problems and practice:

1) The basis of identity in organizations and the importance of its visual articulation.

2) The relationship of identity programs to corporate and environmental change.

3) The roles of professional groups in the creation and maintenance of identity programs.

4) The problems encountered with organizational communications and structures (with internal sub-groups and with large organizational scale, for example).

The comparative description and analysis of these factors have not yet been undertaken in much breadth or depth, perhaps because this task requires an interdisciplinary approach. As Victor Margolin has remarked:

> ...no existing academic discipline or field... has taken on design as a whole. Each deals with fragments of it and thus precludes the kind of comprehensive understanding that scholars seek from their subject matter. (1988: 67)

For example, in recent years there has been a rapid expansion of historical research and theoretical speculation concerning design, bringing with it a recognition that mainstream art and design history, concerned primarily with authorship and individual artifacts, does not provide a complete framework for developing an understanding of the role of design in industry, which is centered on communication and motivation. Corporate graphics systems are collectively created, and while aesthetic analysis of specific graphic elements in identity programs reveals underlying visual structure, this attribute is chiefly a product of the functions of the programs (which impose severe constraints) and of the cultural norms of designers (influenced by their education and specialization). The meaning of artifacts is contextual rather than immanent[1]. Similarly, semiological interpretation is also limited, for though it analyses communications systems, it is too linguistically based to recognise the cultural significance of artifacts or provide a complete framework for analyzing the motivation, production methods, content or structure of identity programs.

However, the importance of representations in establishing cognitive order (and the implicit questions of ideology and framing), have received attention from both sociologists and historians of material culture. Also, the constituent elements of identity in organizations, and the context for its formation and presentation, are described by the literature of organization theory and culture, which therefore make a valuable contribution to the investigation of the role of graphic design in this area.

Case Histories and Interviews

Using the framework outlined in the introduction, this study examines the objectives and implementation of two major identity schemes, supplemented by interviews with prominent practitioners in associated fields. Case histories are essential in order to demonstrate the evolution of programs through time, and personal interviews are needed because of the scarcity of documentary sources of information. In addition, as the programs are jointly created by groups with different professional cultures and expertise, varied viewpoints have to be considered.

The two case histories used, the Canadian Government Federal Identity Program (referred to as the FIP) and the program of Bell Canada, were chosen because they present a clear picture of the role of identity design in large organizations of cultural and geographic diversity. Both are bureaucratic service organizations whose identities are not primarily involved in the marketing of specific products (where corporate identity and brand identity overlap), but with the communication of the purpose, structure and character of the organizations they serve. Though a complete cultural analysis of these organizations is not possible, an examination of organizational history, characteristics and policies, drawn from documents and interviews, provides the parameters for understanding their identity programs.

The interviewees (listed below) were chosen because of their links with the case histories and/or their prominence in their fields. They represent the three professional groups participating in the creation of corporate identity programs - managers, designers working within organizations, and external consultants.

Bell Canada

Jean-Patrick Amisse, Corporate Communications Consultant, Axion Design Inc.
Charles Harris, former Vice President, Bell Canada.
Burton Kramer, Design Consultant.
Roland Lavoie, Art Director, Bell Canada.
Davis Masten, Partner, Cheskin and Masten, Market Research Consultants.
Colin McMichael, former Art Director, Bell Canada.
Jean Morin, Partner, Axion Design Inc.
Ed O'Brien, former Assistant Director, Advertising and Promotion, Bell Canada.

Canadian Government Federal Identity Program

Claude Béique, former Designer, FIP, former Art Director, Canadian Coast Guard.
Jim Donoahue, Design Consultant.
Tom Ford, former Director of Planning and Research, Information Canada.
Paul Strongitharm, Senior Secretariat Officer (in charge of design) Canadian Coast Guard.
Ulrich Wodicka, Senior Designer, FIP.
Chris Yaneff, Design Consultant.

Others

Clive Chajet, Chief Executive Officer, Lippincott and Margulies (Corporate Design).
F. H. K. Henrion, Partner, Henrion, Ludlow and Schmidt (Corporate Design).
Wally Olins, Partner, Wolff Olins (Corporate Design).
Lorne Perry, Assistant Vice President, Canadian National.

The initial basis for the interview questions was Woodward's study: Industrial Organization: Behaviour and Control (1970: 41), though many of the later interviews do not conform rigidly to this theoretical framework as they were directed towards completing the case histories. Woodward sees the structure of an organization as a product of the managerial control system, which is in turn determined by the type of technology that the organization is using. Though she deals specifically with the impact of technology on control systems, the approach is relevant, as design has become aligned with management strategy and has created visual control systems for its presentation. Also, the emphasis on organization and control in the definition of design given in the introduction denote a strong link with management aims and functions, despite cultural differences between the professional groups (see Chapters 3 and 4).

Woodward identifies four elements in control systems: objective setting, planning, execution and control (1970: 37). This description can be applied to corporate identity programs, which stress: (a) design, because simplicity and memorability are paramount in recognition, (b) research, because of the importance of accurate definition, both of identity and publics, (c) design management, because coordination and consistent implementation are essential, and because of the link with long term strategy. Broadly, the functions of design and research correspond to Woodward's descriptions of objective-setting and planning, while design management corresponds to her description of execution and control. She also points out that management relies on cooperation as well as control (ibid., 50), both of which are objectives which identity design is supposed to serve (see Chapter 3).

The aspects of control systems investigated by Woodward are summarized below:

1) Setting of objectives.
2) Relationship of the four elements of the control cycle (above).
3) Setting of standards.
4) Awareness of standards.
5) Use of control information.
6) Information controls.
7) Control system and social system. (1970: 41-44).

In adapted form, this list was used as a framework for the interviews as follows:

1) Objectives.
   a) what are they?
   b) who set them?
   c) how were the decisions made?
2) Implementation (planning, execution).
3) Standards (supervision).
4) Internal/external awareness (publics, relationship to brand identity- where applicable).
5) Feedback.
   a) assessment of public reaction.
   b) response of program to change.
6) Limits.
   a) what was left out?
   b) why?

The major interviews have been transcribed from tapes, edited and included as Appendix VII, which also contains brief biographical information. The appendices and Chapter 5 (which describes and analyses the case histories) may be read out of sequence with the rest of the paper. A comparative survey of the literature of relevant disciplines (broadly, of organization theory and culture in chapter 2, art and design history and theory in chapter 3, and design practice and design management in chapter 4) seeks to establish the intellectual framework of the study. Words which have specialized or multiple meanings relating to design programs are defined in an illustrated glossary (fig. 1).

Chapter 2

Corporate Identity

The premise outlined above argues that in order to delineate identity design's role in organizations, there should be an account of its role in focusing the aspects of corporate life which contribute to identity development. These core areas are described in organization theory as, briefly, (a) culture (the value system), (b) ideology (that part of the value system which is consciously articulated), and (c) strategy (the long-term corporate plan). This section will review the coverage of these areas in the literature, beginning with an introduction to the concerns of organization theory and progressing to a survey of culture, symbols and meaning related to organizations. The second part of the chapter deals with issues of strategy, goals and ideology.

The contributory factors outlined above are shown in figure 2, grouped around identity. Though diagrams necessitate simplification, the simultaneous presentation of concepts and relationships in this form is a useful aid to discussion here, as definitions of terms and the relationships between them are described from many different viewpoints in the literature of organization theory and culture. Other important, constituent issues such as goals, symbols and leadership are positioned as sub-categories in the diagram, as are the concerns of identity: recognition, maintenance of the system and a shared sense of mission.

It will be seen in this chapter that system maintenance and shared mission are frequently referred to as products of corporate culture in the literature. However, corporate culture is neither as monolithic nor as neutral as the term may indicate, as it is not a purely "grass-roots" phenomena. It is produced by the interaction of different cultural groups and has a strong ideological dimension as a result of management intervention. Corporate identity is a product of framing and articulation by management, drawing on a common cultural base. In organizations, perceived cultural attributes of uniqueness, continuity and collective purpose form the basis of the conscious propagation of recognition, system maintenance and shared sense of mission, respectively. Identity is an appropriate term for this process, being more clearly strategic than culture. It will be shown, here and in Chapter 3, that design makes both a strategic and an ideological contribution to identity, and it therefore appears in these two sections of fig. 2.

Organization Theory

Scott defines theory as a general statement "about the likely relationship between two or more phenomena" (1970: 169). The relationships described by organization theory are complex and centre on two main areas: (a) power - its location and distribution in the system, and (b) goals, the "core activities" of organizations - achieving objectives, maintaining the internal system and adapting to the external environment (Argyris, 1964: 322). Included in these two areas are issues important in the development of identity: the endorsement of power and its values, and the processes of evaluation, control and change.

Woodward has written that in attempting an overview of processes in organizational life, whatever the original discipline,

> "the starting point is the identification of a system and the questions subsequently asked are very much the same: what are the strategic parts of the system under review and how are these parts interrelated and independent?" (1965: 251).

Theories of organizations spring from many different disciplines and therefore have varied viewpoints[2]. The earliest theories concentrate on the formal structures of authority in organizations (called the "relatively stable aspects of organizational patterns" by March and Simon in 1958). Best known are the rational goal model of Weber's analysis of bureaucracy (1968) and Taylor's "scientific management" theory (1911)[3].

Subsequent authors have increasingly described organization as a process rather than as a relatively static structure, thus prompting the distinction made between early, "mechanistic" and these more "organic" models by Burns and Stalker (1961: XVI)[4]. A central theme of organic models is the gap between the official, apparent organizational structure (or formal organization) and the informal organization (or social system) - all "the actual behaviour and attitudes of organization members" which "may be a product of more than the structure" (Clegg and Dunkerly, 1980: 140). Informal organization is located within the culture area of fig. 2.

The human relations school, lead by Elton Mayo, emphasized motivational factors and the informal, social aspects of organizations (1945)[5]. Similarly, organizations are seen as existing in a state of internal tension and dynamic equilibrium with the environment by Selznick (1949, 1957), Gouldner (1954) and Crozier (1964). All three explore the dysfunctional consequences of bureaucracies. Crozier cites Merton's comment that "institutional means" replace the original goal of the organization, and states that the ethical values of bureaucracy (conformity) and capitalism (individual responsibility) are in conflict. People cope by resisting greater participation ("retreatism") and the bureaucratic system is one where ..."the feedback process, error-information-correct, does not function well" (1964: 187)[6].

The recent attempt at an integrated picture of organizations through the use of the culture concept is particularly relevant to these dysfunctions and to this study. It demonstrates the role of ideology in the achievement of management goals because of the central importance of influencing behavior and attitudes.

Culture and Organizations

There is an enormous range of definitions of culture. It is "one of the two or three most complicated words in the English language" (Williams, 1976: 76) and an "extremely amorphous" concept (Smucker, 1986: 2)[7]. Culture is the process of structuring reality and it is subjective and selective;

it excludes some parts of reality and gives increased value to others, creating social cohesion in the process (Bourdieu, 1984: 170). The problem of framing culture is summed up by Weber's comment: "all knowledge of cultural reality ... is always knowledge from particular points of view" (1949: 81). Therefore objectivity in the study of culture has inevitably been a problem, and the debate about the breadth and use of the culture concept has been continuous[8]. Smucker has described the use of culture as a "field" term to cover the whole area of beliefs, norms and values (1986: 2-3).

Smucker and Williams have referred to the increasing application of the concept to constituent parts of our own society - sub-cultures within the ambient culture. Surveys have attempted to create typologies of cultural consumption, relating the choices of individuals based on their values and social circumstances (Bourdieu, 1984; Mitchel, 1983). In recent years the application of this pluralistic culture concept to the study of organizations has gained widespread attention, both in sociology, as a means of understanding organizational behavior, and in management theory, as a means of influencing behavior[9]. Culture has been seen by writers on organization theory as a useful metaphor for the irrational and dynamic aspects of organizations, though the problems of definition and coherence, mentioned earlier, remain (Astley, 1985; Louis, 1983, 1985; Pinder and Bourgeois, 1982; Van Maanen, 1979).

The value of the culture metaphor for describing the interaction of individuals in an organizational setting has been its inclusion of meaning (the qualitative, motivational aspect of organizational life), expressed by Pettigrew in his definition:

> Culture is the system of such publicly and collectively accepted meanings operating for a given group at a given time. This system of terms, forms, categories and images interprets a people's own situation to themselves. (1979: 574)

Pondy and Mitroff (1979) argue that the advantage of the culture concept over other metaphors is this emphasis on communication and the creation of shared meanings. They use Boulding (1968) on general systems theory (i.e., the general theory of relationships) to argue their case. Boulding proposes a hierarchy of levels of complexity in systems (1968: 199). The lowest level is physical,"static structure" (adequately described by the sciences). The subsequent levels incorporate increasingly complex relationships between systems and their ambient systems until we reach "symbol processing systems" (the human level) at level

7, and culture, a "multi-cephalous system", is at level 8 (Pondy and Mitroff, 1979: 5-10).

Culture is therefore seen as an integrating concept which shows organizations to be socially constructed realities. Spybey (1984) argues that different groups within organizations have different "frames of meaning" unconsciously drawn from society as a whole, and that organizational structures are reproduced in a partially unconscious way. Frames of meaning are an important factor in the selection and reproduction of value systems, and in linking behavioral and environmental issues (Simon, 1945: 75).

The use of the culture metaphor also emphasises organizational fluidity and dynamism (Jelineck, Smircich and Hirsch, 1983; Kimberly, 1980; Pettigrew, 1979). This dynamic view of organizations is often seen in terms of a "life cycle", with culture as an important element (Gagliardi, 1986; Kimberly, 1980; Tichy, 1980; Schwartz and Davies, 1981). Kimberly writes that though such a biological metaphor is "imperfect", it does prompt discussion of the genesis and "self- maintenance" systems of organizations (1980: 9-14).

Several typologies of approaches to organizational culture have been proposed, notably by Allaire and Firsirotu (1984), Louis (1983), Morgan, Frost and Pondy (1983), and Smircich (1983). Culture is delineated in two ways, expressed by Smircich as a "critical variable", based on mechanistic assumptions of organizational function, and as a "root metaphor", based on an adaptive, organic view (1983: 339-340). Culture seen as a variable leads to the possibility of intervention and manipulation, while culture as a root metaphor provides an overview of organizations as "expressive forms, manifestations of human consciousness" (ibid., 347).

Louis describes psychological and sociological contexts for the use of the culture concept, the latter, which is of particular interest here, being concerned with "Continuity, Control, Integration and Identity" (1983: 45)[10]. Allaire and Firsirotu also outline relevant approaches to this study: (a) a "sociocultural" view of culture, where "structures and strategies ... are a product of their genesis and historical transformations" (as in Smircich's adaptive "root metaphor"), and (b) a "cognitive" approach which corresponds to Smircich's "critical variable"[11].

Corporate culture's "primary function is to cue and shape individual behaviour toward the mode of behaviour dictated by organizational demands" (1984: 218-219).

The significance of these approaches can be seen in: (a) the powerful influence exerted on identity development by the shared experience (ie. corporate history and characteristics) of the organization's members, and (b) the major strategic and ideological aim of the design of visual identity - to influence perception by creating symbols which express this common ground (cf. discussion of ideology, 41-46).

Symbols and Meaning.

Pettigrew argues for the use of constituent concepts of culture in the analysis of organizations. These are: "symbol, language, ideology, belief, ritual and myth", of which symbol is "the most inclusive category", containing language, ritual and myth (1979: 574). Acknowledging his debt to anthropology, Pettigrew defines symbols as:

> ...objects, acts, relationships, or linguistic formations that stand ambiguously for a multiplicity of meanings, evoke emotions, and impel men to action (1979: 574).

Sperber points out that symbols express the "tacit knowledge" of members of a culture "without elaborating the underlying argument" in a rational way (1975: X-XI). This irrational element is shown by the fact that symbols embody contradictions, non-contradiction being the basis of rationality (Sperber 1975: 1). Similarly, Martin has noted that symbols "are curiously resistant to being imprisoned in one unequivocal 'meaning' "(1986: 28). Ambiguity and emotive power are closely related, for the power of symbols lies in their capacity for individual interpretation and in their adaptability.

Symbols are therefore the collective metaphor through which individuals in a group can share meaning. Meaning here is an active process depending on the individual's orientation to symbols and value systems (Geertz, 1973: 212). Symbols are also "part of the innate mental equipment which makes experience possible" (Sperber, 1975: XII)[12]. On this shared, cognitive aspect of symbolism, Morgan, Frost and Pondy draw on Weik's "sense-making" metaphor (1977) to point out the rationalizing function of images of reality created within a culture (1983: 24).

Morgan, Frost and Pondy (1983), Firth (1973), Langer (1978) and others have written about the distinction between the meaning of symbols and signs. Using flags as an example, Firth shows the difference between flags as signs (naval signaling flags), where they form a distinct language in which "it is vital for efficient operation that fabricator and interpreter are using a common code" (1973: 66), and national flags, which do not communicate specific, linguistic messages, but embody the idea of nationhood and have an "officially impuned sacredness" (1973: 365).

Analyzing meaning in visual symbols by treating them as linguistic codes (semiology or semiotics) has been controversial[13]. Semiology is an approach commonly used in the criticism of advertising, where the use of words and of collective fantasy are clearly significant, (as in Williamson, 1978; Goffman, 1979; Marchand, 1985) but has not been applied to a corporate identity system, for reasons given below. It is the internal relationships in sign systems which are studied in linguistics, and this approach has been disputed when applied to visual material:

> Levi-Strauss has studied anthropological phenomena as if they were languages ... (structuralism) practises, first and foremost, an "immanent" type of criticism, refusing to look outside the text or group of texts with which it is engaged in order to seek an explanation of their structure. (Sturrock, 1979: 11)

Though semiology has been useful in the study of, for example, organizational terminology[14], it is not so applicable to the study of all visual symbols. Bertin offers a useful semiological classification of graphic systems, describing three levels: (A) "graphics" (corresponding to mathematics) which are logical systems of pre-defined signs, such as maps, (B) "figurative images" (corresponding to words) which are descriptive, spatial images, such as illustration, and (C) "non-figurative images" (corresponding to music) which "no longer signify anything precise in order to attempt to signify everything", such as abstract corporate symbols (in Ashwin, 1983: 273-279). In relation to this last category, Firth, discussing the range of symbolic representations, has written that image "is concerned primarily with forming a mental entity, giving shape in the "mind's eye" to a set of qualities perceived in or attributed to the object (1973: 71)[15]. Meaning, in the predictably transferable sense of linguistic codes such as signaling flags, does not exist here; it is "cognitive and not semiological" (ibid., 140)[16]. According to Sperber, symbols are not signs, do not have a code structure, have little resemblance to language and are therefore "incomprehensible from the semiological point of view" (1973: 85-87).

Though corporate identity graphics, whether representational or abstract, do function as denotive signs, on the level of signifying ownership or location, they also function in the connotative sense as persuasive symbols. For example, the zoo pictograms (fig. 73) are designed for maximum clarity of recognition. The aim is to avoid associative meaning other than recognition; the generalized representation of a lion in the zoo simply indicates its location, as with pictograms on highway signs[17]. However, the lion has functioned as a metaphor for strength and nobility from medieval heraldry to modern corporate identity such as MGM, or the Royal Bank of Canada. A good example of its use in the latter context is the symbol of Monarch Industries, a producer of pumps, water systems, tanks, valves and castings (fig. 72). Both the Monarch symbol and the zoo pictogram are graphically simple and geometrically structured to promote quick recognition, but the pictogram aims to be emotionally neutral while the symbol, though acting as a label of ownership or of origin (depending on its context) also retains some heraldic connotations in order to connote tradition, strength and superiority, further emphasized by the direct, symmetrical gaze instead of a profile. Similarly, complex associations are implied when the pictogram of the bird of prey with its young is used inside the zoo's logotype; it takes on symbolic qualities of nurturing and the protection of endangered species[18].

Associative qualities in corporate symbols are also enhanced by controlled context, appropriate names (eg. Monarch) and the coordination of related publicity. Where only logotypes are used, as with Bell Canada, this control of presentation becomes even more important. However, it would be impossible to state complex meanings completely without ambiguity in purely visual terms, because total control of context and interpretation cannot be achieved. Thus while signs are context-specific, operating in established frameworks (or codes) in order to achieve better "fit" between the sender and receiver of the message, symbols allow more individual freedom of expression and esthetic modification, and of audience interpretation. Because of this ambiguous functioning of symbols, "cultural symbolism creates a commonality of interest but not of opinion" (Sperber, 1973: 137).

Commonality of interest may be read as group identity in organizations, i.e., a sense of personal investment in the organization on the part of individual members. Smircich outlines culture's impact in organizations in this area, claiming that culture generates commitment, increases stability and influences behaviour patterns, all of which can be seen as relevant to corporate identity (1983: 345-346). This symbolic view of social reality and its continual re-creation is discussed by Pondy and Mitroff, who stress the need for a group to have dialogue if it is to develop a coherent world-image (1979: 9) and by Wexler, who describes the mediating role of symbols in individual/group relations (1983). The culture metaphor therefore creates an image of organizations as symbolic discourses (Smircich, 1983: 350).

Daft (1983), Cicourel (1973) and Allaire and Firsirotu (1984) are also concerned with the intuitive, cognitive aspect of culture. According to Daft, symbols help employees to "interpret and understand the organization and their role in it" (1983: 199). All corporate symbols, from a receipt to a myth, have both information and value content. He terms these instrumental and expressive. Receipts are placed at one end of the spectrum as an example of universal, concrete symbols, while myths and stories are placed at the expressive, individual, abstract end. Daft places the company logo towards the objective end, near the organization chart. This seems logical, as both items are highly formalized representations of the structure of the organization. The logo, however, is more expressive than an organizational chart because, though it reflects the hierarchy in its implementation (in different graphic treatments of stationery for different levels and sub-units, for example) a corporate logo is also a statement about how the company sees itself (as with the Monarch symbol discussed earlier) and therefore has an ideological dimension as well as being an operational description (ibid., 203-204).

Meaning in symbols has been interpreted in two ways, functionalist and interpretive. Dandridge takes the functionalist view, dividing the uses of organizational symbols into three: descriptive, energy controlling, and system maintaining (1983: 72-78). The first two attributes can be attributed to effective corporate graphics, which seek to represent corporate characteristics while reinforcing centralized authority. The third, system maintenance, has already been described as one of the chief functions of corporate identity (fig. 2).

Finally, an interpretive, psychoanalytic approach to meaning in symbols is found in Walter. Citing Lasch (1978) and Goffman (1959), he discusses the power of symbols to influence "the action of the psyche and its final nature" (1983: 258). Walter describes the dominant corporate mode as the symbolism of success; the spectacle of flaunted, materialistic success which says "We don't make mistakes" (1983: 260).

Observations based on individual psychology, though interesting as comments on the values of society as a whole, are problematic at the collective, eclectic level of corporate design; they lead back to the questionable idea of the corporation as an individual with one mind. Links between corporate design and ambient culture are more effectively drawn in a sociological manner[19]. The objectives and functioning of identity design within the corporate symbolic field have a cognitive and motivating role, but a study of any deeper psychological impact on audiences lies beyond the scope of this paper.

Symbols and Change

The chief source of instability and change for organizations is located outside the system, as external forces "both provide resources and limit organizational action", while being beyond organizational control (Barnard, 1938: 6). The boundaries between organizations and their environment is fluid, and change is prompted by "internal strain and external threat" (Katz and Kahn, 1966: 109)[20].

Mintzberg elaborates on this idea of tension by describing five "pulls" which influence structural configurations: to centralize, to formalize, to professionalize, to balkanize and to collaborate. (1981: 104). These models show how the position of each group within an organization is predicated on that of the others, and demonstrate that stability is a dynamic state produced by counterbalancing forces.

Schein also gives precedence to the influence of the environment in the process of organizational change. Basic assumptions and values are created and tested by interaction with the environment, and in turn condition group members' perception of, and reaction to, the environment. As with Spybey's frames of meaning, external issues are resolved in terms of "the leader's or the group's definition of the environment", internal issues by their definition of organized relationships (1985: 51). The artifacts of corporate culture are a product of these reciprocal patterns. A shared sense of identity grows out of the history of dealing with the constraints of the environment, and cultural artifacts represent this in symbolic, memorable terms (ibid., 52-53). As the organization responds to environmental change and reviews its mission and structure, its identity is re-examined, updated, reinforced or re-created.

Symbols can therefore play an important role in times of change (birth, rapid growth, merger, take-over, crisis, new policy directions, etc.), when a clearly communicated and commonly held sense of mission/ identity are important (as in the case histories, Chapter 5). Unless culture adapts to external change, it will no longer "provide meaning and identity" (Schein, 1985: 270) or act as the "normative glue" (Tichy, 1980: 165-167)[21]. Symbols can mediate between apparently contradictory values of stability and change (Quinn and McGrath, 1985: 315-334; Dandridge, 1983: 73-74) because they can provide perceptual and conceptual continuity while announcing change.

Krefting and Frost argue that symbols can "help focus attention" and "frame other possibilities". They use Miller's term, "chunking" (1956), to describe how metaphors can facilitate the conception of complex cultural aspects of organizations as "coherent wholes" (1985: 168). Similarly, March and Simon proceed from the premise that: "the human organism can be regarded as a complex information-processing system" (1958: 9). They explore the limits of this system for rational decision-making and state that "rational behavior calls for simplified models that capture the main features of a problem without capturing all its complexities (ibid., 169). There is a correspondence here with gestalt theories of perception and design, which account for the simplification and the prioritization that occur in making visual decisions (Arnheim, 1954, 1969). March and Simon characterize these simplifications as the result of sequential search processes, and choices between stock, semi-independent action programs which have "restricted" applications and consequences. In the same vein, Swidler argues for a functionalist metaphor of culture as a "tool kit" used in problem-solving, while denying that it dictates behavior (1986: 273-276). The tool kit relates to the "frame of meaning" analogy of Spybey and Goffman, and Geertz's view of culture as a program. Thus the role of corporate symbols in times of change is to establish the perceptual background for decisions and behavior patterns, rather than being a direct causal agent.

For corporate symbols to be an effective change agent they must have links with the perceptions of the organization held by the publics being addressed (Olins, 1978, cf. Chapter 4). However, large bureaucratic organizations tend to be resistant to change, and internal forces mitigate against innovative individuals employing creativity or achieving an objective overview (Burns and Stalker, 1961; Crozier, 1964; Gouldner, 1954; Katz and Kahn, 1966; Woodward, 1965)[22]. Moore names three key strategic areas of activity where such "creativity" (in the sense of personal discretion and ingenuity) is important if an organization is to succeed: relationship to the environment, modifying organizational objectives, and improving means of achieving objectives (1962: 217-218). In periods of change, flexibility and effective communication in these areas have increased importance. A common solution, discussed in Chapter 4, is to hire external consultants (described as "entrepreneurial brokers of information" by Douglas, 1982: 8)[23].

Strategy

Discussions of strategy, goals and ideology in the literature demonstrate the importance of the cultural reference in describing the role of leadership. Andrews sees strategy in a cultural context, as a continuous process of organization, both instigating and responding to change (1987). The sheer complexity and uncertainty of relations with the environment, combined with a multiplicity of goals, internal factors and individual values, mean that strategy is never really complete (ibid., 113-114). Corporate strategy is the combination, or "pattern" of goals and policies of an organization, rather than the pursuit of single or limited goals.

> It is the unity, coherence and internal consistency of a company's strategic decisions that position the company in its environment and give the firm its identity, its power to mobilize its strengths and its likelihood of success in the marketplace. (ibid., 14-15, emphasis added).

This view of corporate strategy emphasises its mediating and motivating aspects, as well as the importance of values in strategic decisions. Andrews also draws attention to the importance of a conscious awareness of this value-base for management, whose role is not only to "conceptualize corporate purpose", but to use "dramatic skill to invest it with some degree of magnetism" (ibid., 8). In the words of Berg: "strategy should be treated as a ... synthesized abstraction of corporate identity that a company wants to promote" (1985: 281-282, emphasis added). Here, both the formulation and implementation of strategy are closely linked to ideology, the former because of its value-base, the latter because it employs ideological (non-rational) means of communication.

Weick demonstrates that the terms "culture" and "strategy" are often interchangeable in the literature (1985: 381-382). Disagreeing with this equation of the terms, he defines the difference between the two describing shared strategy as "agreement on means", and shared culture as "agreement on ends" (ibid., 383). Both terms "describe ways in which people understand what is happening" (ibid., 388), but an important difference between strategy and culture is the level of consciousness of formulation and direction. Where culture is a program for Geertz, strategy is a conscious program for March and Simon (1958: 142-148). The process of rationalization of the irrational, of turning desires into (more legitimate) "interests", justifies them (Gouldner, 1976: 216-217; Abravanel, 1983: 274-278).

Goals

Organizations are founded to achieve goals, though over-emphasis on this aspect of their activities has been criticized by Katz and Kahn, who warn that "stated purposes [may] ... idealize, rationalize, distort, omit or even conceal some essential aspects of the functioning of the organization " (1966: 15). Goals clearly reflect management priorities rather than broader organizational culture. Moore writes that the concept of goals can only be attributed "to those who formulate and pursue objectives on behalf of organizations" (1962: 23) - the executive group whose goal-setting function is described by Barnard (1938: 231-232) Katz and Kahn (1966: 298-299) and others[24].

Mintzberg writes of "consistency" and "intendedness" of behavior, which may be understood as observable products of goals, rather than abstract goal formulations (1983: 245-248). In this sense an organization's goal direction can be a tangible part of its identity; for consistency of purpose is obviously easy to recognise. Goals are most clearly seen in an organization with strong, shared ideology, where the mission is paramount, while multiple and changing goals produce a problem of lack of coherent identity (seen in multi-national conglomerates, for example). Moore has described the problem of proliferation and confusion of goals (1962: 24) and many writers, including Moore, Mintzberg and Bendix have pointed out that the original mission (of profit) is replaced in major corporations by the more bureaucratic one of survival. This displacement or supplementation of original purpose is prompted by the need to adapt to an uncertain environment.

The assessment of goals and the functioning of systems depends on concepts of efficiency and effectiveness. Katz and Kahn draw a distinction between efficiency (maximization by economic and technical means) and effectiveness (maximization by "non-economic or political means") (1966: 120). Barnard formulates this division by stating that an organization has to offer "objective inducements" and change "states of mind" in order to succeed (1938: 141). This makes clear the limited, rational nature of efficiency and the subjective, value-based (and therefore cultural) element in effectiveness. Simon describes goal selection as a value judgement, while factual judgements are concerned with goal implementation. He says of efficiency that it "must be the chief criterion in factual decisions", though he acknowledges that in "valuational elements" of decisions it has "no meaning" (1957: 197). Interviews with various professionals involved in corporate identity design will show how acute the problems of evaluation criteria in this area can be for management (discussed in chapter 4).

Discussing the assessment of organizational effectiveness, Katz and Kahn state that (like culture) it must "always involve some assumptions with respect to frame of reference" (1966: 120). The fact that effectiveness is hard to measure and that efficiency is value-neutral (and measurable) has led, Mintzberg says, to the over-emphasis on efficiency as a goal. As costs are more easily measured than benefits, economics become more important than social benefits, and economic morality becomes more important than social morality (1983: 271-272). In pursuit of efficiency, many organizations force people into passive, ineffective roles, which leads to social consequences of unrest and withdrawal. Argyris pinpoints the central problem of large organizations as: "...their increasing internal deterioration and lack of effectiveness in producing services or products". (1973: 159). Individuals have to be able to internalize the organization's goals, as well as being directed by "legal compliance" and rewards (Katz and Kahn, 1966: 388-389). Awareness of the motivational problems implicit in large organizations has been one of the factors in promoting unity of purpose through the idea of cultural intervention by management (discussed below). Identity design, as will be seen in the case histories and interviews, is an aspect of this intervention (fig. 2).

Ideology

Management culture is metamorphosed into a consciously projected value system (ideology) which both legitimizes strategy and shapes its goals[25]. Viewing ideology in relation to management control in this way emphasizes its rational characteristics (Selznick, 1949: 264). Bendix has described the need, in increasingly bureaucratic organizations, for ideologies and legitimation; "the attempt to justify industry ... has become a matter of public relations, concerned with propagandizing the achievements of technology and production" (1956: 8). Stressing the central role of effective communication of ideology, Barnard defines authority as: "the character of communication by virtue of which it is accepted by a [member of the organization] as governing the action he contributes" (1938: 163). He quotes Michels: "authority ... is created and maintained by public opinion" (ibid., 164).

If compliance is to be gained by persuasive as well as legal means, control of the channels of communication is necessary. Blau and Scott (1963) and Katz and Kahn (1966) have remarked on the necessity of a "restricted" flow of communication for effective coordination . Internally, this restricted flow passes through "channels for oral and written communication, paper flow, records, reports and manuals" (Simon, 1957: 152)[26]. Corporate identity design, which, as will be described later, is usually administered by public relations departments, specifically concentrates on these centralized forms of communication. Katz and Kahn, writing of the close relationship between communication and structure, claim that "authority structure ... is nothing more than the pattern of such legitimized and individual communicative acts" (1966: 57).

Because of this emphasis on legitimation, ideology is usually associated with selectivity, over-simplification and the manipulation of power politics (Sutton et al., 1956: 316-320). Writing of the derogatory, politically partisan connotations of the term, however, Geertz has argued for a more "nonevaluative conception", where ideology is seen as "an ordered system of cultural symbols ... capable of dealing more adroitly with meaning" (1973: 196). Comparing ideology with science, he describes the latter as "diagnostic" and "critical", where ideology is concerned with "patterns of belief and value". Science and ideology are, respectively, rational and irrational social constructs (1973: 230-231). Though ideologies are weapons which can be used to "...institutionalize a particular view" (ibid., 202), they are inevitable and essential in both cognition and action, "...impregnating the basic structure of society" (Larrain, 1979: 14). Abravanel distinguishes between structural (fundamental) and legitimating (operative) components. Broadly, the first component is concerned with the framing of self and situation (identity), the second with justification and "emotive appeal" (1983: 276-280).

This power to propagate certain views has lead to a debate concerning the possibility of cultural manipulation by corporate leadership. Gagliardi describes a major function of management as being the "creation and manipulation of the symbolic field" (1986: 117). He asserts a strong link between identity (based, in part, on cultural assumptions) and survival (ibid., 127-129). This is what Smircich and Morgan call the "management of meaning". As meaning is experienced through culture, "authority relationships" specify "who is to define organizational reality" (1982: 257-285). The corporate leadership propagates symbols to "control or manipulate the organization or the context in which it exists (for example, through language, categorizations or "sacred" objects)" (Berg, 1985: 282). Effective leadership can thus be defined as the leader's view of a situation forming the basis for the actions of others (Smircich and Morgan, 1982: 262).

Enormously popular books have extolled the virtues of cultural management, citing successful corporate examples in the USA and Japan (Deal and Kennedy, 1982; Ouchi, 1981, 1984; Peters and Waterman, 1982). In this literature, two related themes consistently emerge, the importance of leadership (Pettigrew, 1979; Smircich and Morgan, 1982; Gilmore, 1982; Lippit, 1982; Schein, 1985) and the debate concerning the actual scope of managerial control (Turner, 1986; Westley and Jeager, 1985; Smucker, 1986; and Frost et al., 1985).

The chief theme of the popular literature is an optimism about the broadening of management control. Ouchi, Peters and Waterman argue that culture is central in changing management style. Here, "values" are a wealth-producing asset if manipulated correctly - "shaping and enhancing values can become the most important job a manager can do" (Deal and Kennedy, 1982: 21). The high symbolic value of the leader-entrepreneur as cultural hero is described by Pettigrew (1979). In founding organizations, the entrepreneur mobilizes people through Weber's "charismatic authority".

The most thorough examination of the issues of leadership in organizational culture is Schein's. He describes three basic levels of culture: the preconscious level of basic assumptions, values (testable in the environment and by consensus) and the visible (but often not decipherable) artifacts and creations of the culture (1985: 14). Schein's level of "values" seems to correspond most closely to ideology; it is the "sense of what _ought_ to be" (ideology's fundamental aspect), and because it is testable, can be a source of "cognitive transformation" (ideology's operative aspect) (ibid., 15-16). However, Schein asserts that ideology and culture are not interchangeable terms. He argues that the parts of culture have been confused with the whole, and only the more superficial, conscious parts of culture can be manipulated (ibid., 45). Westley and Jeager also maintain that it is the ideology part of culture which is being discussed. They point out that ideology serves the "system's leaders or elite group", deriving its persuasive power from the charisma of the leader and the emotion and structure of its arguments (1985: 9).

Schein's reservations about the extent to which it is possible to influence basic assumptions in organizational cultures have been voiced by others: Siehl (1985), Turner (1986), Schwartz and Davis (1981) and Westley and Jeager (1985). Turner attacks those authors who advocate managerial intervention for being both superficial and ignorant in their use of terminology (1986: 104). He sees culture as being more concerned with "social maintenance" than with production (ibid., 109). The chief value of current research for managers is to create a greater awareness of assumptions and therefore to avoid dysfunctions arising from organizational culture (ibid., 110). Schwartz and Davis are also sceptical about cultural manipulation as a management panacea, stating that the concept is too nebulous and the degree of control "is very limited compared with the degree of control they have over structure, systems, and people's skills" (1981: 36-37). Management can furnish symbols as recognizable components of identity, but not create whole value systems.

Summary and Definitions

Smucker has described how the constant theme in the development of organization theory has been the re-framing, with different emphasis and metaphors, of authority relations (1980). The image, derived from culture, of organizations as symbolic discourses (drawn by Berg, Smircich, Gagliardi and others) has lead to a re-thinking of this central issue.

The bureaucracy of modern organizations seeks to reduce uncertainty by extending its control over internal and external factors. The strategy for achieving control is concerned with effective internal coordination of constituent systems (technological, structural and cultural) and with response to external change. Values are an integral part of this planning function: the culture concept increases the breadth of strategy's concern with internal and external planning to include the use of symbolism. External consultants are often used in an effort to circumvent internal perceptual limitations and structural problems. As the coordination and maintenance of the system are central executive functions, strategy is used here in the sense of the planned, conscious promotion of the ideology and objectives, or identity, of the corporate leaders (Berg, 1985).

In the literature, culture is seen as a metaphor for the social process, the social construction of shared meaning based on tradition and values. Sub-cultures exist within the ambient culture, closely related but with modified or additional symbol systems. Culture adds to the concept of ideology a recognition of its significance in cognition on an individual level, and consequently affirms its mediating function in individual/group relations and the framing of roles. Ideology is therefore important in achieving consensus and cooperation on an organizational level, and a significant factor in control, legitimation, and the setting of goals (Brunsson, 1985). Because of the centralizing, strategic function assigned to it in the literature, corporate culture tends to be synonymous with ideology, rather than a description of the total social process of organizations. There are no complete accounts of corporate cultures and so far, "there is no orthodoxy in the field" (Turner, 1986: 106).

Two functions of the corporate culture concept are proposed in the literature, the prevention of culturally-related dysfunctions (a concern with psychological effectiveness), and the development of a new control tool for management (to increase efficiency). In both cases the chief role of culture is in establishing social cohesion; it is more directly involved with system maintenance than production. Smucker argues that the recent popularity of the culture control concept is traceable to the increasingly uncertain environment, both for organizations and individuals (1986).

Symbols are the vehicle of meaning, an active process of interaction between individuals and groups, and they can take the form of acts, concepts, objects or images. The ambiguous and contradictory qualities of symbols are difficult to reconcile with theoretical requirements of internal consistency (Bate, 1984; Quinn and McGrath, 1985). In this paper, symbols are viewed from the functionalist, sociological standpoint, as the concerns of this perspective show the strong links between corporate identity, ideology and strategy. On a cultural level, meaning is "indigenous to the local social group" and on an individual level it is produced by personal history and experience (Louis, 1983: 41-42). Corporate symbols mediate between these social and individual levels of meaning, contributing to a collective perception of identity in the members of the organization (fig. 2). Total control would only be possible if meaning could be established on a universal level, where it is "objective or physically feasible" (ibid., 41-42).

Legitimation of the position of authority is achieved by maximizing its apparent contribution in the perception of various publics. Because of the need to appear objective (in the sense described above) and to gain acceptance, legitimation is articulated through symbolism drawn from the ambient culture (the conscious use of traditional or "common sense" symbols and assumptions: Smucker (1980: 154), Della Fave (1986: 477), Barthes (1968: 32)[27]. These images become the cognitive map internalized by the general public (Boorstin, 1977).

Identity integrates the sense of continuity (the system-maintaining attribute of culture) with a sense of mission carefully articulated through management ideology. Identity design is a visual statement of strategy which combines both coordination and persuasive image creation for the management group. Its purposes and development are examined further in the next chapter.

Chapter 3. Graphic Design and Corporate Identity

This chapter will review the literature of corporate identity design and define the subject by examining its purposes and its historical development. Identity design will be related to other corporate communications, and the character and activities of organizations. Finally, identity's role in strategy will be examined. Throughout, reference will be made to the literature and interviews conducted with professionals in the field (Appendix VII).

It follows from the discussion in the previous chapter that the expression of corporate identity is a broader issue than the design of symbols or logotypes. As design consultant F.H.K Henrion says, it also concerns behaviour patterns, including seemingly insignificant things such as the way people speak on the telephone - "It is really the whole communications mix, with the emphasis on the visual" (Appendix VII, 436-437). Henrion terms the visual presentation of organizations the "... explicit identity ... sticking your mark everywhere", and the more behavioural aspects (concerned with labour and public relations) as the "implicit" identity (Appendix VII, 443-444). Consultant Chris Yaneff has remarked that corporate identity can be created "through a trade mark, through advertising and through public relations" (the latter by such devices as sponsorship of the arts or of sports, Appendix VII, 430-431). Similarly, Davis Masten, of the Cheskin and Masten consultancy, described corporate identity as "everything you can see" (Appendix VII, 386). The emphasis is on the visual because it is that area which makes the most impact. All corporate artifacts, from ephemeral printed material to comparatively permanent architecture, are visual media.

Review of Related Literature

There has been little published specifically concerned with the question of the cultural role of corporate identity design in organizations, though reference has been made to the subject in discussions of organizational symbolism (Berg, 1985: 287; Daft, 1983: 203-204), of the designer's function (Butler, 1987: 24-47) and of corporate consultancy (Henrion, 1967; Olins, 1978, 1983). Identity is seen from the point of view of management strategy by Gray and Smeltzer (1985), Belt and Paolillo (1982), Bernstein (1984) and Olins (1983, 1985). Its importance as an integral part of public relations has been described by Henry (1984), Margulies (1984) and Wathen (1986).

Writing concerning corporate identity design has been directed primarily at managers and designers professionally involved in the field. There is no thorough account of design management which deals specifically with corporate identity, though Olins' brief work (1985) offers useful organizational outlines, as does related material from product design (White, 1973; Lorenz, 1986) and design management in general (Topalian, 1980). Some consultants have produced explanatory literature about their services, and their instructional manuals, which guide the implementation of their identity programs, form a valuable record of this process. In addition, increasing awareness of the function of design in organizations, both as a factor in identity and as part of the product planning process, is reflected in recent conferences and is now being made available (for example, conferences organized by the Design Management Institute in Boston, 1987, 1988).

There is also a small number of books concerned specifically with corporate identity design, which usually follow the pattern of stating the importance and problems of corporate identity and illustrating these points with case histories. In addition to the work of Henrion and Olins mentioned above, other examples are Blake (1971), Nakanishi (1981, 1985), Rosen (1970) and Schmittel (1975, 1978, 1984). The authors all stress the need for a total commitment by management if the exercise is to be an integral part of the management function and not an expensive piece of window dressing. Similarly, they agree on the necessity of close and continued cooperation between the designer and the company during the implementation of a program. All these books stress the benefits of identity design, which are said to be: increased profits (resulting from improved efficiency and morale), better public relations (with customers, financial institutions and the general public) and the attraction of better quality recruits.

A more critical view, which seeks to define the concept of corporate identity more clearly in relation to brand identity, is expressed by Martineau (1984), whose anxiety about the corporate identity concept is centered on its global scope (and consequently rather nebulous quality) compared with brand identity. More openly antagonistic opinions are voiced by Breach (1971), Finn (1984), Jacobs (1987) and Wolfe (1972). These authors all express concern about the effectiveness of abstract visual symbols, and the role managerial vanity plays in initiating programs. These issues are debated periodically in the press. However effectiveness can never be literally quantified, and reinforcing the confidence and position of management, (as seen in Chapter 2) is a real and important function.

Many case histories and interviews with designers have appeared in such design magazines as Print, Design, Industrial Design, Graphis, Communication Arts, A.D. and Architectural Review. These are usually short, superficial and lavishly illustrated, presenting the aspects of identity programs out of context and thereby perpetuating the idea that identity is just about corporate logos.

The publication of these books and articles in the United States, England, Switzerland and Japan over the last twenty-five years positions the corporate identity phenomenon both geographically and historically. The historical development of corporate identity design has not been treated in a single volume, but Sparke has outlined the changing role of designers in industry, and the links between industrial and graphic design practice in the history of design consultancy (1983). Also relevant here are accounts by Meikle (1979) and

Loewy (1979). There are scholarly case histories of the pioneering corporate identity schemes of London Transport (Pevsner, 1968; Forty, 1986) and A.E.G. (Buddensieg and Rogge, 1984).

Theory, Culture and Roles

Interest in systems design (and systems for designing) has increased in the last twenty-five years. This can be attributed to the growth in size and complexity of design and planning problems in many fields. It also reflects the development of a more sophisticated assessment of function in design, which considers psychological and environmental requirements as well as immediate physical needs. Little has been published in the field of design theory and methodology which applies directly to graphic design and identity, however. Relevant comments about the solving of complex problems appear, chiefly in the fields of architecture, urban planning and artificial intelligence: Alexander (1964), Broadbent (1973), Cross et al. (1984), Rowe (1987), Simon (1969, 1984), and Topalian (1980). These centre on information processing and problem structuring, and generally emphasize the commonality of problem-solving and decision-making in areas as diverse as design, physics and management.

There have also been some attempts to achieve an overview of design's cultural role. In addition to the semiological analysis of meaning in design (mentioned above) the subject is discussed in broader, social terms by: Dickens (1980), Teymur (1983), Dilnot (1984), Margolin (1984, 1988) and Sparke (1987). Using a contextual basis for developing design theory, these authors see all branches of design as a continuum - an integral part of the culture of mass production and mass consumption. The theme of consumer culture (with the emphasis on advertising) is also explored by Ewen (1976, 1982), Williams (1980), Bowlby (1985), Leiss, Kline and Jhally (1986), Marchand (1985) Nye (1985) and others. The contextual interpretation of the "meaning" of artifacts, based on their position in the culture producing and consuming them, is again the general theme.

Teymur, discussing architecture and planning, says that meaning arises from "built and natural context, historical conjuncture and cultural, ideological and institutional reference", which establish an "environmental discourse" (EDRA, 1983). He agrees with Dickens' call for "a social theory" of design (1980:

357). Teymur also typifies the social, cultural and economic concerns of the "new art history". This is described by Jon Bird as being centered on the production of cultural commodities, the structure and process of ideology and the social limits of power and technology, as opposed to the traditional emphasis on individual authorship and expression, pictorial technique and connoisseurship (1986: 36-37).

The same concerns are described in the literature of material culture (a diverse, interdisciplinary study derived from anthropology, art history and social history) which studies objects as "physical manifestations of culture" (Schlereth, 1982: 2). Here, artifacts are the evidence "of belief systems - the values, ideas, attitudes and assumptions - of a particular community or society, usually across time" (ibid., 3)[28]. Miller, for example, criticizes the linguistic emphasis of much discussion about the cultural importance of objects, arguing that interaction with artifacts is a major factor in "the [unconscious] formation of mental imagery", and that objects therefore "play an inconspicuous and normative cultural role" independent of language (1987: 95-101). He dismisses the more tradi onal design history described above for failing to understand the importance of consumption patterns, or the role of the designer, in the cultural process (ibid., 140-142).

The role of designers in our culture is an important one which bridges varied activities and groups (Chapter 4 explores this in terms of professional practice). According to Dickens, designers provide:

> ... the ideas ... which act as forms of symbolic communication between patron and public while simultaneously interacting with the products and the production processes of the remainder of industry (1980: 357).

The designer has often been seen as the catalyst, the central figure in the coordination of design programs, but Forty calls for a more realistic assessment. While designers have to exercise "creative autonomy and originality", design is also "determined by ideas and material conditions over which designers have no control". Designers, says Forty, tend to be obsessed with their "omnipotence" while "wholly ignoring their role as agents of ideology" (1986: 242). This does not imply a totally deterministic view of design, where the form of artifacts would be entirely the product of vague, collective forces or of authority structures, but it positions the designer within a social system and a cultural process. When seen in relationship to identity design, Teymur's defining characteristics of context, historical conjuncture, and ideological and institutional references are described by the concepts of organization theory and culture (discussed in Chapter 2). The literature of design reflects a growing concern with the issues of meaning, authority and ideology.

Purposes of Identity Design

The chief stated purposes of corporate identity design are: coordination of sources of communication, identification of publics, consistency of presentation and recognition of the organization (Gray and Smeltzer, 1985). These aims are demonstrated by the interviews and the two case histories presented in this paper, and are widely recognized in the literature. They are detailed in F.H.K. Henrion's "Advantages of a Corporate Identity Program" (figs. 3-4). Starting with the premise that all corporations project images, even if unconsciously, Henrion then lists all the corporate artifacts which contribute to this. When managed properly, these artifacts can present a unified, coherent image to various external and internal publics, including: management, staff, shareholders, customers and financial institutions. This is summarized in fig. 5.

Benefits from identity programs often include cost savings brought about by rationalization (for example, see the account given of savings made in stationery by Chris Yaneff, Appendix VII, 423-424). Effective corporate identity can also strengthen brand identity (Olins, Appendix VII, 457-458). However, the overriding concern is recognition, both internally and externally (in which consistency and standardization of application are implicit):

1) External recognition means "A quick, positive identification of the company." (Chris Yaneff, Appendix VII, 427). People are made aware of, and develop a favorable attitude to, the organization. As a result, they buy the company's products and services, apply for jobs within it, and invest in it.

2) Internal recognition requires the definition and expression of organizational purpose. External appearance should reflect this internal coherence. This has particular significance for internal morale at every level (Olins, Appendix VII, 463 and Henrion, Appendix VII, 444).

R. H. Beck sees design being involved in four basic functions: communications (as applied psychology), technology (as applied science), art (as applied aesthetics), and business (as applied economics) (1971: 9). Design must be effective in all four areas "before it can be effective as a business tool". His diagram provides a useful illustration of how these different areas overlap and helps to position corporate identity design within the functioning of the corporation (fig. 6). It lies between communications and design. The strategic role of corporate identity relates it more closely to visual aspects of corporate communication than to graphics (the design of individual items) or marketing. It is concerned with systems of visual control, both in the coordination of design of corporate artifacts and in setting standards - as with Bell's graphics standards program (Perry, Appendix VII, 380).

Olins and others also stress, however, that identity design should aim at conformity rather than dull rigidity. Allan Topalian has written of design management that though "design is a primal source from which structure and meaning are derived ... 'leading' can be transformed - through a series of imperceptible steps - into 'imposing' " (1980: 5) The great danger of depersonalized corporate graphics is the possibility of endless, boring repetition "imposed" across the organization, with a correspondingly feeble communication value. In the New York magazine, Tom Wolfe voiced the following criticisms:

> These abstract logos, which a company ... is supposed to put on everything from memo pads to the side of its fifty-story building, make absolutely no impact - conscious or unconscious - upon its customers or the general public, except insofar as they create a feeling of vagueness or confusion. I'm talking about the prevailing mood of abstract logos ... Logos are strictly a vanity industry, and all who enter the field should be merciless cynics if they wish to guarantee satisfaction. (quoted in Kron, 1976: 47-49).

This piece originally appeared in July, 1972, and was quoted extensively in 1976 in the same magazine. The 1976 article, "Alphabet Scoop", told how NBC paid Lippincott and Margulies a "rumored" $100,000 to $750,000 for an identity program based on a letter "N", only to find that a tiny Nebraska station, for an estimated $100, already had a virtually identical trademark. The obvious danger here is that in a world of vast conglomerates, all trying to achieve abstract visual identities, strong similarities inevitably occur, sometimes through intentional imitation of success (Paul Rand, quoted in Jacobs, 1987: 73). Imitation can also be unintentional; the effectiveness and memorability of corporate identity design can work against it: "The subconscious recognition of a trademark that makes it work as a symbol often causes others to copy it without meaning to" (Wathen, 1986: 26).

Origins and Development of Identity Design

It is not surprising that large capitalist organizations at the beginning of the twentieth century should have appropriated and developed the concept of corporate identity. Brand identity, the creation of increased public awareness of individual products in the market place, had emerged in the nineteenth century with the birth of the advertising and packaging industries[29]. Recognizable product logotypes and packaging created at least a superficial distinction between brands of early consumer items such as soap, beer, matches and tobacco[30]. Technological developments in printing and the growth of markets and manufacturing made posters and press advertisements the first visual mass-media in history, and the rise of the "commercial artist" to serve this vast new graphics industry created a new professional expertise in visual communication[31]. Departing from allegorical, illustrative visual styles based on the European iconographic tradition in fine art, graphic design at the beginning of the twentieth century started to evolve an increasingly simplified style, both more memorable and easily recognizable. The development is seen in trademarks (compare figs. 8 and 9, and changes in Bell's symbol, fig. 7).

Some brief case histories, particularly the work of Peter Behrens for AEG in Germany, serve to demonstrate the integration of different areas of design, and the combination of these disciplines with technology and corporate organization to create the first modern, large-scale identity programs. Peter Behrens (1868-1940) was trained in architecture[32]. In 1907 he became "artistic advisor" to the German electronics company AEG in Berlin. He was actively involved in the radical new design ideas (he was director of the art school in Dusseldorf at the time of his appointment at AEG, and trained the architects Walter Gropius and Mies Van der Rohe) but it is Behrens' role at AEG which is of prime importance here. He designed everything from factories and domestic electrical appliances to brochures, posters and exhibitions for AEG. Although his own visual education had taken place during the height of the decorative Art Nouveau style, Behrens realised that in order to develop appropriate, new type-forms for new kinds of objects (whether consumer products such as electric lamps or kettles, or buildings with new purposes) there had to be a shift in approach away from personal expression and applied decoration towards the more modern idea of form being derived from function.

The graceful beauty appropriate to typical products of industrial mass production should be achieved, he said, without recourse to historicism or to the stylistic individualism that had been demanded of the artist by Jugendstil [Art Nouveau]. Such a manner of design would resolve the conflict between the technical character of electrical appliances and the "artistic layout of a room" in favour of an "all-embracing artistic order". Consistent with the "logical application of these intentions", the AEG would also "attach great importance to the artistic and typographic design of all its publications" and to the design of future exhibitions ... Thus, "the practical realization of these ideas" would also make possible "the conversion of artistic and creative work into material assets", and the applied arts would gain an economic and social function". (Buddensieg and Rogge, 1984: 9).

This long quotation is valuable because, though it shows that a vocabulary did not yet exist for describing the role of design in modern industry, several key concepts were articulated by Behrens. The "all embracing artistic order" and "its logical application" express the desire for visual control over all product areas and other aspects of the company's appearance, which is the foundation of the idea of corporate identity as industrial design coordination[33]. The importance of graphic design in this total scheme is also made clear, as is the theme of the establishment of the "economic and social function of design" as a whole.

Behrens saw that "both the engineer and the man of artistic sensibility" must work together in all areas of society if the arts were to have a genuine "economic and social function" instead of retreating into pre-industrial notions of individual craftsmanship. While he recognized the importance of technology, he realized that its potential for standardization could "subjugate the human element (ibid., 16). The dilemma of individual expression versus centralized control, and its place in mass culture, is seen here in visual and technical terms, but it is a central aspect of the modern bureaucratic problems of anonymity and disaffection discussed in organization theory.

The sacrifice of stylistic individualism which Behrens described proved ideal for the conscious articulation of corporate ideology by visual means. In 1894 AEG had used the allegorical "Goddess of Light" as its trademark, and the style of its publicity material tended towards Art Nouveau (figs. 8A, 8B). Under Behrens, classical mythology and inappropriate curvilinear decoration were replaced by the abstract, de-personalised, geometric symbol of 1908 (fig. 9). Commenting on the change of direction in design at AEG, Buddensieg has written that this abstraction was an appropriate reflection of "the work ethos of the firm as the specialized subdivision of clearly demarcated tasks" (1984: 27). Here, avant-garde design was closely linked not only to new products and technology, but also to the form of industrial organization. Walter Rathenau, the head of AEG, wrote of the importance of leading in "plant and product, in industrial relations, in technical know-how, in organization and in working methods" (ibid., 34). A brief parallel can be drawn with Camillo Olivetti, the Italian entrepreneur and contemporary of Rathenau and Behrens. Olivetti (a manufacturer of office equipment) had a similar commitment to technology, efficient organization and design, and was an admirer of F. W. Taylor's "scientific management". In 1910, reflecting on the division of labour, he wrote that "laws which regulate and dominate the human body can be adapted to the social body ... specialization has thus found new and important applications" (quoted in Clegg and Dunkerly, 1980: 110).

The design of corporate identity has always been concerned with the presentation of official ideology. The definition of ideology by Bendix, in Work and Authority in Industry, is particularly apposite here:

> ..the constant process of formulation and reformulation by which spokesmen identified with a special group seek to articulate what they sense to be its shared understandings. (1956: 443).

In the first really extensive example of industrial corporate identity, AEG, we can see a process of "formulation" which articulated new images of corporate, as opposed to individual power. Newness, technical perfection, organization and de-humanization are communicated in a completely controlled, standardized, visual continuum of buildings, products and graphics (themes which have been re-stated in various forms ever since). One "spokesman", Peter Behrens, was given complete, centralized control over this visual identity program, while his social and aesthetic idealism had an uneasy relationship with the goals of the entrepreneur in charge of the company. The degree of his direct involvement in the designing of so many artifacts was possibly unique, but the commercial and ideological role of identity design has remained the same.

Another useful early example, which deals with slightly different problems, is London Transport's design policy, initially implemented in the inter-war years[34]. As with AEG, architecture, engineering and graphic design all played important roles and were coordinated to produce a coherent visual identity for a very large and complex organization. New technology, in the form of improved busses and subway trains, was reflected in the design of new subway stations and the improvement of old ones in a recognizable house style, designed chiefly by the architect Charles Holden. One symbol was applied throughout the system, as was the typeface created by Edward Johnston in 1916 (fig. 10). All station furniture, ticket machines, bus stops and uniforms were standardized. However, in contrast to the early years at AEG, many design specialists were used, under one coordinating force, Frank Pick (the chief executive). Pick was an early example of a design manager, with a definite policy concerning identity and a firm belief in the advantages of strong visual consistency for the system. In this respect London Transport between the wars was closer to current practice than AEG before World War 1.

AEG and London Transport had different histories but similar design requirements. AEG had been founded by Walter Rathenau's father, Emil, and was still very much the creation of a single entrepreneur. Under Walter Rathenau the company had grown enormously and required visual uniformity not only to distinguish it from its competitors, but also as an expression of central control. The London Passenger Transport Board was officially created in 1933, though the smaller independent companies from which it was formed had gradually been amalgamating since the turn of the century. There had originally been 165 companies running separate bus and subway routes, and even though 73 had already merged by the time the Board was formed, 92 more had to be integrated. Therefore a strong visual identity was required to show the totality of the new network.

As with AEG, central coordination was paramount. All the employees needed to have unified pay scales and integrated operating schedules if the system was to be operable at all. Establishing a new identity with this internal public, partly through the standardization of uniforms, was seen as an important element in integration. Similarly, the external public needed to be shown how to use the new system, and convinced that amalgamation had made travelling easier. As one third of all journeys were not work related, a concerted effort was made through a vast poster campaign to educate Londoners about the recreational and entertainment attractions of various destinations.

The most important aspect of the impact of graphic design on the identity of the transport system was the re-design of the subway map, because it was so closely related to Londoner's conception of their city. The old, geographically correct map was designed by F. H.

Stringmore and in use from 1919 to 1933 (fig. 11). It looked organic and confused (reflecting accurately the piecemeal development of the system). London Transport turned to the schematic, and subsequently very influential design by Harry Beck in 1931 (fig. 12). Its geometric simplicity transformed the original map into an abstract route diagram, which bore no relation to geography but made the network of over 200 stations more comprehensible. This map altered the travelling public's perception of the city; its simplicity and memorability became a model for the visually confusing reality and vastness of London (Walker, 1979).

The two-fold aim of good labour and public relations was achieved by presenting a streamlined, efficient image of the service and the system. Pick's comments on this show that he was not primarily concerned with design or social idealism, but with the rationalization of the workplace.

> The whole atmosphere in which the work is carried on and the whole attitude towards the circumstances of the problem have been changed. It is a noteworthy gain to have placed the study of traffic and the determination of its problems upon a scientific footing. (in Forty, 1986: 235).

The roles of graphic design at London Transport and AEG were: (a) to improve standards of presentation, (b) to standardize that presentation (and in so doing, reinforce perception of the system's identity) and (c) to win acceptance through the communication of the myth of modernity (for which avant-garde design found more suitable metaphors, in the mass-production context, than the traditional iconography of fine art). That the promotion of this myth of modernity was intended to affect both the informal organization of the labour force and the company's cultural environment is made obvious by Pick's use of the words "whole atmosphere" and "whole attitude". It is the change in these intangible characteristics that is addressed by the identity design, rather than material conditions. Image and reality become inseparable.

After World War II, the link between management ideology and design became far more widespread, first of all in the United States. The Depression there had seen the rise of famous industrial design consultants such as Raymond Loewy (1893-1986), Norman Bel Geddes (1893-1958), Harley Earl (1893-1969) and Walter Dorwin Teague (1883-1960)[35]. Their skills made virtually every conceivable industrially-produced artifact, from refrigerators to railway trains, more "modern", streamlined and saleable. An early example of a complete corporate identity is Teague's work for Texaco, which included the symbol (still in use in modified form) and a standardized format for service stations which was widely copied (fig. 13). The approach of the American designers was much more marketing-based than that of designers in Europe because they "emerged from a background of window dressing, fashion illustration and advertising draughtsmanship" (Art and Industry, 1982: 38).

This background in mass visual communication, coupled with the growth of companies and the increasing uncertainty of their relationship with external forces, contributed to the change of emphasis in the 1950's from the design of individual objects to a much broader integration of design and corporate strategy. Many of the newer consultancies specialized in the design of corporate identity. Penny Sparke gives the example of Peter Müller Monk, who wrote in 1948: "our job is to make the design process a management philosophy and not only to design products" (1983: 37). At companies such as Lippincott and Margulies, awareness of identity design moved from the creation of logotypes to a closer integration with "mainstream" corporate activities, and design consultancy grew closer to management consultancy (Clive Chajet, Appendix VII, 521-522). The organization of the design activity also changed. Much of the design work in identity programs now is the product of anonymous teams, bearing the name of the founder of the office, as in advertising and architecture.

Types of Corporate Identity

The structure, character and activities of organizations determine how they relate to their various publics. Therefore these factors also determine what is included and what is exempted from centralized identity programs, the relationship of the programs to other forms of corporate communications, and the choice of artifacts used as media.

Olins has described three categories of corporate identities: monolithic ("one name and one visual system"), endorsed ("visual or written endorsement" of group members) and branded (the parent company "operates through a series of brands or companies which are apparently unrelated") (1984: 18). The endorsed category is also referreo to as "umbrella" branding (Bernstein, 1984: 173). Olins gives the examples of IBM (monolithic), General Motors and its many brand names (endorsed) and Proctor and Gamble (branded).

Both Bell and the Government of Canada's Federal Identity Program (FIP) can be seen to operate in both the endorsed and branded categories. Olins states that endorsed identities tend to be developed by organizations which have acquired subsidiaries as they have grown, and are then confronted by the problem of integration. This is clearly the case with Bell, and is essentially the case with the government, in relation to some of the crown corporations and agencies which have their own requirements, traditions and audiences. The FIP has shown that an organization as huge and diverse as the government cannot, in a democratic society where the state does not control the media, achieve a single, monolithic identity (unlike the identity of Nazi Germany, for example). There is also a correspondence to the separate identities of the branded category in these programs. Bell's manufacturing arm, Northern Telecom, is allowed its own identity, and has no visual link with Bell or BCE (Bell Canada Enterprises, the holding company), just as the crown corporations which compete in the marketplace are allowed autonomy from the federal identity program (the FIP - for example CN, CBC and Air Canada).

Some of the tensions produced by the implementation of the programs at Bell and the FIP stem from a resistance by organizational units to the imposition of the "mother" identity, and CN executive Lorne Perry has given an account of that organization's gradual reduction of its monolithic identity (Appendix VII, 361-362). The relationship between the sub-units and the parent (and between each other) is constantly changing and therefore needs constant clarification. Control is implicit in the idea of consistency, and this has political as well as economic and design dimensions. Olins has written of the "balancing act" of the endorsed category:

> Companies which seek to create a corporate identity covering a wide range of activities, with subsidiaries which have differing and frequently competitive backgrounds, face a complicated task. On the one hand, certainly at the corporate level and for corporate audiences, they want to create the clear idea of a single, but multi-faceted organization that has a sense of purpose. On the other, they want to allow the identities of the numerous companies and brands they have acquired to continue to flourish in order to retain goodwill, both in the market place and amongst employees. (1984: 21).

Olins also divides the concept of identity into three categories according to the major activities of organizations. It is based on either products and services, environments (i.e. buildings and interiors) or communications (Olins, 1984: 12-13, Appendix VII, 456). The identity rests in the artifacts which form the chief points of contact with the audiences, so Olins cites Ford as having a product-based identity, Harrods and other retailers as being environment-based, and "fast-moving consumer goods" manufacturers as relying on communications (in this case, press and TV advertising and packaging, as with food or detergent producers). In practice, organizations use two or all three of these, but their major activity determines which aspect will be emphasised (Olins cites banks' identities lying in a combination of environment and communications, for example).

Bell is clearly still essentially a service company, despite the broad range of its other activities, and has naturally emphasised service vehicles and signage. Similarly, the Federal Government has used its program to identify its services through building signage and vehicles (though in this instance a much bigger range, including the ships and helicopters of the Coast Guard). In both organizations the identity's only link with advertising is the use of the logotype as a signature, to name the source of the communication and to endorse the particular service being described.

As identity programs based on communications depend on advertising, packaging and other point-of -sale items rather than more permanent media, there is an overlap with marketing in this area (Clive Chajet, Appendix VII, 518-519). The case of Bell's attitude to the packaging of telephones is a good example of boundaries being re-drawn by changes in policy. Ed

O'Brien recalls how, when the packaging was first introduced in 1985, the marketing people at Bell wanted to ignore the corporate identity, but they were turned down on the grounds that, "What you're selling is Bell, not the set" (Appendix VII, 330). The resulting packaging used the corporate identity (colours and typography) strongly (fig. 14, top). This is being replaced by new packaging which does the opposite, emphasising the product in a more aggressively competitive way, with minimal marketing endorsement from the corporate identity (fig. 14, bottom). Describing this change of tactic, Jean Morin (the designer of Bell's logotype) has remarked:

> I think it is the right thing. The product has more appeal. You're buying it in a Bell phone store, so you know the support is there - all the other communication supports the idea that the product has support. (appendix VII, 320)

Identity Design and Marketing

Their common concern with image means that both marketing and identity design are concerned with generating spontaneous associations in the minds of audiences (Christopher, 1972: 104). They are both aspects of the total field of corporate communications (Bernstein, 1984: 108-116). The example of the Bell telephone packaging mentioned above demonstrates the basic difference between marketing and corporate identity; the former is about the image of a specific product or service (advertising and brand identity), and the latter is concerned with the image of the whole organization. As Olins has said, with a "branded" identity, where a multiplicity of product images replaces the corporate identity, "As far as the final customer is concerned, the corporation does not exist. What the customer perceives is only the brand" (1984: 22). The important decision here for the corporation is, "what the core associations are that carry through, and what you can modify without risking the core (motherhood) when you're competing in specific markets" (Davis Masten, Appendix VII, 383).

Brand identity and advertising are much older concepts in business than corporate identity (as discussed earlier) and the sophisticated integration of different modes of communication mentioned above is only a recent phenomena. Martineau (1984) has commented on the vagueness of the corporate image concept which arose from the speed of its development out of brand identity. Referring to the fact that corporate identity developed out of marketing, Ulrich Wodicka has remarked that at the start of the FIP there was a tendency to confuse them. However, he states that identity is now seen as "an ongoing function in government, and we would not want to associate it with marketing" (Appendix VII, 403).

There is general agreement amongst those involved in identity design that brand and corporate identity tend to be separate in their aims and approaches, and that corporate identities should not be produced by advertising agencies. The following reasons were cited in the interviews:

1) The corporation may make products whose images contradict each other, and it needs a different, unified approach at corporate level (Davis Masten cites the example of 3M, which is in the high-tech field but also makes sandpaper, Appendix VII, 383).

2) Corporate identity has to reach a whole range of audiences rather than the one specific market for a product. Therefore too close an association with one product can produce a problem of over-narrow identification. Chris Yaneff believes that the product and company names should always be different, and gives Gilbey's, who make Smirnoff vodka as well as gin, as an example of a company whose name is too exclusively associated with one particular product (Appendix VII, 430). Olins also discusses the need to separate

corporate and brand identity, and stresses the importance of corporate rather than brand loyalty for internal morale, because employees work for the company, not the brand (Appendix VII, 457).

3) The differing character of corporate and brand communication. "Very basic and obvious symbolism", which will attract the customer on the supermarket shelf, is inappropriate for a sophisticated and complex corporation" (Olins, 1984: 22). Jim Donoahue has said of advertising agencies: "They're not logo people and they don't really know how to do them. Advertising is much more about playing with words. It's a different attitude" (Appendix VII, 409).

4) The difference of time-frame between marketing and corporate identity. O'Brien has talked of the conflict between the need to meet short-term sales targets and the integrity of the corporate image (Appendix VII, 340-341). Henrion has also described the "immediate, short-term and fashion-oriented" outlook of advertising agencies as an inappropriate for corporate identity (1967: 8). Ian McInnis (partner of Jean Morin) has elaborated on this:

> Advertising and identity, though related, tend to be two different things. An identity change has to be a significant change for the company, whereas every year there's a new nuance in the marketing group as to

> which direction they're going to go - which strategy they're going to use - so they can change their advertising for six months or a year. But the identity is there for what we in presentations refer to as a minimum of seven or eight years, and often, for corporations like CN, it's twenty years... (Appendix VII, 367).

In its overall, long-term concern with relations with the organization's environment, identity design has a close association with public relations, although it does not present opinions and causes (Finn, 1984: 102-103). Charles Harris (a former Vice President at Bell) has remarked that, though advertising and identity are together in some companies, when they are they have "more fights", and as "the public relations department is overall custodian of the company's image ... they usually handle the administrative part of corporate identity" (Appendix VII, 347). Bell's identity program is located in the public relations department, under the Director of Communications, and separate from advertising and marketing (Appendix VII, 308). Similarly, the Federal Identity Program is, logically, located in the Information Management Division of the Treasury Board, which controls information policy. At CN, public affairs and marketing are under one vice-president, but divided into "hustle and hurry" and "planning and longer range", identity falling under the latter (Perry, Appendix VII, 367).

Identity Design and Strategy

Because marketing is based on short-term sales tactics and identity on long-term corporate strategy, corporate identity is seen increasingly as an umbrella under which all corporate visual communication should be organized (as in the remarks of Davis Masten quoted earlier). Marketing addresses specific parts of the audience, but the corporate identity/product relationship must be communicated consistently to the total audience, including the general public, government, investors and the media (Bernstein, 1984: 96-97).

Strategy, as defined by Gray and Smeltzer, relates the corporation to its environment (1985: 73). Linking the question "what is our business?" with the question "what is our image?", they write:

> The environment ... is composed of constituent groups or publics. Corporate image is the impression of the overall corporation held by these various publics. The image that each public has of the corporation determines, to a large degree, the success of the strategy vis-a-vis that group. (1985: 73).

The reasons for the recent increase in the strategic importance of corporate identity are said by Gray and Smeltzer to be "greater internal complexity and accelerating environmental pluralism" (1985: 77). In the present climate of sweeping change, mergers and take-overs produce new companies which require new names and new identities, while technology produces new products and new industries, and government regulations concerning the environment and monopolies contribute to an air of uncertainty (see Chris Yaneff, Appendix VII, 427). Bell Canada is a clear example of many of these factors, and the motivation which initiated the Federal Identity Program demonstrates that government itself is vulnerable to the forces of fragmentation (see Chapter 5).

This point is elaborated by Olins in his description of recent developments in large companies. They are "diversifying, decentralizing and internationalizing":

> That means that they are moving from products with which they are familiar to products with which they are unfamiliar, from geographical areas in which they are well-known to areas in which they are unknown, and they are employing managers who, for the most part, are new to their own business ... So all companies, at the same time that they are doing these things, which produce enormous centrifugal forces, are setting up countervailing centripetal pressures. (Appendix VII, 451-452).

The centrifugal forces outlined by Olins, which threaten the cohesion of the corporate structure, are balanced by centripetal forces of central coordination. Olins lists these as: finance, investment, product quality, human resources, research and development and corporate identity. All these factors have to operate throughout the organization, and all have to emanate from, and be controlled by, the centre. Identity is the only aspect of corporate strategy that anyone sees (Appendix VII, 454).

The importance of this global perspective for graphic design is made clear by Henrion, who claims that as designers are involved in much more than aesthetic decisions they should know about new technology, corporate policy and organization. He calls his concept of design "total communication" - "It affects the whole company and its thinking and goes far beyond graphics" (in Blake, 1971: 25). His company is frequently asked to help to write the corporate philosophy before beginning any design work (Appendix VII, 441-442).

Summary

Growing out of advertising and brand identity, where the aim is to increase market share, the history of corporate identity design demonstrates that its primary concerns are control and legitimation. The importance of integrating design with other management functions in order to influence the perception of all the organizations' various publics has been increasingly acknowledged. This central, strategic function of corporate identity design and its range of applications give it a unique environmental role (as in fig. 5). According to Olins, corporate identities are "three-dimensional", in that "you can live within them", and brands are not, "though they have clear personalities in the minds of those who purchase them" (Appendix VII, 457). He believes that brands, too, should be managed strategically, and sees the growing power of international consultancy to provide a complete, integrated service (from the establishment of the corporate philosophy to the marketing of individual brands) as the emerging pattern for the structure of the visual communications business (Appendix VII, 460).

Chapter 4

Professional Practice in Identity Design

This chapter outlines the methods and functions of the professional groups involved in the creation and implementation of identity design. The identity cycle, from instigation to adaptation or re-design, involves in-house designers, design and research consultants, and management. This chapter describes the design process and outlines the purposes of research and the functions of design management at each stage of the cycle. This is summarized by examining the differing role perceptions of the participating groups.

The length of the corporate identity cycle varies enormously. Jean Morin's company, Axion, gives a minimum life span of seven to eight years for identity programs, and many last, largely intact, for generations. This is partly dependent on the field in which a corporation is involved (cf. Henrion's examples of relatively short cycles in the retail trade and airlines, and longer ones in banking, Appendix VII, 447). At times, change is not feasible because of cost and scale (as in Henrion's example of Volkswagon, Appendix VII, 447). Compared to the relatively short product and marketing cycles, identity design is, as Davis Masten has said, a "permanent" medium.

Evolutionary change in a corporate identity corresponds to a similar, relatively stable rate of change in the corporation's internal or external circumstances. This was the case with Bell and its symbol for nearly a century of steady growth. Organizations usually seek new visual identities for one of three reasons:

1) Because the organization or its environment has changed, and their image must reflect this (as in the case of Bell, with new technology and diversification).

2) Because a radical review of the organization's activities has revealed a need for change in presentation (as in the case of the federal government's review of its communications).

3) Because of a failure to manage the existing identity properly . When control and consistency are lost, "the easiest solution seems to be to start afresh, with a new scheme and symbol" (Ulrich Wodicka, Appendix VII, 405).

These reasons for change demonstrate the strategic link between design and organizations, discussed by Olins:

> If a corporation is changing its strategy (if it's diversifying, divesting, investing) unless it changes its identity as it changes its reality, its reality will change less quickly than it otherwise would. Identity can act as a catalyst to help that change to happen. (Appendix VII, 461).

The Design Process

There are strong parallels between non-visual, management decision-making and the design process (Simon, 1969, 1984; Topalian, 1980). In both cases, structures must be imposed on problems before solutions can be found (Alexander, 1964; Cross et al., 1984; Rittel and Weber, 1984; Simon, 1984; and Rowe, 1987). Jan V. White writes that graphic design is 90% analysis, and the "deeper function" of the designer is to act as a "catalyst" (1976: 57). Similarly, John D. Hough, graphic designer in charge of the program at Xerox, is recorded as saying that design without analysis is "arbitrary" and without planning it is "like trying to nail jello to a tree" (1965: 38).

Henrion's account of design procedure also stresses structuring, planning and organization, defining the functions of the designer in managerial terms. After thorough investigation, long-term plans and budgets are developed in liaison with various departments in the client organization. Henrion's definition of current practice in large consultancies describes the necessary teamwork, while placing the designer firmly at the centre, coordinating the whole program:

> My own experience is that what is required today is an interdisciplinary team. We work with marketing people, mathematicians, scientists and engineers, and we call them in when we require information or skills which we do not ourselves possess. It is our job to ask the questions because I believe in the concept of the designer being in the centre, as a team coordinator, particularly for ... types of large design program ... (in Blake, 1971: 25).

Designers of corporate identity programs are usually external consultants. In-house design teams are associated with implementation rather than the instigation of new ideas (see Chapter 2 on the role of consultants). Ed O'Brien has remarked on this, using the analogy of designing a tree or a forest to describe the difference made by an objective overview:

> I feel there should be the separation of church and state as far as this [the initial concept] is concerned. There should maybe be a design group within the company to do some implementation of things because you've got to worry about being cost effective, but for the overall design, in other words the design look, you should have outside sources. (Appendix VII, 325-326)

The other key advantage of the external consultant is his ability, as an outsider, to circumvent the usual hierarchical chain of communication and talk directly to the top management, the importance of whose involvement has been described above (fig. 15). When architect Eliot Noyes was offered the job of Director of Design at IBM in 1956, for example, ease of communication was the reason he gave for refusing the post, and accepting that of consultant director instead[38].

Many companies rely exclusively on consultants for identity design work (CN for example). In the case of the federal government, the original intention was to have a strong in-house team to handle the massive, continuous job of implementation, but the reverse happened, with a reduction in design staff both in the FIP and the various departments (Appendix VII, 398-399). This led to a greater reliance on liaison with external design groups, as with the program for the Canadian Coast Guard (Appendix VII, 468). When both external and internal designers are used, there can be some conflict in the interpretation of the original design manual (Donoahue, Appendix VII, 413) or internal resentment (Harris, Appendix VII, 347, 352-353).

A useful outline of the design process is Bruce Archer's "operational" model of design (discussed in Cross, 1984: 57-82, and Rowe, 1987: 49-50). The sequence followed is: briefing, data collection, analysis, synthesis, development and communication. Archer's model allows for feedback, and the sequence of operations is often somewhat telescoped in practice. For example, data collection and its analysis often result in a re-conceptualizing of the requirements, and designers are not always consulted at the beginning of the process.

Alan Topalian has discussed the initial difficulties of framing the design problem accurately and has pointed out that often the "intuitive leap" process is used: "The designer lights upon a fairly clearly formed solution without much analysis of the problem". Designing is then a process of " 'fitting' a pre-formed solution to the problem" (1980: 10). Similarly, Lawson has defined two approaches to problem solving as "problem focused", which he links with a scientific approach, and "solution focused", common in design (1984: 209-221). Simon (1969) and Brunsson (1985) have pointed out that many management decisions are made on the irrational basis of values, and are then followed by a progressive rationalization and taxonomic specification of sub-units. However, Archer's rational scheme is useful as a generic model for corporate identity design because the scale and collective nature of the programs necessitate a fairly structured sequence of events (investigation, analysis and evaluation, synthesis and development) described below.

1) Data Collection, Analysis and Evaluation

The problem-structuring activities of data collection, analysis and evaluation, which culminate in a mutually-agreed brief for design, are the "pre-project" phase of the process (Topalian, 1980: 45). This phase may be dominated by the client, a research firm or a large identity design consultancy such as those of Henrion or Olins (data collection is discussed in the section on research, p. 99).

Communication between these groups is of central importance at this stage of the process (cf. "Role Perceptions", p. 111). F. H. K. Henrion and Davis Masten have both stressed the importance of structuring the problem in an easily comprehensible form, both to state the problem cogently to the designers themselves, and to instill confidence on the part of the corporate management, who are often not visually oriented.

Masten describes the urgency of expressing visual, symbolic requirements in rationalized terms which management can understand and evaluate:

> ... sometimes, in the absence of fact, everyone's an expert, and so often management is very scared to make anything but the most evolutionary type of change. When they don't have a basis in reality for understanding just what equities they have in their visual identity, then they say, "It's no good", if that's the language of their folklore ... [Research provided] quantified data that intuitively passed their test of reasonableness" (Appendix VII, 389; cf. Amisse, 528).

The designer is often faced with what Henrion has described as "a kind of elementary educational job" concerning the definition and benefits of identity design, and research helps enormously in this task (Appendix VII, 444). Once again, the parallels are drawn between designers and managers, particularly in the large design consultancies:

> My office does more writing than designing, not by choice but by necessity. You have to qualify and rationalize, to convince yourself and to convince others. Designers should become managerial and speak the language of management. (Henrion, Appendix VII, 446)

2) Synthesis and Development

After the initial management decision and research into the character of the organization and its aims and markets, a presentation is made by the consultants (as at Bell or CN, see Charles Harris, Appendix VII, 355-357). The program will address all the "explicit" areas to be covered (applying the logotype/symbol to various artifacts) and often the "implicit", behavioural areas too (Henrion, Appendix VII, 443-444). The explicit areas will be more noticeable to external publics, while implicit characteristics will be stressed more internally. The proposed identity program will be a complete communications package, of which the graphics are only a part, but a central part (Chris Yaneff, Appendix VII, 434-435).

The synthesis stage of the design process is therefore considerably more complex than for the design of individual items. Jean Morin's apt analogy is to building a Byzantine mosaic - all the pieces have to fit (Appendix VII, 315, fig. 5). The design of identity systems rationalizes the chaos of unrelated visual fragments in corporate communications, interprets the strategy of the client organization in visual terms, and utilizes available media to transmit its images to target publics (fig. 16)[37]. The perception of order which is created is more significant than the appearance of any single item. This visual order can have a far-reaching effect on labour relations (Lorne Perry, Appendix VII, 379) morale (Paul Strongitharm, Appendix VII, 470) and recruitment (Wally Olins, Appendix VII, 465). Olins states that the accumulated internal effects on those people "living within" the identity are more important than external benefits such as increased sales (Appendix VII, 463; cf. Chajet, Appendix VII, 518).

Though there are still some representational symbols in use, the constraints (discussed below) on the designer are so complex and severe that it is not surprising that corporate graphics tend towards simplicity, abstraction and visual similarity (cf. Chapter 3). The intrinsic problems with progressive abstraction are (A) that the organization is being represented in generalized terms, which makes the symbol, whether an icon or a logotype, applicable to any other object in its class, and (B) simplicity can deny the audience's active role in the creation of meaning and lead to boredom (Ehses, 1977: 62-65)[38]. If the organization offers a specific product or service (or wishes to be identified with tradition in a particular field) more representational imagery may be appropriate, as in the program developed for Watney's Brewery in London by the Pentagram design group, which features a beer barrel (fig. 17) and the Wolff Olins program for the shipping line P & O, which uses a flag (fig. 18). Even here, elements are standardized and presentation is carefully controlled; there is a "painting by numbers" specification for the P & O flag symbol (Nakanishi, 1985: 23).

The illustrations and interviews with designers confirm that graphic design will exploit visual simplicity and modular spatial systems (cf. grids, fig. 1) for the following reasons:

1) To accommodate the great range of objects and the formats in which the symbol will appear. Josef Muller-Brockmann, the Swiss designer who has been very influential in the use of grids, has written that they are successful in corporate identities because they help to clarify, systematize and integrate - "to achieve architectural dominion over surface and space" (1985: 10). Not fully developed until after World War II, the use of grids in graphic design is now universal.

2) To make future applications and modifications easier. Modularity and visual simplicity reduce the complexity of future problems and decisions.

3) To ease the program's physical installation, often in remote or difficult circumstances, and often by unskilled labour (as in FIP signage and the Coast Guard).

4) To facilitate reproduction in a wide range of sizes and in a variety of different media. An example of the sort of problems that can occur when this factor is ignored is the difficulty of printing the government's ministerial stationery, which features the detailed Coat of Arms (fig. 19, cf. pp. 135-136).

5) To increase legibility in different conditions, such as bad weather or (on vehicles) under dirt. This will usually be tested, as it was at CN.

6) To increase recognition and aid memorability. This too will often be tested. If a symbol is too specific, relating to only one aspect of the organization, it cannot be used to create the desired associations in different publics.

Research

Research is used periodically during the whole process of creation, implementation and policing of identity systems. It produces a "clear articulation of a corporation's long-term point of difference", or unique identity (Masten, Appendix VII, 388). All the consultants interviewed for this study take the research of the external constraints in identity design very seriously. Wally Olins calls it "creative

McKinsey" because it goes beyond the superficial visual presentation of the organization, and involves an analysis of more broadly-based cultural issues such as the perception of the company by different publics (Appendix VII, 464). Similarly, Fitch, the large British-based design group which has extended its design services into almost every area, has set up an internal "information group" which constantly gathers data of all kinds (Woudhuysen, 1988).

The use of research can be grouped in four areas:

1) The integration and control of corporate communications necessitate an assessment of the existing situation (termed a "visual audit" by communications consultant Jean-Patrick Amisse, Appendix VII, 523). An extensive analysis of all sources of communication is undertaken, including stationery, signage, vehicle fleets and packaging. This involves photographing all the items currently in use and interviewing staff and suppliers. It will also mean reviewing other design programs, including those of competitors (Henrion, 1967: 9). The ultimate aims of this diagnostic exercise are simplification and rationalization, which in turn often produce financial savings, as in Yaneff's account of reducing the number of types of forms used at Canada Trust from 860 to 300

(Appendix VII, 423-424). The large design firms, and research companies like Cheskin and Masten, will extend this initial survey to include the company philosophy and strategy as well as design and communications (Appendix VII, Henrion, 445-446; cf. Amisse, 524-525; Cheskin and Masten's thorough checklist, fig. 20).

2) To aid the objective development of the design. It may also be important to carry out various forms of communication analysis, such as research into legibility, while developing the new design, as Cheskin and Masten did for public information symbols for the Federal Government at the beginning of the FIP (Appendix VII, 403) and Henrion did for KLM (fig. 74). Similarly, CN executed tests to check the visibility of their symbol on dirty equipment (Appendix VII, 373). To test the recognizability of the federal symbol, a survey was conducted for the FIP in 1979, when it was assessed in comparison with the provincial symbols of Ontario and Quebec (Appendix VII, 397).

3) To check the consistency of implementation. This is a tool for design management and takes the form of surveys, such as the major surveys of signage conducted for the FIP in 1982 and 1983, which revealed enormous inconsistencies (figs. 21-23).

4) To assess public reaction to the graphics of the identity, including the colour and the symbol or logo. The chief use of this type of market research is by companies whose identities fit Olins's categories of products and communications. Cheskin and Masten, for example, did market research into brand logotypes for Memorex, Kroger Lite and Nature Made, in which consumers were asked about the qualities projected by different designs (fig. 24 shows part of the survey's questions, fig. 25 shows the results).

Limitations of Research

The most frequently cited limitation of research into corporate identity design is in the evaluation of the impact of an identity scheme on its audiences. Lorne Perry has discussed the approach at CN, where public opinion surveys are used regularly. In addition to general surveys, carefully chosen samples of different sections of the public are surveyed on a qualitative basis (individual interviews or focus groups, see Appendix VII, 373-376). Though this provides CN with a broad picture of their image with the public, "It's almost impossible to isolate the impact the visual side of your image is having on opinion - it's coloured by events all the time" (Appendix VII, 373-374; cf. O'Brien, Appendix VII, 342). Olins agrees with the view that many factors other than design can affect a company's standing. He finds the use of market research in this area too simplistic and "a waste of time":

> As to conventional, marketing research, we don't do a lot of that, and I don't believe in it. We do a lot of checking to see how the company is seen after we've done our work, but there are a number of factors to take into account here. The first is that we are not talking about re-packaging sausages; there are a great many issues which will affect the way a company is perceived, of which identity is only one. ... An indirect gauge of all this is better. For example, if job applications have increased, and if business has gone up. (Appendix VII, 464).

The designers particularly disliked the use of market research, believing in their own experience and creative intuition. A designer's intuition consists of a sensitivity to the ambient culture and an ability to synthesize different components. The designers' research and analysis are more likely to be based on their recognition of the importance of the individual experience of others, rather than the (supposed) objectivity of market research (Caplan, 1982: 181-182). Chris Yaneff remarked that research can show if there is anything wrong with the product, or if its name has a negative meaning in another language, and it can also reveal the demographics of the potential market. However, citing Coca Cola's disastrous product change (based on market research) and the huge and unlikely success of the perfume "Poison" (the name of which was based on the intuition of a Dior executive) he adds, "I don't believe in taking a pack and analyzing it - you can't ask people whether they're going to like something" (Appendix VII, 433). Similarly, Jim Donoahue, while acknowledging that it might be interesting to know if people see particular attributes in a given logo, has remarked that: "... if the designer is any good, he shouldn't miss by that much" (Appendix VII, 416). Echoing Davis Masten's comment about management needing reassurance from research, Donoahue points out that big companies use focus groups when they are "really nervous" (Appendix VII, 415). Though Masten says that, "Typically ... [research is] thought of as a club with which you keep the creative people in line, and I don't buy that" (Appendix VII, 390). Clearly an important function of market research is to allay executives' distrust, either of designers or of their own judgement in the visual field.

Design Management

Design management operates on two levels, in top and middle management, and is concerned with policy and implementation. All the interviewees stress the need for the involvement of top management because of the necessity for commitment. Topalian calls the chief executive the "design responsible" - the instigator and the inspiration of the design programs (1980: 59)[39]. If an identity is to have the maximum effect, a key strategic decision, which can only be made by management, is the timing of the launch. To get the most attention, "You have to be first and you have to be unique" (Yaneff, Appendix VII, 435) and if the timing is wrong, the whole project can backfire, as Olins has observed:

> If you introduce it [identity] too soon, it's perceived as hype, rubbish and not true. If you introduce it too late, or not at all, then you don't get the change you want ... it is disastrous to introduce it too quickly, and it slows things down if it is introduced too late. (Appendix VII, 462).

The commitment of top management is also important because of the need for cooperation from all departments. In addition, the complexity of the implementation requires organization and policing at lower levels throughout the organization. This need for complete cooperation has been pointed out by David Carter: "a weak symbol <u>applied consistently</u> is more effective than a better symbol which is not used uniformly" (1978: 1, author's emphasis).

Olins agrees on the central importance of organized implementation:

> "Because identity deals not with a whole series of big things, but with big things and an innumerable series

of tiny things, you have to operate from a management platform, which enables you to make that work effectively" (Appendix VII, 453).

The areas of the program which have the greatest visibility for the target publics (internal and external) will be implemented first, as with Bell and its vans. Sometimes change requires the winning over of internal opposition. This occurred within Bell to the loss of the "old ding-dong", (Charles Harris, Appendix VII, 355) and within the Canadian Coast Guard, to changes in colour and uniforms (Paul Strongitharm, Appendix VII, 467). Several of the interviewees therefore point out that internally, implementation must be a diplomatic exercise, if it is not to be counter-productive.

The internal, administrative aspect of implementation is not usually handled by a designer, though Roland Lavoie is now doing this at Bell. Both Henrion and Olins encourage their clients to appoint design managers if they do not already have them. These are usually from inside the company, and often not people from public relations or marketing, who "have preconceptions about it" (Olins, Appendix VII, 466). Olins cites as examples company secretaries and lawyers[40]. Ed O'Brien was a district manager for Bell, before moving to public relations, and Paul

Strongitharm (of the Canadian Coast Guard) is a career administrator. Both became enthusiastic converts to the cause of design within their organizations. To return to Olins' discussion of identity as one of the factors which reinforces centralized control, it is easy to see why managers from apparently disparate areas would be comfortable with the financial model he offers for identity management. With finance, every department of the company is affected, and every department has targets and controls. This is basically how identity should be implemented (Appendix VII, 453). Charles Harris gives a good example of the necessity for central control, where only the president of CN was able to bring a rebellious area manager into line (Appendix VII, 353).

A designer's chief contribution to the management of identity programs is centered on the production of the manual, a set of instructions for the implementation of the identity. Some consultant designers (such as Jim Donoahue, Appendix VII, 414) feel that the manual should be their last word on implementation and that design management is an exclusively internal process for the client, though they sometimes apply the identity to new requirements when commissioned[41]. Donoahue is the "strict professional" type of designer, who concentrates entirely on design problems (Topalian, 1980: 72-73). However, consultants such as Lippincott and Margulies, Yaneff, Henrion and Olins, believe in a much more complete service from the beginning, and therefore a longer-term relationship with the client. The nature of the corporate identity design problem is defined by them in much broader terms, and Olins claims that involvement in implementation will be a growth area for multi-disciplinary consultancies in the future (Appendix VII, 466). The relationship between the consultant and the organization "... varies in intensity ... If they can't install it with their system of management, then there's nothing you can do as a consultant that will make them put it in to their system" (Appendix VII, 455).

Jim Donoahue has said of the manual that "It's the visual policy and it shouldn't be debated" (Appendix VII, 414). However, it must be adapted to the changing needs of the corporation. For this reason manuals are usually issued in sections, for ease of updating and distribution to the relevant users. Successful implementation is done in the spirit, rather than to the letter, of the original scheme:

> The problem with the manual is that it supports the idea that graphic design is, in some strange way, formal and unchanging. And this is very dangerous. The point about design in everyday management is that it is constantly changing, being revised and renewing itself. It must constantly be open to new ideas and change as the company changes. This means that the manual must be used with great discretion. (Olins, 1985: 33).

Reservations about the manual as a bible are also held by Lorne Perry, who while acknowledging that manuals are a form of "control mechanism", does not issue more than specific working drawings to different departments, and deals with any problems on an informal basis over the telephone: "book systems ... [are] a big brag or ego piece" (Appendix VII, 365). Both Ulrich Wodicka and Jean Morin have pointed out the necessity of flexibility in the design and implementation of identity (Appendix VII, 400-401, 322). Henrion has described how even the most carefully prepared manual can be mis-applied if not managed correctly (Appendix VII, 449) and Olins has criticized consultants (eg. Donoahue) who do not take an active interest in implementation (Appendix VII, 454).

Speaking of the watch-dog function of design management, Lorne Perry has outlined three aspects: maintenance, up-dating and protection.

> ... maintenance is one [aspect], but I'm also conscious of the need to be looking for minor up-grades here and there, to re-tune it and take a

fresh look at certain aspects, otherwise it won't stay alive - it'll start to look a bit stale and to coast downhill, and then someone will start to say that we need a new symbol. (Appendix VII, 377).

To summarize, the design manager's role is to oversee the implementation of the identity program: to liaise with management (both educating them about design and protecting the scheme from dilution), to liaise with external consultants, people in marketing and colleagues in subsidiary organizations, and to manage any internal designers employed in the implementation of the program (O'Brien, Appendix VII, 331). Paul Strongitharm's comments on the attempts to find standardized ways of applying lettering to ships are an unusual and instructive account of the special organizational problems that can arise when implementing an identity program (Appendix VII, 153-154).

It should be noted that computers will have an impact on the implementation issue in the future, in areas of cost, accuracy and interpretation. For example, the Federal Identity Program manual will be made available on hard disc (at an anticipated cost of $35 per copy, instead of $250 for the book version) and this will mean that all the elements will be digitized for accurate and cheap repetition. Ulrich Wodicka believes that this will also make it much easier for people without design training to try different ideas for layouts, guided by computerized "menus" of options, rather than sticking to rigid rules or having to refer back to the designers (personal conversation, 24/6/88).

Role Perceptions

In defining a corporate identity and the strategy for its projection, it is clear from the above account that there is an overlapping of roles and an interdependence of professional groups which can lead to communication problems at every stage of the design and implementation process. The perceptions of their own roles, and of each others', held by the different groups involved in identity design are, not surprisingly, diverse. These differing role perceptions arise from the cultural differences between designers and managers (which are a product, in turn, of their different training and expertise) and from their different functions and positions within the corporate culture (internal decision makers vs. external consultants) [42].

In his study of design and management, The Management of Design Projects, Topalian presents surveys, conducted at conferences in Britain, Canada and the United States, of the views of managers and consultant designers on the difficulties of solving design problems in industry, from product to graphic design (1980: 134-139). In the responses, there is "significant" agreement between designers and managers from all three countries regarding some major problems. The first is that effectiveness demands involvement in "a wider field than indicated by the problem"; divergent, holistic solutions are needed, rather than narrow, efficiency-centered ones. Both designers and managers agree that managers tend not to be familiar with, or to understand the nature of design problems, and are not sufficiently prepared to deal with them. Topalian cites the example of management being unaware of a problem, then having to deal with it on a "fire-fighting" basis and ending up with a superficial design solution (1980: 29-30). The nature of design problems in general is seen by both groups to be alien to the culture of the management group.

Designers surveyed by Topalian frequently do not feel at home with the values of management. They agree amongst themselves that managers tend not give them enough information or understand the wider implications of design. Projects tend to be under-funded and often grow while the budgets do not, and too much is expected of design. The designers feel that management involvement is often not at a sufficiently high level in corporations, and too many people get involved. Designers tend to feel that managers think they do not understand business information (though most managers surveyed think that designers do understand it). Finally, designers, rather than managers, feel that the two groups speak different languages.

Topalian sees this difference of focus between the two groups resulting in a major evaluation problem. He describes the typical management evaluation of design projects as "counting the costs, but losing sight of the benefits", and partly blames designers for their "pious, largely unsubstantiated exhortations" (1980, 105). This evaluation problem is one of assessing effectiveness, as opposed to efficiency (cf. the section on goals in Chapter 2, and section on research, this chapter). From the survey it appears that management tends to underestimate the breadth and depth of design problems, and also the time, resources and influence needed to produce effective solutions, while simultaneously having an unrealistic view of design as a sort of panacea.

The problems outlined above can be acute in corporate identity, because of its complexity and range, and because it deals with the irrational, cultural aspect of organizations which management is traditionally uncomfortable with. Many of the points made by Topalian are therefore corroborated by the interviews conducted in this study. In these interviews (Appendix VII) design consultants tend to see themselves at the centre of identity programs because they feel they have external objectivity, problem structuring expertise, visual skills, intuition and coordinating ability. Originality of outlook is a virtue readily attributed to external design consultants by researcher Davis Masten, who pointed to their "real different" perspective (Appendix VII, 391). Design manager Ed O'Brien has similarly talked of their "fresh look" at the problems (Appendix VII, 326). However, Masten thought that his firm was better at problem structuring, analysis and planning, though he did acknowledge designers' visual expertise. O'Brien also praised designers' visual ability, and their external overview, but retained the pre-project problem structuring, and the control over the continuing organization of the program, as management functions (as did company vice-presidents Lorne Perry and Charles Harris).

O'Brien and design manager Paul Strongitharm both showed an acute awareness of the problems of winning support within different layers and departments of their respective organizations, a role which the consultants agreed was strictly an internal responsibility. However, management's role and effectiveness in perceiving and presenting design problems, and later, administering the implementation of solutions, varies a lot, according to Henrion, Masten and Olins. They, and designer Jim Donoahue, echo Topalian's finding when they all mention the lack of confidence of management, in many organizations, in its own ability to evaluate design. Masten's remark about passing management's "test of reasonableness" demonstrates the lack of trust in the design process, as does Henrion's view of his self-appointed educational role with clients.

The designers tend to work in interdisciplinary, project-based teams (termed "adhocracies" by Mintzberg, 1983: 393-396) and represent a visual, qualitative aspect of corporate culture as a whole, in contrast to management's more bureaucratic organizational environment and hierarchical, abstract viewpoint. The first group is retained by the second to translate its ideology and justify its position in qualitative, emotive terms. Thus both rational and irrational organizational factors are involved in what Chajet has termed "perception management" (1987: 1) and the functions of designers and management have to be integrated in a unique way in order to do it effectively. Designers are trying to design whole situations, rather than groups of artifacts, but, as Caplan writes, they "have enough trouble with things. Situations are often uncontrollable and to make them otherwise suggests manipulation" (1982: 166). Caplan feels that designers are the servants o', not the directors of, ideology, and therefore the managers are the real situation designers, "because they determine the vehicle, the setting in which communication takes place" (ibid., 167).

However, liaison with management has moved design consultancy considerably closer to general management consultancy and has changed the designer's role and widened the range of consultancy services [43]. Chris Yaneff has described this change:

> In the old days, the artist just sat at the drawing board. MacDonald and all the others were employed just to sell printing and plates. The artist was at the bottom of the totem pole. There's no such thing as commercial art any more. (Appendix VII, 435).

Olins predicts a closer relationship between designers and management in the future, with the growth of massive, international design consultancies to meet the needs of international conglomerates, the structure of the service organizations reflecting that of their clients (1985: 25-26; Appendix VII, 460). Jean Morin would also like to see the working relationship grow closer, so that corporate identity design, as the visual arm of strategy, is completely integrated in the decision-making process from the beginning:

> It's too bad that we designers aren't often there, to say, "Before you make the decision, you must realize how it will translate visually". People are visually uneducated. Visual communication is very complex. (Appendix VII, 320).

Henrion sees this closer link as inevitable and necessary, and he believes that design standards generally will rise because of it, but he feels that the results of the process described by Olins will become even more standardized than at present - "the cutting edge of design ... has always come from individuals" (Appendix VII, 438-439). He has also spoken of the need for a "delicate balance between research, analysis and design" (Appendix VII, 446) and has stressed that design should be at the centre. This dilemma is an old one. Henrion's reservation about the position of individual creativity in the emerging professional structure of corporate design returns us to the similar concern of Peter Behrens at AEG, prior to World War One (discussed in Chapter 3).

Chapter 5

Case Histories

The Federal Identity Program

As can be seen from the chronology in Appendix I, although the Federal Identity Program (which will be referred to as the FIP) was not announced until October 23, 1970, many of the pieces were already in place. The coat of arms was adopted in 1921 and adapted in 1957, and the Canadian flag was proclaimed in 1965. Jim Donoahue designed what was to become the "Canada" wordmark, also in 1965, and the 11-point maple leaf became a protected trademark of the Canadian government in the same year (fig. 19). The federal symbol (maple leaf and one bar) was designed by the CAC group (Commercial Art Centre, Montreal) and adopted in 1970. The Official Languages Act of 1969, also had a great impact on the FIP (Appendix VII, 395).

The FIP grew out of the report of the Task Force on Government Information in 1969, titled To Know and Be Known. Set up in August, 1968 by Prime Minister Trudeau, the Task Force was given six months to compile its report. The report resulted in the setting up of Information Canada, a central agency intended to coordinate all governmental communications (see Appendix II). Though the report's scope is much broader than just the graphic aspect of communication, it is worthwhile to describe it briefly because of its astute understanding of the following areas of interest:

1) The place of graphics within the total communications context.
2) The identification of both internal and external publics.
3) The need for centralized policies for effective coordination and political/economic survival.
4) The political issue of centralized control in communications.

> The terms of reference required a study of the structure, the operation and the activities of federal departmental information services and their advertising programmes at home and abroad. The terms of reference also called for an examination of selected activities of those agencies with special responsibilities to produce and distribute information on the programmes and policies of the Government of Canada. (To Know and Be Known, 1)

From the start, the report was concerned with issues of the public's right to information, its awareness of information services, and the effectiveness and relevance of those services. Thus it involved an assessment of objectives and of the opinions of various publics. Reviewing the radical politics of the period, and the issue of personal freedom versus the necessity for government control (the issue of environmental pollution is cited as an example), the report describes a growing disaffection amongst the general public and states that "governments must acquire the power to speak persuasively and continuously, on many subjects and at many levels of comprehension" (ibid., 1).

Describing the situation in 1969, the report criticizes the lack of central policy and the use of both official languages in government publications. It speaks in tones of urgency and despair of the state of government communications, with section titles such as "The Developing Tragedy", "Is Anybody Out There Listening" and " Twelve Easy Steps to a Quick Understanding of the Mess in Government Information". A summary of government surveys shows a marked degree of public ignorance about the level of government involvement, and of its policies (ibid., 49-55). Describing the particular problems faced by a huge country where "special publics" abound and regionalism is "endemic", the report points out that government messages were not getting through, and the public did not even know to whom to address letters (ibid., 5-7). Also, government information officers tended to be under-rated, misunderstood and demoralized (ibid., 18-19).

Graphic design is given a special mention, being dismissed as "unimpressive, dull and unprofessional" (ibid., 22). In contrast, Expo 67 and the CN identity are praised, and it is stressed that the design issue is important because "the Federal Government's image is partly at stake" (ibid., 22, 187-193).

> Over the years, we have watched the growth of such well- known corporate bodies as Olivetti, KLM, London Transport and IBM. Their recognition throughout the world, and business success, can be attributed largely to good design philosophy, management and co-ordination. This same philosophy ... should be applied to Canadian government work. The benefits to be gained are directly associated with the government's wishes to establish a stronger national identity ... (ibid., 22).

In advocating a corporate identity system for the government, the report even lists the print items which would need to be covered (ibid., 192-193). It quotes the designer Paul Arthur, who extolls the economic virtues of systems design, and describes the client/designer relationship in the implementation of large-scale identity programs. He also discusses the fear of over-centralization:

> There is a general concern that systems are totalitarian in nature, that they hamstring creativity, imposing a boring grey mediocrity on life and art. One has only to look at the extraordinary diversity of expression achieved within the system of

gothic architecture, to see how false this notion is. (ibid., 191)

This concern with the distinction between co-ordination and coherence on the one hand, and dictatorial control on the other, is a major theme of the report. Discussing the principles of information policy, the report states in its summary that an abhorrence of state propaganda should not be used as an excuse for not strengthening information services, which have a legitimate function, in that people cannot participate in democracy without information. To counter any possible dangers, it advocates "a parallel strengthening of both Parliament and the public in the determination and review of government information policies" (ibid., 49). This was to be achieved partly through closer liaison between information officials and ministers, partly through more information being disseminated, and partly through new administrative structures.

However, the report stresses that primary responsibility for information should still rest with the departments concerned, and advocates not a new ministry, but a "central government agency" ("Information Canada") in order to achieve "the de-centralized co-ordination of a major government activity" (ibid., 52). Citing the French government's scrapping of its own ministry of information as an example, the over-centralization of this function is seen in the report as impractical in the Canadian context (ibid., 53). In fact, this mandate proved impossible to fulfill, as was pointed out in the Miller report (Appendix II).

The role of Information Canada was to provide co-ordination and advice, and the FIP was to do this in design terms (ibid., 65). Each government department was to administer its own identity program, following guidelines set out in a manual produced by the central FIP design team, and this structure is still in operation. For example, the vast range of government forms are not designed by the FIP personnel, who only advise on the identification of organizations on these forms. Bodies such as the Canadian Coast Guard have their own manuals produced in consultation with, but not by, the FIP design team.

When Information Canada was disbanded in 1976, the FIP was transferred to the Administrative Policy Branch of the Treasury Board Secretariat (Appendix VII, 400). This could be said to be an appropriate position, as the FIP was seen as part of communications policy from its inception, and _To Know and Be Known_ advocated the integration of the communication function of government more fully with administration.

Objectives and Parameters

The Administrative Policy Manual of the Treasury Board of Canada defines the objectives and scope of the FIP (Chapter 470, March 1982). The objectives are as follows:

1) To enable the public to clearly recognize federal activities by means of consistent identification.

2) To facilitate access to federal programs and services.

3) To improve the methods of the graphic handling of the official languages, consistent with the Official Languages Act.

4) To promote the effectiveness, efficiency and quality of graphic design in all applications of the federal identity.

5) To effect cost savings through standardization of the program's applications.

Recognition, control and economic factors are common to all identity programs and have already been mentioned in the outline of the initial report, To Know and Be Known. The political importance of the objectives is stressed heavily in the following quotation :

> ... the following statement applies generally to all aspects of federal identification when it noted that spending without federal presence is not just frustration for the politician, it is also a denial of the citizen's right to see the government's work and to judge it. When the federal role is not evident, it cannot be assessed. Visibility involves a search for the chance to take the credit, but at the same time, a willingness to shoulder the blame. As politicians, therefore, we reject the simplistic view that a concern for visibility is no more than public relations for its own sake. Answerability of federal MPs to the public is the other side of the coin from accountability of ministers to Parliament, and a government that is not visible cannot be answerable" (Fiscal Federalism in Canada. Report of the Parliamentary Task Force, 1981: 3).

The achievement of the objectives "is based on the use of identifying symbols applied in conjunction with organizational titles" (ibid., 3). The prominence given to correct designation, in both official languages, of government organizations, ministers, programs and services, can be seen in Treasury Board publications (To Know and be Known and Message. Identification of Programs and Services, 1983). Similarly, a major part of the guidelines published by the Administrative Policy Branch is concerned with correct terminology, as outlined in the extensive glossary in both official languages, of terminology associated with the program (Glossary. Terminology Series, 1985). Because of the importance of language issues, the visual presentation of both official languages is stressed in all the various policy documents, particularly the design manual (see below, and figs. 26-29).

The Administrative Policy Manual also describes the "identifying symbols" and the broad policy concerning their use. These are as follows:

1) The "Federal Symbol". This is now the "Flag symbol" (the maple leaf with two bars, fig. 19). The original federal symbol (the maple leaf with one bar, fig. 19) is being phased out. It is used: "to identify all federal departments, agencies, corporations, commissions, boards, councils, other federal bodies and activities". It "shall not appear without a bilingual applied title" (ibid., 9).

2) The flag symbol "is reserved for the Prime Minister, ministers, ministers of state, parliamentary secretaries, and their offices" (ibid., 9).

3) The Coat of Arms. The coat of arms is listed as being used by the judiciary, the legislature, and by External Affairs for official premises abroad. It may replace the flag on minister's invitation cards.

4) The "Canada Wordmark". "The 'Canada' wordmark is the global identifier of the government, and is the dominant graphic symbol in the FIP" (ibid., 11).

Something of the range of the application of identifying symbols is revealed by the list of 135 organizations which come under FIP, from Agriculture Canada to War Veterans Allowance Board of Canada (Titles of Organizations, 5-14). In the same document, there is also a list of 38 government organizations which are not part of the program (ibid., 35-36). Many of these are Crown Corporations whose position in the market place demands a stronger individual identity, such as Air Canada, the CBC, Canadian National, VIA Rail, and Petro-Canada. Otners, such as the armed forces and the Royal Canadian Mounted Police, already have strong and discrete identities, while obviously being government organizations. Other organizations exempted are those engaged in some forms of international collaboration, and those co-owned with the private sector. Exemption still demands conformity to the use of both official languages (Administrative Policy Manual, chap. 470, 4-5).

Finally, the relationship of the FIP with the identity programs of the provincial governments is purely consultative. The provinces which have identity programs have all developed them concurrently but independently of the FIP: Ontario (1972), Quebec (1972), Alberta (1975), British Columbia (1977), Saskatchewan (1982), Manitoba (1984), (see figs. 30-34). Because the programs address similar problems, the use of symbols and typography is often similar, too, but the relationship between the provincial identities and the FIP has been distant, if constructive (Appendix VII, 402).

Implementation

The step-by-step development and implementation of the FIP can be traced in Appendix I, and an example of its use in one government agency is discussed in the interview with Paul Strongitharm (Appendix VII, 467). In terms of recognition, the key elements are obviously the stationery, which was tackled first, and the signage, for which guidelines were issued in 1979-80 (see Appendix II). Under the present government, a major review and re-presentation of the FIP has been instigated, culminating in the production of a new manual. This is appearing in sections and should be complete by the end of 1989.

The FIP staff have a consultancy role in addition to producing the key design policy document (the manual).The government organizations which are under the FIP program often have their own designers, though Ulrich Wodicka (Senior Design Advisor in the FIP) points to a reduction of these in the last ten years, and an increase in the numbers of outside designers used. The special requirements of some government organizations have lead them to develop their own manuals. Examples are: Parks Canada, Public Works Canada, the Canadian Coast Guard, the National Capital Commission, Correctional Services Canada, and Central Mortgage and Housing Corporation.

The implementation and updating of identity graphics is always a long term project, and in so vast a scheme, directly subject to political as well as economic pressure, it is a continuous operation. These problems of scale and complex organizational relationships are emphasised in the FIP, which, though it had seven designers at its inception, now has only three (conversation with Alan Way, Senior Design Advisor, FIP). This again reinforces the purely advisory role described in To Know and Be Known.

1) Problems of Scale

Ulrich Wodicka pointed out, for example, that there are 18-20,000 government installations across Canada, with millions of signs (Appendix VII, 393). There is no complete and current inventory of government installations and vehicles. Such an inventory was used in the signage surveys of 1982-83, but was inevitably outdated by the time it was compiled (conversation with Lise Potvin, Design Advisor, FIP).

As with other identity programs, this need to monitor implementation (and the consequent public reaction) has lead to various surveys. In 1970, the year in which the program was inaugurated, a marketing study in London, Ontario and Sherbrooke, Quebec, found that the proposed federal emblem (the maple leaf with one bar) while hardly exciting the public, attracted only a 17% negative response (Appendix I). Again, in 1979, a survey was conducted to test the recognizability of the federal emblem. It proved stronger than the Quebec fleur-de-lys, and much more effective than the Ontario trillium (Appendix I). Though the chief reason for this is probably the use of the maple leaf, another is the scale of the implementation of the FIP mentioned above. The role of effective, comprehensive implementation in establishing identity is a major one (as discussed in Chapter 4).

The surveys of government signage referred to above (in 1982-83), were carried out in the early phase of a $78 million sign renewal program (Appendix III). The 1982 survey revealed that 73% of all installations did not conform to the FIP in their primary signage, and the one in 1983 found that, of 459 installations surveyed, the signage of 64% was still inadequate (see figs. 26-28, appendices I and III). The results of the 1983 survey, in the form of binders of photographs taken by students employed during the summer, were sent to the Deputy Ministers of the appropriate departments to show them how they looked in the regions. This lead to a survey by the Customs and Excise of all its border crossing posts, for example.

One way of standardizing primary signage has been the centralized production of standard components in Ottawa (Appendix VII, 397). Also, various attempts have been made to standardize lettering and letter spacing to give predictable results even when unskilled people are involved in letter assembly (there are no training programs at present). These include the use of pre-cut vinyl letters and standardized unit-width systems suitable for computerized layouts (fig. 35).

Wodicka points out that despite an uneven administrative response, and because of the vast scale of the program, there is little point in being too rigid. Localized communication needs in different parts of the country and in different departments arise continually, particularly in relation tc publications and advertising, and an overtly policing role rather than an advisory one would be both impossible and counter-productive.

2) Problems of Organizational Relationships

The Treasury Board's role is to oversee FIP policy and monitor its implementation, and to report to Cabinet (The Administrative Policy Manual, Chap. 470, 5). Thus the Treasury Board's function relates closely to that of design management in corporations (as in Bell or CN) but in practice the relationship between the design group and government is rather confused (Appendix VII, 398). This is for the following reasons:

1) Each agency or department appoints an individual, who may be in public affairs or from a different background, to be in charge of the implementation of the FIP.

2) Each department decides how this function fits into its own area. "There is no design management function as we know it" (Wodicka, Appendix VII, 398).

3) Only one individual, with other responsibilities, is appointed, regardless of the scale of the organization.

4) There is continual uncertainty about the positioning of the central FIP organization in the federal government administration (Appendix VII, 400).

On a departmental level, organizational charts and personnel change frequently and the Treasury Board has no model which it recommends to the various government organizations for the administration of their identities. Crown Corporations which fall under the FIP are treated the same way as government departments, and sometimes the liaison and application of central policy are not very strong, as in the case of the Canada Post (Appendix VII, 405).

In relation to the upper echelons of the federal government, liaison seems to be weak. The saga of the choice of the initial design for the federal symbol (chosen directly by cabinet in 1970) is a good example. Originally, the second bar of the flag (on the right of the maple leaf) was to be visually implied by the type indicating the particular government department, but the use of two official languages and many long official titles made this impossible. This original design (one version of which used the Optima typeface, fig. 36) caused strong opposition from the design community and the designers subsequently in charge of using it found it very difficult to implement. However, although the typeface was changed the decision on the symbol could not be reversed before it was too late and extensive implementation had taken place. The design staff, who were never happy with the design are pleased with the recent adoption of a complete, modified flag symbol (though, as exterior signage has a life span of 15 years, and each primary sign costs $8000-10,000, the old symbol will be visible into the next century). Also, the program is seen as largely self-regulating. There is what Wodicka describes as a "temporary power vacuum", and a reluctance to fill it with another layer "which would probably then be very active to create new initiatives" (Appendix VII, 404).

This design management problem can lead to difficulties with the enforcing of design policy, which is so central to identity programs. An example is the use of the Coat of Arms on the Ministerial stationary, a change which is currently being implemented (fig. 37). The Coat of Arms, originally meant to be used in a decorative, specialized capacity, is preferred by current ministers to the other symbols used by the government. On the stationery, this causes several problems:

1) The traditional Coat of Arms does not reduce well. On a small scale it is illegible. The province of Ontario's designers tried to overcome this problem by re-designing the provincial Coat of Arms, with a rather Walt Disney-ish effect (fig. 33).

2) The ministers want the Coat of Arms in gold on buff paper, which does not copy well and gives acute problems of quality control to the Department of Supply and Services because it is difficult to print.

3) The Coat of Arms is impossible to digitize and will always have to be used by skilled people. This contrasts with the common aim in corporate identity of establishing methods of implementation for maximum ease and speed (as, for example, in the FIP signage instructions). (Synopsis of discussion with Lise Potvin at the Treasury Board, 28/4/87).

4) All coats of arms tend to look the same. There is a possibility of confusion with the provincial symbols.

The character and problems of the federal identity program are summarized in comparison with the Bell program at the end of this chapter.

The Bell Identity Program

In 1979, the company employee tabloid publication, Bell News carried a spread of photographs of company buildings, vehicles, stationery and other artifacts which showed the range of the Bell identity program. The text proclaimed:

> Over the years our company has been identified by a series of symbols whose progression reflects Bell's growth from a relatively small telephone company to a leading international telecommunications enterprise. (Bell News, Ontario Region, June 18, 1979).

Though the tone and intent of the piece reflect the internal, morale-boosting aim of corporate identity programs, the statement is substantially true. Bell began as a small, one-service company, and the first two symbols (1880, 1891) are typical of much graphic design of the period, being visually complex illustrations, depicting in detail some of the equipment then in use (fig. 7). They are very specific to a particular activity, and in an area of rapidly changing technology, to a particular time.

As the service became established, and therefore commonplace, the need was clearly felt for quick, visual identification of the service itself, instead of the hardware. Angus Hibbard, who did the first drawing of the bell-shaped symbol while he was general superintendent of A.T.& T. in the United States in 1888, wrote:

> ... the long distance telephone should have a sign, a trade mark which it could display to the public in announcing and advertising its service ... thinking that what we were to advertise was the Bell telephone and the long distance telephone, I drew on my scribbling block of paper the outline of a bell and placed across it the words "Long Distance Telephone". (Quoted in the Bell Telephone News, December, 1938)

This symbol, with gradual simplification, lasted until 1976. It is important to remember however, that it was a trade mark which promoted a service rather than a complete corporate design program that embodied all the elements of the company's visual presentation, and that words were required to differentiate between the different telephone companies. The first mention of a complete manual to coordinate all visual aspects was in 1965, when many corporations began to take the graphics of corporate identity more seriously. This scheme still used the bell, and was produced in-house (fig. 7). In 1968, the Toronto design firm of Stewart and Morrison was invited to submit a proposal to Bell for an identity scheme, but it was not used.

The drastic changes came between 1975 and 1977. There were several reasons for this, which are summarized as follows (Appendix VII, 322-323):

1) Bell became independent from A.T.& T. (who also still used the bell-shaped symbol) in 1975.

2) The company had been developing independent and advanced technology throughout the 1970's. In addition, telecommunications were changing rapidly all over the world and Bell needed to be seen as a modern company.

3) The company had become more diversified, and surveys had shown that the bell symbol was synonymous with only the telephone.

4) The need for rationalization and centralization of procurement and services in corporate communications.

The Bell management wanted to have their new design work done by a Canadian firm, and in 1975 they approached three companies in Toronto and three in Montreal, hoping that they would collaborate in a joint presentation. However, the result was a lot of separate presentations (Appendix VII, 309-310). Some of the designs, by Burton Kramer, Alan Fleming, Ernst Roch, Jim Donoahue and Theo Dimson, can be identified (Appendix V, figs. 38-40). Other designers involved were Rolf Harder and Fritz Gottschalk.

The only remaining record of these proposals are two groups of slides from the presentations, one owned by Jean Morin, the other by Theo Dimson. The strange commissioning procedure employed by Bell may explain how these designers, some of the best known in Canada, produced generally undistinguished designs. Several of them would either be impossible to reproduce in a broad range of applications (fig. 38, bottom, for example, whose fine lines would fill in on a smaller scale) or look dated because of banal imagery (arrows in fig. 38, top, and molecular models, fig. 39, top). The Dimson design (fig. 40) was liked by Charles Harris (Vice President, Public Affairs) and Ed O'Brien (Public Relations Manager), but rejected by Jean de Grandpré (President) after an expensive presentation (Appendix VII, 309-310, 332). Jean Morin has remarked that the design was too radical to fit the culture of the company, which was dominated by conservative engineers. The briefing asked for something futuristic, but the company was not ready for it, and design alone could not impose a new reality (personal conversation, 11/7/88).

As an interim solution in 1976, Colin McMichael (Bell's Art Director) designed a more simplified bell symbol and a "stacked" logotype, with the words Bell

Canada in two lines (fig. 7). Though satisfactory in terms of stationery, according to Charles Harris, in his script for the presentation of Jean Morin's design in 1977, the program was less successful in other applications:

> In applications like hard hats, building signage, uniform crests and telephone equipment the signature standing alone tends to look lop-sided and out of balance. The double-decked Bell Canada also presents production difficulties when applied to smaller objects, where the signature becomes less legible... What's needed - in situations like these - is a bolder, more compact logo that can stand alone with a sure sense of balance (Harris, 1977b).

After this, Bell proceeded with more caution and asked Jean Morin to examine the problem. He liaised with Don Black, then the Corporate Design Manager. Though there was some opposition within Bell to the dropping of the old symbol, Morin advocated a logo without a symbol at all. The decision to use just the word Bell in the logo, while creating a shorter and stronger statement and coinciding with the name which everyone used for the company in practice, was also partly a political move because of the situation in Quebec at the time (Appendix VII, 309). The graphic identification elements were to be: the logo, the name "Bell Canada", the corporate colours (silver-grey and blue) and the consistent use of the Univers 55 and 65 typefaces (figs. 41-42). The new colours had the advantage of being unique, and more readily associated with modern technology than the old green colour which Bell had used on its vans. Also, as applied to these vehicles, the conversion costs after factory delivery were minimized, and very little adaptation was required to accommodate vehicle styling changes (Harris, 1977; figs. 43-44). The logo itself is, in its printed form, the standard Univers Extra Bold 696. Its strength is evident when compared to the symbols of the other Canadian telephone companies, many of which still include outdated imagery such as telephones and arrows (fig. 45). In signage the Univers 696 is optically corrected for legibility; the letters are expanded slightly (fig. 46). Considerable attention is given in the manual to variations of the logo in signage, including illuminated blue acrylic letters, back-lit stainless steel and freestanding signs (figs. 47-48). On the signs and vans, Jean Morin worked with an industrial designer, Michel Dallaire.

Implementation

Implementation started with the most visual part of the company, the compact vans which constitute 75% of its vehicle fleet of 9000 (<u>Bell News</u>, Oct. 3, 1977: 1). The importance of the appearance of the vehicles was stressed in the original presentation, where views of the vans in daylight and at night, in summer and in winter, were shown (Harris, 1977). Ed O'Brien even recalls that the vans were paraded up and down Beaver Hall Hill in Montreal, past the chairman and the president of the company, who were standing on the steps of the headquarters building.

The implementation of the identity has been gradual and very careful. Jean Morin was trained partly in Switzerland (Appendix VII, 311) and the simplicity and control of the typography reflects this background (figs. 49-50). This has lead to a widely praised graphic standards system. However, as the logo is a standard typeface, it does need to be very carefully handled in order to retain its distinctiveness (fig. 51 shows some of the instructions for establishing the surrounding space, from the manual). This point is also discussed by Lorne Perry of CN, when comparing that organization's program with Bell's. He feels the CN symbol is more self-defining and able to compete with its surroundings on a printed page (Appendix VII, 380).

Current Developments

The lack of distinctiveness in the logo is one of the reasons why the identity program is under review. On this point O'Brien said, "With hindsight, we could have got a distinctive typeface at that time, but that was all we could sell" (Appendix VII, 328). In a proposal put before the board at Bell in 1986, the reasons for change were listed as follows:

1) Organizational restructuring of BCE (Bell Canada Enterprises, see Appendix IV) and Bell. BCE now has very wide interests, including energy and real estate (fig. 52).

2) Similarity of the name Bell with other companies (Ed O'Brien cites Bell Helicopter as an example, see Appendix VII, 328).

3) Advertising and headline similarity with the existing logo reduce its distinctiveness.

4) Advertising of new subsidiaries provide no family link and a lack of identity consistency.

This last point was also discussed by Ed O'Brien (Appendix VII, 338). The scale of the problem can be seen in the ill-assorted range of logos and symbols used by some of Bell's many subsidiaries (figs. 53-54). Attempts to standardize them, either by having them all use the same typeface or the same colours, are resented by the people working there (Appendix VII, 338).

The stated "image objectives" of the review, in which Bell was to be seen as a progressive, high technology company with dynamic management and high quality services and products, were to be projected through the realization of the design objective of contemporary, graphic uniqueness. Jean Morin drew many modifications of the existing logo, finally choosing more extended and unusual letterforms (figs. 55-58). He also considered various ways of standardizing the appearance of the subsidiaries (the most sweeping of which can be seen in fig. 57) but he left open the amount of integration which Bell's management might want to have. According to Ed O'Brien, the decision taken was to standardize the colours, but not to adopt the new logotype (Appendix VII, 338).

Visual unity is a difficult issue. Too much unity between the subsidiaries and either Bell or BCE might produce difficulties when shifting the control of the subsidiaries from one parent to the other. This could happen when the corporation is combating government regulation or maximizing tax benefits

(Appendix VII, 338, 318). Roland Lavoie, the internal art director at Bell, is now working on standardizing the typography, but nothing has been done about dropping their various symbols. This seems to be a compromise and a temporary solution to the problem. Ed O'Brien thinks the 1986 proposals failed because of lack of involvement and support from top management (Appendix VII, 335). The company is still reviewing the situation with customary caution.

Comparison of Case Histories

Despite apparent differences between the goals of Bell and the Canadian government, there are obvious organizational similarities and therefore corresponding similarities between their identity programs, outlined below. Though Bell is a profit-making, private enterprise, its local monopoly and uneasy relationship with government regulation have led to a rather unaggressive presentation of the company. This quasi-institutional position has given Bell a similarity with Crown Corporations. However, the situation is changing as the company finds itself in an increasingly competitive situation and needs to capitalize on its technological leadership (Amisse, Appendix VII, 530).

Structure

1) Both programs serve very large organizations which are, because of their scale (a) bureaucratic, and (b) geographically dispersed.

2) Both organizations encounter the political and economic problems of having widely disparate, often semi-autonomous, constituent groups, whether subsidiaries, departments or agencies.

Aims

3) Both organizations are concerned in their identity programs with (a) recognition by very diverse publics, (b) internal and external visual consistency and coherence, (c) the communication of policies and qualities to a range of different publics, and (d) the cost-saving advantage of rationalization.

Implementation

4) Implementation is cautious and gradual, and revision is constant. The programs are never static.

5) Both have had to consider a very large range of items (Appendices III and VI list the contents of the parent organization's manuals, which do not cover the special requirements of the subsidiaries or agencies).

Requirements

6) The importance of the early and continuing involvement of those at the top of the organizational hierarchy is demonstrated.

7) The need for internal coordination and firm policies on implementation is made clear by the design management problems of these organizations, and by their structural complexity (mentioned above).

Method

8) Both organizations use external consultants for research and design input, and both use internal staff for implementation and continuity.

Omissions

9) Both organizations grant visual autonomy to subdivisions which for various reasons they want to appear to be separate from the parent (eg. CBC, Northern Telecom).

10) Neither organization has a central architectural policy as part of its identity, though this is often considered important.

Summary

Many of the above factors are very common in other organizations, as can be seen from the interviews, but there are specific similarities between the case histories. The instigation and implementation of both programs indicates a similarity of culture and ideology. The leadership of both organizations felt, in the late nineteen-sixties and early nineteen-seventies, a need to coordinate corporate communications and address changing external and internal conditions. From a basis of piecemeal, incoherent, low-profile visual presentation, they sought to increase the impact of their organizations - to make the general public more aware of their presence and boost internal morale. The timing of the exercise was therefore important, both for maximum external impact at a critical moment for the ambient culture (political forces of nationalism and separatism affected the programs of both organizations) and maximum internal momentum, in a period when both leaderships looked favourably on change (as mentioned by Charles Harris and Tom Ford in the interviews).

Culturally, however, this transition could not be achieved any more easily than the physical changes. Both organizations possessed a high degree of bureaucratic conformity and resistance to change. This was expressed by Charles Harris when he described Bell as "a sort of military organization ... [where] people took orders and didn't question too much" (Appendix VII, 353). Tom Ford similarly described the federal government as "a very entrenched corporate culture" (Appendix VII, 505). This conservatism was shown by localized opposition to changes in visual symbols or names, and also demonstrates the strategic, image-changing role of corporate identity design. Tom

Ford expressed this succinctly: "The program is there to be a change agent. We're dealing very strongly here with corporate culture" (Appendix VII, 505). A tangible, visual difference was necessary in order to implement changes in policy.

The initial decision, both at Bell and the federal government, was hesitant and controversial (as with, respectively, the extraordinary commissioning procedure at Bell, described earlier, and the opposition to the federal symbol from the graphic design profession, through the Society of Graphic Designers of Canada). Having made the decision, the highest level of leadership of both organizations retained ultimate control, but their liaison with the designers gradually weakened. This has caused some problems. Only with the highest backing is any change possible at all, and inflexibility has meant that changes are made late (as with the federal symbol) or for reasons of vanity (as with ministerial stationary). Cultural differences between designers and management are frequently alluded to in the interviews, particularly by those designers existing within the organizations (cf. Chapter 4).

Hierarchical priorities are equally prevalent in other areas. Despite the need for a widening dialogue with its publics (described in To Know and be Known), the federal government, no less than Bell, has a fundamental ideology of control. The debate concerning the extent to which agencies and departments should conform to the FIP is continuous, just as at Bell and its subsidiaries. Both identities are a little less monolithic than they were, but this is at least partly due to the enormous policing problems involved in establishing and retaining total conformity. Bell is still in the competitive business world, and the federal presence is still in competition with that of the provinces (in terms of gaining credit with the public for its funding activities, for example). For both identity programs, therefore, central strategic requirements and maximization of the visual presentation of the central core of the organization inevitably override other considerations such as the traditions of internal sub-cultures (a good example being the Canadian Coast Guard, Appendix VII). The resulting tensions conform closely to Olins' description of the counterbalancing, centripetal role of corporate identity design in relation to the many centrifugal forces which weaken the effectiveness of large organizations, one of which is a lack of internal cultural coherence (Appendix VII, 452, also discussed by Chajet, 518).

Chapter 6

Summary and Conclusion

Simon, in The Sciences of the Artificial, remarked that most knowledge about design was generally "soft, intuitive, informal and cook-booky" (1969: 57). He argued that design problems are universal (both organizations and graphics are designed, for example) and that a body of hard, transferable knowledge should be developed. This can only be done by looking at the actual situations in which design is working. In corporate identity, the background issues are those of organizational relationships. As Simon has said, design is always about what *ought* to be, and this metaphorical and ideological role, which is central in the organizational use of graphics, is summarized below.

Identity Design and Organization Theory

Organization theory is concerned with authority relations within organizations, and the relationship between organizations and their environment. The analysis of corporate identity design presented in this paper describes the role of visual representations and their meanings in these relationships. Externally, identity design is an attempt to achieve stability within an uncertain environment. Internally, identity design's goal must be to reinforce the members' shared sense of personal investment in the unity and the objectives of the organization. This should happen at both an individual level (if dysfunctional consequences of bureaucracy are to be alleviated) and at the organizational level (to address the problem of balance between centralization and decentralization, particularly crucial with sub-organizations). In both cases, identity design may be seen as a palliative for the problems of very large scale organizations, where impersonal, bureaucratic relations are the norm, and where entropy is a constant threat to cohesion.

In its integration with management ideology, design resembles organization theory, for while the latter does not serve ideology directly, it has provided it with intellectual tools. Silverman has remarked on the commonality of interest (if not of aims or motivation) between sociologists and executives in the "fit between organizational requirements and environmental characteristics" (1970: 18-19). This relationship is implicit in the mediating role of identity design between the requirements of management ideology and its audiences. Both design and organization theory seek to improve the functioning of organizations and in the process both are used as ideological tools. It is not the intention of this study to describe the above activity in pejorative terms, but to outline its necessity and inevitability in large organizations of all kinds.

Identity Design, Ideology and Legitimation

In the typology of Allaire and Firsirotu (cf. Chapter 2), design programs are, as cultural artifacts, classifiable as both cognitive and sociocultural, for they reflect and inform the structure and character of the organizations they serve, and are also clearly a product of the genesis and history of those organizations. Corporate identity design seeks to conceptualize the organization and project it in simple, visual metaphors. It represents an attempt to centralize control of the "conventionalizing of gestures into true symbols" which Buckley describes as one of the key attributes of complex, sociocultural systems (1967: 65). Coherence and consistency, corporate identity's stated aims in the visual presentation of organizations, are also attributes of established cultures.

Design shares a centralizing function with other forms of control and coordination; the role of the dominant group is made visibly evident throughout the organization and in its environment, as illustrated in the comments of Olins, Chajet and Wodicka (Appendix VII). This organized presentation may not represent as direct a form of control as management can achieve over technical and formal structures, but whether the entire cultural field within an organization is manipulable or not, identity design represents an attempt at coordinating the visual artifacts of that field. Research attempts to ensure that the corporate symbols relate effectively to the internal and external audiences.

Henrion, Ludlow and Schmidt, when planning the new, world-wide identity for Mitsubishi Motors, found that the key area within the corporate culture was the dealer/corporation relationship. Having used the design program to bring the two groups closer together on a global scale, Schmidt claimed that the result was a "front-line corporate culture" (quoted in Pearman, 1986: 30). This direct linking of corporate goals and individual motivation through the identity exercise is typical of the view of culture as an aid to efficiency, expressed by Ouchi, Peters and Waterman, and others.

Identity design is concerned with both symbolizing values and achieving legitimacy, the aspects of ideology described as fundamental and operative respectively by Abravanel (1983: 278-280).

The idea of the management of culture as a goal of leadership was exploited in industry, through corporate design, before it was advocated by popular authors on corporate culture. IBM chairman T. Watson Jr. (widely praised by these authors) demonstrated the broadening of corporate mission and the central importance of public relations when he described "good business":

> Everybody wants to be a part of, or do business with, a winning organization. If the organization looks the part with good design, people begin to think the company is going somewhere in the world". (in Schutte, 1975: 79).

A more sinister, bureaucratic view of corporate visual communication is expressed by Stuart and Elizabeth Ewen in a chapter titled "The System is the Solution", in Channels of Desire: "it offers total control as a positive ideal, an absolute good" (1982: 41)[44]. Clearly, identity design does not spring from the collective grass-roots of organizations, but relates directly to management ideology (fig. 15). Though identity design is projected by both management and designers as a beneficial problem-solving activity, it is preponderantly a one-way channel of communication (from the top down) and therefore not value neutral. The ultimate goal of effective communication is the promotion of efficient behavior (as in Allaire and Firsirotu's description of the function of corporate culture).

This study has examined the role of identity design in communication between three cultural groups: (A) between management and internal audiences, (B) between the corporation and external audiences, and (C) between management and designers (fig. 15). The graphic systems of organizations are seen here as an integral part of the symbolic discourse of authority relations. They contribute to the symbol systems which create the shared perception of reality which focuses identity as much for the upper echelons of hierarchies as for their various target publics (Dandridge, 1985: 144-145; Geertz, 1973: 222). In this context, charges of vanity laid against leaders of large organizations who are involved in identity programs may be seen as a negative view of what has been termed the "second mode" of communication, "autocommunication", by Broms and Bahmberg (1983: 482-495). They argue that strategic plans are mind-focusing "mantras" for organization leaders. In view of the importance of symbolic artifacts in culture and strategy, it is possible to attribute this focusing function to designed identity because it provides constant self-reinforcement in the face of uncertainty. Thus Berg has written that "an image (e.g., the corporate logo) may represent the very essence of the corporate identity" (1985: 287).

This self-framing role of corporate graphic systems again emphasizes their importance in legitimation. Being presented as consistent, competent and omnipresent reinforces the confidence of the dominant group in their control and strengthens its acceptance by internal and external publics (Della Fave, 1986). Henry has acknowledged this dimension of the identity-framing role by pointing out that without agreement on:

> the corporation's commensurate obligations to society ... the corporate image debate [is centered on] the problem of the le 'imation of power (1984: 276-277)

The relationship between the graphics of corporate identity and the idealized roles of the corporation in society, and of the leadership within the corporation, is synechdochal - visual organization stands for an (assumed) real organization[45]. Sperber's description of symbols encapsulating tacit knowledge "without elaborating the underlying argument" (discussed in Chapter 2) reinforces this conception of identity graphics as an effective, rhetorical form of communication. Butler, like Sperber and Firth, dismisses the advocates of linguistics as a tool for the analyzing of visual symbols "as though they were words" (1987: 25). This point is important, for the irrationality of non-verbal cognition is one reason for the effectiveness of visual symbols; they are more difficult to refute than verbal statements. As visual communication is associative and synechdochal, identity design has a link with the irrationality of the commodity fetishism which is carefully exploited in advertising [46].

The economy of visual means seen in corporate logotypes and graphic systems, which represent very complex institutions and ideas, both contributes to their effectiveness in terms of recognition and memorability, and aids their acceptability as visual metaphors. Writing of the communications role of graphic design in an environment in which transmitted information is of primary importance, Francis Butler has said:

> ... designers, being ecologically skilled, can produce, or reproduce, the visual shapes that attract the attention of human beings, and provide them with <u>the exact amount of information needed to organize the world, and no more.</u> (1987: 29, author's emphasis).

The complete corporate identity graphics system is perceived by each constituent part of the total audience only through those artifacts they come into contact with, whether they are products, bills or signs (fig. 5). These artifacts will orient internal audiences within the corporate system, both spatially (by the use of sign systems and maps) and culturally (through different interior decor, stationery and uniforms, for example). The receiver in the communication process plays an active role, calling on his cultural background in order to interpret the visual message; Buckley talks of meaning being "generated during the transaction" (1967: 54)[47]. Thus the meaning of visual identity programs embodying corporate ideology is defined by the culture of the organization's environment, as is the meaning of the products and services produced by the organization.

Increasingly, "manipulating information is more important than manipulating objects" in a highly technological, "immaterial" culture (Moles, 1988: 25). Designers and managers are allies in the creation of integrated, credible communications environments in which, as Olins has said, individuals can live[48]. The importance of the links between universal, collective and individual questions of identity in late capitalist societies is described by Leiss, Kline and Jhally in their account of the ascendancy of consumer culture:

> the market place... gradually absorbed the functions of cultural traditions in providing guideposts for personal and social identity - telling one "who one is" or "where one belongs" or "what one might become in life". (1986: 11)

Large corporations increasingly seek the expression of cool modernity and benign power; references to actual manufacturing, or categories of products or services, are not apparent in the visual continuity of their ubiquitous presence. The anonymous new corporate names are examples of this: Burroughs and Sperry have merged to form Unisys, United States Steel is now USX, and International Harvester has become Navistar (Appendix VII, Yaneff, 427-428; cf. Chajet, 517). As universally and prominently employed visual artifacts in a world consisting of symbolic as well as physical reality, the graphics of corporate identity design are an important factor in the ambient culture, legitimating the corporate presence by giving it the appearance of authority and inevitability.

Notes

1) Silverman, when discussing meaning, quotes Weber:

> Every artifact, such as for example a machine, can be understood only in terms of the meaning which its production and use have had or will have for human action ... Without reference to this meaning such an object remains wholly unintelligible. (1970: 93).

The importance of the link between design and the social sciences has been stressed by Papanek (1984: 300-301).

2) Woodward describes four approaches: the social system (from sociology), psychology (based on the "presumed antagonism between individual and organizational goals"), theoretical economics (concentrating on a rational approach to decisions), and finally, mathematical "management science" (1965: 250-251). To this list could be added the cultural concern of anthropology, and the systems approach (from biology and physics).

3) Weber developed a typology of authority, describing three different categories. These are "charismatic", where the personal prestige of the leader is paramount, "traditional", centred on reverence for the past, and "legal", which invests rules and duties with authority. The latter is found in most modern organizations, and in all bureaucracies (1968: 212-216; also summarized in Albrow 1970: 43-45).

4) Examples of this include systems theory (Buckley, 1967; Katz and Kahn, 1966; Silverman, 1970; and Scott, 1981), the dynamic account of authority relations offered by Mintzberg (1973, 1981, 1983) and studies of the impact of technology and innovation on structure (Woodward, 1965, 1970; Burns and Stalker, 1961).

5) The importance of irrational factors in motivation and decision-making is also described by Barnard (1938), Simon (1945), March and Simon (1958) and Brunsonn (1985). Gouldner points out the gap between supposedly rational processes and their actual, irrational or "expressive" content (1954).

6) Argyris (1962, 1964, 1973), Kanter (1977) and others have also written on these problems of individual/group relations.

7) Kroeber and Kluckohn list a great many of such definitions, grouped by area of concentration: structural, genetic, symbolic, psychological, normative, historical and descriptive (1960: 83-137). Though there does emerge from all this a common theme of patterned, socially acquired habits, the concept is still very diffuse. This has been criticized by Keesing (1974: 73) and Geertz (1973: 5). Williams points out the need, within a discipline, to define a specific usage (1976: 80).

8) Williams' description of the evolution of the term, for example, shows that its changing meaning is clearly in step with the evolution of European culture itself. Culture meant European "civilization" in the "Enlightenment" of the eighteenth century, and later "the arts" with the increasing specialization of industrialized society in the nineteenth century (1976: 77-81).

9) For example: Pettigrew, 1979; Pondy and Mitroff, 1979; Morgan, Frost and Pondy, 1983; Jelineck, Smircich and Hirsch, 1983; Kimberly, 1980; Smircich, 1983, 1985; Allaire and Firsirotu, 1984; Tichy, 1980; Bate, 1984; Louis, 1985.

10) A similar distinction is made between interpretive and functionalist approaches to culture by Swidler (1986) and Morgan, Frost and Pondy (1977).

11) Allaire and Firsirotu name three areas of emphasis in the study of corporate culture: the ambient society's values and characteristics, the history of the organization and its past leadership, and contingency factors such as technology and kinds of activity (1984: 209).

12) See also Cassirer (1953, Vol.III: 15).

13) John Sturrock, in Structuralism and Since, has defined semiotics as:

> "The study of signs in general, and of the operation of the vast number of codes in any culture which enable us to interpret these signs satisfactorily" (1979: 7).

14) For example: Evered on official language in the U.S. Navy (1983), Barley on undertakers (1983), Hirsch and Andrews on the language of corporate takeovers (1983).

15) Hanno Ehses has written about the specific application of semiotics to communications design (1977, 1978). He locates meaning in the triadic relationship between object, representation and audience. Though useful in dealing with simplified representational signs (icons), because of the overlapping "sign repertoires" of communicator and audience (1977: 71), this scheme is less helpful in describing the triadic relationship in extensive, abstract systems which connect many signs ("supersigns"): "rules for supersign formation in the visual area are only in their early phases of development" (1977: 63).

16) The cognitive and linguistic contents of symbols are seen respectively as intuitive and logical. Cassirer writes that, "Any attempt to dissolve expression in signification or derive one from the other... remains in vain" (1953, Vol. III: 111).

17) For an account of the language of visual signs, see Otto Neurath's "International Picture Language" (in Ashwin, 1983: 267). Neurath, a Viennese sociologist, advocated the use of "Isotypes", an acronym for International System Of Typographic Picture Education - as a way of overcoming verbal language barriers (1936). This approach is now world-wide for highway and airport signage, and pictograms for events such as the olympic games are well-known (see also Meggs 1983: 351; and Lupton, 1986).

18) Metaphors and other rhetorical figures in graphics (specifically in posters) are described by Ehses (1984; cf. 1986, 1988).

19) For example: Duffy (1980) on office architecture and layout and Forty (1986) on office furniture, Jhally, Kline and Leiss (1985) on media and marketing. These sociological concerns are also found in studies of material culture (see Chapter 3).

20) Katz and Kahn cite "systemic change" as a primary strategy for organizations. The aim of this is "goodness of fit between the social and the technical systems" (the relationship between the technical

organization and the organization of work) (1966: 433, 451).

21) Bate also describes how culture can obstruct change when it prevents fresh conceptualization of problems and solutions (1984: 44). On this theme Mason and Mitroff (1979) discuss the unconscious nature of many cultural assumptions, and Schwartz and Davies show the importance of the level of consciousness of such assumptions in periods of organizational change (1981).

22) One factor is the hierarchical chain of communication (and lack of feedback). Another is identification - the internalization of organizational goals which replace the goals of the individual (Simon, 1945). The effect of an individual's place within his culture on his decision making is discussed by Douglas (1982).

23) Katz and Kahn, echoing Simon's comments on identification, have said that the hiring of experts is useful because the advice given is likely to be objective and a broader range of options is likely to be considered, though they qualify this by adding that inappropriate experts are often hired, and that sometimes these consultants are too similar in outlook to the organization's executives to provide the breadth which innovative solutions require (1966: 296).

24) Katz and Kahn, Argyris (1964) and Buckley (1967) have criticized the attribution of individual goals to organizations. Both Scott (1981) and Mintzberg cite Cyert and March, who state that "the problem is to specify organizational goals without postulating an organizational mind" (quoted in Mintzberg, 1983: 245). Simon proposes that a distinction should be made between corporate and individual goals by calling the latter "motives" (discussed by Scott, 1981: 263).

25) By maximizing the role of the management group, legitimation is achieved through gaining "assent to equity norms" (Della Fave, 1986: 476-479). Della Fave has written of the importance of the "impressive presentations made by the highly placed" in the legitimation process (1986: 489).

26) Simon adds that this regulated flow "will be supplemented by a rich network of informal communication". See also Moore (1962) and Mintzberg (1983) on organizational politics.

27) The management sub-culture in organizations is also dominant in the ambient culture (Walter, 1985), so the imagery of corporate culture in the West has a degree of apparent objectivity, if not the universality described by Louis (1983: 42, 1985: 55). With "the publicly held and shared symbol ... meaning is not problematic; consensus upon action is" (Wexler, 1985: 239).

28) Schlereth's anthology, Material Culture Studies in America (1982), contains such study subjects as the evolution of the Coke bottle (Gilborn: 183-194) and service station design in the mid-Western United States (Lohof: 251-258).

29) For a fuller discussion of the brand/corporate identity relationship see Bernstein (1984: 125-155) and "Sharper focus for the Corporate Image" by Pierre Martineau (1984).

30) See Stuart Ewen's Captains of Consciousness (1976) and Adrian Forty's Objects of Desire (1986).

31) An account of the cultural importance of the new, iconic, mass-communication can be found in Leiss, et al., (1986) and Ewen (1982).

32) Penny Sparke has commented that the architectural training of Behrens and other prominent early industrial designers led to a reliance on the professional structure of architecture, and therefore delayed the emergence of a new, independent profession. (1983: 20). There are certainly many examples of architect/designers in Europe at that time, from Macintosh to Gropius, and the early development of the industrial deign profession in the United States, where designers often did not have this background, supports her contention. Pulos describes the uneasy relationship between the two professions in the United States in the 1930's and 1940's (1988: 29-31).

33) Corporate identity is classified as "industrial design coordination" under the Library of Congress system.

34) London Transport's identity scheme is well documented. In addition to Forty (1986), see Barker and Robbins (1974), Barman (1979) and Pevsner (1968). The map is analyzed by John A. Walker (1979).

35) See: Bush, 1975; Meikle, 1979; Pulos, 1983, 1988; Sparke, 1983.

36) Noyes was able to coordinate the whole design policy, with the freedom to hire his own specialists, such as Paul Rand to coordinate graphic design and Charles Eames for films and exhibitions. This on-going relationship lasted until Noyes' death in 1977 (Art and Industry, 1982: 74).

37) Architect John Johanson described design in his field through the analogy of electronic circuitry: (a) the chassis represents the building's structural frame, (b) the components are the rooms or other enclosures, and (c) the circuiting system is the "channels for the circulation of people and mechanical systems" (quoted in Rowe, 1987: 31-32). In terms of identity these elements would be (a) the coordinating structures of graphics - typographic grids and formal visual qualities, (b) the artifacts to be designed or identified (dictated by the requirements of the organization), and (c) the channels of communication within the corporation and between the corporation and its environment.

38) Karrie Jacobs has recently recorded the resurrection of older symbols and logotypes by companies dissatisfied with the blandness of new designs (Cinzano and NBC) though the strong prevailing trend is still towards greater simplicity (1987: 54). Henry Mintzberg has linked association-free symbols with impoverished strategy (1988).

39) The importance of this role in making design's contribution, in all areas, effective is made apparent in several case histories in the British Society of Industrial Artists and Designers' Design Management Seminars 1983.

40) The brilliantly successful manager of London Transport's identity, Frank Pick, was the head of the legal department.

41) Jean Morin has worked extensively on such updating for CN (originally designed by Allan Fleming, figs. 60-62) and Petro-Canada (originally designed by the firm of Lippincott and Margulies) as well as Bell.

42) Arnold Pacey describes the problem of perceptual myopia as a product of specialized professional cultures in The Culture of Technology (1986: 48-54).

Robert M. Bramson has also related thinking styles to professional roles (1988).

43) The identity consultancy of Lippincott and Margulies became part of the management consultancy of Marsh and McLennan in 1987, for example.

44) See also Lewis Mumford, in "Authoritarian and Democratic Technics", for an account of the anti-democratic nature of technological organization (1964: 1-8).

45) Reading the part for the whole is "primary process cognition" rather than a secondary, verbal process (Maslow, 1967). This (which he terms an "isomorphic interrelationship") is effected by the audience unconscicusly projecting on to received communication previously acquired cognitive structures. Lippman (1945: 79-103) discusses this in terms of stereotypes. Synechdoche is also discussed by Caplan (1982, 64), and Ehses (1986) has examined a wide range of rhetorical figures in poster design.

46) Kline, Leiss and Jhally discuss the use of fetishistic magic in advertising (1985: 5-7). Here, artifacts have a power, quite unrelated to their physical function, which is derived from the meaning they are imbued with by the ambient culture. For a discussion of the cultural dominance of this mode of communication, see Gossage. He argues that magic is always found at the centre of society's concerns, and is such an integral part of prevailing ideology that it is read as a set of common-sense assumptions (1967: 346-347). Judith Williamson (1978) presents an extensive analysis of the use of irrational means of persuasion in advertising.

47) Gouldner's "latent meaning" (1965: 117-118). In "The Visual Image: Its Place in Communication", in The Image and the Eye, Gombrich describes the dependence of symbols and icons in visual communication on their culture of origin (1982: 137-161). See also Ehses on the cultural basis of the recognition of symbols and icons (1976) and Wolff on the active role of the audience in determining meaning (1981).

48) Maffesoli has written of the anti-individualist tendency in the irrational, high-technology society, where group identity, which he terms "neo-tribalism", is paramount (1988: 145).

GRID The structure used to relate different elements in a graphic design layout, and to unify a series of related items. See the stationery from the Bell manual (figs. 49-50) where the grid is printed to show the required positioning of graphics.

LOGOTYPE (Also called LOGO or MARK). A designed shape for a word, to aid recognition and memorability. Most trademarks are logotypes based on brand names.

Bell

PICTOGRAM A pictorial sign. Simplified representation is used to promote recognition.

SIGN A graphic device used to label and direct (eg. on a building). SIGNAGE is the complete family of signs (also called a SIGN SYSTEM) used by an organization.

SIGNATURE The combination of symbol and title.

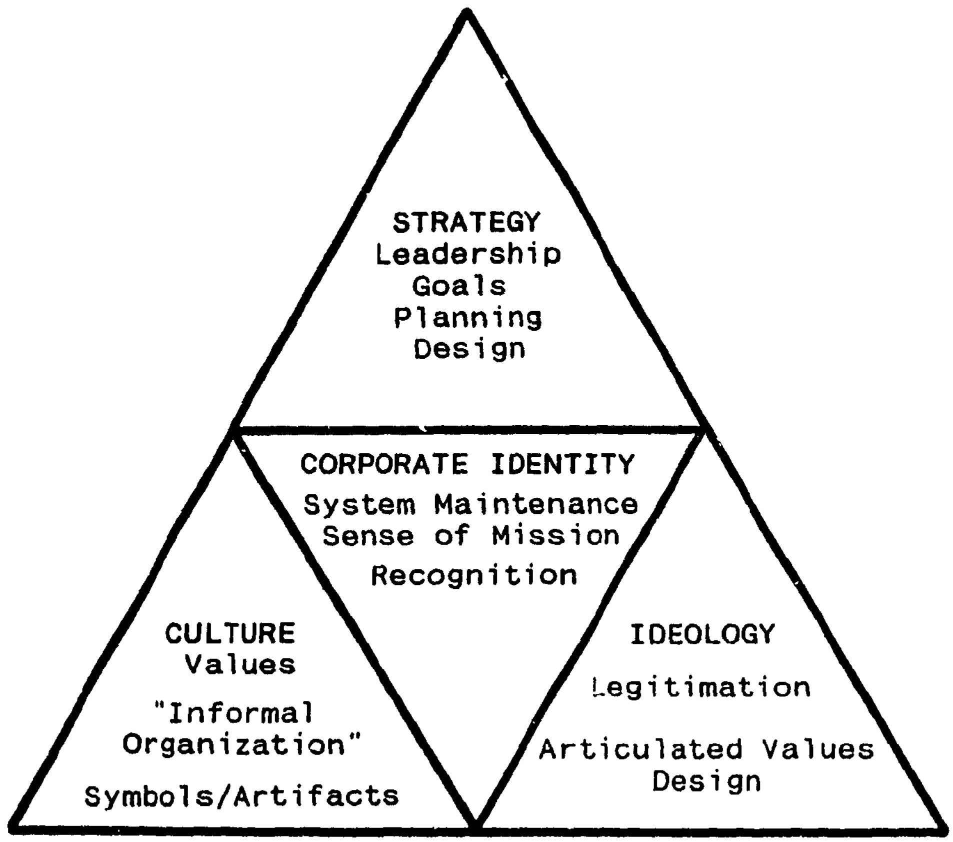
Environnement Canada   Environment Canada

SYMBOL An abstract or pictorial device used by an organization to identify itself. Though they may be used as signs (see above) symbols also refer to cultural values.

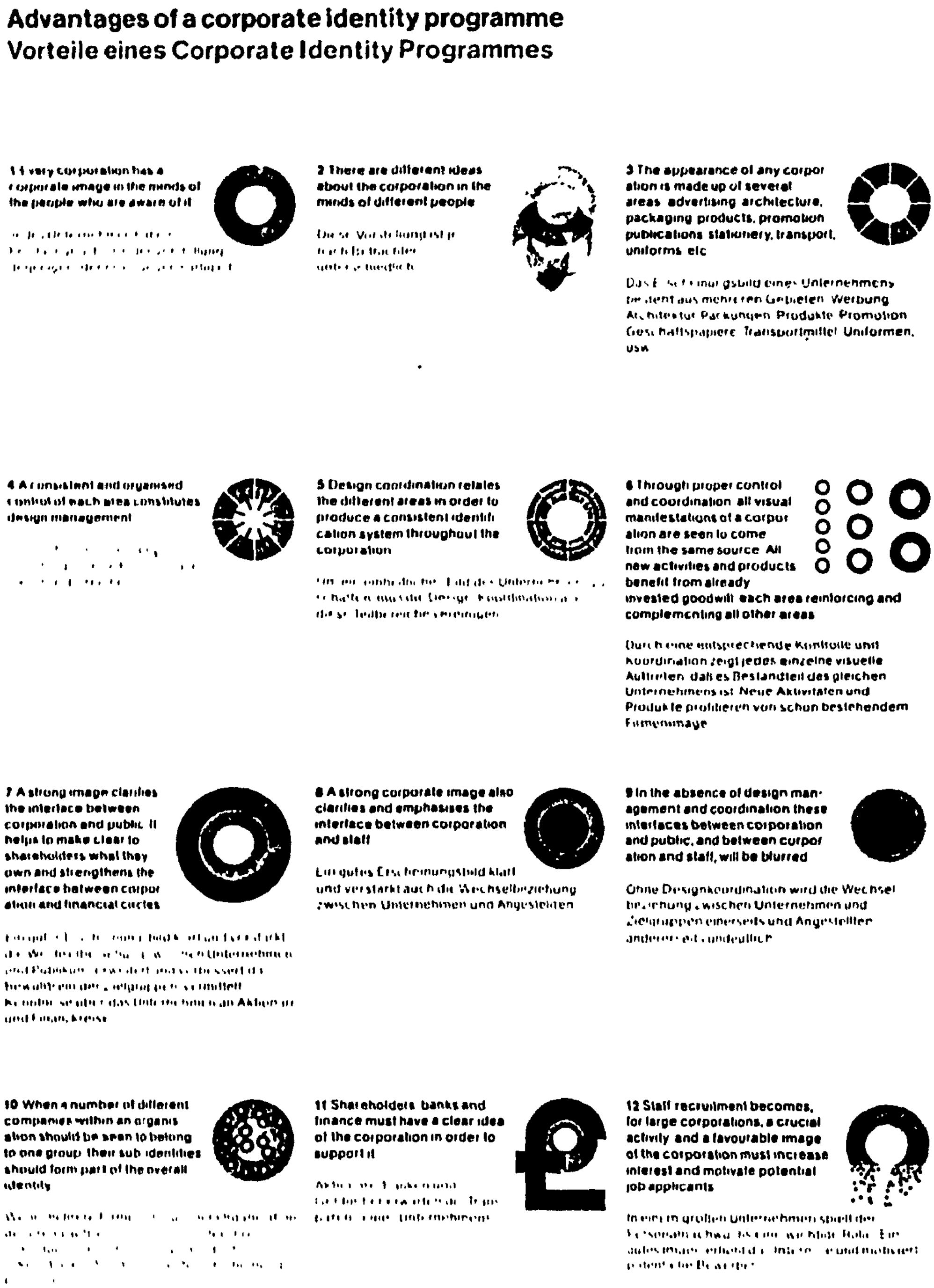
WORDMARK Term used in the Federal Identity Program of the Canadian government for the combination of logotype and flag symbol.

Canada

1 Glossary of terms used in graphic design which occur in the text and interviews.



2 Contributory Factors in Corporate Identity.



Advantages of a corporate identity programme
Vorteile eines Corporate Identity Programmes

1 Every corporation has a corporate image in the minds of the people who are aware of it

2 There are different ideas about the corporation in the minds of different people

Diese Vorstellung ist je nach Betrachter unterschiedlich

3 The appearance of any corporation is made up of several areas: advertising, architecture, packaging, products, promotion, publications, stationery, transport, uniforms etc

Das Erscheinungsbild eines Unternehmens besteht aus mehreren Gebieten: Werbung, Architektur, Packungen, Produkte, Promotion, Geschäftspapiere, Transportmittel, Uniformen, usw.

4 A consistent and organised control of each area constitutes design management

5 Design coordination relates the different areas in order to produce a consistent identification system throughout the corporation

6 Through proper control and coordination all visual manifestations of a corporation are seen to come from the same source. All new activities and products benefit from already invested goodwill each area reinforcing and complementing all other areas

Durch eine entsprechende Kontrolle und Koordination zeigt jedes einzelne visuelle Auftreten, daß es Bestandteil des gleichen Unternehmens ist. Neue Aktivitäten und Produkte profitieren von schon bestehendem Firmenimage

7 A strong image clarifies the interface between corporation and public. It helps to make clear to shareholders what they own and strengthens the interface between corporation and financial circles

8 A strong corporate image also clarifies and emphasises the interface between corporation and staff

Ein gutes Erscheinungsbild klärt und verstärkt auch die Wechselbeziehung zwischen Unternehmen und Angestellten

9 In the absence of design management and coordination these interfaces between corporation and public, and between corporation and staff, will be blurred

Ohne Designkoordination wird die Wechselbeziehung zwischen Unternehmen und Zielgruppen einerseits und Angestellten andererseits undeutlich

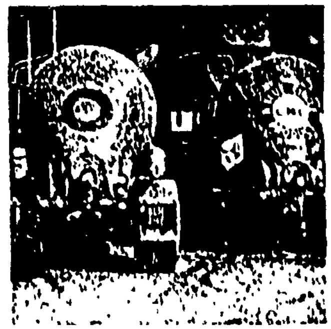
10 When a number of different companies within an organisation should be seen to belong to one group their sub identities should form part of the overall identity

11 Shareholders, banks and finance must have a clear idea of the corporation in order to support it

12 Staff recruitment becomes, for large corporations, a crucial activity and a favourable image of the corporation must increase interest and motivate potential job applicants

3 "Advantages of a Corporate Identity Program". (From HDA International, promotional material).

The aims of a corporate identity
Die Ziele der Corporate Identity



Appropriate image: LEB needed to brighten and modernise their retail image. The new identity is a positive force in their marketing objectives.

Angemessenes Image LEB benötigte ein klares, durchsetzungsfähiges, modernes Image. Die neue Identity hat eine positive Wirkung für die Marketingziele.

Rationalisation. Our analysis of existing packs was the first step in providing AUDI NSU with a modular system for packaging spare parts and accessories. Handling and storage benefits together with cost savings are the main advantages of the system.

Rationalisierung Die Analyse [illegible] AUDI NSU [illegible] war notwendige Voraussetzung für die [illegible] eines modularen Systems für die Ersatzteil- und Zubehörverpackungen. Eine Verbesserung der Handhabung, Lagerhaltung und Kostenersparnisse waren die wichtigsten Ergebnisse.

Cost saving Blue Circle's new all yellow transport livery produced savings over 3 years which paid for all of HDA's fees and expenses. The 2 colour livery was reduced to overall yellow and transfer sizes were rationalised.

Kostenersparnisse [illegible]

Design control Guidelines must be set down so that a corporate identity scheme can be properly implemented. A design manual incorporates all of the necessary information.

Design Kontrolle Designrichtlinien werden entwickelt, um ein Corporate Identity System einzuführen und die Durchführung zu kontrollieren. In einem Design Manual werden alle notwendigen Informationen gegeben.

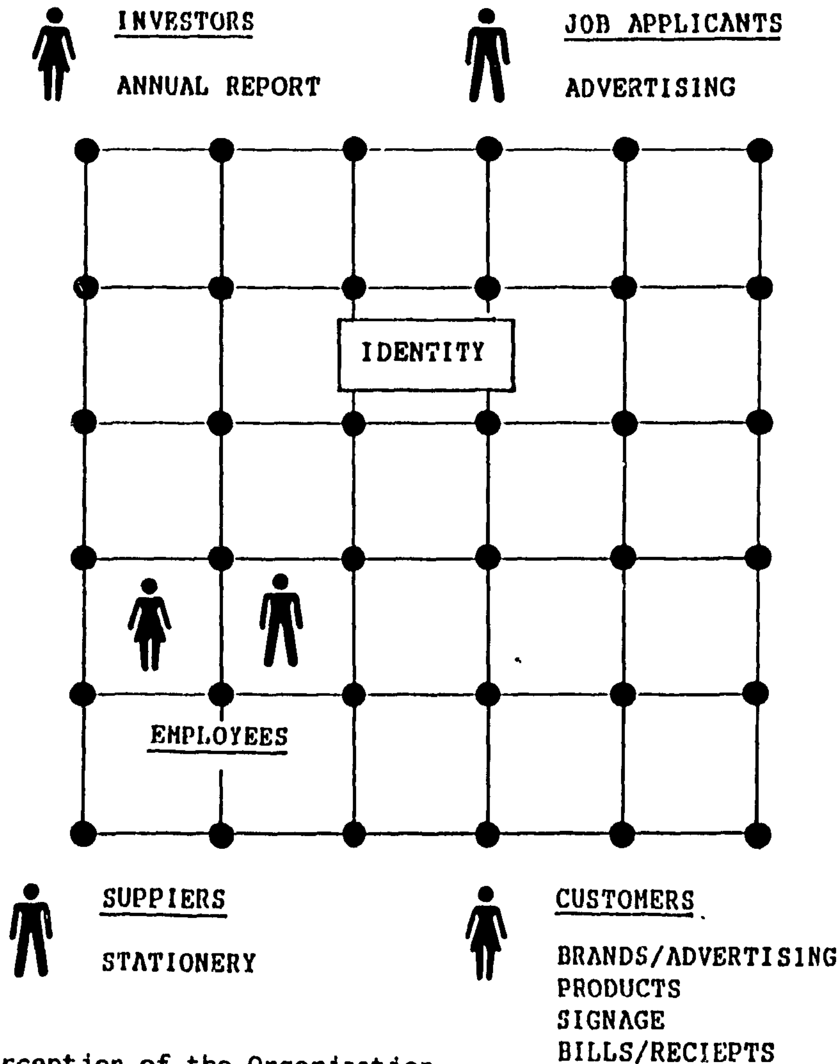
Synergy. All of the different identity elements work together so that the total effect is much stronger than the sum of its component parts. Synergy can only be achieved through correct and consistent application.

Synergie [illegible] Gesamtwirkung [illegible] einzelnen Teile. Nur durch [illegible] und konsequente Anwendung der Grundelemente [illegible] Synergie erreicht werden.

Staff morale The effect of a strong corporate identity on staff morale is always beneficial. The company is seen to have a direction and a philosophy. Staff can relate to it and feel proud to belong.

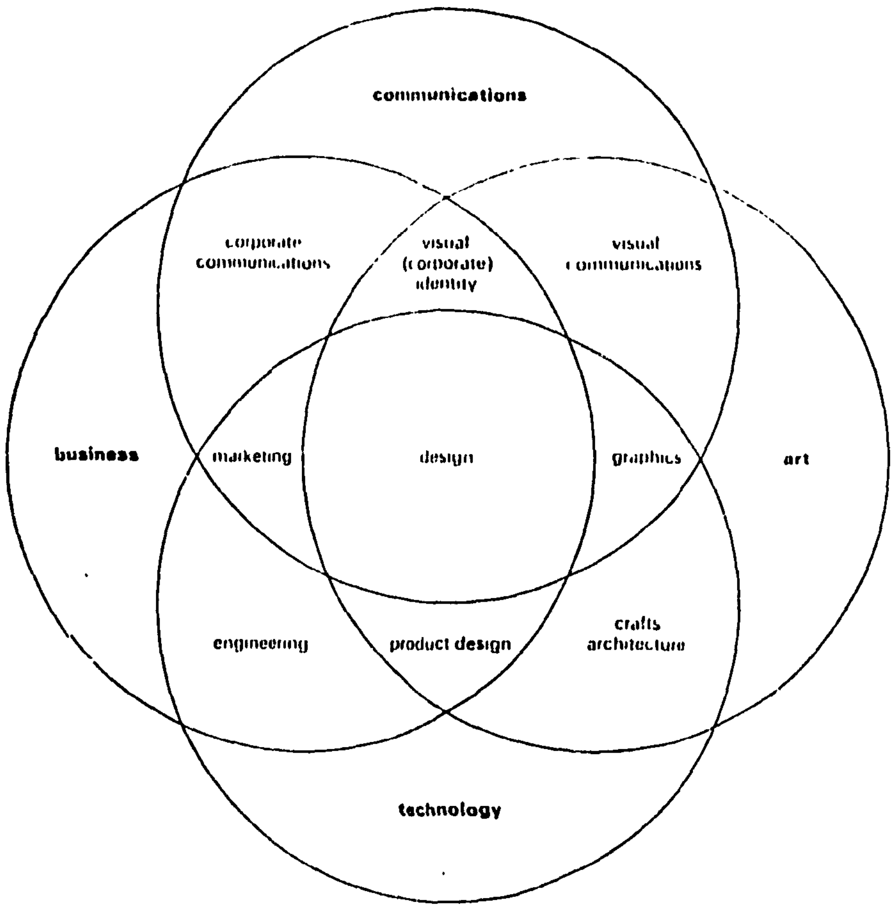
Betriebsklima [illegible]

4 "Advantages of a Corporate Identity Program".
(From <u>HDA International</u>, promotional material).

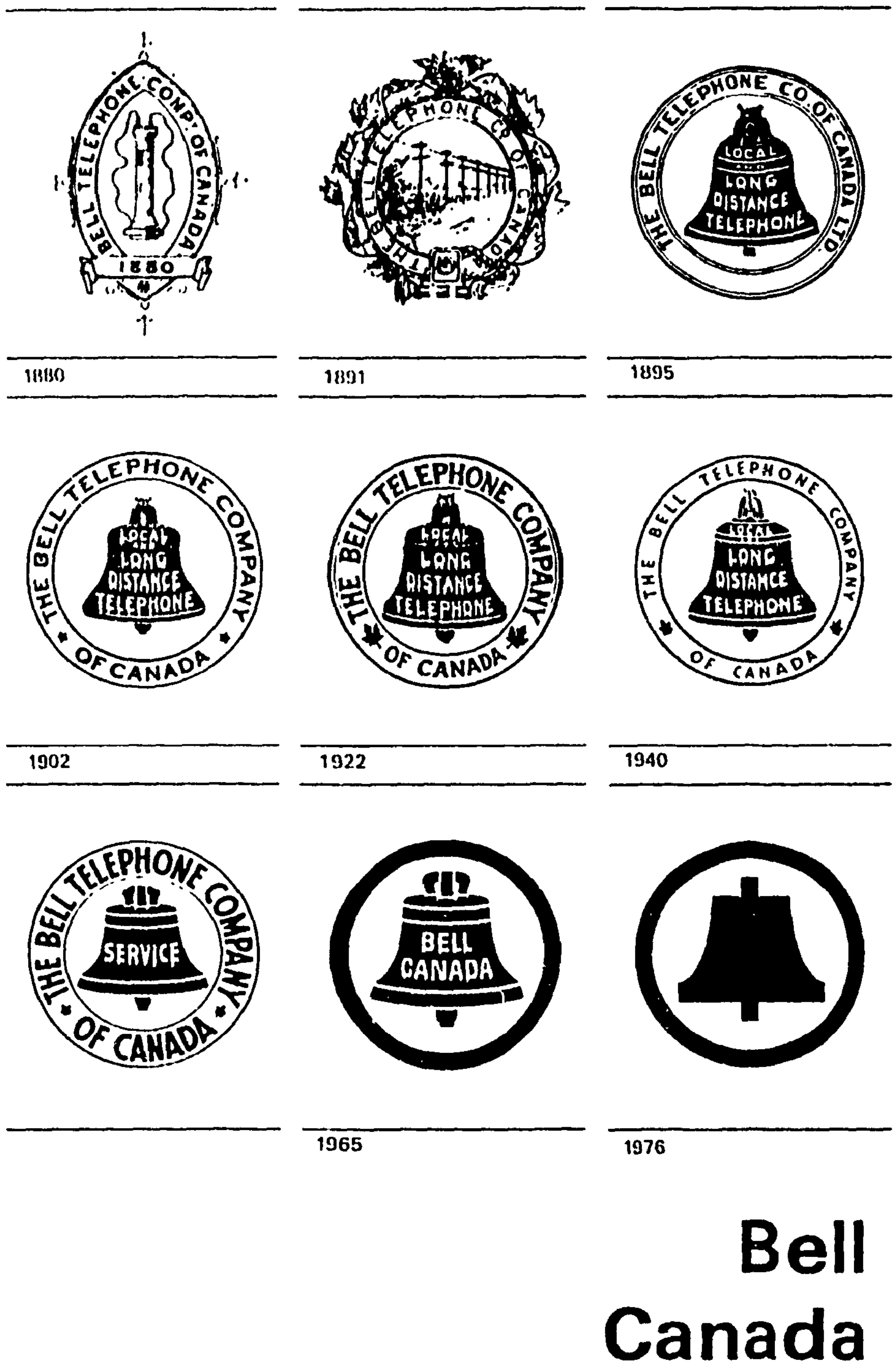


5 Perception of the Organization.

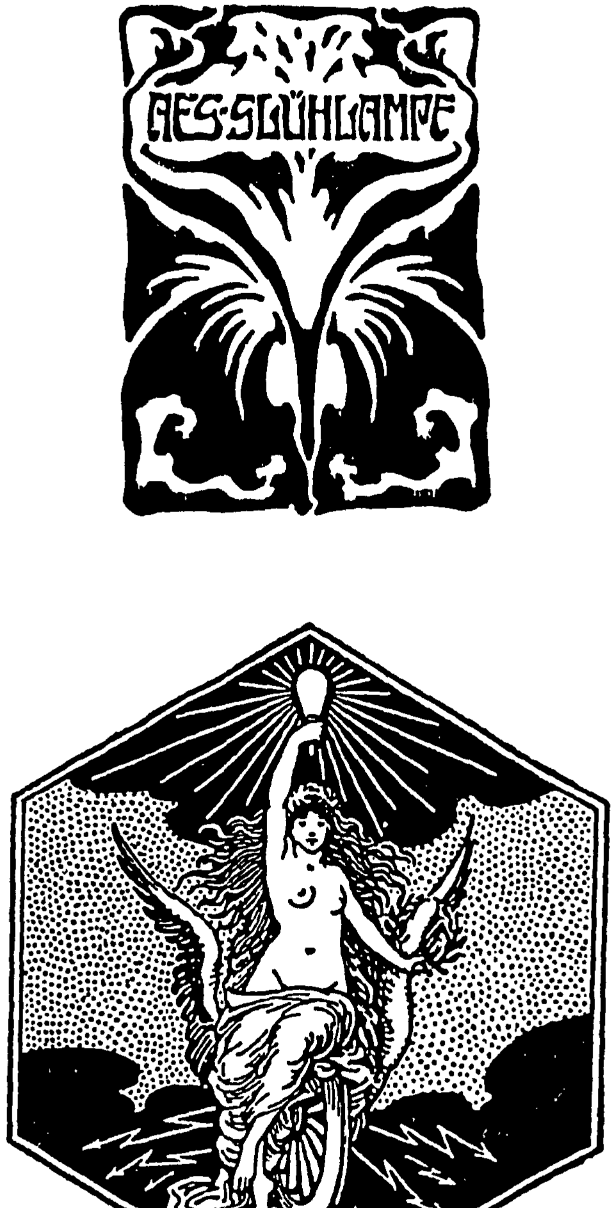
Each of the spots at the intersections of the matrix presented above represents a different artifact. An aim of corporate identity design is that any point of contact with the corporate identity grid, whatever artifacts are encountered, gives the same perception of order and control, though different messages may be conveyed to different audiences. Design facilitates the connection of the various fragments by individuals, who because of their different starting points will arrive at a perception of the organization based on different routes (as with passengers using the London Transport diagram). Thus meaning is achieved by the active process of the audiences creating links between artifacts for themselves, but guided by the designed system.



6 "The four dimensions of design and their inter - relation", (From "Management Objectives, Decisions and Controls", R. H. Beck, in Blake, 1971).



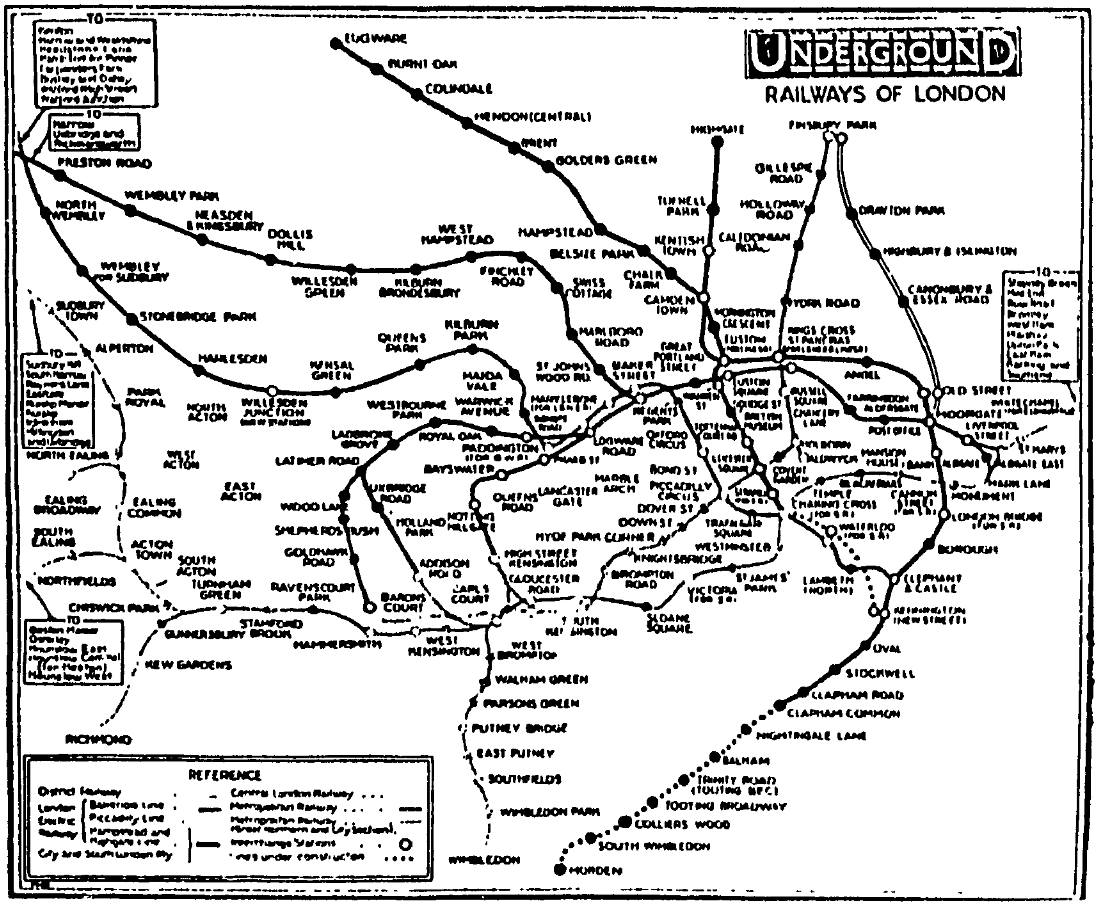
7 Development of the Bell symbol, 1880-1976.
(From Bell Canada Graphic Standards Manual, 1979: 22).



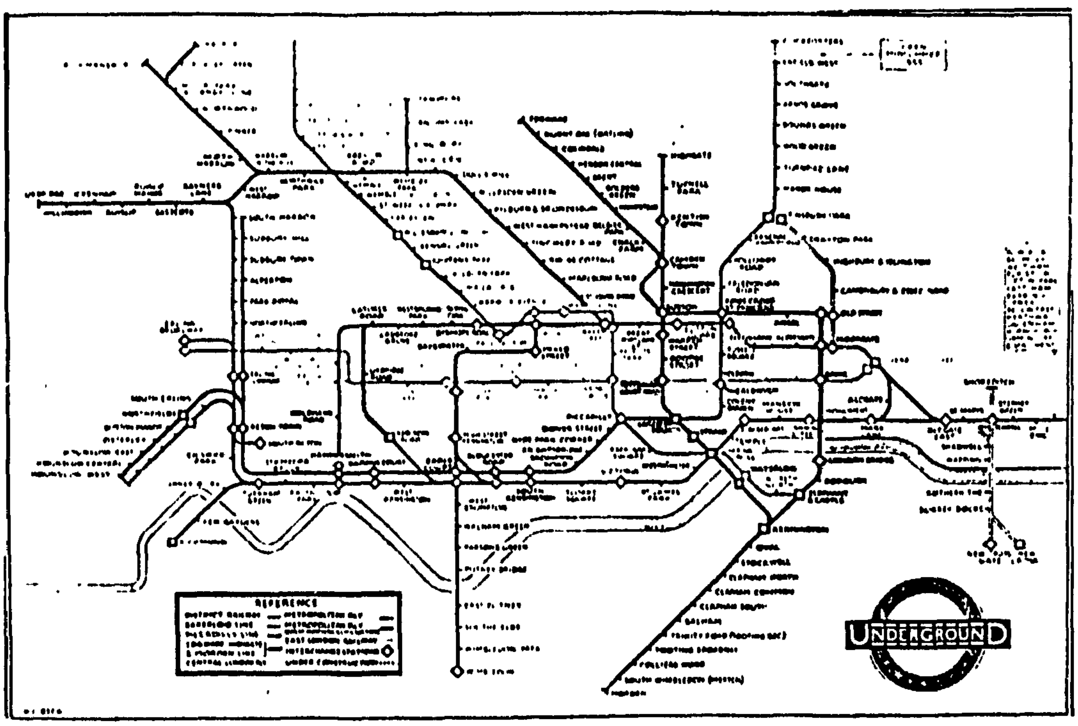
8 A) Otto Eckman, publicity card for AEG light bulbs, 1899-1900.
B) AEG. "Goddess of Light" trademark, 1897.
(From Buddensieg and Rogge 1984, 21).

9 Behrens, AEG Logotype, 1908.
(From Buddensieg and Rogge, 1984: frontispiece).

10 Edward Johnston, London Transport alphabet, 1916.
(From Forty, 1986: 226).

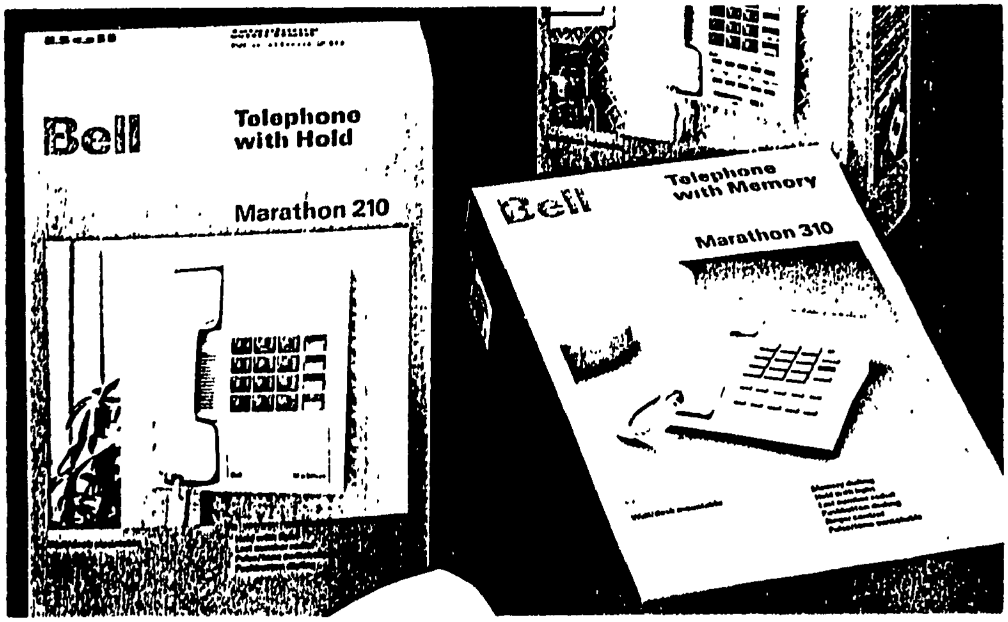


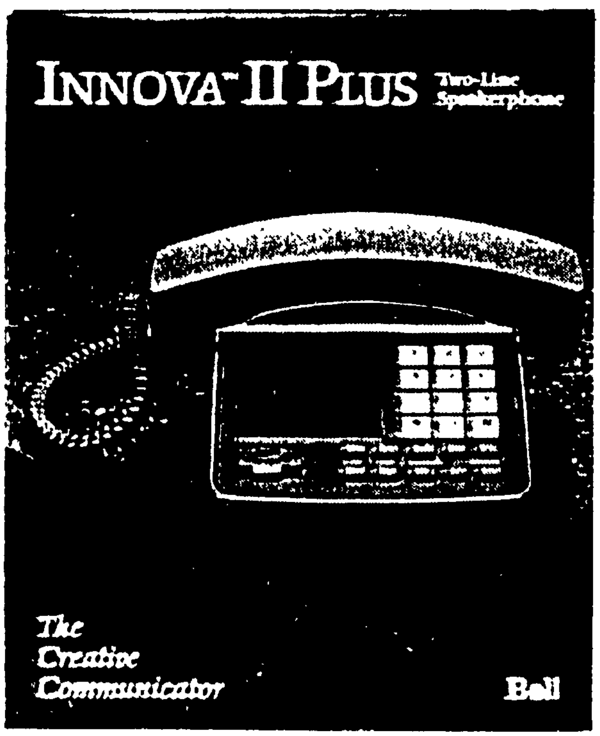
11 London Transport map, 1924. (From Forty, 1986: 236).



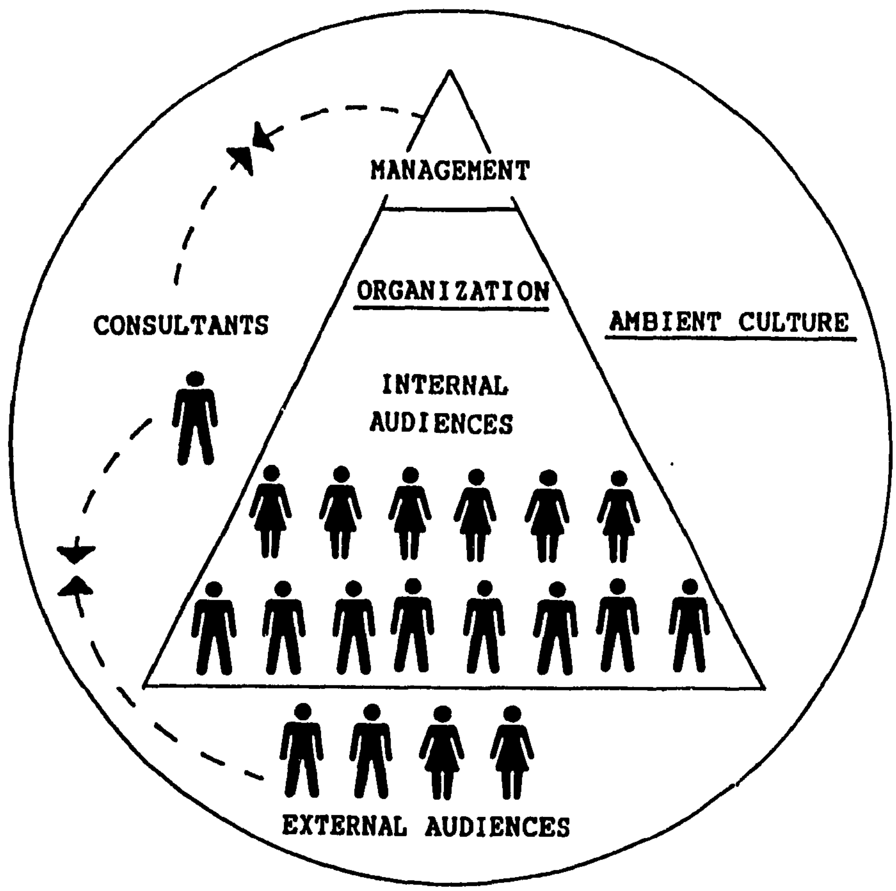
12 Harry Beck, London Transport map, 1931.
(From Forty, 1986: 237).

13 Walter Dorwin Teague, Texaco Service Station, 1930's.
(From Bayley, 1979: 150)



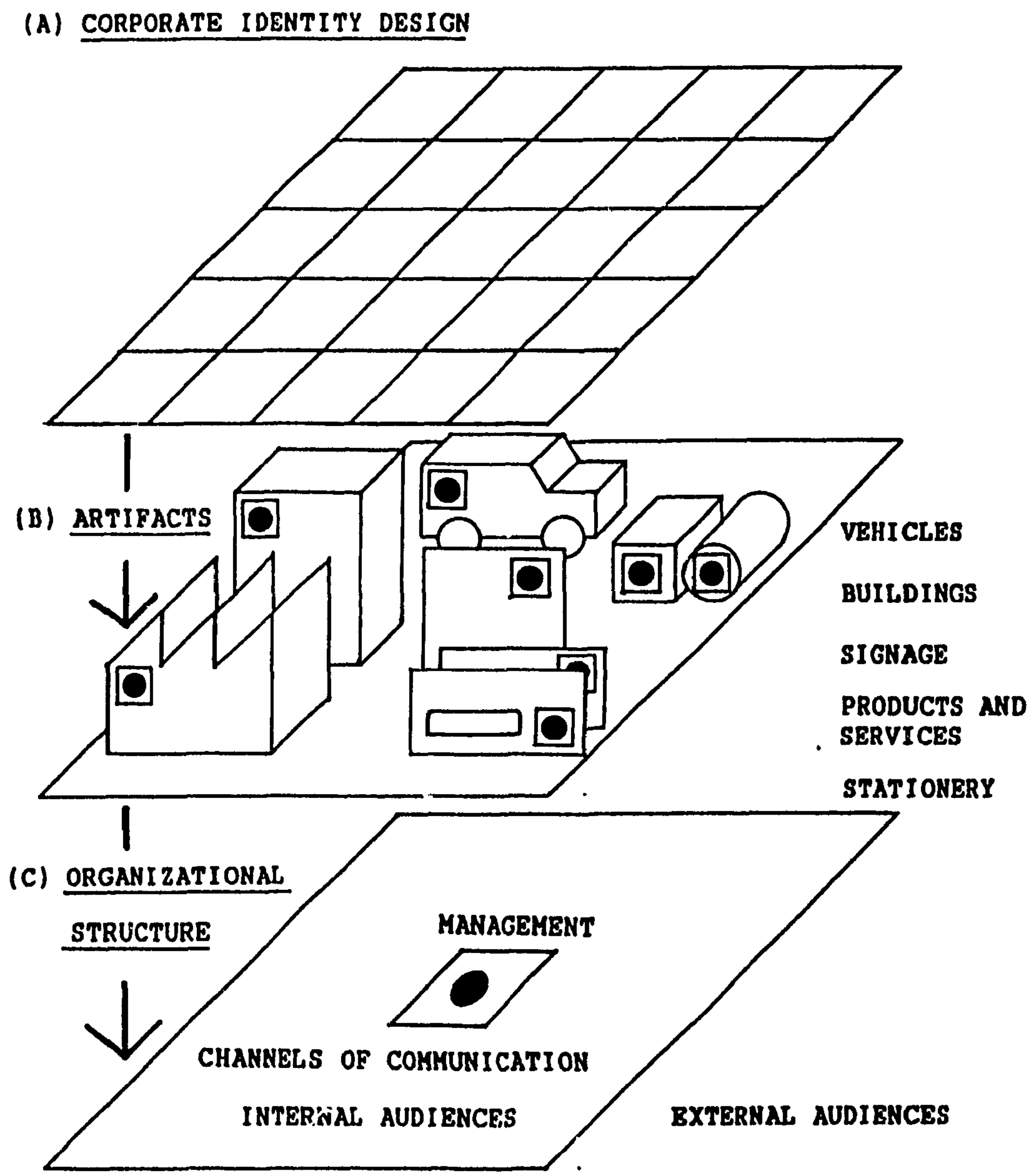


14 Telephone packaging. (From Morin, Lessard, McInnis publicity material).



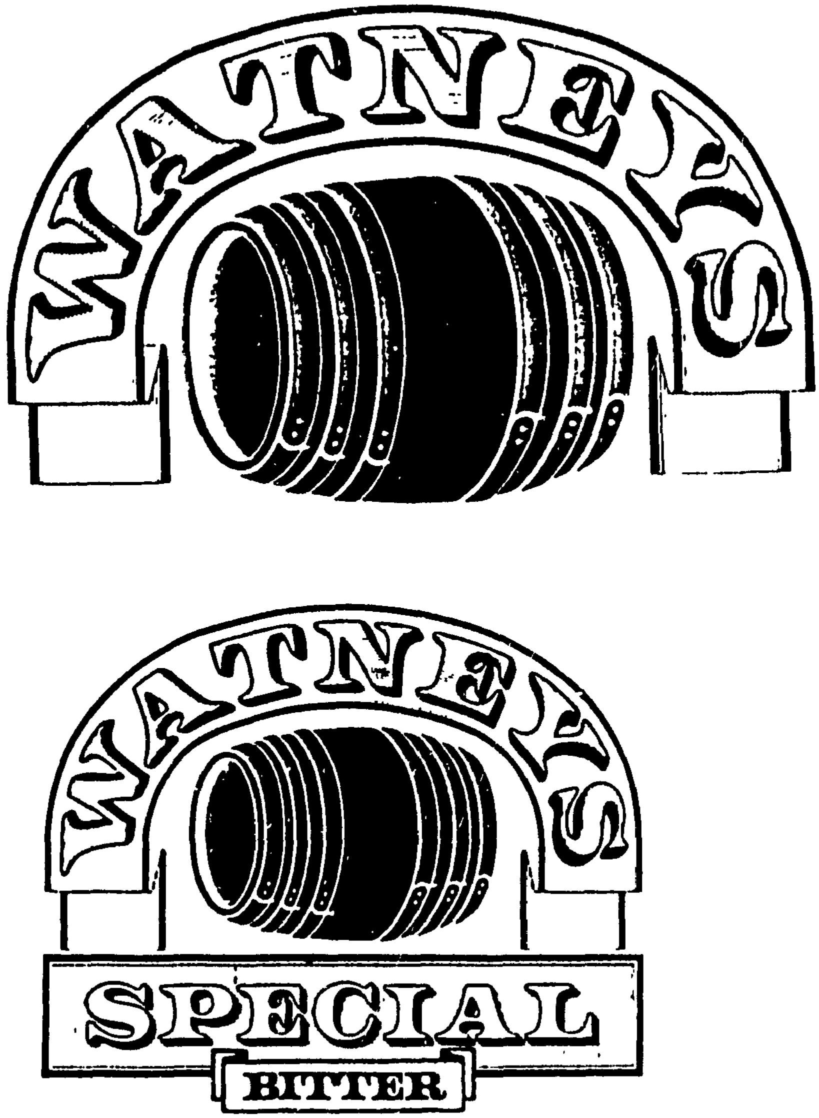
15 Consultant Design and Organizations.

The organization is seen here as a triangle, existing within the ambient culture (the circle). Being outside the organization, consultant designers share the ambient culture with the external audiences, giving them an objective view of the organization and a link with other external perceptions of it held by some of the target groups. Internally, the consultant designer has the same overview as management, but free of hierarchical limitations.

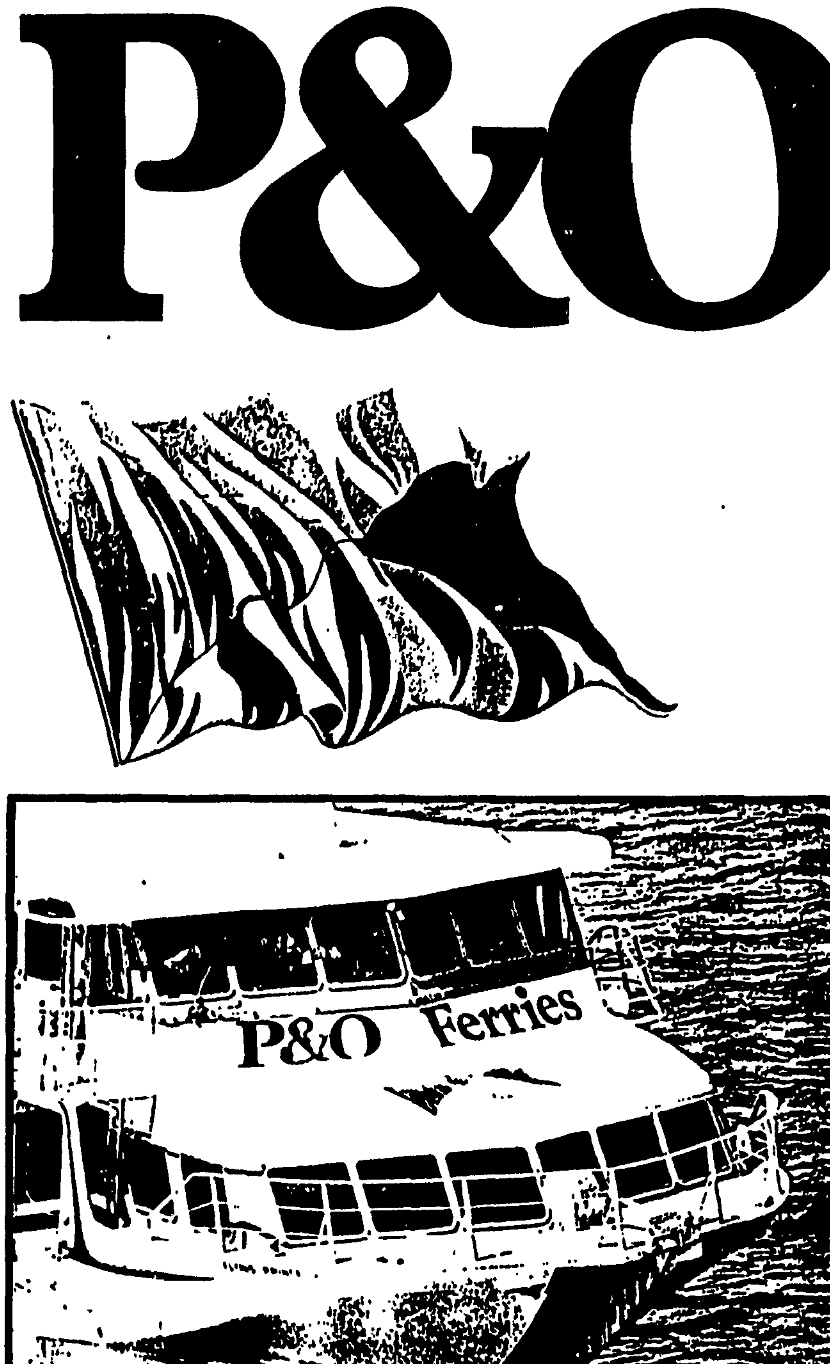


16 Corporate Identity Design.

The visual organization aspect of corporate identity, seen here as a grid (A), integrates the appearance of all the artifacts of the corporation (B), and creates a coherent visual counterpart to the structure of the corporation (C) by exploiting the symbolic communication value of these artifacts and imposing an ordered system of relationships.



17 Pentagram, symbols for Watney's Brewery, London, 1980. (From Nakanishi, 1985: 45).



18 Wolff, Olins Ltd, symbol for the P & O Group, 1974.
(From Nakanishi, 1985: 23).

Fig. 1
Coat of Arms — Armoiries du Canada

Fig. 2
The flag of Canada — Le drapeau du Canada

Fig. 3
The flag symbol — Le symbole du drapeau

Fig. 4
The flag symbol (modified). — Le symbole du drapeau (modifié).

Environnement
Canada

Fig. 5
Wordmark — Mot-symbole

Canada

19 Coat of Arms, flag symbol, federal symbol (1987), the old federal symbol (with one bar, now to be phased out) and the Canada wordmark (the wordmark has a slightly bolder version for signage). (From Federal Identity Program Design Guide, 1979: 3; Federal Identity Program Manual, 1988, 1.1: 4).

Cheskin+Masten
Identity Needs Analysis Process

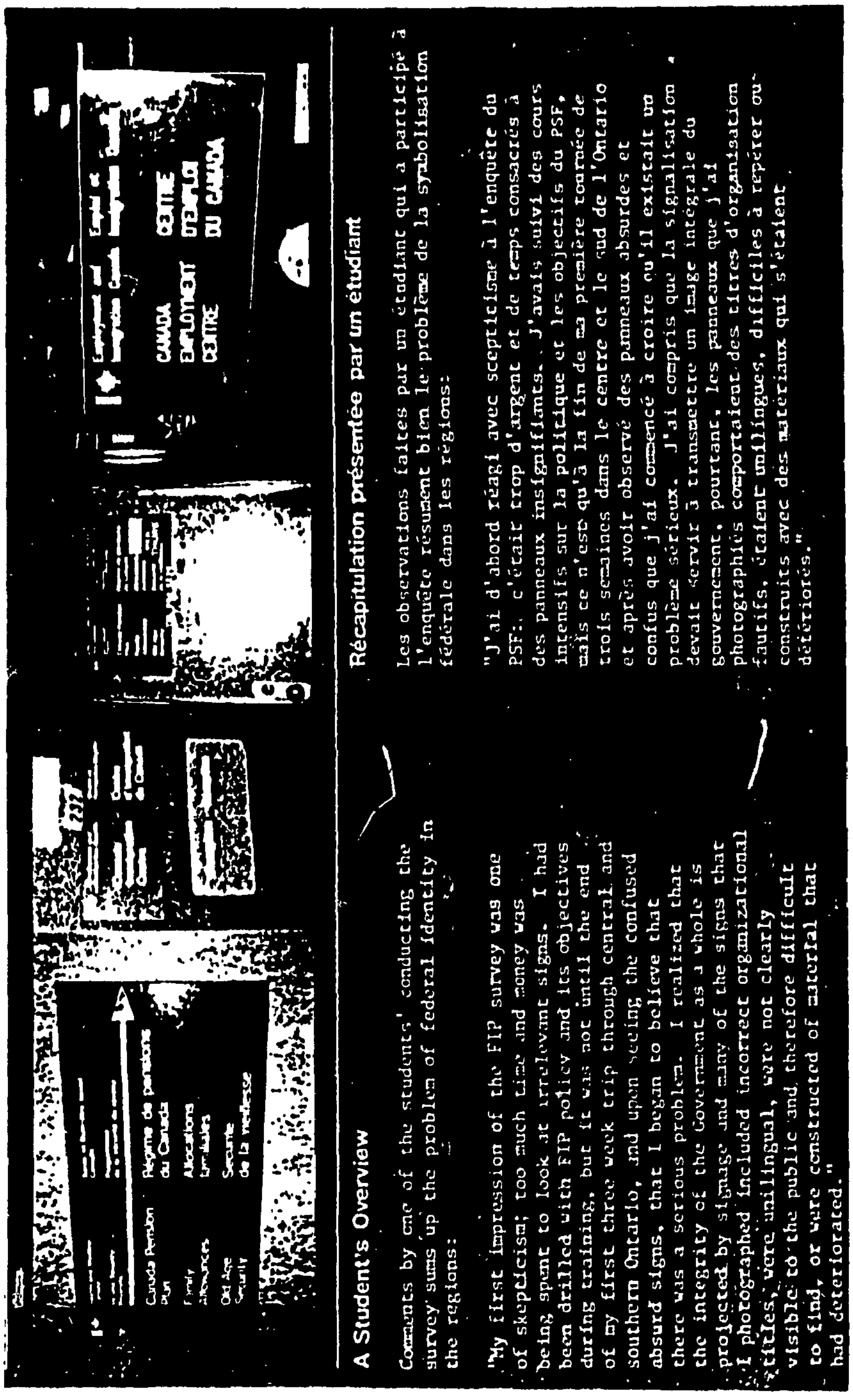
Objective: Identify and analyze all the component parts that are relevant to the strategic image process. Synthesize into clear and actionable direction.

Perspective: A strong teamwork approach between Client and Cheskin+Masten facilitates not only an in depth understanding of the problems and opportunities but stimulates consenus among mangement.

The Process: The Needs Analysis takes the following steps depending on the specific client needs.

1. Review management philosophy.
2. Review the business strategy.
3. Review the corporate structure.
4. Review marketing strategies.
5. Review communication strategies.
6. Review existing identity strategy and design management systems.
7. Review pertinent existing marketing research.
8. Conduct competitive analysis.
9. Review verbal systems.
10. Conduct internal management interviews.
11. Identify key audiences.
12. Conduct key audience interviews.
13. Conduct identity equity research, if necessary.
14. Conduct and analyze an audit of all relevant visual aspects of the company.
15. Make recommendations which include the following:
    - Opportunity statement
    - Strategic Alternatives
    - Risk Analysis
    - Action Matrix and Timing

20 Cheskin and Masten. "Identity needs analysis process". (From promotional material).



A Student's Overview

Comments by one of the students' conducting the survey sums up the problem of federal identity in the regions:

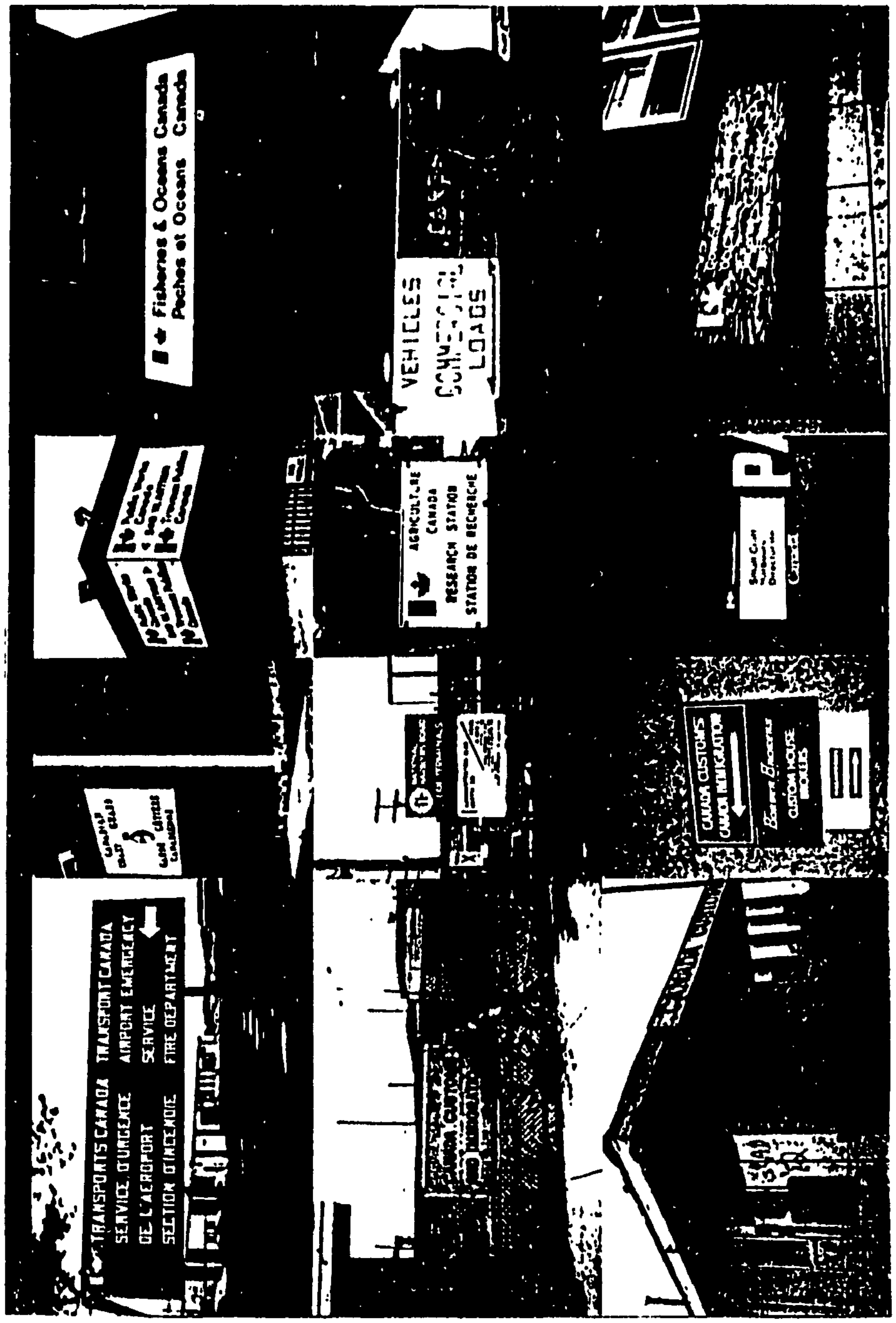
"My first impression of the FIP survey was one of skepticism; too much time and money was being spent to look at irrelevant signs. I had been drilled with FIP policy and its objectives during training, but it was not until the end of my first three week trip through central and southern Ontario, and upon seeing the confused absurd signs, that I began to believe that there was a serious problem. I realized that the integrity of the Government as a whole is projected by signage and many of the signs that I photographed included incorrect organizational titles, were unilingual, were not clearly visible to the public and therefore difficult to find, or were constructed of material that had deteriorated."

Récapitulation présentée par un étudiant

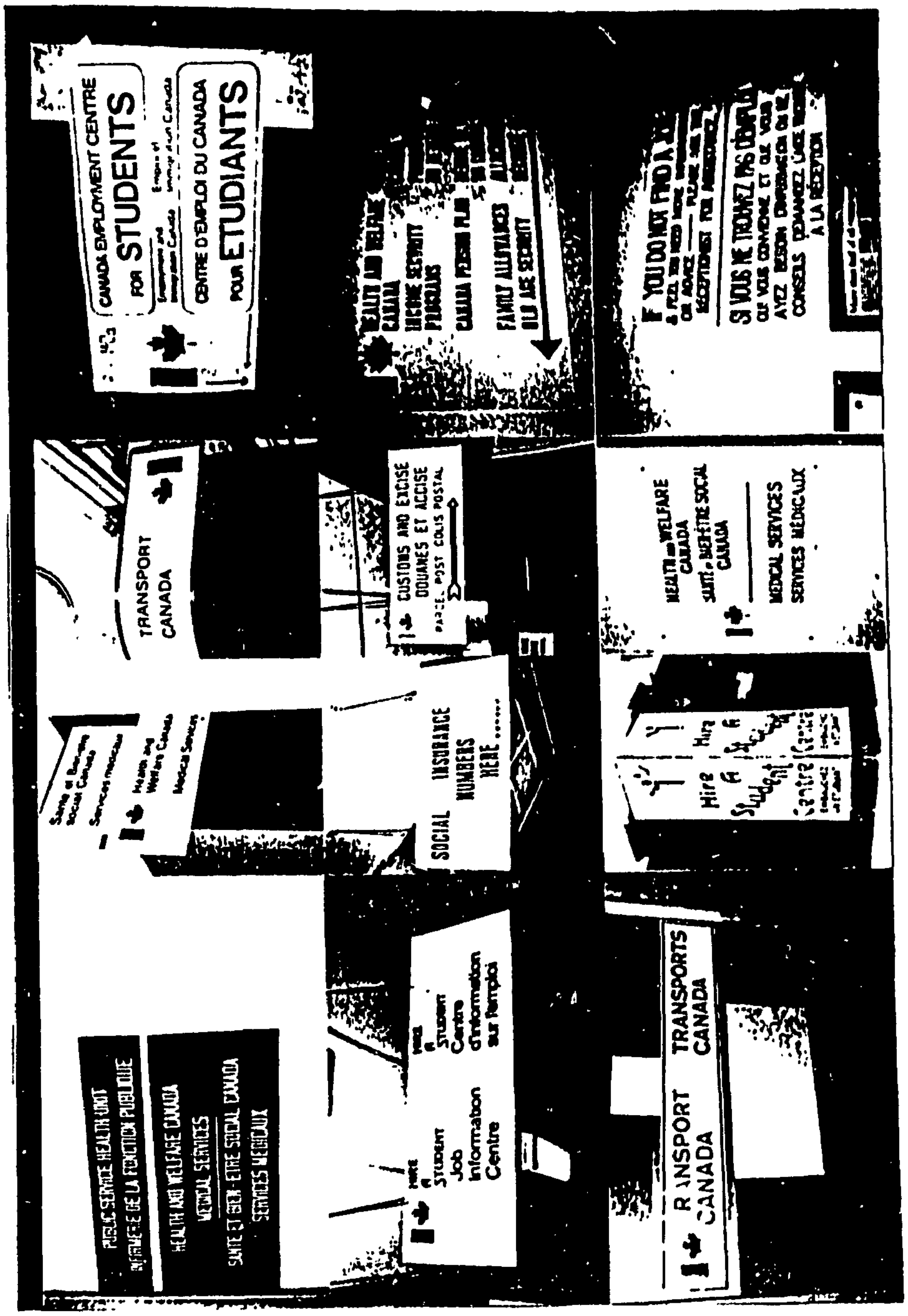
Les observations faites par un étudiant qui a participé à l'enquête résument bien le problème de la symbolisation fédérale dans les régions:

"J'ai d'abord réagi avec scepticisme à l'enquête du PSF: c'était trop d'argent et de temps consacrés à des panneaux insignifiants. J'avais suivi des cours intensifs sur la politique et les objectifs du PSF, mais ce n'est qu'à la fin de ma première tournée de trois semaines dans le centre et le sud de l'Ontario et après avoir observé des panneaux absurdes et confus que j'ai commencé à croire qu'il existait un problème sérieux. J'ai compris que la signalisation devait servir à transmettre un image intégrale du gouvernement, pourtant, les panneaux que j'ai photographiés comportaient des titres d'organisation fautifs, étaient unilingues, difficiles à repérer ou construits avec des matériaux qui s'étaient détériorés."

21 "Marginal Conformance". (From the Treasury Board Signage Survey, 1983: 7).



22 "Non-Conformance". (From the <u>Treasury Board Signage Survey</u>, 1983: 8).



23 "Non-Conformance". (From the Treasury Board Signage Survey, 1983: 9).

CAN YOU PICK THE WINNERS?

Below are three examples of logos tested by Cheskin+Masten. Our clients, Memorex, Kroger and Nature Made, believe that logo decisions based on our research significantly enhanced their competitive edge.

Test your judgement against that of consumers. Take a moment to complete this mini-survey. Answer each question by checking one box below it.

MEMOREX

Memorex wanted hard data about the then-current Memorex audio-tape logo, including how the logo competed against the competition.

Cheskin+Masten conducted extensive tests among audio-tape buyers across the nation to gather that data.

Do your answers match those of the Memorex target market?

A. MEMOREX

B. **Memorex**

C. MEMOREX

D. ***Memorex***

E. memorex

The above represents five divisions of Memorex which produce audio tapes.

1. If your name is drawn for 12 free Memorex audio tapes, which of the tapes would you want to have?

   A.☐ B.☐ C.☐ D.☐ E.☐

2. Which products do you associate with highest quality?

   A.☐ B.☐ C.☐ D.☐ E.☐

3. Which is best for recording music?

   A.☐ B.☐ C.☐ D.☐ E.☐

4. Which product do you associate with the poorest value?

   A.☐ B.☐ C.☐ D.☐ E.☐

KROGER LITE

In 1983, Kroger introduced a new line of Kroger Lite products. Kroger management wanted to ensure that the logo communicated effectively across a wide range of low salt, low fat and low calorie products. Cheskin+Masten surveyed consumers who regularly shopped at Kroger and who purchased products in the "low" category.

Answer the questions below to see if your response is the same as that of Kroger customers.

A. Lite

B. Lite

C. Lite

D. Lite

E. Lite

Test your skills by answering the following questions:

1. Which product do you associate with highest quality?

   A.☐ B.☐ C.☐ D.☐ E.☐

2. Which is best for promoting good health?

   A.☐ B.☐ C.☐ D.☐ E.☐

3. Which product do you most associate with the poorest value?

   A.☐ B.☐ C.☐ D.☐ E.☐

4. If your name was drawn as a winner of sample products, which would you prefer to receive?

   A.☐ B.☐ C.☐ D.☐ E.☐

NATURE MADE

In introducing their new line of Nature Made vitamins, Pharmavite, Inc. wanted a logo that would communicate effectively to female vitamin purchasers. Cheskin+Masten asked the following questions to hundreds of women who had purchased vitamins for themselves or their families during the previous six months. How well do your answers match those of these women?

A. *NATURE MADE*

B. **Nature Made**

C. NatureMade

D. NATURE MADE

E. ***NATURE MADE***

1. Which product do you associate with highest quality?

   A.☐ B.☐ C.☐ D.☐ E.☐

2. Which product is made with the highest pharmaceutical standards?

   A.☐ B.☐ C.☐ D.☐ E.☐

3. Which product do you associate with poorest in promoting good health?

   A.☐ B.☐ C.☐ D.☐ E.☐

4. If your name was drawn as a winner of vitamins, which would you prefer to receive?

   A.☐ B.☐ C.☐ D.☐ E.☐

When you finish, turn to the back cover and compare your answers to actual test results.

24 Cheskin and Masten. "Strategic Logos". (From promotional material).

DID YOU PICK THE WINNERS?

Below are the results of the logo tests shown earlier. How do your responses compare to those of consumers? (The numbers below represent the rank order of responses. Actual percentages remain confidential.)

MEMOREX

	highest quality	best for recording music	poorest value	preference
A. MEMOREX	1st	2nd	5th	2nd
B. Memorex	5th	5th	3rd	5th
C. MEMOREX	3rd	3rd	1st	3rd
D. *Memorex*	4th	4th	2nd	4th
E. memorex	2nd	1st	4th	1st

At the time of the test, the Memorex logo was C. It ranked third of the five, and had the highest association with "poorest value." The winning typeface was E, and was the typeface used by Maxell, a key competitor. Through this test, Memorex learned a critical fact: their logo did not compete effectively with that of a major competitor.

KROGER LITE

	highest quality	best for promoting good health	poorest value	preference
A. Lite	2nd	2nd	4th	2nd
B. Lite	4th	3rd	2nd	4th
C. Lite	3rd	4th	3rd	3rd
D. Lite	5th	4th	1st	4th
E. Lite	1st	1st	4th	1st

The winner in all categories was E. Next time you are in a supermarket, look at the wide variety of typefaces used for the word "LITE." See if your frame of reference has changed.

NATURE MADE

	highest quality	highest pharmaceutical standard	poorest for good health	preference
A. NATURE MADE	2nd	3rd	4th	3rd
B. Nature Made	4th	2nd	2nd	2nd
C. Nature Made	1st	1st	5th	1st
D. NATURE MADE	5th	5th	1st	5th
E. NATURE MADE	3rd	4th	3rd	4th

The equity in Nature Made's logo—C—is obvious. In all categories, C was the winner. However, following the test, a slight modification was made in the typeface to make it more proprietary.

POINTS TO PONDER

In thinking about your logo, here are some questions to consider:

- What does your logo communicate to the consumer?
- Is your present logo as effective as that of your competition? If not, why not?
- What might be the advantages of changing your logo? The disadvantages?
- If you decide to change logos, what must you do to ensure that the new one improves your position in the marketplace?

Answering such questions is the first step in a corporate brand identification process because the logo is, like the name, a central element of the communications program.

A logo, like a brand name, can promote consumer preference. It can communicate a desired image, as well as the benefits of the product. It can provide a strong foundation for a marketing communications strategy.

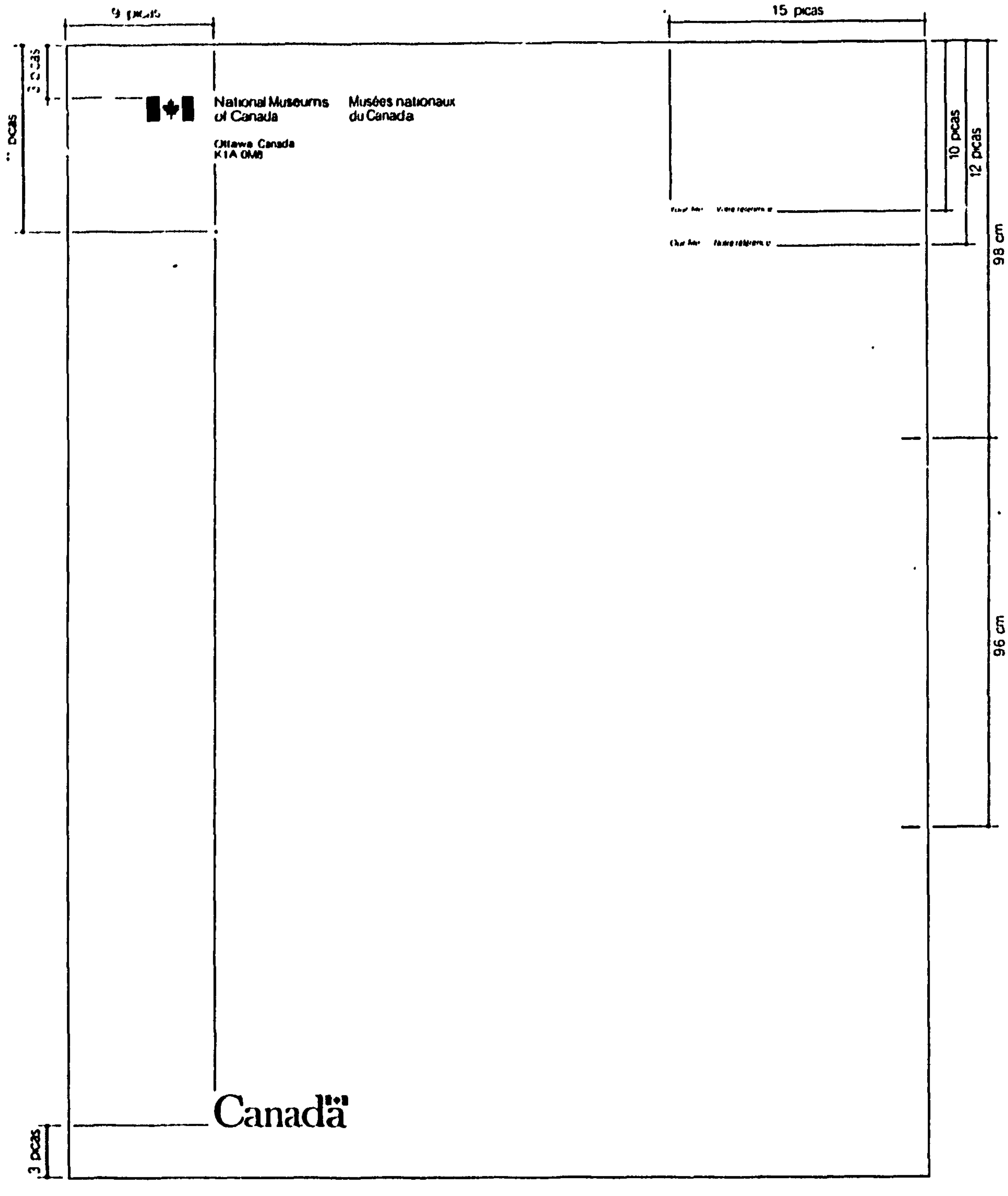
—Davis Masten

For forty years, Cheskin + Masten has specialized in developing strategic images through research-based strategic planning processes. The company is located in Palo Alto, California.

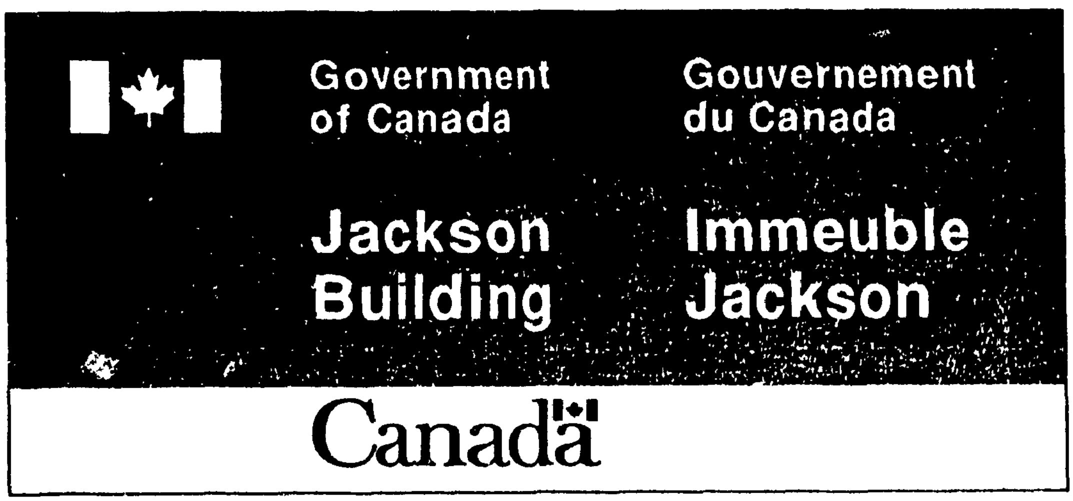
[illegible] Page Mill Road
Palo Alto, California [illegible]
[illegible]

[illegible]

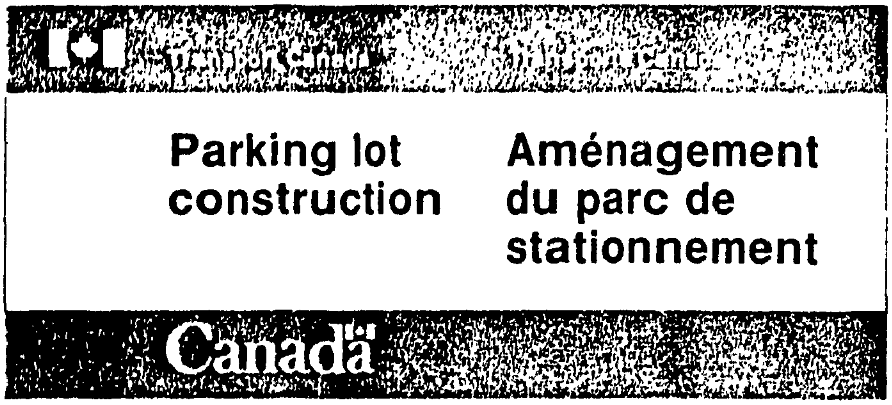
25 Cheskin and Masten. "Strategic Logos". (From promotional material).



26 Layout of letterhead using federal signature and Canada wordmark. (From Federal Identity Program Manual, 1988, 2.2: 13).



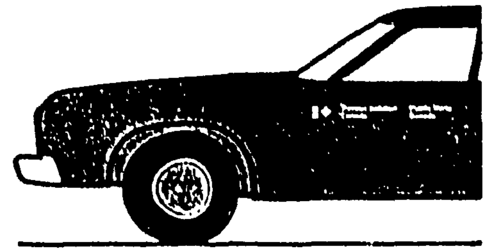
27 Examples of exterior, primary signage using federal signature and wordmark. (From Federal Identity Program Manual, 1988, 4.2: 14).



28 Project signs (the dark bands are in red). (From Federal Identity Program Manual, 1988, 4.4: 14).

Use of colour

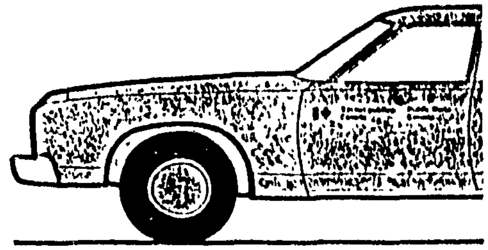
Vehicles Organizations should standardize their fleet colour. Advice on this is available from the Transportation and Energy Products Centre, Technical Services Section, Supply and Services Canada.



Vehicle markings without stripe The colours for vehicle markings without a stripe are:

- white signature on a dark-coloured vehicle;
- black signature on a light-coloured vehicle.

Colours should match the appropriate colour sample shown in CGSB standard 1-GP-12, ***Standard Paint Colours***, white 513-101, black 512-101. Although the designated colour numbers are for gloss colours, their semigloss counterpart is acceptable and may be used when desired.



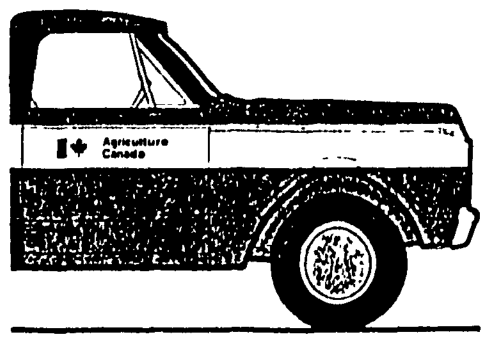
Vehicle markings with stripe The colours for vehicle markings with a stripe are:

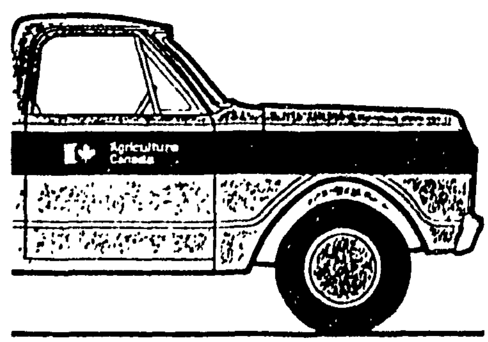
- white stripe on a dark-coloured vehicle, federal symbol in "FIP red" with black characters;
- black stripe on a light-coloured vehicle, federal symbol and characters in white.

Additional text below the stripe appears in:
- white characters on a dark-coloured vehicle; or
- black characters on a light-coloured vehicle.

The white and black colours should match the appropriate colour sample shown in CGSB standard 1-GP-12, *Standard Paint Colours*, white 513-101, black 512-101. Although the designated colour numbers are for gloss colours, their semigloss counterpart is acceptable and may be used when desired.

The "FIP red" should be accurately matched to the colour swatches (printed on coated stock) which are provided in the "Design guide" binder and are available from the Administrative Policy Branch, Treasury Board Canada.





29 Guidelines for the use of the federal symbol and related type on various kinds of vehicle, and light and dark backgrounds. (From Federal Identity Program Design Guide, 1979).

30 Alberta Signature. (From Alberta Program Manual, 1975).

QUÉBEC

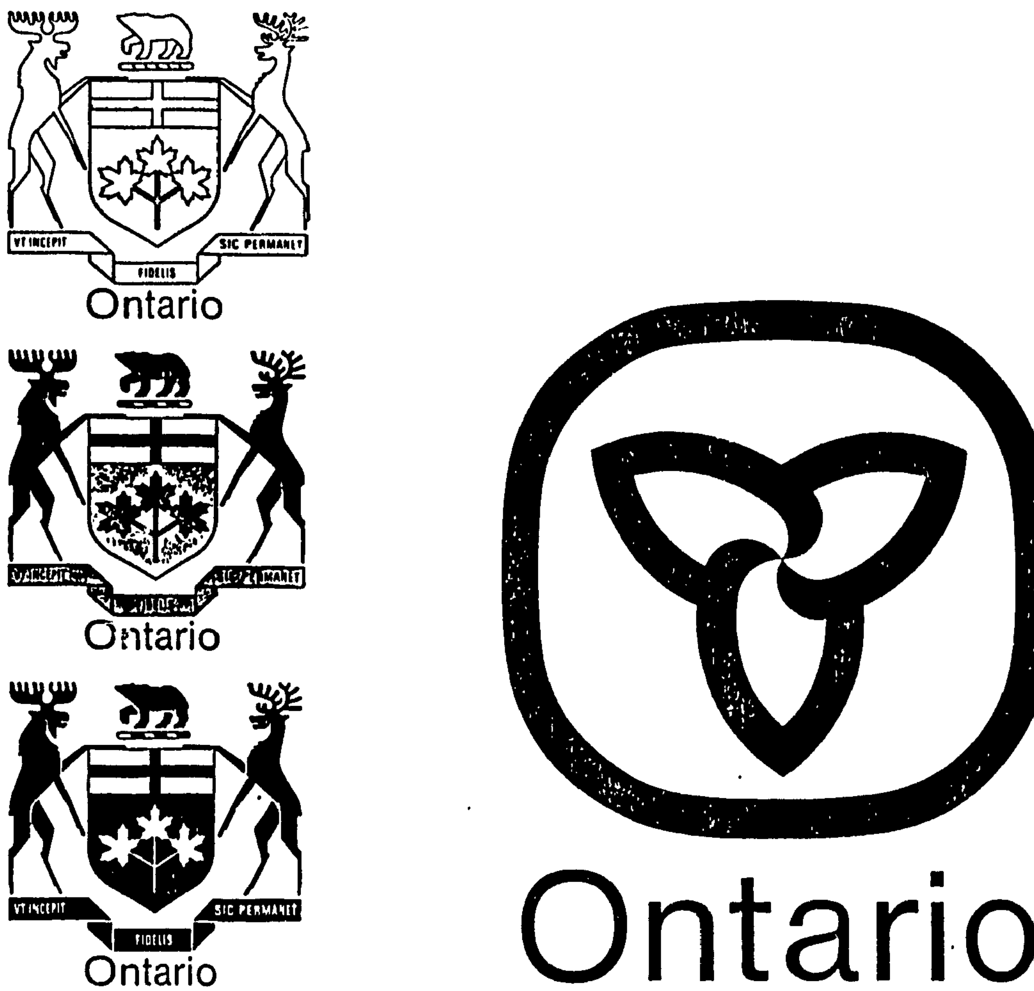
Gouvernement
du Québec

QUÉBEC

31 Quebec Signature. (From <u>Règles Graphiques Générales</u>, 1972).

Manitoba

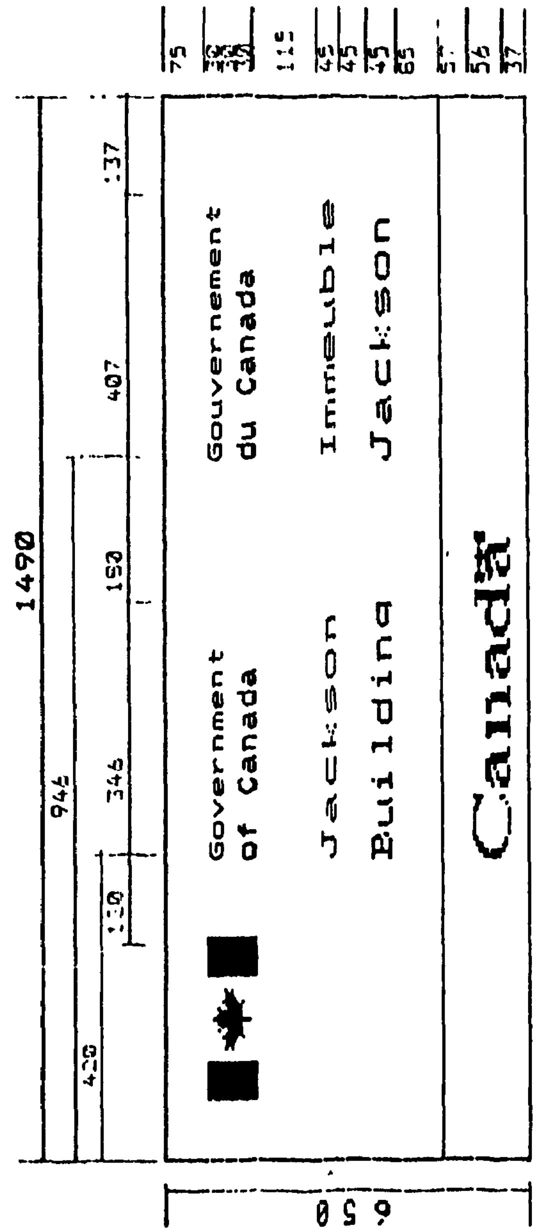
32 Manitoba Signature. (From Manitoba Program Manual, 1984).



33 Ontario Signature and Coat of Arms (From Ontario Program Manual, 1972).

Saskatchewan

34 Saskatchewan Signature. (From Saskatchewan Program Manual, 1982).



35 Layout produced by computer-aided layout system (proportions are not true, but dimensions are correct). (From Federal Identity Program Manual, 1988, 4.2: 14).

INFORMATION
CANADA

36 CAC (Commercial Art Centre, now defunct) Montreal. Early version of the federal symbol (1970) using "Optima" instead of Helvetica (Collection of Prof. John German, Montreal).

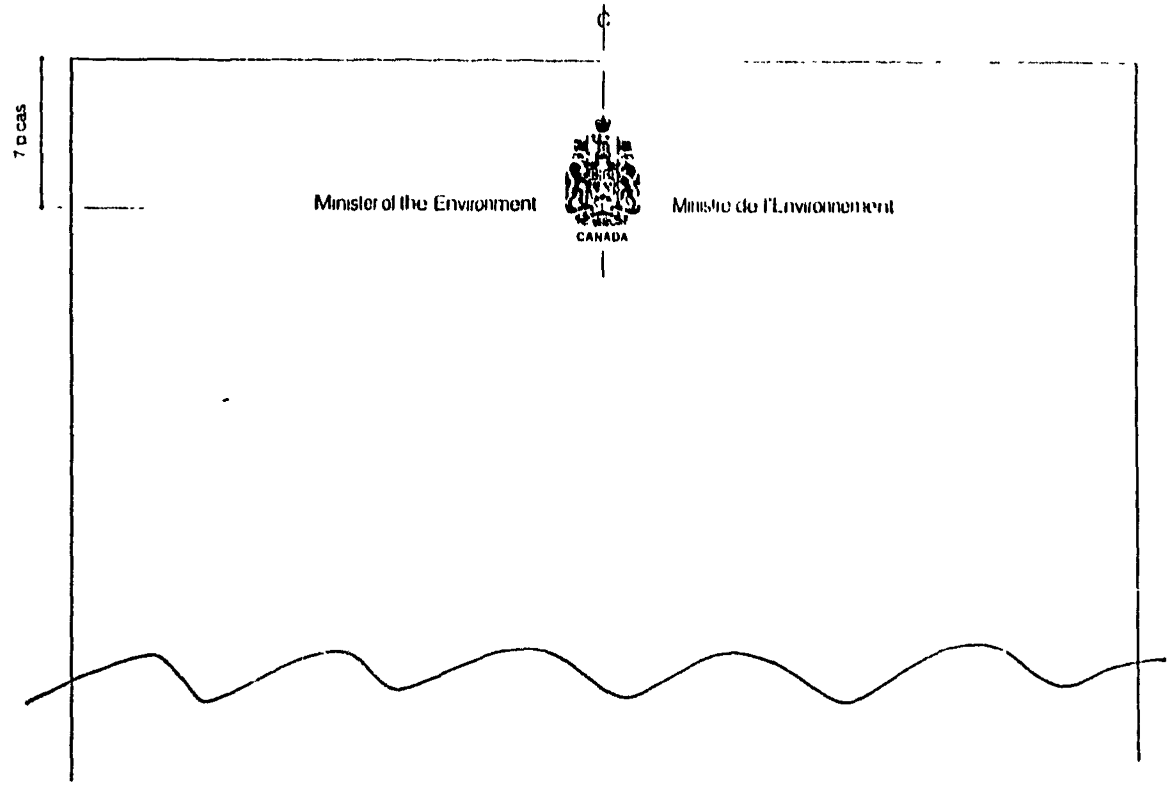


Fig. 9
Choosing the type size. Le choix de corps.

Office of the
Deputy Prime Minister
and President of the Queen's
Privy Council for Canada

CANADA

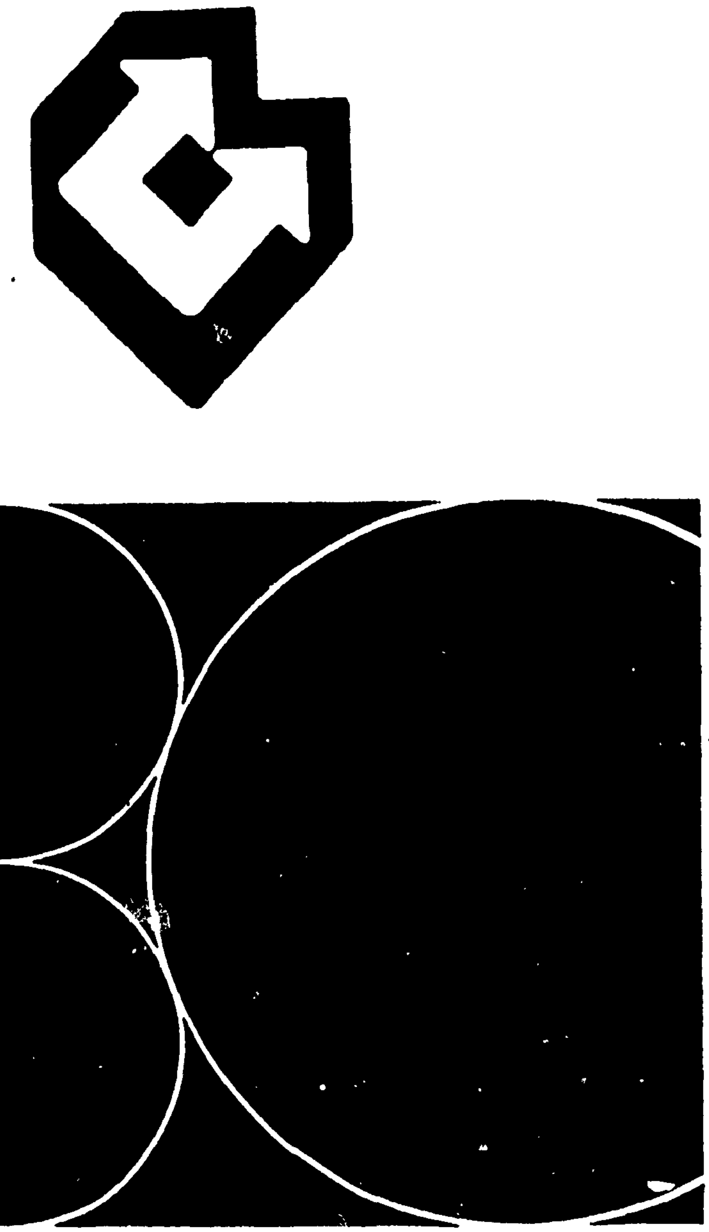
Cabinet du
Vice-premier ministre
et Président du Conseil privé
de la Reine pour le Canada

Office of the
Deputy Prime Minister
and President of the Queen's
Privy Council for Canada

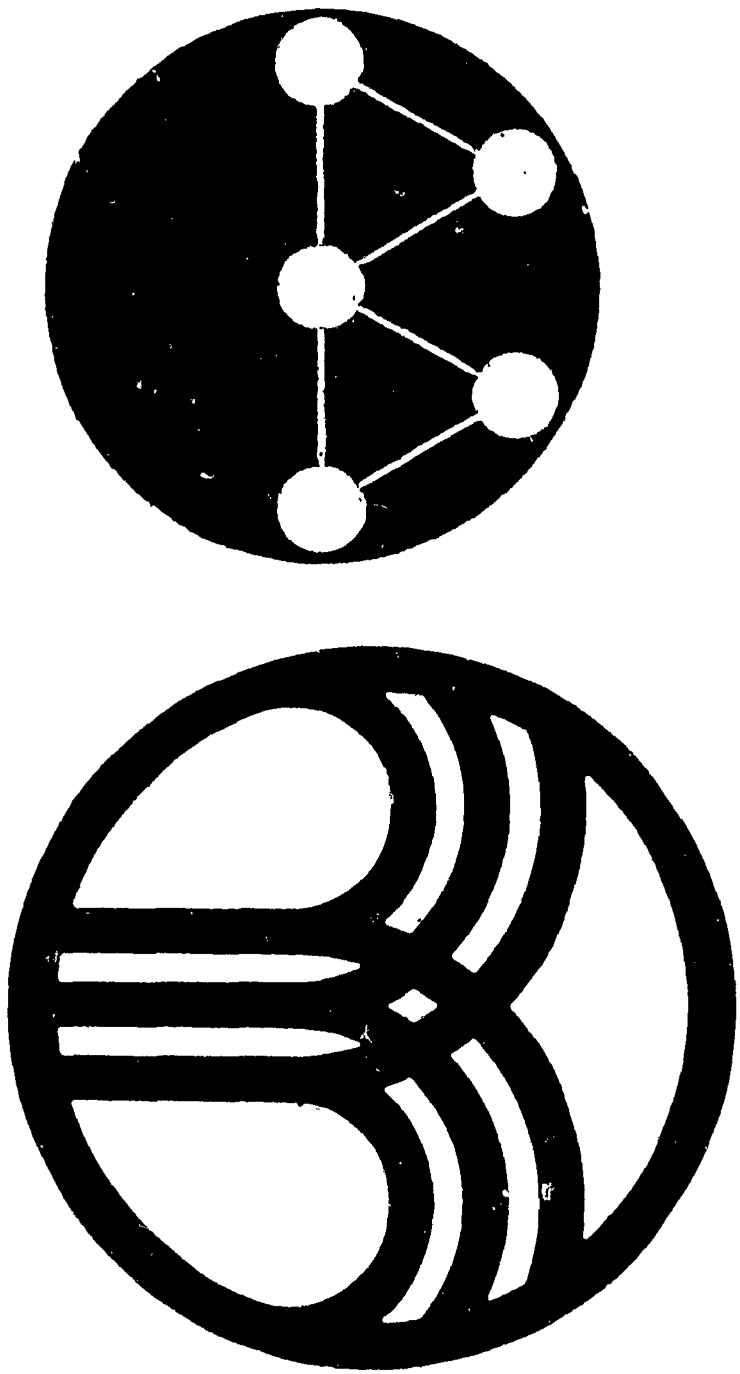
CANADA

Cabinet du
Vice premier ministre
et Président du Conseil privé
de la Reine pour le Canada

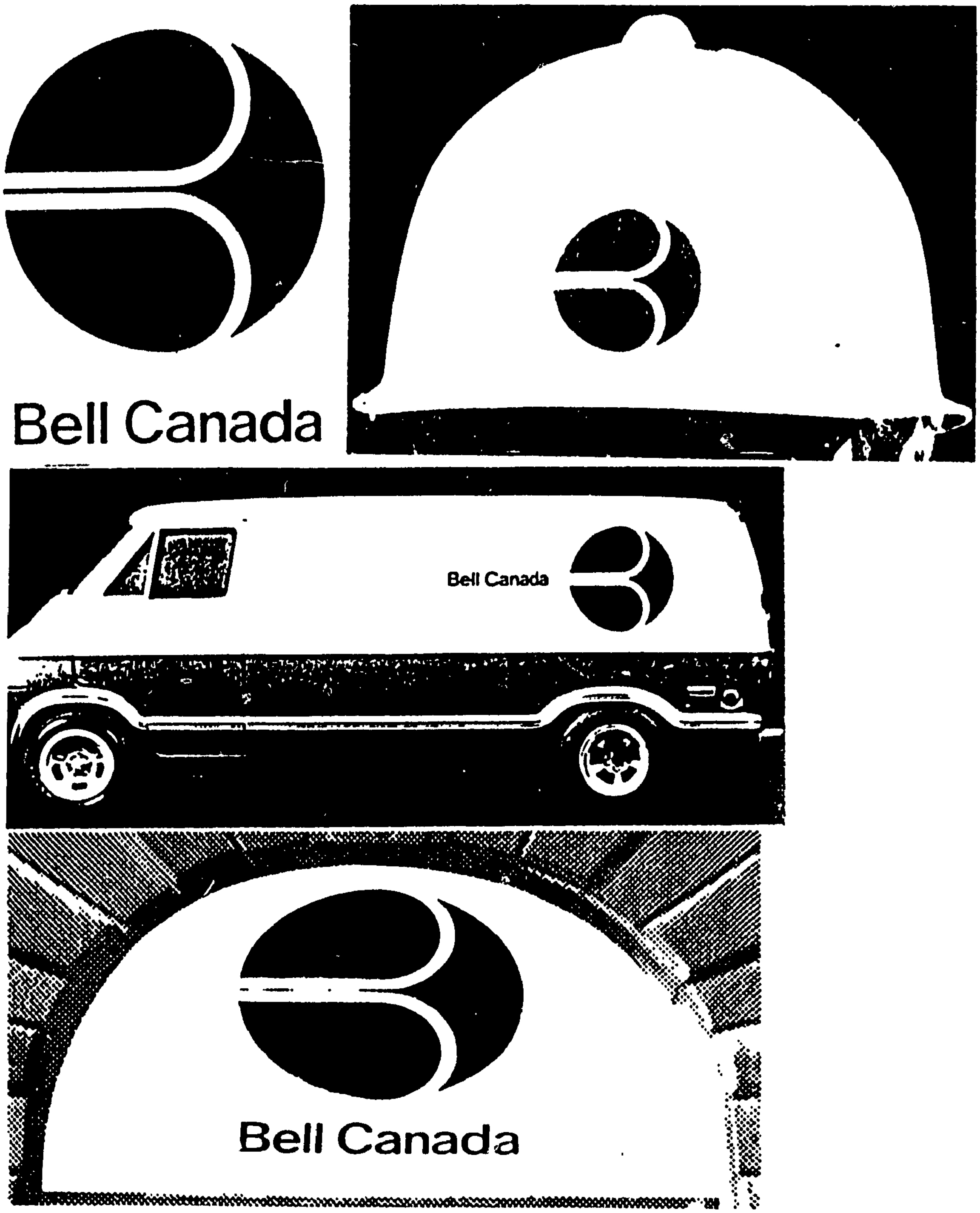
37 Treatments for ministerial stationery. (From Federal Identity Program Manual, 1987, 2.1: 7, 11).



38 Rejected Bell designs, 1975. Top, Burton Kramer, bottom, Alan Fleming. (Collection of Jean Morin, Montreal).



39 Rejected Bell designs, 1975. Top, Ernst Roch. Bottom, Jim Donoahue. (Collection of Jean Morin, Montreal).



40 Theo Dimson. Rejected Bell design and adaptations, 1975. (Collection of Theo Dimson, Toronto).

Graphic Identification Elements

Four graphic elements are used by Bell Canada for corporate identification: the logo, the name, the colors, and the typeface.

The Bell Canada name, which fulfills legal and linguistic requirements, generally appears in all areas of company activity. When the Bell logo is used, the Bell Canada name is included in a secondary role to complete company identification requirements.

In 1968, an Act of Parliament, amended our charter to include Bell Canada as one of the legal names of the company. The original full legal names (The Bell Telephone Company of Canada, La Compagnie de Téléphone Bell du Canada) continue to be used, but in select legal applications only.

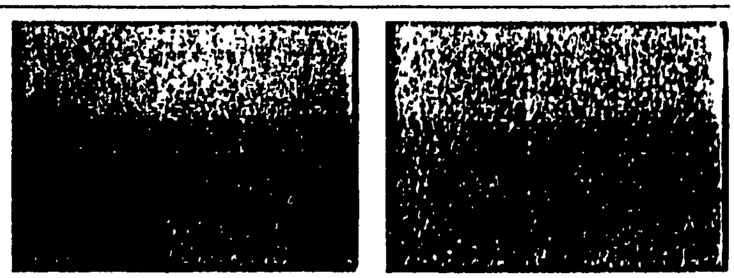
The Corporate Logo

Bell

The Corporate Name

Bell Canada

The Corporate Colors



The Corporate Typeface-Univers

ABCDEFGHIJKLMNOPQR
abcdefghijklmnopqrstuv

41 "Graphic Identification Elements".
(From Bell Canada Graphic Standards Manual, 1979: 2).

Corporate Typeface

The official Bell Canada corporate typeface is Univers, a sans serif type, universal in its application, appeal and availability

Univers was selected for its excellent appearance, legibility and reproduction qualities in a variety of applications Optical variations throughout the typeface ensure that the eye flows evenly through a balanced alphabet; yet the variations remain proportionally constant at all sizes.

Illustrated below are letters of the complete Univers 55 and 65 alphabets, including numerals, punctuation and accents In application, the typefaces are always set in upper and lowercase letters; never in all uppercase letters.

Metal typesetting is recommended for the setting of Univers in point sizes up to 36 point to avoid any undesirable modifications to this typeface Photocomposition may be used for larger display sizes.

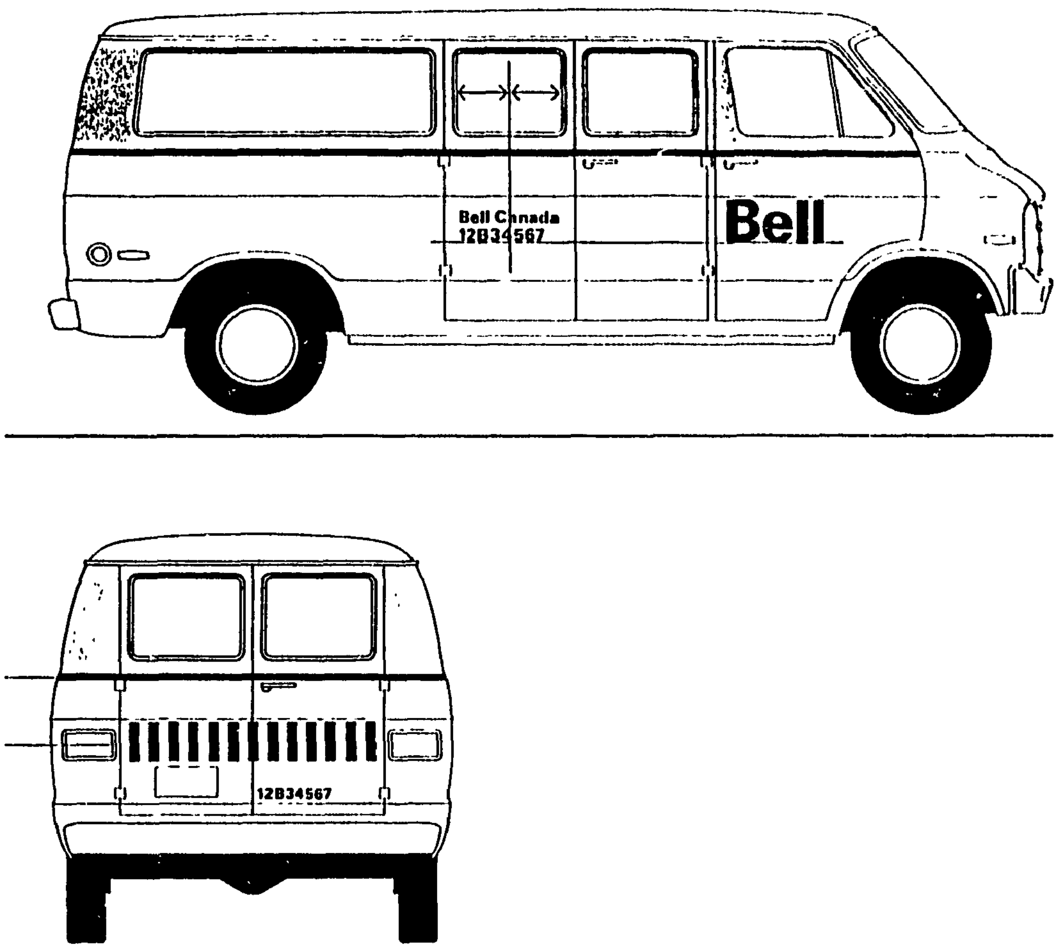
Univers 55

ABCDEFGHIJKLMNOPQR
STUVWXYZ
abcdefghijklmnopqrstuv
wxyz
âàéêèëîïôùûüç
1234567890
%$¢.,-:;"!?&()

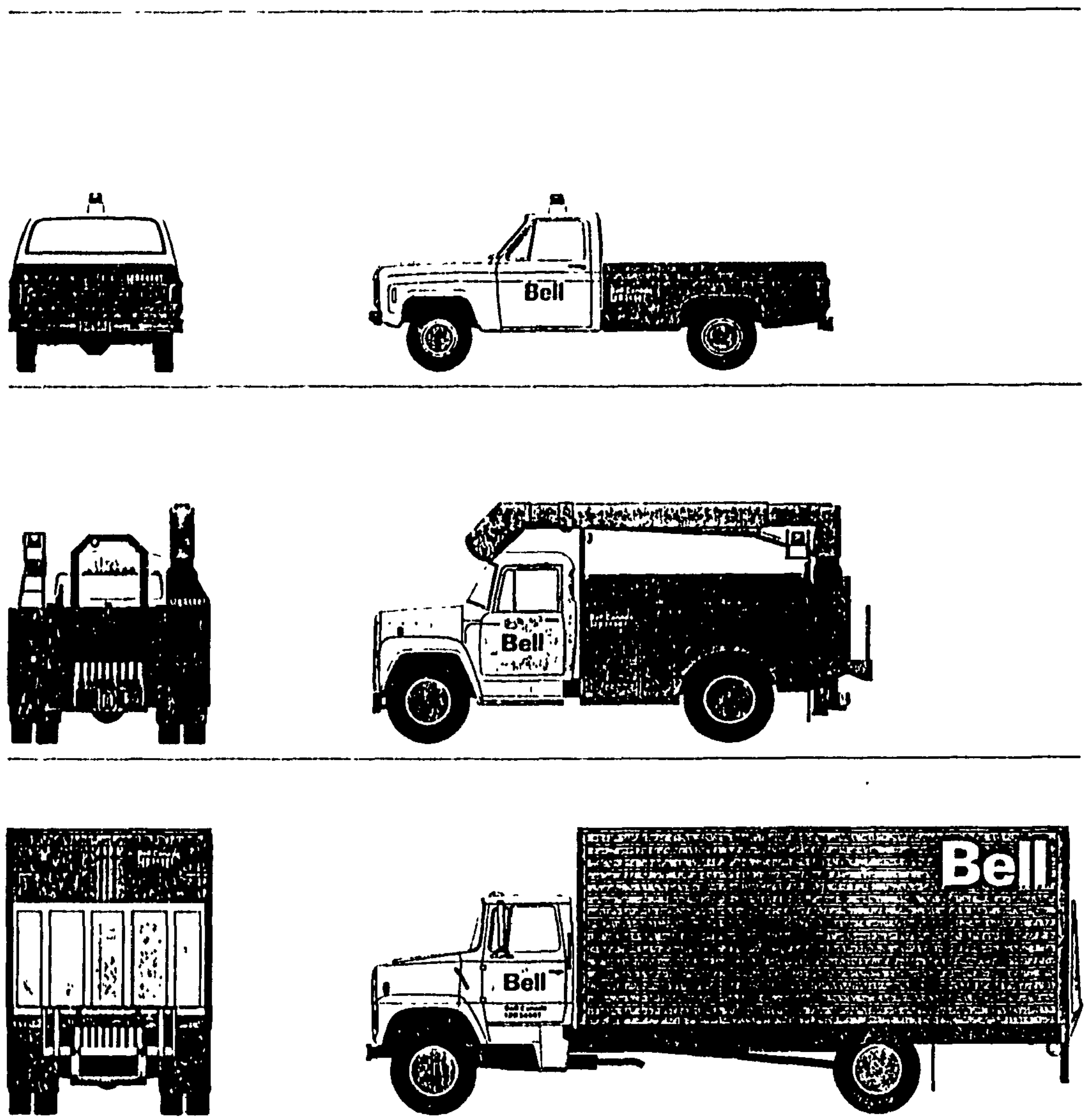
Univers 65

ABCDEFGHIJKLMNOP
QRSTUVWXYZ
abcdefghijklmnopqrstuv
wxyz
âàéêèëîïôùûüç
1234567890
%$¢.,-:;"!?&()

42 Univers 55 and 65. (From <u>Bell Canada Graphic Standards Manual</u>, 1979: 9).



43 Bell trucks. (From *Bell Canada Vehicle Manual*, 1981: 3).



44 Bell trucks. (From Bell Canada Vehicle Manual, 1981: 4).

AGT
Telecommunications
TransCanada Telephone System

B.C. TEL
TransCanada Telephone System

Newfoundland Telephone
TransCanada Telephone System

Bell
TransCanada Telephone System

SASKTEL
Saskatchewan Telecommunications
TransCanada Telephone System

MTS
MANITOBA TELEPHONE SYSTEM
TransCanada Telephone System

SASKTEL
TransCanada Telephone System

Maritime Telegraph & Telephone Company Limited
TransCanada Telephone System

Telesat Canada
TeleSat
TransCanada Telephone System

NBTel
TransCanada Telephone System

Telesat Canada
TéléSat
Réseau téléphonique transcanadien

NBTel
Réseau téléphonique transcanadien

45 Symbols and logotypes of Canadian telephone companies. (Collection of Jean Morin, Montreal).

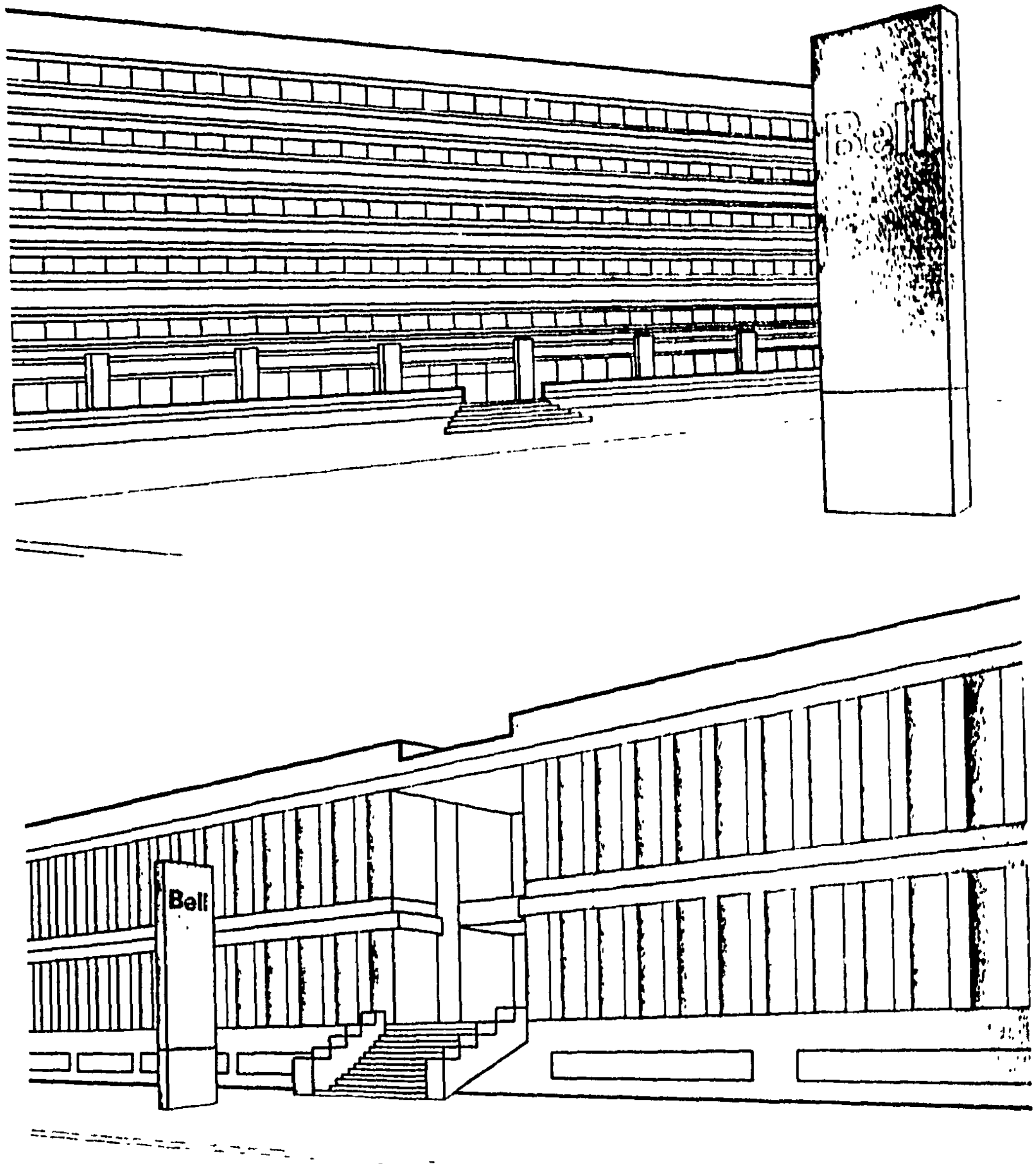
The Bell Logo for Signage

The Bell Canada logo has been optically corrected for its use in signage. Altering the logo in any way, such as tilting the letters, changing the size or width of the letters, or using more than one colour on the face destroys the approved logo and the consistent look of the identification.

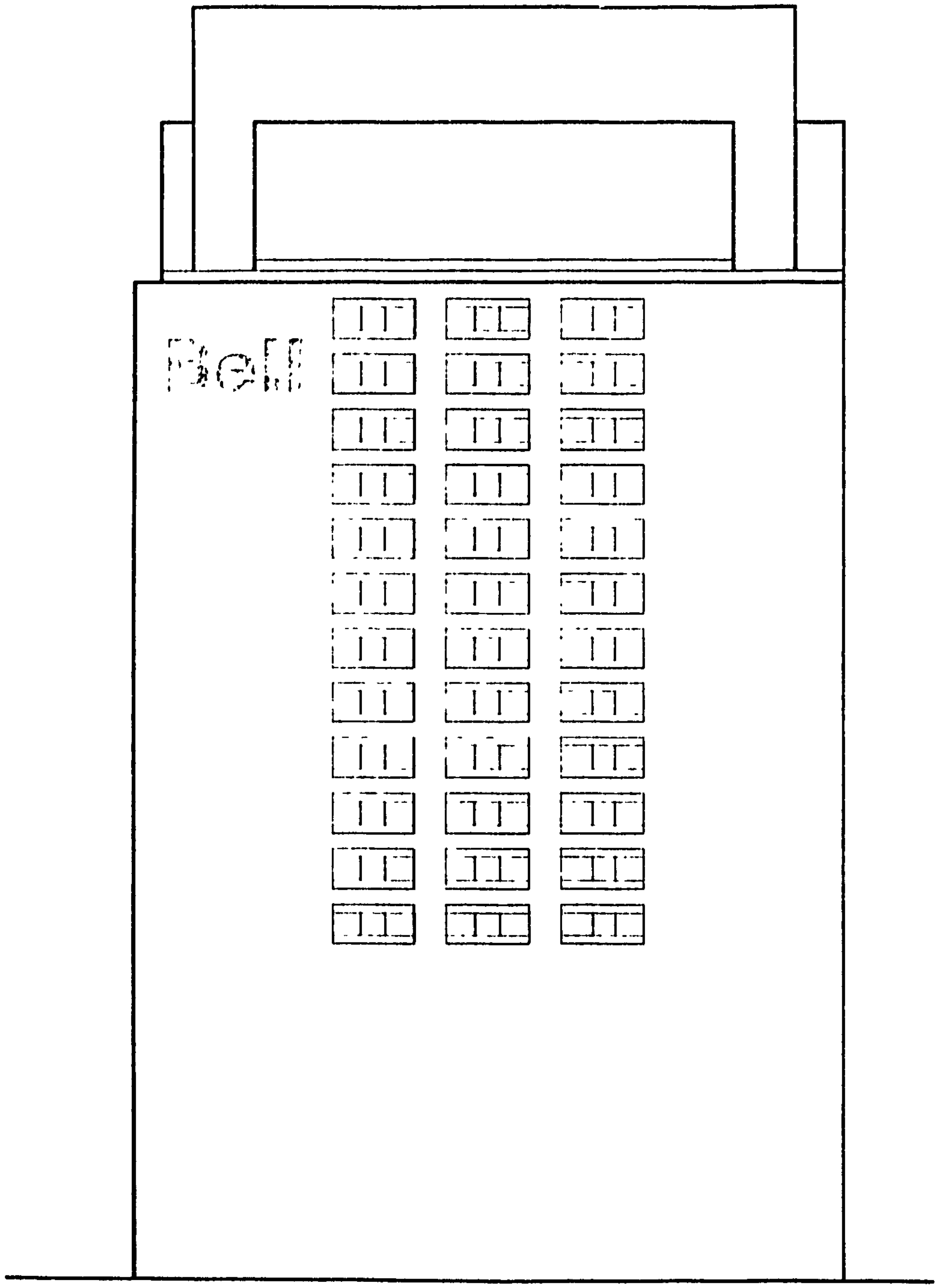
Version 3: Optically adjusted logo for signage

Illustration shows the difference between version 1 (normal Bell logo in grey) and version 3 (optically adjusted Bell logo for signage — outlined in black)

46 Signage logotypes. (From Bell Canada Building Identification Manual, 1981: 3).



47 Free-standing signs. (From Bell Canada Building Identification Manual, 1981: 11).



48 Illuminated sign. (From Bell Canada Building Identification Manual, 1981: 8).

Bell Canada
1050 Beaver Hall Hill
Montréal (Québec) H3C 3G4
(514) 870 1511

Date

Addressee name
Title
Company name
Address
City, Province
Postal code

Salutation

Only the printer and our secretaries generally see the company letterheads without a typewritten letter on the sheet. In fact you might say that it is the secretary who visually completes the design of our new letterhead. The typewritten message is a visual balance for the printed components aligned on the left side of the page.

This is an example of a letter typed in the contemporary format which fits so well with our new letterhead design. All typewritten text aligns with printed text including the signature block. The date should be typed to align with the Bell logo. In general, the address begins 3 spaces below the date and the salutation is placed 3 spaces below the address. The first paragraph begins 2 spaces below the salutation.

Of the many visual ways companies present themselves to their personnel and to the public at large, stationery is the most consistent visual expression a company makes.

Sincerely,

E.W. O'Brien
Public Relations Manager

49 Typing guidelines for letterhead. (From Bell Canada Stationery Manual, 1981: 13).

Business card size: 3½" x 2"

A. There is a one pica margin:

from the x-height of the first line to the top edge of the card.

from the last line of the text to the bottom edge of the card.

from the Bell logo to the left edge of the card.

on the right edge of the card.

B. 4½ picas

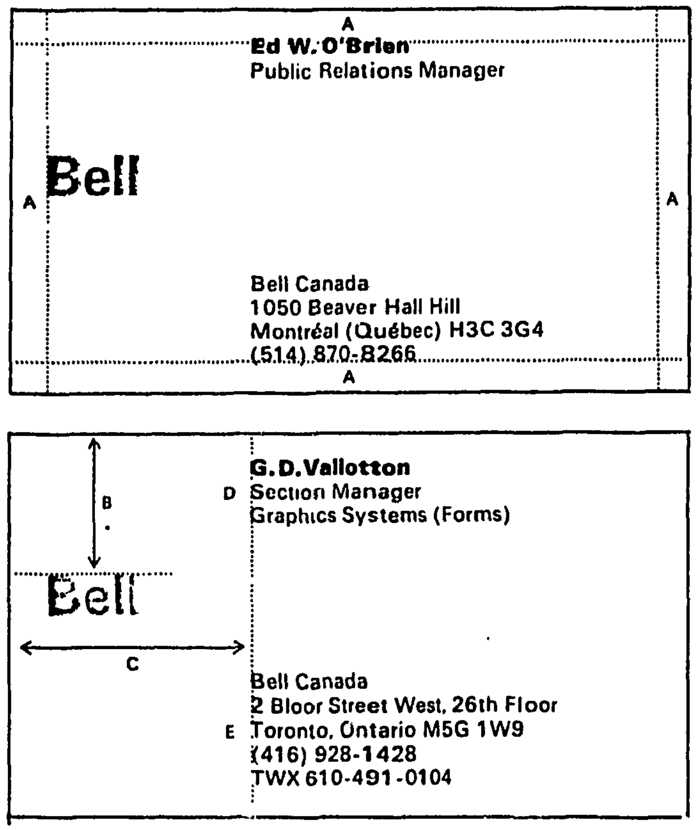
C. 7½ picas

D. Maximum of 4 lines

E. Maximum of 6 lines

All text is typeset in Monotype Univers 55 (except the name which is in Univers 75), 8/9 point, upper and lower case, flush left alignment, 4 to em word spacing, normal letter spacing.

If Monotype Univers is not available only the phototype alternatives listed on page 3.20 are acceptable.



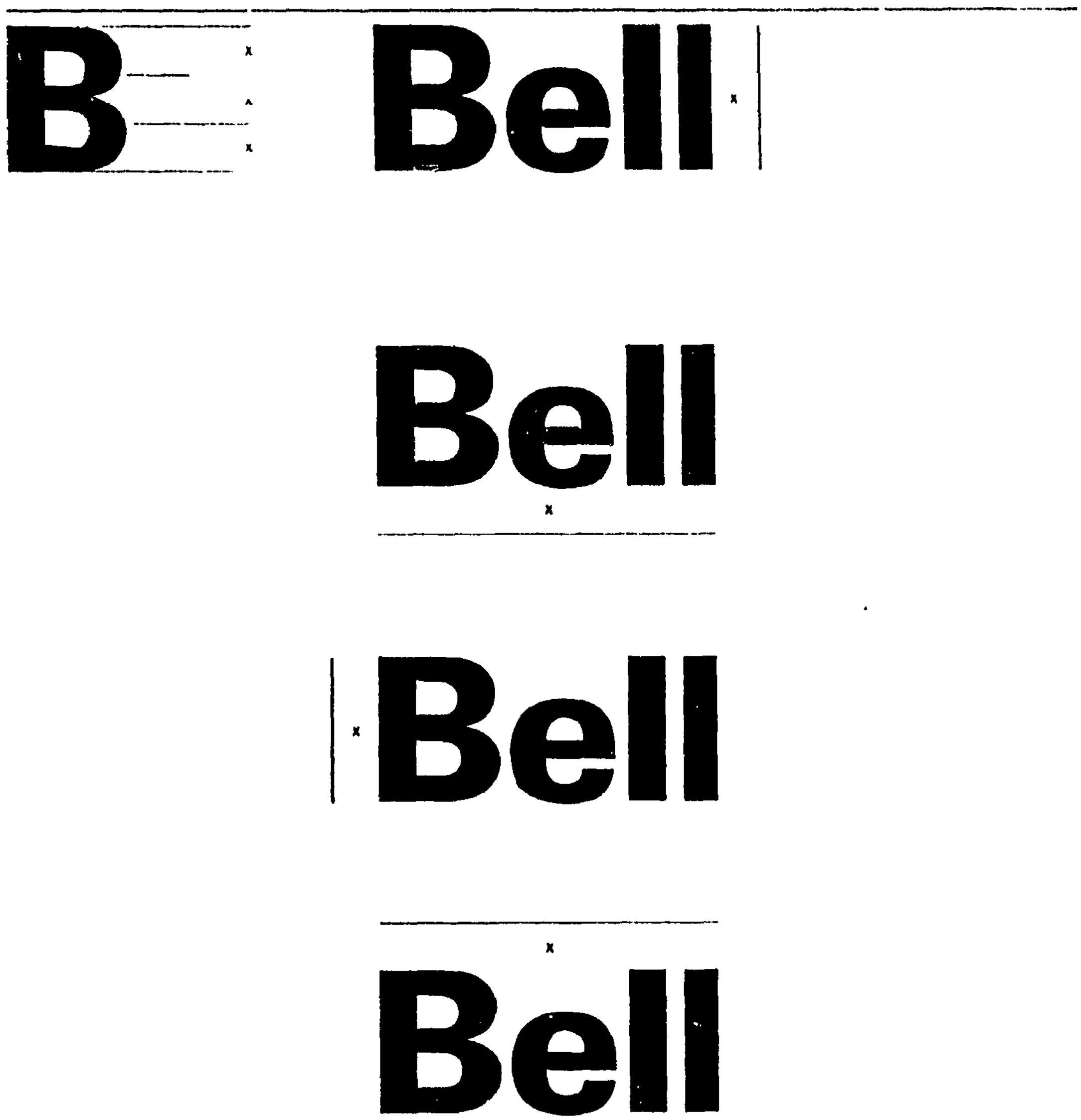
50 Production specifications for a business card. (From Bell Canada Stationery Manual, 1981: 18).

Logo Surrounding Space Recommendations

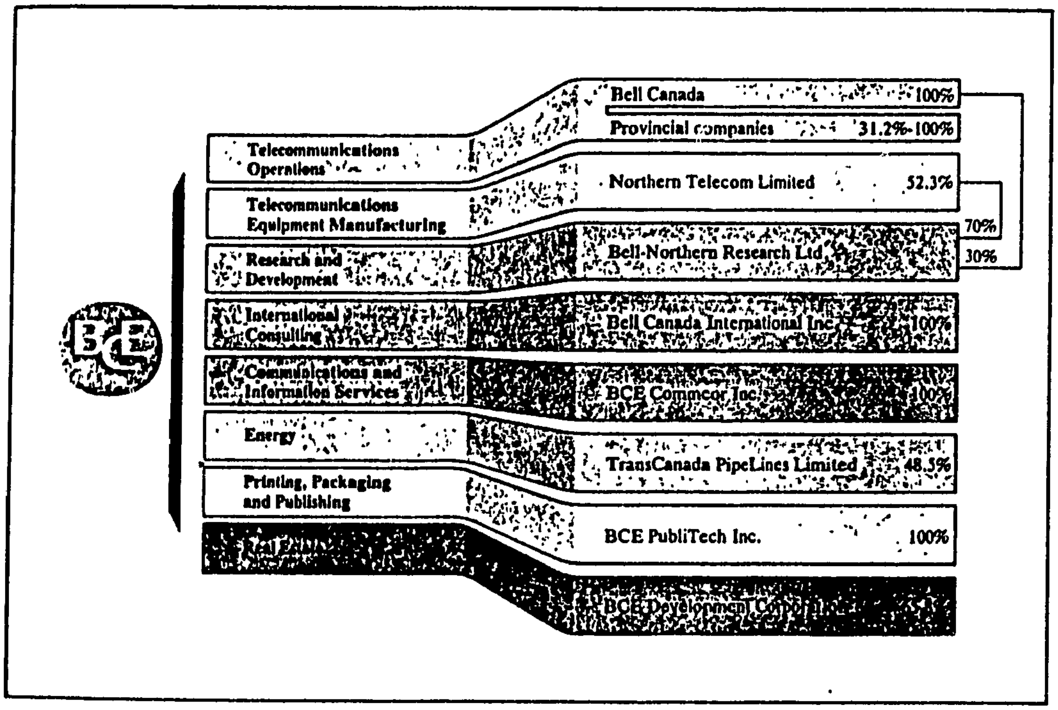
For maximum impact, the Bell logo should be allowed sufficient surrounding space.

Indicated below is the *minimum* space recommended between the logo and other elements, such as illustrations, photographs, or the edge or border of a working area. This space should be no less than one-third the capital letter height of the logo.

For spacing standards between the logo and secondary typography, see page 2 12.



51 "Logo Surrounding Space Recommendations", (From Bell Canada Graphic Standards Manual, 1979: 6).



52 Bell Canada Enterprises major holdings.
(From Bell Canada Enterprises Annual Report, 1986: 7).

National Mobile
Radio Communications
A Bell Canada Company

Bell Canada
Marketing Research
A division of Bell Canada

INFO PRO
A Division of Bell Canada

Bell
Cellular

Bell Data

Bell Technical
Services

53 Symbols and logotypes of some of Bell's subsidiaries.
InfoPro was designed by Gottschalk and Ash, 1984.
Bell Canada Marketing Research by Roland Lavoie, 1985.

TÉLÉ-DIRECT
(PUBLICATIONS) INC.

Bell TELIC

PROTOCOL
MESSAGE MANAGEMENT CENTERS INC.
A BELL CANADA COMPANY

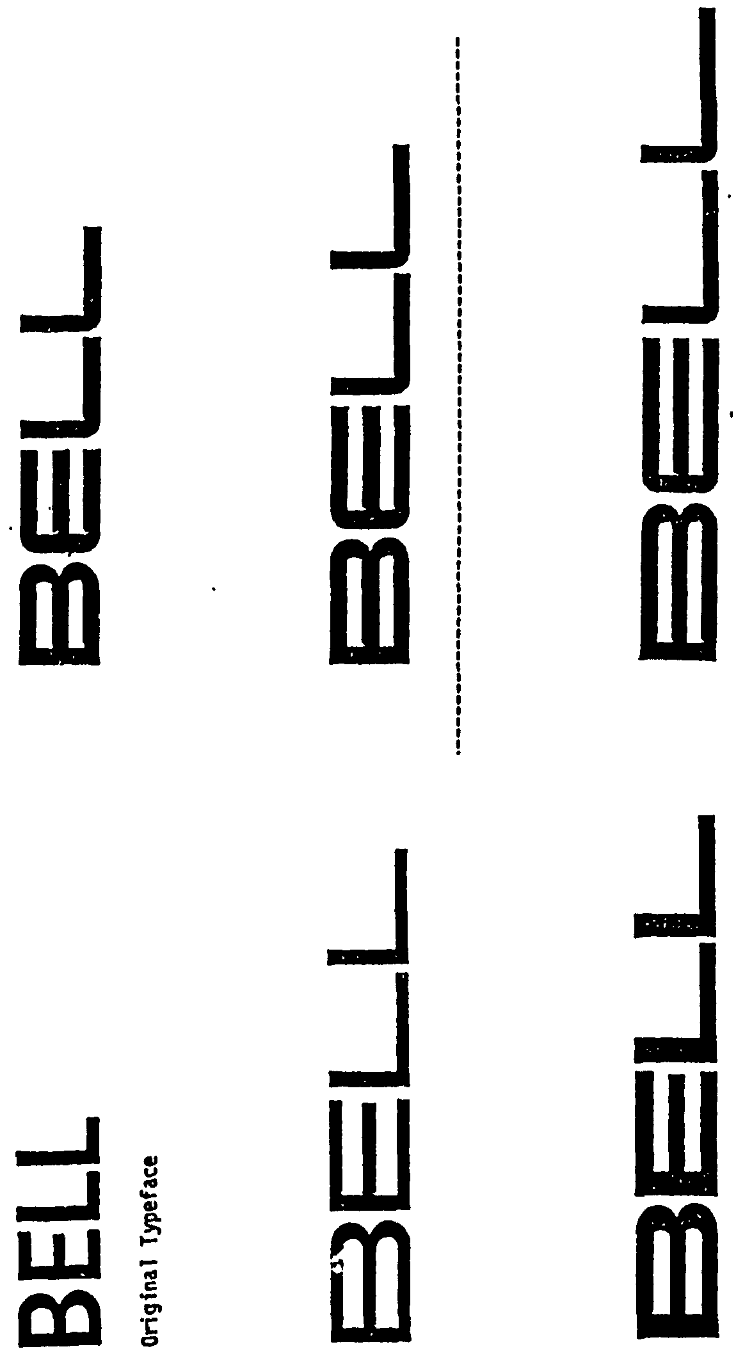
Bell Canada
Management Corporation
A Bell Canada Company

Bell Information
Systems
A Division of Bell Canada

BNR

54 Symbols and logotypes of some of Bell's subsidiaries.
Bell Telic, by Roland Lavoie, 1986.
Bell Information Systems, by Roland Lavoie, 1986.

55 Adaptations of Bell logotype by Jean Morin.
(From Bell Canada Visual Identity Proposal, 1986: 6).



56 Development of new Bell logotype by Jean Morin. (From Bell Canada Visual Identity Proposal, 1986: 7).

BELL BELL CELLULAR
A BELL CANADA COMPANY

BELL BELL DATA SYSTEMS INC.
A BELL CANADA COMPANY

BELL BELL TECHNICAL SERVICES
A BELL CANADA COMPANY

BELL TELE-DIRECT PUBLICATIONS INC.
A BELL CANADA COMPANY

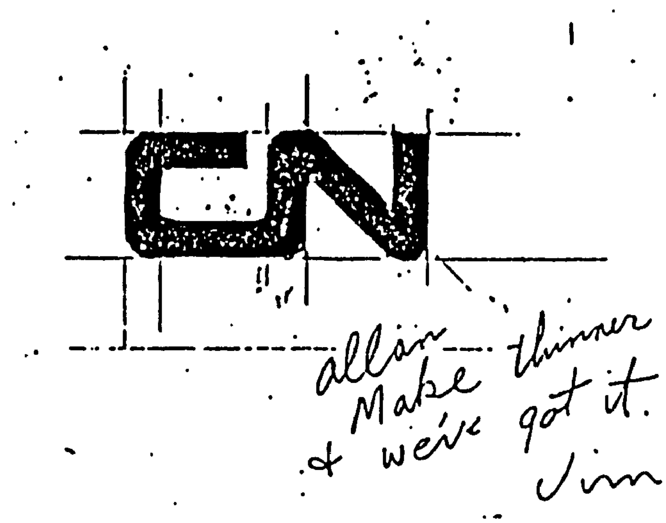
BELL BELL INFORMATION SYSTEMS
A DIVISION OF BELL CANADA

BELL BELL CANADA MARKETING RESEARCH
A DIVISION OF BELL CANADA

BELL INFO-PRO
A DIVISION OF BELL CANADA

57 New logotype used to standardize the presentation of the Bell subsidiaries by Jean Morin. (From Bell Canada Visual Identity Proposal, 1986: 11).

58 Bell Canada Enterprises logotype, by Young Blodel, 1983. (From Bell Canada Enterprises Annual Report, 1986).



59 Sketch for Canadian National logotype by Allan Fleming, with written comment by Jim Valkus, c.1959. (From Growing up With Canada, 1987).

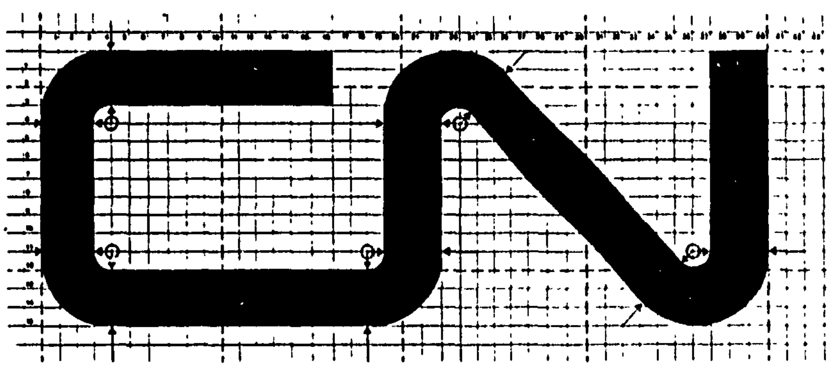
CHAIRMAN AND BOARD OF DIRECTORS

PRESIDENT AND CEO

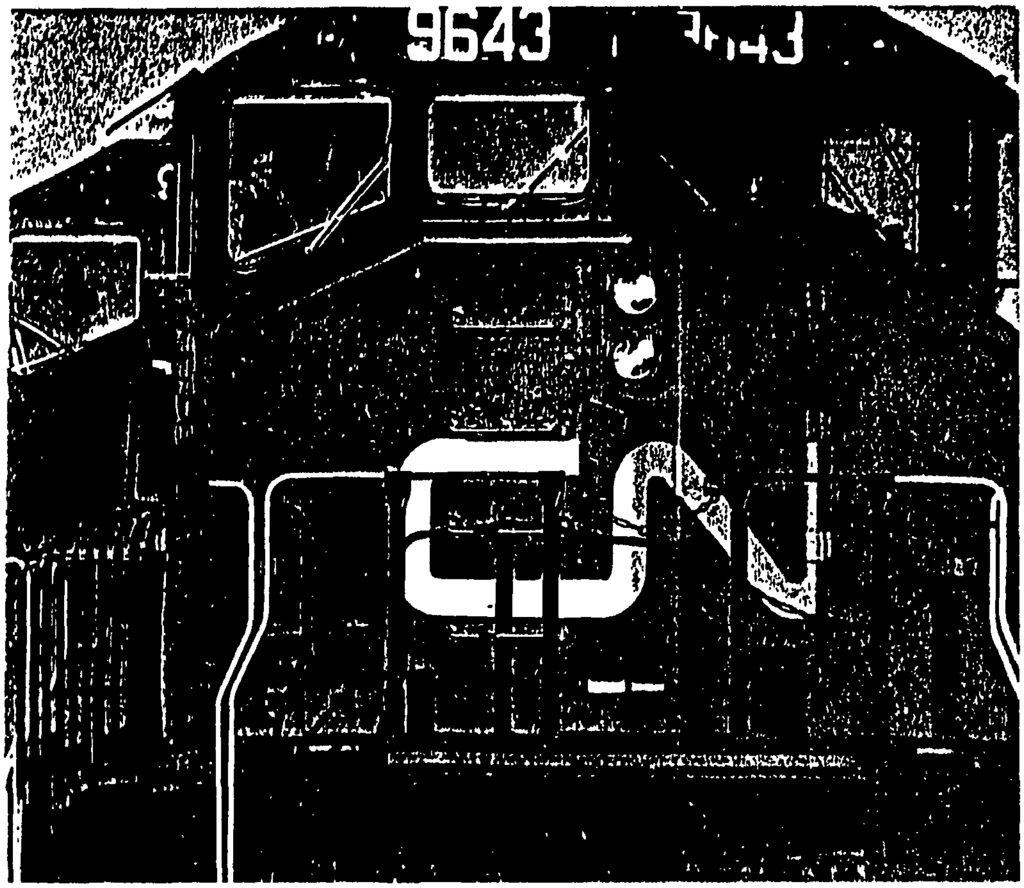
VP, PUBLIC AFFAIRS AND ADVERTISING

ASSISTANT VP. (LORNE PERRY)	GEN. MANAGER
CORPORATE IDENTITY	MEDIA RELATIONS
ADVERTISING	AUDIO-VISUAL
EMPLOYEE COMMUNICATIONS	SHAREHOLDER REL'S
HISTORY & ARCHIVES	

60 Organizational chart. Corporate identity at Canadian National.



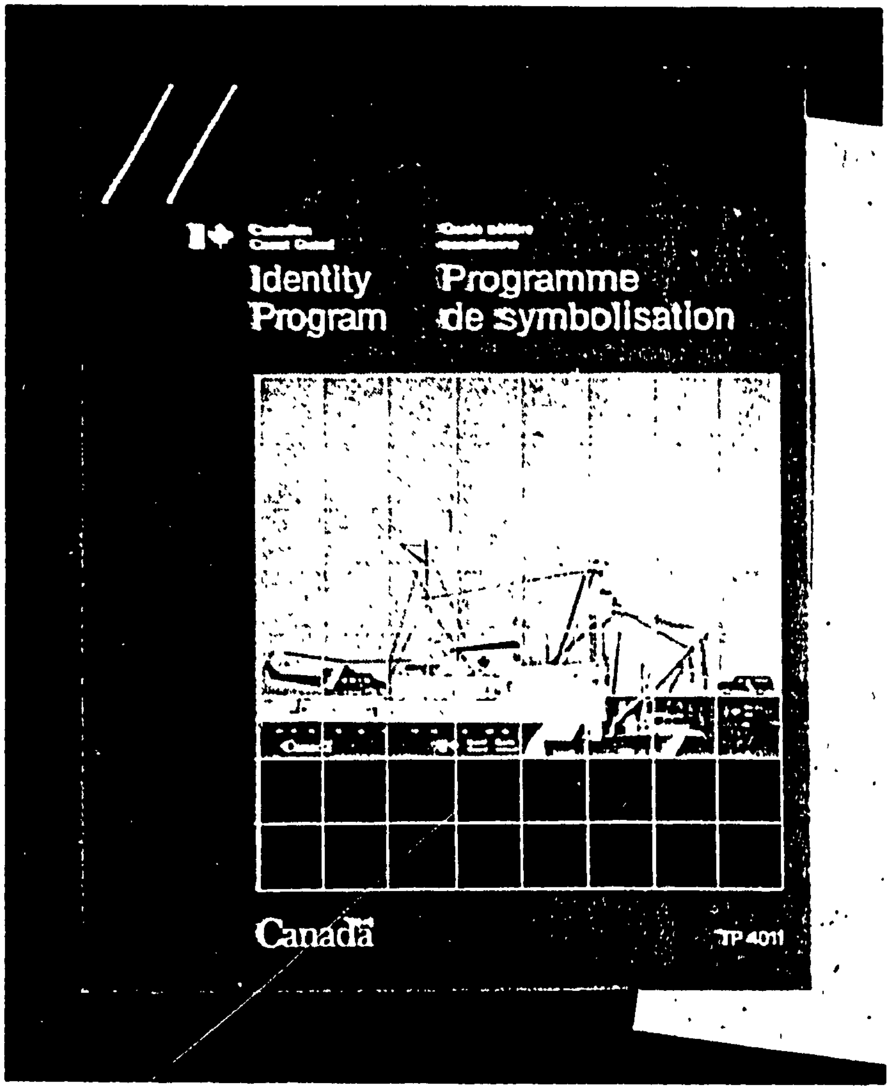
61 Canadian National logotype in current use, gridded drawing. (Collection of Canadian National, Montreal).



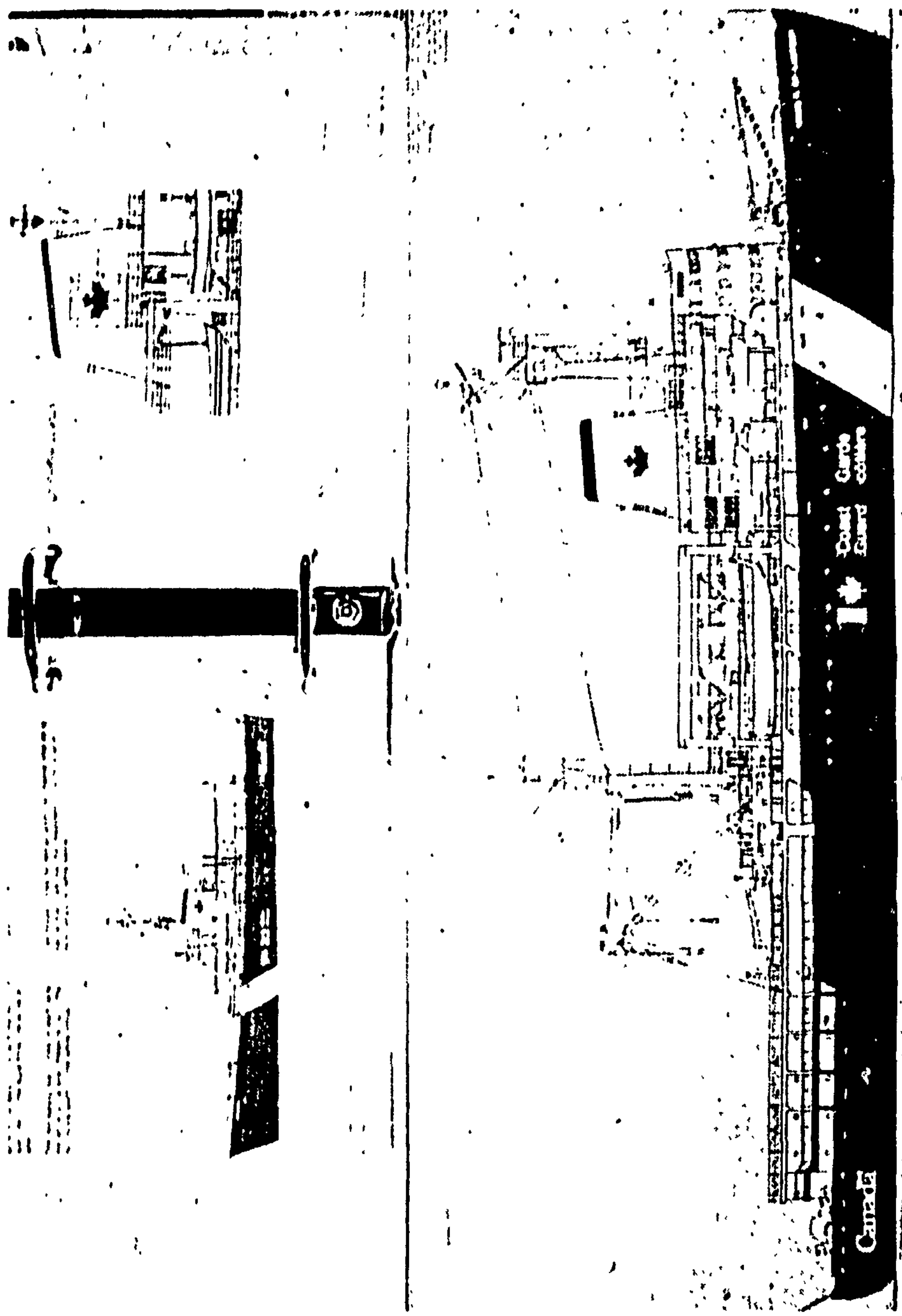
62 CN train, graphics by Jean Morin (train in red, logo in silver). (From Morin, Lessard, McInnis publicity material).

63 Designs by Jim Donoahue.

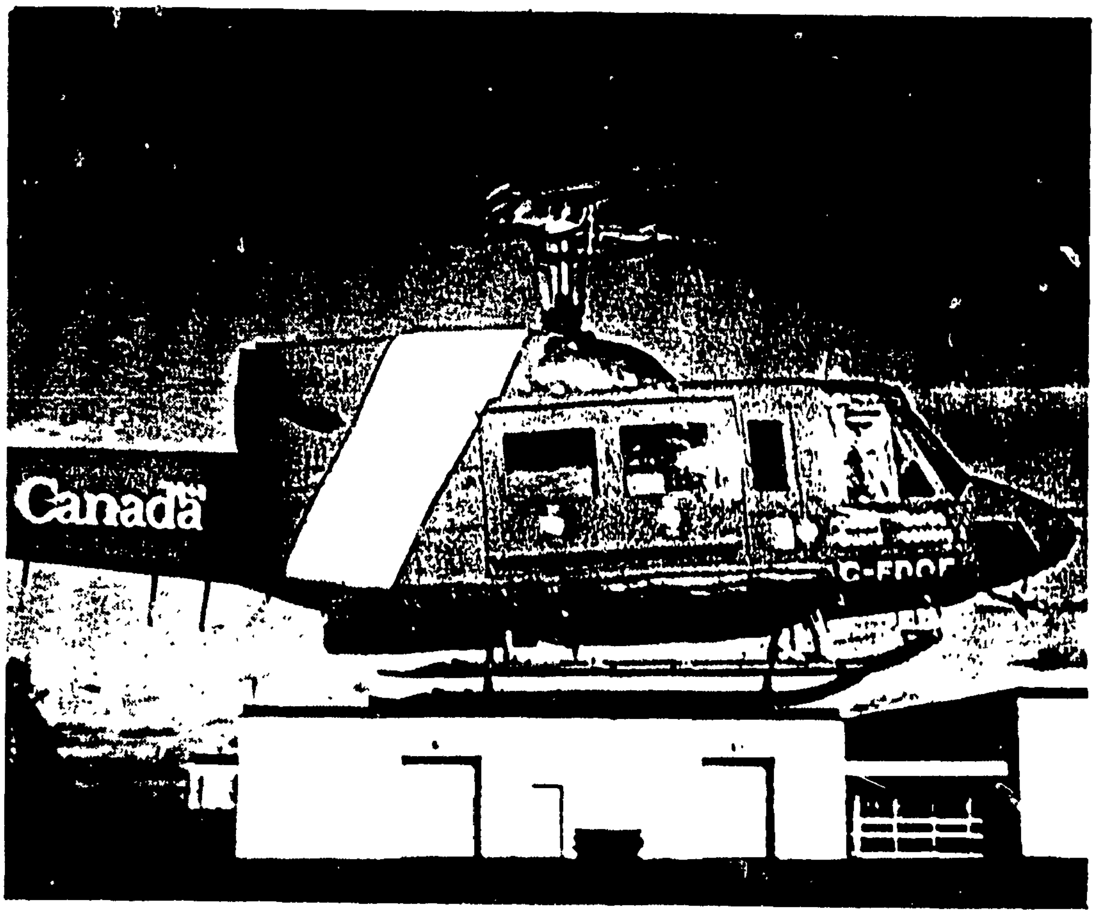
64 Designs by Chris Yaneff Ltd.



65 Cover and contents page. (From Canadian Coast Guard Identity Program, 1984).



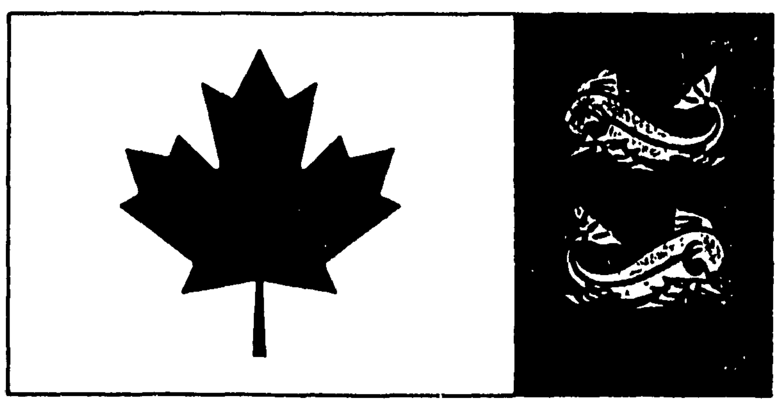
66 Ships. (From Canadian Coast Guard Identity Program, 1984).



67 Canadian Coast Guard helicopter. (Collection of Canadian Coast Guard).

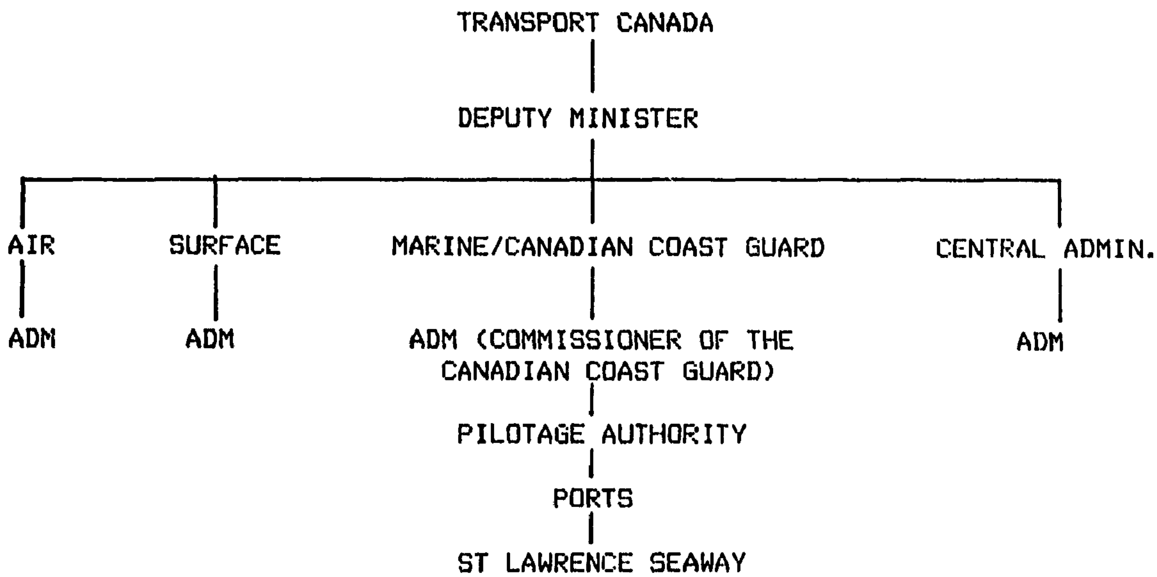
Crest **Écusson**

Canadian Coast Guard



Jack **Pavillon de beaupré**

68 Canadian Coast Guard. Crest (approved in 1962) and Jack. (Collection of Canadian Coast Guard).



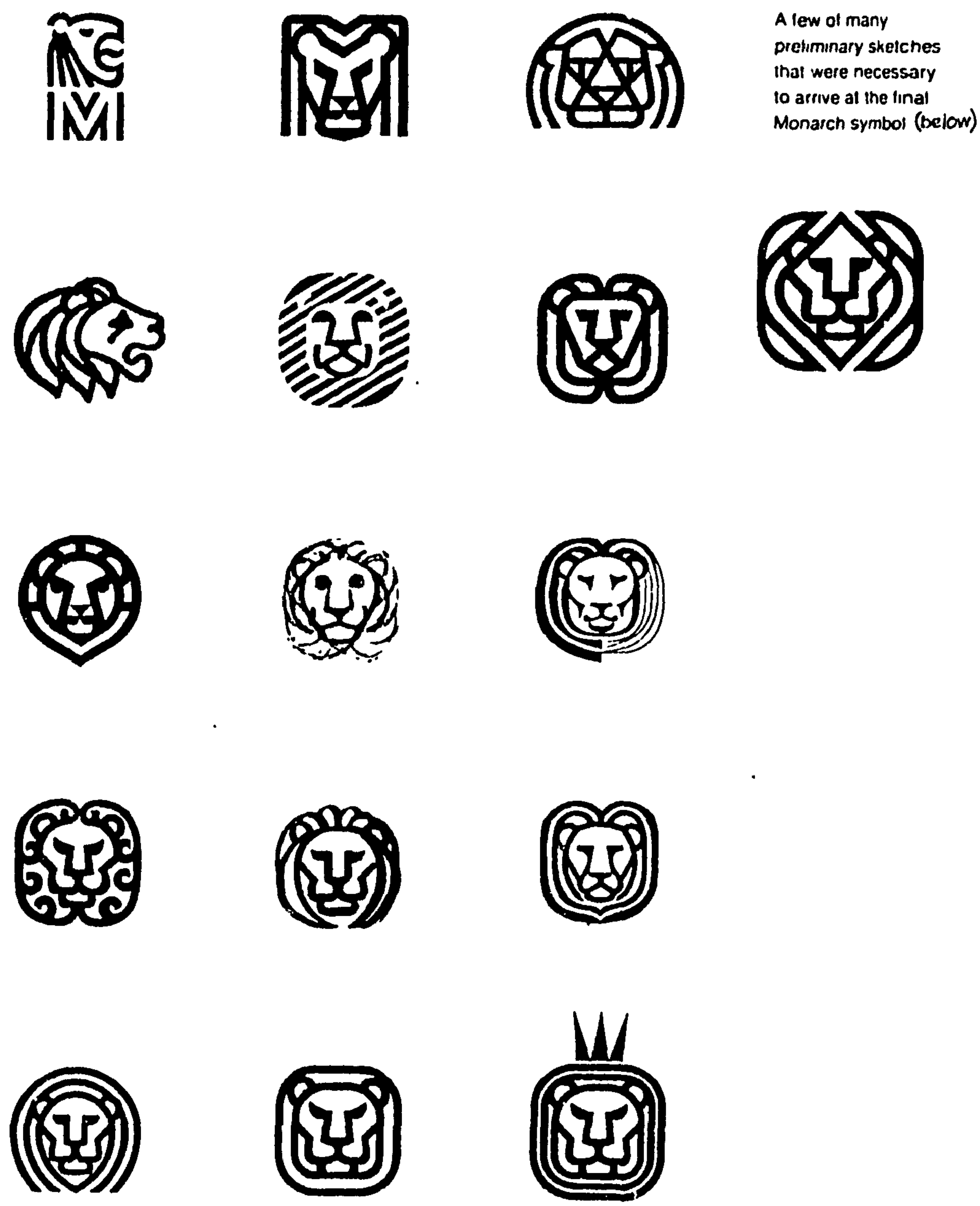
Note: ADM= Assistant Deputy Minister. The Coast Guard commissioner is at ADM level. There is more than one ADM in each department.

69 Organizational chart of Transport Canada.

Reed Paper Company

70 Designs by Burton Kramer, including the CBC symbol.

71 Some of the corporate identities managed by Lippincott and Margulies. (From Lasting Identities, 1987).

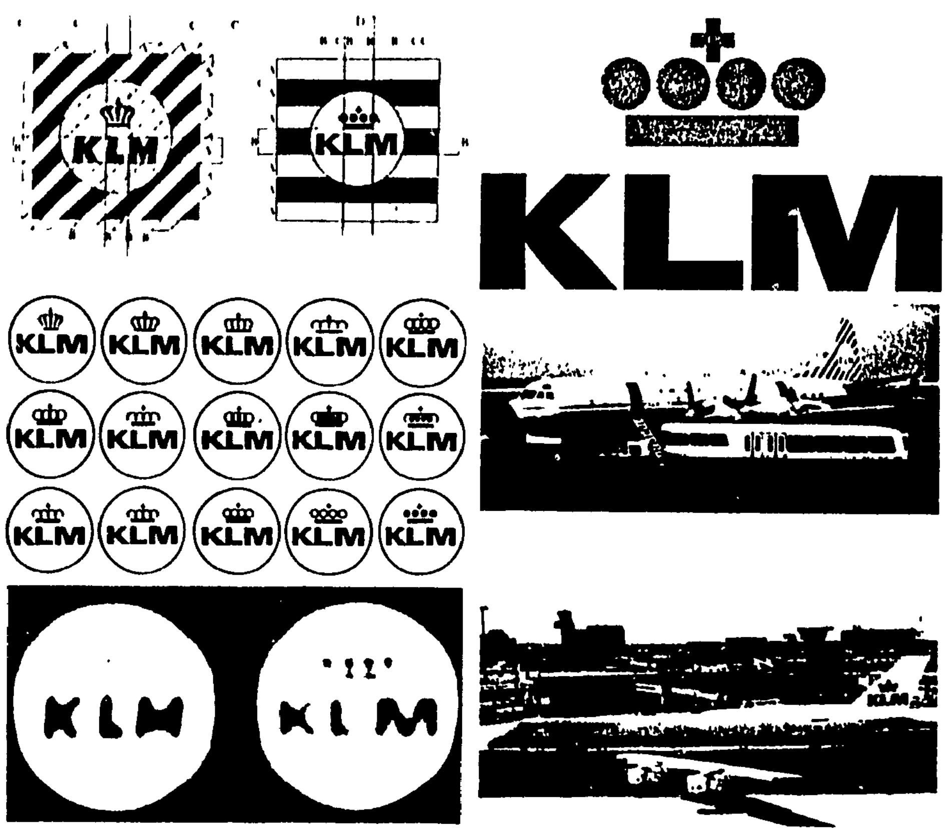


72 Chris Yaneff Ltd. Development of Monarch Machinery symbol. (From promotional material).

73 Robert E. Mulcahy, logotype and pictograms for the National Zoological Park, Washington DC, 1977. (From Nakanishi, 1985: 113-114).

KLM

KLM's problems arose from difficulties of standardisation, with the diagonal stripes on opposite sides of aircraft or vehicles, and a feeling that the existing symbol looked out of-date. To retain goodwill, the stripes, initials and crown were kept at first, but completely redesigned. Tests showed that, the worse the viewing conditions, the more crown-like the new crown becomes. We have since helped KLM to update their visual image twice over a period of 15 years



74 KLM, by Henrion, Ludlow and Schmidt. (From promotional material).

During the years in which we have been involved in the development of corporate identity, the concept has progressed from infancy to maturity. Our contribution to this process has been considerable.

Since the first steps in corporate image building and visual coordination we have regarded strategic design as a vital ingredient in the corporate communications mix and as having a particular relevance for marketing.

We can justly claim to have been pioneers at the forefront of the development of corporate identity and the following pages show an unsurpassed range of work.

1953 Post Control (later Fisons). One of the first true planned corporate identities. Henrion saw the huge benefits in coordinating all aspects of an organisation's visible image to create a whole greater than the sum of the parts: synergy.

1960 KLM Royal Dutch Airlines. The KLM project demonstrated, among other things, the value gained from a complete transformation to a fresh, modern and vital image, in this case linked to the values of the country of origin.

1970 London Electricity Board. The LEB identity was one of the first fully integrated retail identities. It proved the power of coordinated retail marketing in an increasingly competitive marketplace.

1975 British Leyland. At about this time, we worked on identities and dealer identification programmes for Audi NSU, British Leyland and Volkswagen. The motor industry was beginning to experience mergers and subsequent image problems. Our work for these companies acted as a model for many later schemes.

1978 Beiersdorf AG. The vital significance of corporate identity to marketing was the driving force behind the Beiersdorf project, where the identity acts as a 'tool' to the product divisions, giving the right background for international brand marketing and appropriate goodwill for the launch of new products.

1980 Coopers & Lybrand. One of the first worldwide identities for a firm engaged in professional services, in this case accountancy. A highly devolved structure, with over 400 offices in 100 countries, meant that flexibility to meet local conditions, plus sophisticated logistics, were prime considerations.

1982 Montanus Aktuell. By this time the retailing revolution was in full swing and our scheme for Montanus Aktuell demonstrated what a distinctive selling environment could do to challenge the best of the competition.

1985 Mitsubishi Motors. The essence of this world project was to present Mitsubishi as a brand internationally, reflecting traditional and positive Eastern values in all of the various and diverse markets in an acceptable and appropriate way.

75 Designs by the firm of Henrion, Ludlow and Schmidt. (From promotional material).

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Appendices

Appendix 1. History of the Government of Canada's Federal Identity Program

(Compiled from interviews with Toronto consultant Chis Yaneff, designers Alan Way and Lise Potvin, of FIP, and from an unpublished chronology prepared by Lise Potvin).

1921 Coat of Arms adopted by the government and granted by proclamation of George V. At the same time, red and white were declared and appointed Canada's official colours.

1955 Coat of Arms legally protected.

1957 Coat of Arms modified in colour and design.

1965 Canadian flag proclaimed, and the maple leaf confirmed as the national symbol.

1965 The "Canada" wordmark was created by Jim Donoahue of McLaren Advertising in Toronto. It was adopted by the Canadian Government Travel Bureau.

1965 The 11-point maple leaf (as depicted in the national flag) was legally protected, and conditions for its use defined.

1969 Proclamation of the Official Languages Act.

1969 Report of the Task Force on Government Information, and recommendations to the cabinet were made by the Cabinet Committee on Science, Culture and Information.

1970 Information Canada established.

1970 Several marketing studies were conducted by private consultants to gather information on the public's reaction to the proposed federal emblem. One survey, conducted in London, Ontario and Sherbrooke, Quebec found that 39% of respondents reacted positively to the emblem, 42% neutrally, 2% mixed, and 17% negatively.

1970 Cabinet decided that:

- the federal emblem would be adopted for departments and agencies (with some crown corporations exempt) and replace all symbols not later than January 1, 1973.

- the Coat of Arms was for decoration, not identification.

- marketing studies would be conducted for the new emblem.

- Information Canada would be responsible for the implementation, and would prepare a manual and convene an inter-departmental committee on implementation.

It was also decided to simplify organizational names. The scheme adopted for doing this was the work of Chris Yaneff of Toronto, and the original scheme for the identity design was produced in Montreal by the CAC (Communication Art Centre, now defunct).

1970 Cabinet further decided that "Canada" and the federal emblem would replace "On Her Majesty's Service" on government envelopes.

1970 (Oct. 23). The Hon. R. Stanbury announced in the House of Commons the adoption of the FIP, citing standardization and the need to identify federal activities as the main purpose of the program. He stressed that the federal emblem would not replace the Coat of Arms or the flag. The FIP would be implemented as soon as existing supplies were depleted.

1971 "Design in Government" assembly. The first graphic design conference was held by Information Canada to present details of the government's policies to the design and communications community within the government.

1973 The first vehicle identification guide was issued.

1974 Cabinet made a number of decisions regarding the FIP, including the following areas:

- brief identifying names should be adopted by those departments which had not done so.

- the Coat of Arms should remain on legal documents and on Orders in Council.

- certain functions of External Affairs should be exempt.

- FIP should be fully implemented by March 31, 1974

- criteria for exemption.

- proposed management system for the graphic design secretariat.

1974 "Canada" wordmark legally protected for use by the Canadian Government Office of Tourism.

1974 Treasury Board approved a Circular which established the FIP management system, including the inter-departmental TB Advisory Committee.

1974 The Cabinet Committee on Science, Culture and Information decided that Information Canada was to submit recommendations to the Treasury Board for a signage design and conversion system, and all organizations subject to FIP were not to undertake any major signage project without consulting the Graphic Design Secretariat.

1975 The beaver was made an official symbol of Canada, by Royal assent.

1975 The first sections of the FIP manual were issued, dealing with official languages, approved short names, exemptions and technical details.

1976 The federal emblem was legally protected.

1976 Information Canada was disbanded after 6 years of operation. Responsibility for the FIP was transferred to the Administrative Policy Branch of the Treasury Board Secretariat.

1978 New design guides and a list of approved titles of organizations were issued (Administrative Policy Manual, Chapter 390).

1979 Survey, regarding the federal emblem. In a national Gallup survey of 2033 Canadians, 63.1% recognized the federal emblem as a symbol of the

Government of Canada (while 55% recognized Quebec's fleur-de-lys and 24.2% recognized Ontario's trillium). Recognition of the federal emblem was highest in Quebec (85.7%) and lowest in Ontario (50.3).

1979 Ministers were allowed to use the Coat of Arms or the departmental crest on their stationery in conjunction with the FIP symbols.

1980 The Cabinet Committee on Communications agreed to extend the use of the "Canada" wordmark. The Treasury Board Secretariat was to reinforce the use of the wordmark in advertising, prescribe extensive use in displays and exhibits, and examine the application of the wordmark to other areas.

1980 The Treasury Board approved the expenditure of $7.8 million over fiscal years 1980/81 and 1981/82 to implement a revised policy. Organizations were required to report on the status of implementation.

1981 A report was made to the Cabinet Committee on Communications on the progress of implementation. Problem areas were identified and a communications strategy was proposed as a solution. Organizations were rated on their implementation of the FIP.

1981 A news release by the president of the Treasury Board announced plans for the expanded use of the "Canada" wordmark, noting that: "The 'Canada' wordmark is intended to provide a clear and attractive expression of the federal presence".

1981 The Deputy Secretary (Administrative Policy Branch) made a presentation to the Council of Federal Information Directors. It was reported that implementation of the FIP (including the wordmark) was: 20% fully satisfactory, 35% satisfactory and 35% unsatisfactory. The remaining 10% of organizations subject to FIP did not report their status.

1981 In a presentation on the state of existing signage in the federal government it was concluded that: signage in the region was very poor and the addition of the wordmark would not resolve the problem; there was confusion over the respective responsibilities of client departments and service organizations; and there was a problem with the identification of federal government offices located in privately-owned, multi-occupancy buildings.

1981 The Cabinet Committee on Communications decided:

- ministers should be responsible for their departmental signage.

- the Minister of Supply and Services should be responsible for the supply of all signage.

- FIP policy should be amended to resolve problems in TV and print advertising and to clarify management responsibilities.

- the Coast Guard and the Correctional Services should comply with the FIP.

- the Treasury Board should proceed with a $78 million, 4 year signage renewal program.

1982 A Treasury Board Circular noted that Cabinet had identified major problems:

- the "very poor state" of signage in the regions.

- the clutter in advertising signatures.

- the poor co-ordination within organizations.

1982 An audio-visual presentation explaining the role of the FIP was made available to government organizations.

1982 On the request of the President of the Treasury Board, the Prime Minister wrote to all Ministers asking them to place a high priority on FIP and the implementation of the signage renewal program.

1982 FIP field survey. During the summer of 1982, the Treasury Board conducted a survey of federal installations in 34 major urban centres across the country. The survey evaluated signs and other applications of organizations subject to the FIP. The applications included: primary signs (exterior and interior), secondary signs, directory boards, project signs, vehicle identification, printed material and advertising. The results were as follows:

- 73% of all installations had either no primary sign, or a sign which did not conform.
- 59% of all secondary signs did not conform.
- 35% of project signs did not conform.
- 49% of all printed material and advertising did not conform.

1982 "Canada" wordmark legally protected as an official mark of the Government of Canada.

1983 Signage survey. The survey was designed from "the public's point of view" by evaluating signage at each location from the "outside-in". The results were:

- of the 459 installations surveyed, 64% had inadequate primary signage.

- of the 201 installations which should have refurbished primary signage in Fiscal Year 1982/83, 54% had inadequate primary signage.

- of the 402 primary exterior signs surveyed, 53% did not conform.

- of the 67 primary interior signs surveyed, 40% did not conform.

- of the 474 common-use signs surveyed, 50% did not conform.

- of the 506 directory boards surveyed (both government and non-government owned) 70% did not conform.

- of the 3668 operational signs surveyed, 46% did not conform (figs. 21-23, cf. Appendix IV).

1984 Publication of Titles of Organizations (Administrative Policy Manual, Chapter 470, Appendix C).

1984 The Treasury Board approved a Circular which provided for the use of the Coat of Arms signature to identify ministers, parliamentary secretaries and their offices. The basic colours for stationery used by ministers and parliamentary secretaries were prescribed as gold (Coat of Arms) and black (type), while offices of ministers were to use grey and black respectively.

1985 Further to the Treasury Board circular on the subject, the Treasury Board Secretariat issued new design standards on the presentation and printing of stationery, detailing the layout of signatures and addresses on letterheads, envelopes, notepaper, complimentary slips and calling cards.

1987 Preparation of a new manual. The Federal Symbol changed from the maple leaf with one bar to the maple leaf with two bars (referred to as the flag symbol).

1988 Publication of new manual in sections (estimated completion in 1989) and implementation of the above changes.

Appendix II. Information Canada

In 1976, shortly after the disbanding of Information Canada (the parent organization of the FIP, founded in 1970 on the recommendation of the report *To Know and be Known*) Eric Miller, who had been the Deputy Director of the organization, wrote a report on its six-year existence. It was published by the Treasury Board Secretariat and titled: *Information Canada. April 1, 1970 - March 31, 1976. A Report on Federal Government Communication.* It describes the inception, performance and demise of Information Canada. The issues outlined in the document are those associated with corporate identity: control, consistency, centralization and change.

Information Canada was to be a central agency which coordinated the duplicated communications functions of different departments and cut across boundaries, just as the Treasury Board Secretariat does in the area of allocating resources, the Privy Council Office does in bureaucratic policy, and the Public Service Commission does in staffing (ibid., 12). Unlike these bodies, Information Canada had three constituencies: the "abstraction called government-as-a-whole", the different departments and the general public. Also, in a hostile internal environment, it had little clout (ibid., 15-16). It was a horizontal organization, trying to develop an overview of government communications but pitted against entrenched hierarchies whose members owed loyalty to their respective departments rather than to the government or the people, with inconsistent and ineffective results (ibid., 25, 27, 30).

Information Canada was also supposed to make communications a more two-way affair than the "narrow monologue that many institutions call communication" (ibid., 17). This required feedback mechanisms and research (ibid., 33). Information Canada instituted regional enquiry services to make the government more accessible, and "a computerized publics analysis tool" in order to have accurate data on target audiences (ibid., 22). The government was spending $25 million dollars on advertising and a total of $250 million on communications annually without knowing if its messages were getting through. Miller points out that the failure to achieve a genuine dialogue was a failure of federal policy on communications (of political will) and not a failure of Information Canada (ibid., 19-20. Miller admits a degree of subjectivity in his postscript).

Information Canada was modeled on the Central Office of Information in Britain (itself based on commercial advertising practice, ibid., 36). Agreeing with the diagnosis of the problems of government communications in To Know and be Known, Miller describes how the effort "to bring some consistency to the balkanized activities of the departments" was doomed, because of the entrenched bureaucracy and by receiving only limited government support, both financial and political (1976: 7). The FIP emerged as the only lasting part of the original scheme, and the only one regarded as a legitimately centralized function (see interview with Tom Ford). The basic structure of federal communication was essentially the same after Information Canada as before it:

> The structure of communication as the Government knew it reflected the structure of government.
>
> There were the departments, each responsible to a minister and each administered by a deputy head. Responsibility for informing the public about what a ministry did rested solely with the Minister, within the department, and was administered by a director of information. The Minister's staff took care of communication situations of an obviously partisan character and shared responsibility with elements of the departmental information division for activities related to the person of the Minister. (ibid., 8).

The most lasting success was in graphic design. The Graphic Design Secretariat provided design management and design counsel, as well as developing the FIP (ibid., 30).

Appendix III. The Federal Identity Program Manual

The FIP manual has been redesigned (1987) and is at present being reprinted and distributed in sections. In addition to sections on FIP policy and titles of organizations, the following items will be included in the new manual:

1.1 Design. Symbols, typography, signatures, colours
1.2 Message. Identification of programs and services

2.1 Stationery. Ministers, parliamentary secretaries and their offices
2.2 Stationery. Departments, agencies and corporations
2.3 Forms

3.1 Motor vehicles
3.2 Aircraft
3.3 Watercraft

4.1 Signage. System overview and principles of application
4.2 Primary identification signs
4.3 Common-use and operational signs
4.4 Project signs
4.5 Signage typeface

5.1 Advertising
5.2 Printed material
5.3 Audio visual
5.4 Exhibits
5.5 Identification of shared-cost programs

6.1 Personnel identification

Appendix IV.

1983 FIP Signage Survey: Analysis of Problem Areas in Design and Implementation

The following is a complete list of areas examined in the 1983 survey (see figs. 21-23).

A. SIGNATURES

1) Wrong layout
2) Wrong typeface
3) Wrong title
4) Improper repeat of signatures

B. SYMBOLS

1) "Canada" wordmark applications
2) Coat of Arms: decorative use
3) Coat of Arms: signatures
4) Special symbols
5) Pre-FIP identification

C. NON-CONFORMANCE WITH FIP

1) Mis-representation of federal emblem
2) Non-standard colours
3) Three-dimensional lettering
4) Monumental signs
5) Non-conforming signs
6) Partially conforming signs
7) Non-conforming directory boards

D. MESSAGES

1) Unilingual messages
2) Use of building names
3) Use of street addresses
4) Hours of service
5) Where to? Use of arrows

E. SITING OF SIGNS

1) Poorly sited or integrated signs
2) Well sited or integrated signs
3) Stacked, commercial signs
4) Footings, pedestals and posts
5) Methods of fixation
6) Signs on doors

7) Identification of heritage buildings

F. APPEARANCE OF SIGNS

1) Temporary signs
2) Visual clutter
3) Maintenance, vandalism
4) Oversigning
5) Lettering on transparent surfaces

G. TYPES OF SIGNS

1) Common-use signs; verbal message
2) Common-use signs; graphic symbol
3) Parking control signs
4) Notices
5) Project signs
6) Joint identification/publicity

H. SIGNAGE OF ORGANIZATIONS

1) Parks Canada
2) Canada Post
3) Employment and Immigration Canada

I. CONFORMANCE WITH FIP DESIGN STANDARDS

1) Primary identification signs
2) Directory boards
3) Operational signs

Appendix V.

History of Bell Canada Corporate Identity Program

(Compiled from conversations and interviews with Burton Kramer, Theo Dimson, Jim Donoahue, Roland Lavoie, and Jean Morin (designers), Charles Harris and Ed O'Brien (managers), Lawrence Surtees (journalist, Globe and Mail), from articles in Bell News and Bell information bulletins, and Harris (1977, 1977b), and Surtees (1986b).

1880 Alexander Melville Bell (father of Alexander Graham Bell) sold his 75% of the Canadian patents to the National Bell Telephone Company in the United States. The Bell Telephone Company of Canada was incorporated. The first symbol contained a descriptive drawing of part of the equipment (fig. 7).

1888 The bell-shaped symbol was designed by Angus Hibbard, then General Superintendent of the A.T.& T. company.

1891 Bell (in Canada) was now using an illustration of a line of telephone poles as the company symbol.

1895 According to the Bell archives, Bell adopted the bell-shaped symbol in Canada, bearing the words: "Local and long distance telephone" (fig. 7).

1947 After slight modifications during the intervening period the type was strengthened and the wording on the bell itself reduced to "Service".

1965 A further simplification occurred, with all wording removed except for "Bell Canada". A manual was prepared for the application of the symbol throughout the company. This was done in-house, by the public relations department at the Montreal headquarters, and its implementation was supervised by P.J. McGinnis, general advertising manager.

1968 The name of the company was officially changed to Bell Canada. The "purpose was two-fold; to stress the Company's Canadian character, and to have a short, modern-styled name without the limitations implied by the word 'telephone', and more in keeping with its vigorous role as a supplier of a full range of up-to-date communication services" (<u>Bell News</u>, 1, May 13, 1968).

1968 Bell management was considering a change of identity design and commissioned the Toronto firm of Stewart and Morrison to submit a proposal. The proposal was not implemented. According to my research, the design no longer exists.

1971 Bell Northern Research was formed by Bell and its 100% owned manufacturing company, the Northern Electric Company, to carry out research and development.

1975 Bell Canada bought back the shares in the company which had been owned by A.T.& T. The same year, the two companies terminated their joint servicing agreement, chiefly because of Bell's development of its own research and manufacturing capacity.

1975 Bell commissioned designs for a new identity scheme. The designers Allan Fleming and Fritz Gottschalk, and the design consultant Graham Crabtree, proposed that Bell should commission two groups of designers, one in Toronto and one in Montreal, in the hope that each group would cooperate and submit a joint proposal. The Toronto group consisted of Fleming (chair), Jim Donoahue, Burton Kramer and Theo Dimson. The Montreal designers included Rolf Harder and Ernst Roch. Some of the symbol designs still exist (figs. 38-40). Dimson's design was chosen, but after a big presentation to the board in Montreal it was finally rejected, apparently because it was thought to be too futuristic (figs. 40). Ed O'Brien attributes its rejection to the personal dislike of Jean de Grandpré, the president.

1976 As an interim solution to Bell's graphic problem, the final version of the bell-shaped symbol appeared, a straightforward silhouette of a side elevation, with no curved lines to indicate three-dimensionality, and no words (fig. 7). This was designed by the company's art director, Colin McMichael. He also designed a "stacked" logo, with "Bell" on top of "Canada" (fig. 7).

1977 Jean Morin designed the now-familiar Bell logo, and the blue and silver livery for the trucks.

1979-1981 The various sections of the manual for the Bell program appeared as the program was gradually implemented (figs. 41, 42-43, 46-51).

1983 The company was re-organized under a new holding company, Bell Canada Enterprises. This has its own logotype, designed that year by the firm of Young, Blodel (fig. 58).

1986 To address problems of distinctiveness and the integration of the increasing number of subsidiaries, a proposal for a new logotype was designed by Jean Morin (some of the options considered are shown in figs. 55-57). None of these ideas were developed and implemented, but the program is still under review in 1989 (a process described by Jean-Patrick Amisse, Appendix VII, 524-531).

Appendix VI. The Bell Manual

The manual was issued in parts (see bibliography) and covers the following areas:

Use of the logo

Unacceptable use of the logo

Typefaces and colours

Internal and external stationery

Full range of Bell vehicles

Building signs (Metal, acrylic, backlit and freestanding),

Recommendations for the use of the logo in print and television advertising

The subsidiary companies are not included, and are under review at present (see Chapter 5).

Appendix VII Interviews

INDEX TO INTERVIEWS

Note: After the first mention of interviewees' names in full, they are referred to by their initials. Where interviews were short or interrupted, but still contained valuable information, a synopsis has been included. Otherwise, all the material other than introductory, biographical data is transcribed from tapes.

Roland Lavoie 4/11/86

Synopsis.

The present Bell design was originated by Jean Morin in 1976. Roland Lavoie is the chief designer implementing it "in house". J M is still involved, and meets R L regularly. Describing the difference between Bell's internal organization and professional design practice outside, R L says he is a "section head" but has "art director" on his card (people in graphics don't understand what a section head is, and people in Bell don't understand the role and prestige of an art director). Corporate Identity is located in the public relations department (separate from advertising and marketing).

His main current task is trying to bring the subsidiaries into line with the corporate style. Discipline is a continual problem with semi-autonomous subsidiaries, and with individuals who want to change the letterheads or business cards to appear more important (with gold printing or a bigger size).

Jean Morin 2/12/86

Synopsis

The Bell corporate identity was instigated in 1976 by Charles Harris, VP, Public and Environment Affairs at Bell (previously VP at CN). He went to Design Canada and got the names of three design firms in Montreal and three in Toronto. He had hoped for collaboration but ended up with six presentations. An elaborate slide show (which cost over $100,000) was prepared to present a high-tech solution by a Toronto designer, Theo Dimson (fig. 40). This approach was deemed too futuristic by the board and as an interim solution a simplified bell was used on the company report. Bell then approached J M to write a report, analyzing their requirements. He tried using the bell but decided it wouldn't work. They decided to do the 1977 vehicle fleet first (new colours and new type, and no "Canada" because 1976 marked the rise of the Party Quebecois).

J M worked with an industrial designer, Michel Dallaire, and the corporate design manager, Don Black (now deceased). C H's strategy for the introduction of the scheme across the whole range of corporate graphics was a very gradual one. There was no adverse reaction to the vehicles, so they moved on to the bills. J M describes it as an ongoing process, with annual meetings to discuss progress and fix a budget.

Amongst J M's other clients are Petro-Canada (originated by Lippincott and Margulies) and Via Rail (fig. 62).

Jean Morin 10/2/87

J M's group has three partners, himself, an industrial designer, and a marketing expert, and adopted the name "Axion" in 1987 when it merged with a San Francisco-based packaging design group. The Montreal office now has a staff of 17. He said that corporate identity is changing and is now seen more as an integral part of corporate strategy, "packaging the corporation" and "not to be challenged". There is more emphasis on research than ten years ago. He said the identity updating cycle is 8-12 years and getting shorter. At CN he works with Lorne Perry and at Petro-Canada with two coordinators, one corporate and one from marketing. He complimented C. Harris and Bell on their desire to use Canadian designers. He is very pleased with Bell's cooperation and feedback, citing the development of business cards for their 54000 employees as an example.

Jean Morin. 24/3/1987

Q Could we talk about your training and background in design?

JM My early design education was through a fine arts school in Quebec City, '56-'60 (I was born in Quebec City). I wanted post-graduate education and hesitated between New York and Switzerland. To a North American, going to Europe is always more interesting, so I went to Switzerland and spent a year in Zurich. I was, I believe, one of the first international students who went to study graphic design. There were three of us from the same school who decided to go together. I went to Geneva and Lausanne and then Zurich. I was lucky - one of the directors said," OK, we'll draw you a special course so you can be with first year students in colour and form, and you can be with advanced students in typography". Finally, it gave us a broad overview, and we were very lucky. We were there for a full year, and then I worked for three months.

Q So this where you got your Swiss feel for type.

JM Yes. Switzerland in the early '60's was very interesting. There was Muller-Brockmann, the magazine "New Graphic Design". It was very organized; it was really identity. They had just done Swiss Air.

Q Yes, graphic systems were what the Swiss were very good at in the '60's.

JM Exactly. That's what I just fallen into. So when I came back to Canada, it was a totally different reality. I was a year with the exhibition commission in Ottawa, working on international exhibitions. I was out of my depth. This was not what I was looking for. Ernst Roch was doing the only Swiss/German typography in Montreal, so I went to work with him for a year and a half. Ernst still lives here in Montreal; he is Austrian. Ernst was real Swiss/German discipline - very rigid. Being with him was like the European apprenticeship with the master. At that time there was a design firm in Montreal which took the CN identity project, which was one of the biggest identity projects in that period, and I joined that group in '63. They were just in the first year of the program. I worked with them to '67. Then we did Hydro Quebec. My involvement was always in corporate identity, I've never been a fantasy designer. Fleming was in Toronto at the time, with Cooper and Beatty, and Jim Donoahue.

Fleming was not involved in the Jim Valkus office in Montreal, which was working with Lorne Perry, implementing the CN program. After '67 I went to work with another design firm called Girard Bruce. They don't exist any more. I went to work with them because of identity experience, and we did the Queen Elizabeth Hotel. There were political problems with it at the time. We turned around the identity in terms of the quality seal, as opposed to a way-out design. Then we did Voyager bus, and in '68 I started on my own. It was surviving until the olympics, and because of our experience in big corporate programs, we did the olympic signage system. This was a huge system design project. It was so big we had to put it on computer - something like 800,000 signs were installed. Then overlapping this came Bell. You know the story of that. I started in a very low key with that.

Q From what you say about the current re-organization of your company (Axion) there have been a key group of personnel in Montreal who have formed and re-formed, and who are still a small, close-knit group.

JM In our case, it's like a family. The nice thing is that the Valkus group was a unique office in Montreal. It was so much ahead of its time - there was nobody else who could do that kind of thing, no-one around who had the training. Bob DeVito is in San Francisco now, but he lived thirteen years in Montreal, implementing the CN program, Hydro Quebec and Expo. After this we split, but now we are getting together and founding this company, which is Axion design. The nice thing is that you know you are dealing with people you can work with.

Q Were you determined to stay in Montreal, or were you ever tempted to move elsewhere?

JM When DeVito went to San Francisco, he was very busy and I went to assist him. I told myself it would be a nice place to stay - the whole set-up is there and there's work - I could make a nice life here. I hesitated, but I'm at home here [in Montreal]. I know everybody, all the suppliers and so on. I came back, and I like living here. There is a parallel there. Your personal life enters in to it - the children were going to school here and so on.

Q Could you define what you think the designer's role is in corporate identity, as opposed to that of the design manager?

JM There are two levels. There is the pre-design; meeting the client and so on. Once you get that done, the corporation can absorb just so much of the implementation - there are different ways of doing this (time-scales and so on). Is that the area of distinction you're drawing?

Q Yes, the internal coordination and liaising. Where the designer's role is concerned with asking questions and defining the problem, and with visual control.

JM The designer has the overall vision. You have the whole identity in your head, even if you are just visualizing a part of it. It's like building a Byzantine mosaic; you are adding stones and making sure they all fit. Whether you are establishing a signage system, or identifying a fleet or doing a stationery system, there is consistent communication and feel - it's one corporate language. So the designer's role is to have the overall vision and maintain the overall consistency, so there is a way of doing things. The great thing that the corporation really needs to do is establish a long-term commitment with a designer, because the design staff you have change. New employees always challenge the identity, to have it their own way. They have to accept that they are working within that plan.

The consumer is not as exposed as you are, because you are in to the plan and you see everything. He, once in a while, sees a bill, a building, a truck in the street. He doesn't see it the same way. Identity is a consistent representation.

We were asked to design an identity system for the post office, and I think we did such a good job that they are not in a position to appreciate what we did. We presented them with a system that functioned, saved them money, isn't flashy and doesn't look high-cost. It works, and in the long run, that's what you need; that's what you're asking us to do for you.

Q Does the post office have to relate to the federal identity program in any way?

JM No , they wanted it to be separate. They have trouble creating their identity right now. I think we'll lose it because we didn't sell it right. The identity they have now is an identity of the '70's - very colourful, and it is associated with past problems. So we tried to take that and switch it very slightly to bring it in to the '80's.

With Bell we have a good client who will give you the chance to push things far enough. With something like their fleet, it's been pushed to where it should be. To get there, there were so many flashy solutions that were rejected.

Q Do you have any general thoughts on the future of corporate identity?

JM If you had asked me that two years ago, I wouldn't have hesitated. At one time it was like a blind system; everything was forced into it. I think that now we are closer to the reality of the corporation and its daily activities. How does that translate as an identity? Maybe as a less visible identity, less flashy and more realistic economically. When you review past identity, there is a cycle of corporate identity change which is getting shorter. Everything changes, like corporation structure, so it has to be changed.

I really like the new Esso service station identity [JM's firm, has designed various graphic treatments for Petro-Canada service stations]. I never thought that one day we would see service stations which were so clean, so designed. You have to look at them - they are so controlled. There are so many variables in service stations and yet there is a unified look. It's been really simplified. What I find frustrating is what I call primitive clients, who think that once they have a logo, they have an identity. We try to show them that a logo is not an identity, that they have to look at the implementation of it all. This is what happened at Bell. They (the subsidiaries) all wanted their logos, and they all got their friends to design logos for them, so they ended up with a pile of different types of logo. To me its a total communication confusion. What do you feel about that?

Q I think that as Bell was re-structured in '82, and the various subsidiaries come under the control of different parts of the corporation in response to political, legal and economic change, the case is strengthened even more for a degree of homogeneity. They don't have that. Also, many of the various logos are graphically weak. Some parts of the company seem to be more independent than others, too.

JM Exactly. There is a marketing reason for this. Sometimes they want to play down the close association and want to be perceived as though they are a separate entity. But in some other cases they want to have both - in one area they don't want a close association for a certain public, but in another they want all the support and credibility of the parent company. Also, We are not part of those policy decisions. That's another level of reality; an economic and political reality beyond our reality. We have to adapt to those decisions, and it's changing all the time.

Q I would have thought that at Bell, this would have resulted in dropping some of those symbols and adopting a more typographic approach. Some of them really have nothing to do with Bell. Northern Telecom is a good example, though I know that firm is seen as autonomous.

JM That logo has a lot of retention. It's a grabber. You identify it right away, so in a way it does its job.

Q The relationship between Bell and its subsidiaries, in visual communication terms, seems to resemble that between other corporations and their product, or brand identities. Either the parent's identity has a high profile, or the subsidiary does, depending on current policy. Beatrice has recently been putting the corporate logo prominently on everything, for example, and a company like GM has many identities. Allied, in England, was an obscure conglomerate until the Seagram's battle revealed how many famous names were owned by them. The balance of identity varies a lot.

JM Yes. Its hard enough to be a designer, without understanding all this economic and business policy. You hope that someone sees clearly into all that, and you're trying to translate that reality into design. With Bell, we designed packaging for the first time two years ago. It was decided that we would sell Bell, not so much the product. So we designed the packaging like a Braun identity, it was focusing on the Bell identity. Now, two years later, people change and perception changes, so we're doing a total new line of phone packaging. It's doing totally the opposite; it's really bringing up front the product, the feeling of the product, and it's just very, very quietly signed Bell. It has nothing of the identity; you have to look for it. I think it is the right thing. The product has more appeal. You're buying it in a Bell phone store, so you know the support is there - all the other communication supports the idea that the product has support.

Allan Fleming, apparently, could sit down with the board of directors of a company, and because of his personality, body language, presence, those directors would listen to him. It's too bad that we designers aren't often there, to say, "Before you make the decision, you must realize how it will translate visually". People are visually uneducated. Visual communication is very complex.

Q Yes, one of the functions of the designer is to educate the client.

JM I was put in a role where I was design coordinator (not design director), having the vision of the overall identity. I did not hesitate to go out and get the best talent who could help me, so when it came to signage, I bought in a specialist, and with the fleet I brought in an industrial designer [Michel Dallaire]. I had a hard time keeping him in line, because he didn't understand graphic identity. He would have redesigned the truck to fit the identity. Everybody has been part of the end result. There are so many people involved in identities. Research plays a more important role now; definition of the problem and the process, and so on.

Ernst Roch is a person who has dedicated his life to good design, but he doesn't understand identity (see fig. 39). He will force the people to accept a rigid system, even today. In terms of control and consistency, he is perceived as being a bit rigid.

Ed O'Brien 21/1/87.

E. O'Brien was Director, Advertising and Promotion, at Bell from 1984-86, and prior to that he was Public Relations Manager. He retired in September, 1986 after 42 years with the company.

INTERVIEW

Q What was the primary motive for Bell's new image, to project the idea of efficiency, to reflect change, or to standardize their graphics?

EOB The first (re-vamp) was directed from the top. They wanted us seen as Canadian. They wanted to get away from the Americans because they had bought back the shares that AT&T had lodged. You see, through Northern we had got Interconnect down in the States, which made AT&T an enemy because they hadn't accepted Interconnect, and so we were selling down there. We wanted to make the break and we felt that we had as much expertise in Canada, and I guess this was really born out because Northern was the first in the world with digital equipment. That's where they got their lead and that's what made them. They weren't going to share this with AT&T or anybody, so it was a marketing and economic decision. There was also a bit of a swell, particularly in Ontario, of anti-Americanism (American companies controlling Canadian companies) ... it wasn't such a big problem in Quebec. We wanted a clean, new look, no longer part of AT&T, and nothing to do with the Bell System. In marketing also, the time was coming that there was going to be a lot of competition all over the place. At that time BCE [Bell Canada Enterprises] wasn't started, so we [Bell Canada] still owned Northern Telecom. So basically it was a marketing, economic and cultural combination, driven from the top - the time was right. This last change [a proposed re-vamp, figs. 55-57] was not driven from the top. It was driven by us. Jean [Morin] and I talked, selling my own boss on the idea, which wasn't too hard. He had the advertising job as well, and felt it [the logo] was getting lost - that it didn't have impact anymore. So we spent a number of months going through the whole thing and then told them what we were doing, and they sort of agreed.

Q So you presented a broad analysis of what you had at that moment?

EOB Yes. There's lots of reasons. Charles Harris, at the time of the first thing, had impact (he came from outside, he was our first VP in public relations from outside, he was considered an expert on design management- he wasn't a designer). Whereas they rejected the "football" [an early proposal for a circular symbol, fig. 40] they had confidence and he was well accepted. Unfortunately the VP that we had the last time was on the last legs himself - he's just been pushed out this year after about six years in the company - so they didn't buy it. He didn't want to bring anybody up with him when he was selling it. He didn't know enough about design, and he didn't know enough about the selling points. This is one of the frustrating parts about managing design at my level within the company. When we were with the Charles Harris regime I went up with him, and Jean went up sometimes when we needed him, but at least I went up when we were talking with executives (I had the detail that Charlie wouldn't necessarily have, and so on. I could point out all the things we'd tried that we'd rejected and he wouldn't necessarily have seen). So there was more input, there was more feeling that I could give information back to Jean. Now this time, there was no way. It was lost as soon as it happened. Sometimes these people don't want their underlings to be there because it feels like they're stupid or they don't know their job. But that hurts the job, because the higher up you go, the less you know what went into the design. Design is a complex thing- I've spent many, many hours with Jean, trying to suggest new things, new roads that he might develop - brain storming, if you want to call it that - him from the design angle, me from what I could sell within the company, or what would fit the company. So then when you get left by the wayside and some guy just takes what you've had in your presentation and shows it to them - and particularly when he's on shaky grounds himself in the organization - he's not going to fight how he should fight. So really, in any organization the design job should be with somebody that has some power.

Q Would you say that the advantage of using an external designer like Jean Morin was that you got an objective, fresh look at the problem?

EOB We used to have it in-house, when John German and Colin McMichael [art director] were with us. Colin is still a good friend of mine but he has a one-track mind when it comes to design - what he likes and what he's always done. He'd work like a dog. He'd work nights and everything, doing all the design work himself and sketching and so on as well as trying to manage the overall design. I feel there should be the separation of church and state as far as this is concerned. There should be, maybe, a design group within the company to do some implementation of things because you've got to worry about being cost effective, but as far as the overall design of the company, in other words the design look, you should have outside sources. Even working with Jean, I've gone outside to other designers to get a fresh look, at times on different projects, and I've told Jean this. I've gone to Jim Donoahue in Toronto and got some things from him. Designers can get stale; they can have mental blocks on different things. In my position, not being a designer myself, I had designers like Roland Lavoie reporting to me. Roland wanted to do what he's doing now, which is design management, which I think is a mistake, a very bad mistake. Having both [external and internal designers] it's my responsibility. If I screw up the job, well then they can get rid of me and find somebody else who can do it better.

Q Could you talk about the relationship between internal and external designers roles?

EOB It's difficult. I had Jean, who was basically doing the management design, the total, overall look - vehicles and everything. Roland didn't touch vehicles, he just touched graphics: stationery, booklets, sales aids, that sort of thing. He was not in on selection or changing of design; I asked him for input, but basically that was Jean Morin's job. Roland didn't care for it because he wanted to do the management. He's got that now because the fellow who replaced me has the title, but has given him the job. I suggested Sandra Oban, who has a flair for this thing too, but they left it there. I think it's bad to marry them [design and design management]. For instance in AT&T they did the same basic thing. They had a symbol designed by Saul Bass in Los Angeles. My opposite number there related to Bass and to an internal design crew, and he knew who he could sell things to in the company. He had the same basic problem and we talked about it. His designers would say they could do just as well as Bass (who charged them millions, because he's a big wheel in the States) but I doubt it. Their design was excellent - it's distinctive. So it's a difficult thing as you're always walking between two groups ... Roland does some excellent design work; if you asked the fellow to re-design a tree, he'd make an excellent job of re-designing the tree, but if you asked him to re-design the forest, he couldn't. That's the thing. You've got to step back and look at it on a very broad base when you're looking at corporate design. You have vehicles and you have posters. You also have sometimes to tell these fellows not to bastardize it, but you give in a little because you can see what their objectives are. We don't want to lose the war, but we can afford to lose a little battle, here and there. I'm not saying that a designer couldn't come into Bell and do the design manager's job, but it would take him a long time, because he's got to know the company too. He's got to understand the politics of the company. [On the proposed changes]. We didn't want to lose the Bell and the blue, it has a lot of impact. It would be too much of a change to lose that. We wanted to get out of the typeface, because it is a standard typeface. There's Bell Helicopter too, and every time you see that you think, "it looks like our logo - not only our name, but our logo". With hindsight, we could have got a distinctive typeface in at that time, but that was all we could sell. Jean is an excellent designer. I used to put him in direct contact with our people when it was appropriate to do so, and he would sell them on doing things his way, which was the particular style, the particular feel that we had. Take the re-designed Bell bill. They had a committee on re-designing this bill, and supposedly two or three weeks before they had to have a decision they let me see it. It looked like the old AT&T/Bell System ones (AT&T is separate from them now). So I phoned Jean and told him we had a rush job. He only had two or three days, but he came up with some designs which didn't look like the Americans', and that way we got a foot in the door and sold everybody off. Jean said, "they only let me do certain things". The constraints came from the computer but also from people that don't think of you or think of you in a minor, particular role. When you look at Bell right now, and you look at it from the viewpoint of the average person sitting at home - what are his contacts with Bell? There are very few operator contacts anymore, so you don't have the old opportunity of creating an image through personal contact. Very few people call the the business office, except with a complaint or something, so where do your contacts come in with Bell? Primarily through the bill every month, through the look of the vehicle, through the directory, the telephone booths and through the buildings - and that's why we wanted those signs that lit up at night so they know we're there. We wanted the buildings lit up too, floodlit so they know you're in operation 24 hours a day. But of course we have to conserve electricity.

Q What about other publics, such as industrial consumers?

EOB This is why the brochure program was developed. They all come with the Bell blue and silver look, but you don't want all your booklets the same - you have a different colour in the centre or something like that. They only look the same when you're looking at them all at one time; the guy out there is not. He sees blue and silver, he says "Bell". He has ready, immediate identification of us. Jean and I did a job we had never gone into, packaging. Now in our teleboutiques we're selling Bell equipment, made for us in Hong Kong. It's not Northern Telecom stuff. They wanted some packaging, first for four different types of sets. The marketing people said, "let's get red, green" and so on. After we listened to them for a while we said, "What are you selling in these sets that's different to Panasonic or General Electric? Are you trying to sell the respect that people in Ontario and Quebec have for Bell? What you're selling is Bell, not the set." You depend on people knowing you. They see the colours and they get a feeling of security. We were able to convince them that the only thing they had to sell was Bell. Of course, with that we had some dignity. If you're conservative you don't want the K-Tel approach. Jean did a good job. The fellow that replaced me wanted to get the next lot of packaging done in-house, but packaging is a difficult thing. You have to do some research on it and not every designer can do it. I was liaising with the marketing people in Toronto, who wondered why I didn't use an Ontario designer, but you go where your strength is, the person who knows the company. You should be comfortable with a designer.

Q Could we talk more about the position of corporate identity within the activities of the corporation?

EOB People often say, "This is one thing I can handle; my taste is as good as theirs" - particularly when you've had somebody like me in the job, because my career was not always in design. I came from the operating side of the house (I used to be district manager, running districts down town, etc), so this gives him the opportunity to say, "I don't like this, or I don't like that, or lets change this". I guess it makes them feel good; they feel they should input into the decisions. Very few of them have the sensitivity to manage design. One thing you're doing here is teaching design, and the other one is, within an organization, managing creative people. Charlie Harris, who started the Bell design revolution, if you want to call it that, away from the origins, came from CN where he worked for Donald Gordon at the time the CN logo was introduced. When he came to Bell it was felt to be the appropriate time. We had just broken away from AT&T. The surge of Canadian nationalism made us want to get away from the same sort of a logo, or look, that AT&T

or Bell System had. When he (CH) came in he was gung-ho for changing the design. Bob Scrivener was chairman at that time and this was one of his ideas too, because he was the one who turned Northern Telecom around from the old Northern Electric Company. It was competing down in the States and he really wanted to have a new look, so Charlie Harris put me on this thing along with Graham Crabtree from Ottawa. We tried to get the new look on design, and we got three groups of people in Toronto, including people who designed the old CN symbol and the CBC symbol. They were well-known. In each group there were two or three people, and the same in Montreal. Jean Morin was with Michel Dallaire. From all those submissions, one was picked. This one was revolutionary; one that Charlie Harris hung his hat on. There was a great big presentation of it in a studio in Place Victoria [fig. 40] to Bob Scrivener, Jean de Grandpré and all the executive officers, and the whole thing went flat, because Jean de Grandpré, who was the rising star at that time, looked at it and said it was a football. We were in a position where Scrivener said we had to have something, so Colin McMichael, who was our art director then, came up with the stacked "Bell Canada" [fig. 7]. That was used for a while. Charlie felt he had to give them something. But it was very difficult in some applications, such as small ads, notices and bills - it got blurred. Charlie asked us to come up with something else, so we decided that maybe we could get just the word Bell, because people were just calling us Bell, or Ma Bell. That was revolutionary because at that time the French/English situation was on too, and it might look as though in dropping Canada, we were giving in. We were working alone with Jean at that time (and Michel Dallaire), asking him to implement this stacked Bell Canada program. Jean didn't particularly like it, but he said he would do all our corporate design work. When we decided to use just Bell, he started to do different variations for our logotype. Now with our conservative executive it was felt that, after reviewing a lot of the different typefaces and modified typefaces that could be used, we would go to one that we felt would be saleable - that's why we went for the Univers.

We sold them on the blue and silver. The silver was modified, which was part of the ploy too - you give them two or three. Either one of them is good enough for you, and you let them get into the decision-making. Part of the whole exercise of introducing the Bell was to do the trucks. We put them on the road and we brought the president and chairman out on Beaver Hall and paraded the truck up and down the street in front of them to see how it would look. The colours were designed to get away from the green, that was one thing, and these colours, particularly the silver, represented communications today - the technological age. Silver is usually associated with technology, and that's how it was sold. Hindsight now is that we should have pushed for a more distinctive typeface because our symbol loses itself in headlines. It's not distinctive. It gets bastardized. It was the best we could sell at the time. We had talked to individual officers of the company before presenting it again and they all felt comfortable with it because it wasn't outrageous.

Q So you were both actively involved with the designers and trying to promote the program within the organization?

EOB Yes, there were two roles. One, you had to keep the reins on the designers - well, you've got to keep their ego up, but you've got to tell them what they can't do. You've got to listen to them. They say, "Well, that's design of 10-15 years ago", and they want to win awards for design, etc. You agree with them, but get them to realize that this is the best you can sell.

Q Who's the key person you have to sell it to?

EOB That depends, the organization changes. When Jean de Grandpré was there you sold it to him, then the decision was made. We went through an exercise just shortly before I left, trying to change the symbol, keeping Bell, but using a very distinctive typeface [figs. 56-57]. It was the sort of typeface you see on Omni magazine. It was different, but the other one had been around for ten years. We weren't trying to change the colours, but it was time for a change, and we were trying to marry it in with all the subsidiaries that we have, which are presenting another problem. We've got Bell, BCE, BSI, etc. When you ask who made the decisions on that, it's my feeling that Raymond Cyr, who is now the power in both Bell and BCE, would have bought that symbol, but if you look at the chief executive's job, it's "I have to tell these guys what to do on ten things, and argue with them and fight with them. Here we have something else, it doesn't mean a 'Goddamn' to me. I'll go with what the boys want". So sometimes you have a chief executive who will impose a design scheme because he likes it, you have the chief executive who takes it home and shows it to his wife, because she has better taste than he does, or you have the chief executive who will say, "I'll let these guys make the decision and let them feel good". That's my impression of what Raymond Cyr did. Most of the executives are engineers, and as a result, it was killed, I think, because most of them had put up signs with the other Bell on it and it was going to cost too much money to take down the signs and replace them. We tried to get our foot in the door by saying that the signs could be left up - they were high on the buildings - and anyway it could be done over a period of time. We still have symbols on buildings that date way, way back, some of them because they are put in cement or chiseled in stone, and some because they never got around to changing the signs on these particular buildings. Anyway, that one was killed. Instead, they made some basic rules for subsidiaries that made all the subsidiaries unhappy. They have to have our typeface and they have to be in blue, but they can have different symbols of their own as long as it's always in blue. That made them unhappy because what's going on in the business today with Bell is that the major company splits off little enterprises, letting them go. This has some benefits as far as regulation is concerned, and also the profit picture - there's a lot of tax considerations. What they do is, they take some young hot-shot and they say, "Here's so many million dollars, now go ahead and do it". Boy, he feels good, this is the first time in his career that he's had this great range, so he goes out and hires an outside designer, usually some friend of a friend,and comes up with some weird ideas, and then refuses to budge. You have a hell of a fight then. I had more trouble with these subsidiaries than Bell. They're very sensitive about being told to do anything.

Q So it seems that visual identity is important to many people.

EOB That depends. At different times it peaks. At the time we did Bell, they wanted a new symbol, and they were interested. Jean de Grandpré used to say that he liked the Quebec Liquor Store Board wine glass symbol and he wanted something distinctive. They were a little unhappy when we strayed away from the symbol and went with the word. We even fought the idea of sticking a maple leaf in front of it. We said, "Come on, that's Air Canada, Petro-Canada, the Canadian Government". This time we looked at some more symbols, but what can you do, a Bell again? If you look at the symbols of most phone companies, they're terrible - they've got arrows showing the way communications go, lines showing the road ... "the electronic highway" [fig. 45]. I'm sorry they didn't buy this new look. It was longer and different to our present logotype [fig. 41]. We wanted to get into a colour-coding system with our subsidiaries, excluding Northern, because we don't call Northern a subsidiary of Bell anymore - that's a subsidiary of BCE. It's a very complex company structure now, and they've been moving them around like a ping-pong ball - when the tax situation is better, they move them to Bell or to BCE. We had a vehicle colour system [in the proposal] which left the Bell blue and silver, with Bell Cellular in a different colour, and a different colour for Bell Information Systems and so on. But you can see from an executive point of view, and I'm not always privy to their long range plans. If they transfer one back from another they'd have to change the colours again, etc., so they decided to put them all in the Bell blue, which takes away a lot of the initiative of these other companies. I don't know if they've all got around to it yet. Bell Data used to have a hell of a design, a cheap-looking, computerized logo. But the designer didn't expect them to accept it, which is another thing that designers do sometimes - they give you about ten designs and let you take your pick. This is something that Jean Morin won't do; he won't offer you anything he doesn't believe in. We've had designs submitted by designers and you know damn well they don't really mean it, but they're just trying to get the business.

Q You mention the problem of identity in relation to subsidiaries. How do you supervise general standards of application?

EOB That's a difficult job. Some guy will just write a sign in longhand, and when you see it you write letters saying that this has to be changed because it's contrary to our design standards. You usually get the VP to sign it. It's the toughest job. If you look closely you can see that it's not always the correct Univers typeface, for example. You try and pull off the big things, the ones that have the most repercussions for you - you can't go fighting battles every day. Something that's seen by a lot of people, by a lot of employees; say, something that really distorts the business letterhead - that's important and you've got to step right in. We had a VP who distorted it for his own use. These are the frustrations. If you have a president who says, and he really means it, that nobody messes around with this, that's fine. You have a lot of power because all you have to do is send a letter in to the president or the chairman about somebody mis-using the symbol and he'll sign it, because they realize the value of the symbol. In the break-up of AT&T there was a big fight about the Bell logo. It is an important asset and Judge Green, who was the instigator of the break-up of the system in the United States, made a ruling on who won the Bell logo. We used to use this in the company to prove it was an important asset, a capital benefit. We had someone in the legal department who was an eager beaver, and he would send letters off to anyone who made illegal use of the Bell, anything that looked like our symbol. It has to be protected internally and externally.

Q So you had to liaise with all the departments of the company. Was there a formalized communication system for doing this?

EOB No. A lot of jobs do relate to a lot of people, particularly at Bell. It was the most interesting job I had. I had the film program for a number of years, too, and I enjoyed both of those jobs because of dealing with creative people

Q Did you find that different departments had a different level of awareness of Bell's identity?

EOB Awareness and acceptance, yes. With treasury, you could tell them and they'd buy it. With marketing, though, each man is in charge of a different project, and wants to do it his way. They have knowledge of what you're doing, but not total acceptance, because they know their customers. They think they could do it better - "Well, if I change the symbol a little for this thing, it doesn't really matter that much. I want to get the sales". You have to understand what's motivating them. With the business being so competitive, and the company being so big (with all sorts of projects and all sorts of project managers) some days it drives you out of your mind because every one of them wants it now: "I need it fast and I want it this way, and I don't want to put Bell on it", or, "I want to put it so small that you can't see it" - depending on how they see their objectives.

Q How has the system responded to changes in the company in recent years?

EOB That's one of the reasons that we suggested changes in the symbol, because of all the changes that were going on in the company - the company today isn't the same as it was ten years ago, when the other symbol was put in. That was sufficient for that particular time, but now, it's more dynamic, it's a different chairman, we're breaking it up into all sorts of things. We've got Interconnect; we're selling equipment - it's an entirely different company. In a lot of ways the business itself has shrunk; we've been down-sizing, by about 6000 in the last five or six years. Nobody's fired, but they haven't hired anybody in several years. This is why we thought they needed a new logo.

Q Are there any feedback procedures to assess the reaction to the program?

EOB We have done surveys on design at different times, but basically internally we haven't done much because its difficult to do internal surveys. You've got to do a survey on the people you want to survey to find out what their general attitude is towards the company at that particular time. If you had done a survey of the engineering department a couple of years ago, you would have found they were against everything, because they were very unhappy with their lot in life. Also you find that sometimes management is scared of doing surveys because if the internal people get a hold of them, they can use them for different ends. You're doing a bit of a balancing act in these things and you don't want to put ammunition in to the wrong hands - that may sound a bit autocratic, but you have to retain overall control. There is conflict, and everybody thinks they know a lot abcut what looks nice. Even these poor guys who make commercials, our advertising group - I've seen commercials that were pulled out because the executives didn't like them. We have done surveys outside, used focus groups, shown symbols and got the reaction. We have a marketing research group but we didn't do anything with this last one. We had the survey planned, but we didn't go ahead with it because my boss said that we didn't have enough time. This survey was going to be done in shopping centres, by showing the different symbols and getting reactions to them. There were two locations in Quebec and two in Ontario, we had the whole plot for it, but ran out of time. We had to get it up there to see if it would fly or not, and it didn't, so we saved some money.

Q Would you say that any areas were left out of Bell's corporate identity, and if so, why? How about architecture?

EOB I can't think of anything of any importance that was left out. We have our own group of architects, who don't design the buildings themselves, but select different designers. If the buildings look similar, it would be because of the criteria given to these designers. I didn't get involved with the architects, except on a general basis. Any sameness would come from experience of what we need. Costs, heating and all these things restrict them from going too far. One thing that happened in the last year was that because of the emphasis on revenue they wanted to put advertising on the vehicles. That came from very high levels. Jean and I had to go through a whole lot of time and money showing why it wouldn't work, and what the disadvantages would be. First of all there was only the top part of the vehicle that you could use because in our territory there's a slush zone. The lower part is useless because of the bad weather.

Charles Harris 31/1/1987

CH was Vice-President, Public Affairs, at Bell from 1972 - 1980. He subsequently ran his own public relations company in Toronto and retired in 1985.

INTERVIEW

Q What were the aims and problems of the big identity programs which you were associated with?

CH I'm curious about their (Bell's) attempts to get their subsidiaries into line. We went through the same thing at CN. CN was the first program I worked on and it was perhaps the classic case of a large organization going into a complete design program. At that time this was new in Canada. CN had a problem - they had a lot of diverse activities. They had been not only a railway, but a telecommunications carrier, with hotels and trucks, and they really had a problem getting all the employees of the trucking company to feel they were part of a railway concern. So we went into a highly centralized program at CN, which didn't last for ever, because eventually they all wanted to do their own thing, and the hotels made a good case for not looking like the railway. Originally we said they had to look like the railway, and then eventually the hotels said, "We're in a different business; the railways have a different personality from the one we want to have". So they were allowed, grudgingly, to do their own thing. They weren't with our designers. Lorne Perry was the guy who really did the CN program from the management point of view. He started an attempt to get companies who were interested in design to set up a design management committee who would compare notes on their problems, and they were very active. It started just before I left CN and went to Bell, and he's been carrying it on ever since.

The advertising agency really resented the designers coming in. Allan Fleming did the logo design, and the chief designer was Jim Valkus in New York [fig. 59]. He got the job on the understanding that he would set up an office in Montreal and hire Canadians to do the work, or some Canadians. Actually we had some Americans for a while. One was terribly abrasive; he couldn't stand philistines and walked out. I used to get calls regularly from railroad people, telling me to get this wretch out of their office. But there was a very good, diplomatic guy from San Francisco, Bob Devito, who worked on the CN program, and who Jean Morin knows very well. He lives in Sorsolito [at the time of writing, Devito and Jean Morin's company have recently formed Axion Inc.].

They [Bell] had already moved several large departments to Ottawa (to Hull, actually, to say they were still in the province of Quebec). As VP, I was in charge of government affairs as well as public affairs, and had an office in Ottawa where I spent a couple of days a week. The guy who took my job, Donald Cruickshank, lived in Ottawa and commuted to Montreal. I set up a public relations consulting business in Toronto, ran it for five years and retired. We didn't get into design. Most of the companies who came to us had internal or consultant designers working on their programs.

Q Do you see Corporate Identity Design as strongly related to, or part of, public relations?

CH The administrative end of the program has to come under someone in management and public relations is an obvious place. In some companies, advertising is split off from PR and corporate identity goes under the advertising department, though usually there are more fights within that side than there are in PR. Theoretically the public relations department is the overall custodian of the company's image, or should be, so they usually handle the administrative part of corporate identity. I think it's as well if the person who handles it isn't a designer. There's not necessarily any reason why the person who administrates it couldn't be a designer, but in my experience it was always someone who wasn't. We had an art director at Bell, Colin McMichael, and I suppose he must have resented the design consultants, though he kept it in check. A man in that position tends to think that he is, or should be, the custodian of aesthetics.

Q Would you say that the aims of the programs at CN and Bell were the same?

CH Bell didn't have as many different divisions at that time, it was largely a telephone company. CN had two major objectives: one was that they were looked on as being old-fashioned, and they were in many of their methods and superficial, visual appearances, but they were in the process of re-vitalizing their operations - that was the time of transition from steam to diesel; they were getting into computers and they were going to centralize traffic control - a lot of the old "fly-by-the-seat-of-your-pants" methods of railroading were giving way to modern technology. But the public persisted in seeing them as old-fashioned, so one of the objectives was to create a new face which would be more consistent with what was going on behind the scenes. The other objective was to homogenize the diverse parts of CN into parts of a whole, so that there would be a feeling of belonging to a bigger family. Bell had a bit of the first problem, in that people talked of "Ma Bell". The phone company was thought of as a little dowdy, but it didn't have the problem of welding all the diverse units into a whole at that time, though it may have it now, in spades. We put this out [a poster] to tell the [Bell] employees why we were doing this, and I wrote a piece for the company newspaper. The reasons we gave were that the old Bell symbol was linked in many people's minds with the telephone company. In a way it's like CN, because the telephone company was emerging into something more than just a telephone company, and secondly, the old symbol looked very much like AT&T's bell, and a lot of people thought Bell Canada was a subsidiary. It had been. When I joined the company, 2% of the stock was owned by AT&T - they had a man on the board of directors. By the time I left, they didn't own any of the stock as Bell had bought it back from AT&T and there was no connection. When I first went there, I used to get invited to all the AT&T VP's meetings. We were a member of the family. The third reason was that people tended to think of Bell as being colourless.

The vehicle fleet was the logical place to start because it was more conspicuous than anything else.

They'd been the same horrible green colour for ever. Bell didn't have as many things to change as CN. CN had railway stations which were all crumbling, and that was a fascinating part of the CN program, because we didn't have any money. It was a real challenge. CN also had locomotives, rolling stock and hotels. Bell had offices but not as many big physical things to get your hands on. Apart from the trucks, the rest was all graphics. The advertising was an immediate application and we made a splash there, but there weren't as many opportunities as at CN.

Q As you were in overall control of both Corporate Identity Design and advertising, did you see the two things as totally integrated?

CH I had to bang a few heads. The advertising agencies were very jealous of the designers. We had less trouble at Bell than at CN. At CN we really had to order them to work together. I think it was partly because some of the designers were a little arrogant and not as tactful as they might have been, and rubbed it into the ad. agencies. At CN we had four or five different ad. agencies, one for U.S. passenger business, another for freight, another for telecommunications, and so on. They were very jealous of what they'd been doing. They'd be planning advertising campaigns, and the designers would say, "You can't run a crappy-looking ad. like that". It was good to have that kind of experience behind me when I went to Bell because we made an effort to get everybody together and say, "Look you people are not going to like each other in every respect and you're going to have problems, but you'll make our lives a lot easier if you'll all try to help", and it wasn't as bad.

Q From what you say, there didn't seem to be a major problem with internal acceptance of the scheme. Did you promote it with the general public?

CH I don't think we ran a design ad. as such. I always felt that this was a rather self-conscious way of drawing attention to something that should make its impact through the force of its own merit.

Q Was the schedule for the introduction dictated purely by budget, and was architecture ever included?

CH A lot of it by budget, yes. Also, you picked the parts that were most needed and the ones that were the easiest to do. I don't think Bell's approach to architecture is centralized. If you wander round Toronto, there all kinds of different buildings. Bell developed as the community developed, and I remember a time when the University Avenue offices were the newest thing in the Bell system in Toronto. Now they are in Trinity Square, and there they had a particular design problem. They had a commitment to the city and to the church that Trinity Square church would not be enveloped by something which clashed with it. At Bracebridge, for example, they have two or three buildings which are completely unrelated. The signs were all over the place when we started the sign program. We got together slides and it didn't take long to show the terrible hotch-potch of signs we had.

Q When you were implementing this scheme, how did you supervise the standards?

CH That was always a problem. In the railway, for example, at the same time as our program was going through, there was decentralization of authority, and instead of having everybody reporting up through a vertical organization to a VP in each department the railway set up five regions in Canada - the Great Lakes took in Ontario, the St. Lawrence was Quebec, and there was an Atlantic region. Out west there were two regions, one of which was called the Mountain region. The Mountain region had a guy named Roger Graham, who didn't like Toronto or Montreal and put up an iron curtain. Nobody in head office was allowed to have any authority. He had his own PR manager out there, who theoretically took technical advice from me, but was ordered by Roger to have nothing to do with me. So when we put the design program into play and said, "here's the manual, here's the way you do stationery, stations and so on", this guy said, "To hell with that", and the next thing we knew, I got a letter from him (and I saw an internal memo, and an external letter that he sent out) - he had taken the CN symbol and put it on a tepee. This was the letterhead in the Mountain region. I had to go to the president and say that this idiot was defeating the whole purpose. " If he wants to have his own railway, that's one thing, but if I have any responsibility for it, he'd better shape up". So they had to scrap all this terrible tepee stationery. To some extent, the employees were enthusiastic about the program and took liberties with it, and to some extent that was a good thing, because it meant they were accepting it as something good. Once in a while you'd come across a hand-painted CN. In Bell there wasn't as much of that. Bell had always tended to be a sort of military organization anyway. You took orders and didn't question too much. Ed O'Brien was supposed to keep his eye on those things. It would be more difficult to control today, with BCE. Bell never had any design influence over Northern Telecom, which was always on its own. They had a program at the same time that Bell had - they changed their name from Northern Electric to Northern Telecom and they had their logo, an extensive design program and quite a complete design manual. The printing business never came under the umbrella. Bell Northern Research had its own design program, BNR in Ottawa. Long before Bell's program, Bill Mantle started a program for BNR, which was the most advanced and progressive thinking part of the Bell empire at that time. They were a bunch of free thinkers at BNR who did their own thing anyway. One of our problems in getting the program going at Bell was convincing BNR that it should conform in some way. We even had a bit of a problem convincing the marketing people that the phone stores should be brought in to line. But I'm not aware of any general antagonism at Bell.

Q How about feedback - did you do surveys or polls?

CH We did an extensive program, externally and internally, once a year. I don't think it singled out specifically the design program, but one thing we hoped for was that if the design program achieved its objectives, it would show up in better findings. The surveys were concerned with the general perception of the company and its service. They were quite extensive. When you got all the results, they would tell you how the company was being perceived, both internally and externally. We didn't ask people what they thought of the symbol - it's [the effect of design] difficult to pin down. Before we went into the Bell symbol we did quite a lot of research, both with employees and outsiders, and asked people for their views on this compared with other symbols. Internally, there was some resistance to getting rid of the old ding-dong. It had been around so long.

Q Could we talk about the instigation of the program and the selection of the design?

CH Initially the ideas went before a group of people (at CN) in the public affairs department. I got the president on side before I took it to a large group of VP's, because (I discovered this at CN) everybody took his cue from what the president wanted. If he read it in the wrong way, everybody would say it was terrible; if he looked as though he liked it, well ... The president at that time was Donald Gordon, a real powerful, decisive man, used to having his own way. He didn't like Allan Fleming's thing at first, thought it was really awful, and what we did was to show him lots of applications in the visual presentation. By the end of the presentation he thought it was pretty good. There was one guy with him, the executive vice president, who later became president, Norman Macmillan. Norman liked it immensely. Then we showed it to management committee, which was all the VP's. I made my presentation and Gordon asked them what they thought of it. Nobody said anything for quite a bit, and Gordon wasn't going to influence them. Then one guy said he wasn't sure that he wanted it on his locomotives, and Gordon asked him why, and a couple of others said they weren't sure, and Gordon took them apart. The guy from purchasing said he could see some advantages from his point of view, and then everybody got on side. The board of directors were completely different - when I stopped talking, there was a hush and Gordon looked around to see if anyone was going to have a fit. There was only one guy, a French Canadian called Wilfred Gagnon, who said, "How soon can we have this, I think it's marvelous", and that was it.

At Bell we took it to the president, de Grandpré. I should tell you, we made an earlier presentation with a symbol that I thought was quite good - a 'B' and a 'C' inside a circle - which de Grandpré threw out because he thought it looked like a football and people would ridicule it (fig. 40). I came to the view that the logo, the word symbol, was better than the pictorial symbol. We were trying to get rid of the other pictorial symbol, the ding-dong, so I think it worked out well as this is what people had always called the company anyway. We made the decision on the best scheme, and then sat down with the designer and worked out the presentation and a rational for some of the things, and got some visual applications we could make into slides to show what it would look like. I think at Bell we had people in from different departments, like marketing, to get them involved from the start. We didn't really have an inside design team at the time. We had people who did posters, artwork - about five or six people under Colin McMichael, and an audio-visual department. If you looked around there were quite a few people who had an interest in aesthetics.

Q So you were liaising with different departments, top management and external groups. Would you say that the key person in corporate identity is (what ever his actual title, the design manager) - the person who is responsible for selling, coordinating, implementing and policing the program?

CH Yes. I was always surprised, both at CN and Bell, how little influence the architects had. At CN the chief engineer controlled the architects - they were in the engineering department. The chief architect reported to the chief engineer, who reported to the VP in charge of operations. The architects at CN felt that the whole program should be under them, and resented it. They didn't have much clout. At Bell we had no great fight with the architects; I was unaware of the architects having much participation at all at Bell. They hired mostly outside architects, but they did have their own, for example the senior architect for Toronto (John Langham) had a lot to do with Trinity Square. He later had a position in the telecom building at Expo in Vancouver.

Q Identity programs seem to be instigated at times of change in corporations. Was there an acknowledged need for a new program at Bell before you arrived?

CH I think that, as I had been involved with the CN program, it was assumed that the first thing I would probably want to do at Bell would be to change the image, but I don't know if it went beyond that. When de Grandpré hired me he asked for a list of things I wanted to do - within three months, after I'd looked round. Design was an area which obviously needed attention, and he said to go ahead. He wasn't the president at the time, but he was going to become the president, and everyone knew it. The PR department had a budget, and in the annual budget you'd allocate so much for design (and sometimes you'd have to fight for it). Trucks, and rolling stock with the railway, have to be re-painted anyway. We found that in the process of going into the business of stationery and forms, particularly forms for the railway, that literally millions of dollars were saved eventually by simply eliminating forms which had outlived their usefulness. We were quick to point out to everyone that the design program could actually save them money. The designers kept asking questions, "What do you use this for?, why do you use that", and when the guys ran out of answers, they had to admit that they hadn't used it for years. The designers were good for that.

Q How would you compare the roles of internal and external designers?

CH The internal people tended to be taken for granted; they didn't have much influence. If you're being paid to come in from outside you have more persuasiveness.

Q What was left out of the program, and why?

CH Only Northern (Telecom) because they had always been a separate manufacturing company which had its own distinct identity. I don't think anything was left out that should have been included.

Lorne Perry 17/2/1987

Lorne Perry is Assistant Vice President in charge of corporate identity and advertising at Canadian National.

INTERVIEW

LP There are different kinds of design programs and each one requires a different form of control system to make it work. At Canadian National it's been remarkably easy to administer simply because, from the beginning, we had two things going for us. One was, we had one of the world's most simple and commanding symbols, so that people could latch on to it immediately, and what I've always said is that if you want to look for the authority line with respect to the CN symbol, it is the CN symbol [fig. 61]. It commands its own authority, demands space around it and fights to have order attached to it, just because of the delight of its graphics.

Simplicity and control are built into it, so that has made the job easy. We have also had, from the beginning, the enthusiasm of the top echelons - Donald Gordon and then his successor, Norman Macmillan, and Macmillan was in on it from day one as well. So we had that top-level endorsement, and Macmillan particularly said, "If you need authority, you come to me". We very rarely did, though mind you, we weren't shy about saying we had his authority, and we would get him to sign off on manual sheets, when that was required. He was very willing to do that, so it was a case of rarely having to go to the court of last resort as people knew he was there in the background, known to be keen on it. When we got a sign system going, he asked for some of the letters for some signs at his cottage - then we knew we'd got him hooked, he was the sign program champion from then on.

In succeeding managements there's been a change of atmosphere in which design dwells, as the corporation has changed. What CN stands for has changed, gone through permutations. It was a triangle, a monolith with CN at the top and everything else subservient to it, both in terms of management control and in terms of symbology. It moved away from that into a divisionalized structure, where the divisions, or business units, got their own sense of autonomy, and as they developed that autonomy they said, "How little CN can I have in my image?", because they have more allegiance to there own marketplace - and should have, if they're going to make a buck - than they should have to CN as the owner. That's been a commonplace in terms of big business. Some corporate identities have pulled it back, but we haven't done a lot of that. The way we are structured now, some 70% of all our revenue still comes from rail freight. We lump into that the revenue that we get for handling VIA's trains for them, but they're just regarded as another customer on our list, like General Motors and so on. What CN stands for basically is the railway, and then we have these other business units that are allowed to more or less do their own thing in their own marketplace - that's CN hotels, which bares the name but not the symbol, and CN communications, which is not a commercial company, but a holding company for Terra Nova Telecommunications, Northwestel, and half of CN/CP Telecommunications, which just has the letters C and N, so we let that off to the side for identity reasons. There's Canac International, which is our consulting company, which doesn't have a very strong link. That suits them because they want to be a consultant among consultants, not seen as part of a great big government organization that moves in from a foreign country. We always were diversified but we began to pattern ourselves more after the style of the best of diversified companies, which is to allow those units to do their own managing in all aspects - communications, marketing, the whole bit. So it's a case of getting up-to-date in management structures and style, even though we've been diversified for a long time in a modest way (it's never been more than 20% of our business - that's things other than rail freight).

To come back to the rail side of things, I see our identity scheme as being entrenched and under no threats. It continues to be enthusiastically and faithfully applied and we keep injecting upgrades of various types, like the diesel scheme. That scheme came in in the 1970's. Before that we used to have the CN symbol in giant scale on the side of the unit, and we've since moved it down to the front end, on the nose, and used diagonal stripes. But still, when you put that diesel next to the earlier one, there's still a harmony to them. It wasn't a radical change, but an evolutionary one. We did have diagonal stripes on our passenger diesels from the beginning, then we put them on all our diesels, and now of course we don't have any passenger diesels.

VIA happened in 1979. It was in 1976 that we started the process of segregating our passenger business as a separate management unit so that we could isolate the costs, and the management of the time felt that the way to do that was to give it an identity scheme of its own, different from the rest of CN, in order that it could be recognized for what it was (a great burden on us financially). It was costing us 60-70 million dollars a year to run, and the freight had to bear that load. We began that program in 1976 and invented the name VIA (it was VIA/CN), we put the yellow and blue colour scheme that you see now on the trains and created a lot of hoop-la about it in our advertising. I credit the design scheme with causing the separate company structure which later emerged. It was done by Gagnon/Valkus, which became Corporation Arc, which still exists. Pierre Lessard bought it into the Morin/Lessard/McInnis family (they still keep their individual companies but operate under one umbrella. So it goes all the way back - Gagnon/Valkus was preceeded by James Valkus, who was in charge of the original CN scheme. Valkus had all the design schemes done - everything except for the holes he didn't have the symbol for. He even had diesels with a blank on the side - he knew something was going to go in there and the approximate proportions, but he didn't know what - it was an amazing process.

As to other control mechanisms, we had a series of manuals, but ours is unusual. Everyone thinks of a book you put on a shelf, but ours isn't like that. Its a series of standards that have been promulgated -

designed and then pushed off to the departments concerned to administer. So for motor power and car equipment, which is the biggest application of all and the most highly visible, and the hardest to keep up, with the big scale and so on, there are 30x40" drawings, standard engineering drawings, painting lettering diagrams, and there must be 600-800 of those. That's the manual - wherever anything is painted, those drawings are there, and that's the only place they ever need to be, you don't have to have them in a book on a shelf. We have a standards book in our administrative services division for letterheads and so on and we've got everything channeled there, so nobody else has to have them. We've never gone for a book system where we've used it as a big brag or an ego piece to have on everybody's shelf and never get looked at. We've only made manuals where they're needed, and in whatever form is most suitable for that group. Manuals are expensive and only a few get well- used.

Q Does each division have its own person who looks after the program?

LP We don't even have a person in most cases. I know who to go to and who comes to me. If it's something in equipment it's the assistant chief of motor power and car equipment who calls me up, or even one of the draughtsmen, who says, "Hey, I've got this I'm working on and it doesn't seem to work, what do I do next?". People know that I'm the channel - 98% of the stuff rolls along and it's just a case of taking a peek at things periodically. A guy phoned me the other day from our finance department and said that the design for the cheques was done years and years ago, when was it? I said that it had to be back in the early 1970's. He said that they now had a security problem and it had to be re-done, so we thought it was a good time to have look at the type again. They came up with all the options and the way they print them out, so I could have a look, and it went to Morin/Lessard/McInnis. I keep a running tab with them there - we guesstimate what the demand will be for the year in terms of hours. All I ever pay for is the hours we've used on the projects we've specifically agreed on.

Q Could you say some more about your role at CN ?

LP The authority line is the chairman and the board of directors, then the president and CEO, and then I'll give you the organization which is just emerging, because we've just collapsed some groups together here [LP drew a chart, see fig. 60]. I'm AVP of public affairs and advertising with specific application to advertising (whether it's commercial or corporate),

corporate identity, internal and employee communications (newspapers, etc.), and a couple of other things - historical, archival and so on. The general manager has media relations, shareholder relations (that's Ottawa - one shareholder), and audio-visual, which is mainly a support serv.'s to media and marketing communications. So we split that way - if it's all that hustle and hurry and quick response, then this guy has it. If it's slightly more laid back, with more planning and a longer range, then I have it. Corporate identity is done with no staff. All my advice and counsel comes from Morin/Lessard/McInnis in that area, and we have justified that on the grounds that some 90% of the design that is commissioned by CN is done by them, and the part that is done by them controls the rest. Therefore it had better stay, for the sake of continuity, with one house (a house that we respect and honour in terms of their quality level, their ability to see what's coming, and so on) rather than keep shuffling it around for the sake of sharing the wealth.

Q How does this work out when you want to use the CN logo in an advertising campaign in a particular way, do you refer it to them?

LP We've used both methods. We had a case recently where we had an advertising campaign that was based on diagonals in the ads., and when you've got type that runs down in diagonals, and the CN is straight, you think that maybe this a case where some flexibility could be introduced in respect to the CN - could it go italic? Does it suggest something about the future? Does it do something different? There's nothing graphically wrong with it, but do you want to do that? So, back it goes to Morin/Lessard/McInnis for that kind of study - "Draw me the grid for the italicized CN at this angle. Let's see what it looks like and you tell me what you think". In the end we backed off it (we wanted to keep it geometric and not get into optics on the curves). That's the kind of thing we get involved in with them. Sometimes we get them in to knock heads together with agency designers. We were also involved with the design for inter-modal piggy-back trailers, and that got us into a discussion with the designer at the advertising agency, because he was dealing with it in a very marketing, advertising-y context, but he was dealing with equipment, so we got the overlap going there and it was a good dialogue. We never find that's a constraint. I find that if there's a difficulty about it, it's from the agency side. I never have a difficulty with Morin/Lessard/McInnis talking to anybody - they're not that type of people. They just want good results and there's no sense of domain, whereas with agencies there always is, but I just tell them the lay of the land, and what I want, and to just come back with a joint result, please.

Q Other people have told me that there is often friction between corporate identity and advertising/marketing, because identity relates more strongly to corporate strategy than to the selling of goods and services.

LP Yes. JM has been involved in this recently in the marketing of telephones at Bell, a conflict with Bell's pure and simple identity. One of the interesting things about this company is that we have commercial advertising in the department of public affairs, not in the marketing department, and the unit that handles it is called marketing communications. It is unusual, but it's the nature of our company. I've talked to a number of other crown corporation people and we all share the same concerns over this. Crown corporations have a single shareholder who is also their regulator. It's most distressing that that should happen. It means that your communications have to be tremendously coordinated. The CEO is responsible to the Minister of Transport, to the transport committee and to parliament, and to cabinet, for every decision of all his people, and those usually manifest themselves in a communications context. The CEO's real job is to keep CN out of question period in the house. Advertising therefore has to be managed as part of the total communications context, with all the other slices of the pie, or it's going to go adrift. We rescued a number of things by that control mechanism.

Q What about government regulation?

LP Bell is more vitriolic about it than we are. For us, it's inevitable - we're government owned, so we're going to be interfered with. We try and keep it at a distance, but it's automatic. At Bell it's "Hey, we're here to make a buck - how can this happen to us?"

Q Internally, do you keep identity separate from marketing (with reference to Ed O'Brien's remarks) ?

LP It's not quite the same thing for us. The differentiation between our internal audience and our public audience is clearer here. Bell people are all customers, all telephone users. Whereas precious few CN people are carload shippers (they might have a trailer load of furniture to move sometime, but I'll bet the company is paying for it). They don't think we're trying to flog product or anything. When the CN symbol is attached, it's management talking to them, theoretically about something that is of interest to them. Our identity scheme has always had a positive response. It takes a lot of credit for holding us together through some tough times. I guess this may happen in other industries too, but with railway people - with railway culture - there's a very strong sense of identity with railroading, and secondly, with the company - "My company". There's a complete and utter distrust of the management, who're "A bunch of crooks and out to get me", and so on. They make that split, and it doesn't bother them. "What they're doing to me today, that's the management and not the good company I work for". It's very funny. The union movement is tremendously strong and active in CN, and I think that builds an alienation with management, but they are dedicated and proud of what they're doing. They rise to emergency occasions like no other industry we know. They're individualists and they fight hard to avoid getting moulded by the conventions. The design program has done a lot to help overcome their attitude. It has produced designs that have drawn employees along, as opposed to the feeling of imposition and obligation. We involved them when we were doing passenger train uniforms, involved them heavily, both at the grass roots, by going out and doing field surveys and so on (finding out what was wrong, and how many pockets were needed). We also involved the union general chairmen, which is a national group, in the uniform process. We got them to vet proposed designs, look at the cloth samples, and give their comments. They came on board very readily, and they became salesmen on that. The uniforms were all made to measure too, not off the rack, so they felt they were for them. You always get complaints, whatever you do, but it went pretty well. At one point we went away from an authority-figure symbology and got a lot of reaction against that. They wanted to be seen as the authority figure on the train, and they wanted the trappings that produced that image, so we put back the brass buttons and the bars of service on the sleeves. That made their authority stick with patrons who were out of line - they're the highest authority on the train, and where else can you go for authority on the train? You can't call the cops when you're rolling along at 70 mph. VIA want to have a younger image than some of the old-timers present, but that's their problem.

Q What about feedback generally?

LP From the beginning, the design program was based on research. We went out and did a public opinion study, nation-wide and regional, with adequate size groupings to get statistical supportive data, and that set the framework in which the degree of modernity and the look of things would emerge. Then we went with the CN symbol, to have that tested before we implemented it, to see what the public reaction would be, and also, on the technical side, if it could be read at speed, how was it from angle viewing, how resistant was it to corrugations, what about dirt - we got the research department to go out and sample the colours, samples and shades, thicknesses and degree of dirt on equipment, and put that over the CN to see how it would stand up.

All the public opinion stuff was commissioned from research houses, with us contributing to the questionnaires. That became a benchmark which we then repeated after a few years after the program had been implemented, and we've been doing that upgrading and public attitude study all the way along, so we track our image very carefully, and we can, in the period in we're taking the testing, spot what's happened in the immediate preceding months. You may have had a drop, but you know why the drop occurred by the events that took place, so you can make judgements. It's almost impossible to isolate the impact that the visual side of your image is having on opinion - it's coloured by events all the time, and we're in the news, being a high-profile company. We try to sort it out and our management is very interested in that. They want us to interpret what we hear, and then they'll challenge us if they don't agree with our interpretation. Obviously, corporate identity is just one of 15-20 factors that we're looking at. We go in phases here with firms. We used Russell Kelly for a number of years, then we switched to Goldfarb for a while, and then we switched to Decima. We also get the Decima Quarterly, the compendium that they do, as well, plus we use an Ottawa-watching research house, which does a continuing monitor on the legislative process and the issues that are of interest to us.

Those things will often influence, in an oblique way, corporate identity. You'll start to think, sometimes, that maybe we need more influence and maybe it should come through in the corporate advertising (how you should look and feel - maybe more gutsy and bold, more laid back and authoritative, or more appealing and trying to win - that attitude shift). It'll come through a combination of visual and verbal areas and they all add up together. Paul Myles of Goldfarb, in Toronto, did research for our corporate advertising. Allan Gregg of Decima is very good on relations with government and the legislative process. generally on the environment in which we dwell. We then make our own interpretations with respect to advertising, corporate identity and so on. Myles has done a lot of work for Ford, both in the States and Canada. The tecnnique that Goldfarb use for selecting the sample is very interesting. They have developed a ‸eries of questions that they can go through with the person, and they do this with cut-off points in the questioning. They feed the answers into a little pocket computer which says very quickly whether the person is matching the characteristics of the sample that they want. That way they don't waste time - if by question three you don't fit, the computer will know. It's a value thing - if the person is really a belonger, a joiner, or a mover and a shaker, or a leader - they've got all these categories with the profile around them, and they're not mutually exclusive. The edges are fuzzy, but you can go in on that.

Sometimes you want to find where you're going with the opinion-leader segment, the movers and shakers, because by and large the rest will follow on if you do it right (but sometime later, maybe quite a lot later). People are still calling us CNR, people still think we have passenger trains and we go through it so often with them, they're always two steps behind, and yet we know that the opinion-leader segment is fairly aware of what's been going on. In the formal research, they do questionnaires in shopping centres. They set up a little office in the shopping centre if there's visual material. It has to be face-to-face. They corral people and bring them there, sit them down and pay them a few bucks to be a subject - but you have to have male/female split etc. - all the demographics have to fit. That's called quantitative, but the other sort, qualitative, is one-to-one interviews or focus groups, where without any quantification as to how broad this feeling is amongst the population, you want to find out if the feelings are there. So you want to know, how's this design going to land - are there stumbling blocks? If there are two or three stumbling blocks, you don't care whether they're widespread or not. Goldfarb are skilled at both of those techniques. Also, in terms of our marketplace, we do a lot of research with our market segments, and customer attitudes and profiles. Most of the time we have some research commissioned, through public affairs.

I have dotted-line relationships with the five regional public affairs offices, who are my field watch-dogs. I'm also linked up with other departments. Finance are important because they're publishers - we get into cover designs, layouts and so on, besides the cheques. You do two things: maintenance is one, but I'm also conscious of the need to be looking for minor up-grades here and there, to re-tune it and take a fresh look at certain aspects, otherwise it won't stay alive - it'll start to look a bit stale and to coast down hill, and then someone will start to say that we need a new symbol. In terms of value for money, for a big company it's hard to justify and judge things like this, which seem to be a bit of a frill, in times of financial fluctuations. At one time in the late sixties, after we'd had the design program basically under way and well on its way through its phased implementation, we came under scrutiny - "What's the worth of all this, how can you justify another $100,000 when you've already done it all". The answers that we came back with were that any project that we touched had a payout in strictly mechanical terms. How much was it costing to apply the colour schemes we had before compared with how much is it costing now? How much does it cost to apply a standard letterhead compared to 35 different letterheads? How much was it costing to prepare standardized business cards compared to the way we have handled business cards before, at the mercy of the local supplier in each town. The answers came up with savings every time.

Then we said that this was quite aside from the value of all this in terms of its impact on the impression that Canadians draw of us every day. We know that can't be quantified, we do have this base of lower cost applications in just about every instance, and improved methods to the point where we require fewer people. Even with the signs program we went out in to the field and found everybody with a paint brush in his hand, and gave him the tools to let him do it properly - pressure sensitive letters and rules for putting them down. It wasn't long before the local people started to say that if all the letters were applied at one location, and in the most efficient way (with a vacuum press) we'll save a lot of bucks on sign painting. Then we gradually centralized until we only had one sign shop in the system. We didn't even plan to systematize it for cost savings. We were only systematizing it for order and graphics, and in the end the company devised the schemes to save the money.

Q So you have good feedback systems.

LP Yes. We work at it. As you go around you keep seeing aberrations and stopping them with cease and desist orders, but those orders are always on the basis of "We can do it better for you than that, so that your job will be easier, and incidentally, you won't get any more rockets from head office".

Q So a strong identity has helped internal communications?

LP It's traceable - our labour relations people can trace it right into negotiations. There are messages which are, maybe, unintended, but they're there in what you do and when you organize and set up something orderly. There's a message in the fact that its orderly, that there's some thought behind it. That's the thing that hit the employees, that we knew how long it took to paint all the cars in the system. It changed the attitude in negotiations - rather than defense mechanisms for every job, saying, "Let's plan for the longer term". So it's helped to mould employee attitudes and to coalesce groups; to make them feel that they're a part of something identifiable inside this great big CN. We keep saying that, "It doesn't necessarily buy you having your own symbol in that unit, but tell us what your communications problems are, and we'll solve it within the CN design framework. We'll give you an identity package which relates to your area of business, and it won't fight with the overall thing, so that you get what you want and it won't become a competitive symbol". One of the things that we've tolerated - if you were being an autocrat in terms of design, you would say we shouldn't - is some aberrations in terms of design. Some group decides, "We need the rail profile, an engineering ring and a cog wheel, and that has a CN on top of it, inside the molecular movement circles - boy, have we got a symbol". Then it gets cast in stainless steel and put on a wall before we ever hear about it. The engineers have draughtsmen who can do that. So we let that happen in a corner somewhere, but if they want it in the annual report, forget it. We can allow this because of the strength and power of the CN. I don't believe Bell can. They have a different kind of thing altogether - it's a none-symbol, almost the antithesis of a symbol program. They've made it work by very thorough implementation and control, and the spaces around it are very managed. It's almost Jean Morin's triumph that without a corporate symbol, you can have a very strong corporate identity program. I don't have to have such a strong graphic standards program. The strength is elsewhere. Depending which elements you have to work with, you have to push in different directions, which require a different kind of organization and clout in the company.

Davis L. Masten 8/4/87

Davis Masten is a partner in the research firm of Cheskin and Masten, Palo Alto, California. The firm specializes in the research of corporate identity. Mr. Masten visits Montreal to discuss possible research programs with Bell and CN. Figures 20, 24, 25 show the company's approach.

INTERVIEW

Q Could we talk about the role of research, particularly in identifying and addressing the target audiences. It's in your list (fig. 20).

DM That list is just the part of the process that says, "Hello". For me to do my job, we need to cover these points and more, before the design process begins. Once the design process begins, we fan out in a whole variety of techniques that are not covered here. The aim of research is to help the client make more money than they would otherwise. That's the basic. I'm not taking anything away from inspiration or brilliant strategy. What we're doing is building a platform, by which the creative part of the design process is better facilitated to meet the communication needs of the corporation, which are hopefully the needs of the audiences.

Q How would you describe the relationship between brand image and corporate image?

DM Not an easy question. In terms of the corporate image, the corporation has to speak to so many, more varied audiences than a brand, typically. The number one thing that's going to be on the chief executive officer's mind (of a corporation of any size - assuming it's not privately held) is the price to earnings ratio. That's something that typically doesn't come up in brand discussions, but is paramount in corporate discussions. I tend to be rather monetarily oriented. You invest in communications to make corporations more money than they would otherwise make. They have a lot of things in common, in that hopefully there's some permanence to them, and there's a distinct personality in either situation, whether it's brand or corporation. But let me give you an example. We've studied this kind of thing a lot - with 3M (3M in St Paul, not Canada). We've done a lot of work with 3M as a brand and a corporation, and with Scotch as a brand (and how that differs from 3M as a brand and 3M as a corporation) and then what symbolism can be built into 3M the brand and the corporation. They use a lot of plaid, more than anything else. We've studied those kinds of relationships. It's always easier when a corporation has a distinctly different personality - a different handle - than they have as a brand, because then it's very separate. But 3M sandpaper modifies the perception of 3M the corporation, which is a bunch of ultra-sophisticated chemical engineers that have great compounded growth rates - it's a very different animal. So it would be nice to give you a real quick answer, but I don't really believe there is one. One of the things we strive for when they are the same, as in Hewlet-Packard, who's corporate identity we're working on right now, is to get them to understand, culturally, that who they are as a corporation is, to a large degree, those core associations that differentiate them, Hewlet-Packard, from whatever business they're in. We've been helping their management to understand what the principle core associations are of the corporation, then, when it gets down to the brand level, what the core associations are that carry through, and what you can modify without risking the core (motherhood) when you're competing in specific markets.

Q. So it's a balancing act.

DM Right. I was on the phone yesterday with Proctor and Gamble. Should this new something be under an umbrella brand, or should it be modified by the umbrella, or should the umbrella not be there? It's a tricky problem for any corporation. It depends how sophisticated your audience is. Most of them won't care in the first place, but they will have a gut reaction. So their rational reaction, or response, is going to be, oftentimes, misleading, because their gut reaction is often entirely separate. That makes the research fun. But when you get to your security analyst (who's just a well-paid reporter, typically) they'll understand just what makes up an R.J.R. Nabisco, but the person on the street doesn't have a clue. Nor should they. Then depends on how close you get in - if you're a packaging supplier, you may look at the whole thing and say, "God, huge business!", whereas if you're an ingredients supplier, and you only supply flour, then there's no reason for you to give a shit if they're in the tobacco business, and you may not know that they sold off say, Sealand containers four years ago. You have all these different awareness levels that make it even more complex, so there isn't a simple answer.

Q As your work is so involved in corporate strategy and change, could you talk about the place of corporate identity in change?

DM What is the role of corporate identity in a company in transition? I define corporate identity a little broader than most. Identity, to my mind, deals with design. After that everything is fair game. Anything that any public - internal publics, external publics, anything that the corporation shows forth, is their identity. Fine, we can talk about the logo, and get into debates about whether that's the identity, or you can get into the architecture (interior, exterior) signage systems - sales literature and so on. It's all an opportunity to affect attitudes. One is able to modify attitudes, and attitudes, again, are conscious or mostly, not. I think of corporate identity as an inexpensive way to lead people to the attitudes that you want them to get to (assuming that you're not full of bullshit; integrity is always the key). You can manage identities, but if you lie to people, you're going to get caught.

[At this point, Jean Morin and his partner, Ian McInnis, entered the room].

DM I just defined corporate identity as virtually everything you could see, so that the whole idea of an identity is to shift attitudes and to manage those attitudes. As you shift you want to give people a sense of where you're leading them to (typically, management is only so good at that, from a communications standpoint - it's always very difficult to define those things for yourself) and I think design gives you a unique perspective on that, that's different to the process that an advertising agency will go through, for instance. Identity specialists bring forth a whole different sense of the vision, which oftentimes deals with the finesse side of things, as opposed to the power.

Q So your definition of corporate identity is a global one, which meets more specific areas such as advertising, marketing and so on, at different points.

DM I think that's fair. I think I'd be careful in that identity is just a form of communication, but I wouldn't disagree, speaking in those macro terms.

Q Could we talk about how you liaise with companies, and with designers? What do most companies expect to get when they contact you, for instance?

DM Most companies don't know what to expect. They sometimes think they want a new look. They sometimes think they don't have a problem, but want to check it out.

IM Did you get into the difference between the short term and the long term? Advertising and identity, though related, tend to be two separate things. An identity change has to be a significant change for the company, whereas every year there's a new nuance in the marketing group as to which direction they're going to go - which strategy they're going to use - so they can change their advertising for six months or a year. But the identity is there for what we in presentations refer to as a minimum of seven or eight years, and often, for corporations like CN, it's twenty years with no appreciable change from its original identity.

DM There's the context of the term called "permanent media" that's used by a number of people to differentiate. Identity is not tactical, although it can be in its immediate execution in that it goes after those core associations that we were talking about earlier.

Q Could you talk about strategy and identity?

DM Identity design and what it can do for companies is not well appreciated. Many of the companies in the part of the world that I live in, silicon valley, consist of a bunch of engineers who think of design, first of all, as integrated circuits. Then eventually they get to this trivia called design - "Put it a box and that's good enough". My point is that there is not, for most of the world, an obvious link between identity and strategy, to start with. To my mind, an identity should be just a clear articulation of a corporation's long-term point of difference; what gives them their differentiating edge. By definition you have to have that as part of the strategy. If you don't understand the strategy, and if you don't force issues around the strategy and create openings for management in ways that they are not, typically, trained to think it through, then you're not going to be able to develop something that's going to last very long. Just as design is not taught, strategy and design is not taught. These are not issues for brand managers, who need to worry about performance in six months. These are clearly long-term kinds of things, and one of the things that research can help in that process is that it can often facilitate two things. One is that it can make decisions go quicker because what happens is that unless the CEO is real comfortable making the decision, oftentimes they like to be grounded. Management and corporations nowadays are numbers people and quantitative research can provide some numbers that hopefully are accurate (not necessarily). Within that it can facilitate decision-making. The second point is that sometimes, in the absence of fact, everyone's an expert, and so often management is very scared to make anything but the most evolutionary type of change. When they don't have a basis in reality for understanding just what equities they have in their visual identity, then they say, "It's no good", if that's the conversation of their folklore. Within the corporation it's either great or it's horrible, typically, and they don't know how to dissect that - how to understand it. We've been in situations where we've been working with our associates in San Francisco, for example with the Memorex company, who felt that their identity was just dandy. They were just testing it out because they research every other part of their process, but they thought it was great. We were able to find out that it wasn't, and to show them, with quantified data that intuitively passed their test of reasonableness. They were able to go farther in their identity change than their management would have ever considered, because they felt confident about it and they'd identified what some of the problems were. Research is not typically thought of as a facilitator of major change. Typically it's thought of as a club with which you keep the creative people in line, and I don't buy that.

Q So your role is that of a cultural analyst and consultant?

DM Check. Very much so. You need to do that to help corporations to figure this stuff out. Everybody's scared of it. People don't understand it, and they don't give it enough respect.

Q So one of the key audiences you address is the management group themselves.

DM Check. We have just completed a phase one process like this, where we talked to a hundred and eighty senior executives around the world from multi-billion dollar corporations. That's very large, but it can certainly help to develop a consensus beforehand and get people on board.

Q So you build a profile of what and who the corporation is. As your company doesn't do design, how do you then relate to, and work with, designers? How about briefings, for instance?

DM Depends on the situation. What often happens is that the client comes to us, and they don't know what to do. That's different to them having an existing identity and designers that they've worked with for years. We're still willing to get in there and do what we can in any case. This is not true of all designers, because a lot of designers don't talk well, but there's a perspective that designers bring to bear on situations that's real different, so we welcome designers in the process. There are times, when it's real live research, when it's best to let the researchers go do the research, but we often work strongly as a team, designer and researcher, and are quite candid, but yet quite independent.

Q I imagine that can work well, as designer's are trained to ask questions too.

DM Yes. We are skilled at indirect methodologies when it comes to asking questions, and there's a certain amount of value in that. We were hired on a project recently, and this often happens, where we came in independently, because in a corporate identity change, they're not sure, if they go to just designers, if the designers are going to tell them that it's a design change that they [the company] need because they're designers, or because they need to change.

Q So it's a source of reassuring objectivity. Very briefly, what's your own background?

DM I have degrees in marketing and psychology, but I primarily learned this stuff through Lou Cheskin. Strategy is what's always interested me. I had five-year plans when I was fourteen, and so ... it's kind of sick and it's screwed up a lot of my life, but long term planning is what comes naturally. Cheskin is the research genius. The issues that I enjoy most are the strategy ones.

Ulrich Wodicka 21/4/87

Ulrich Wodicka is senior design advisor on the Federal Identity Program (referred to as FIP). He has been there for 14 years, starting three years after the inception of the program in 1970. The program is part of the department of Information Management Practices at the Treasury Board of Canada Secretariat, whose director, G.W. Bethell, sanctioned my use of this case history. Information Management Practices also controls Access to Information and Privacy, security and other aspects of government communications.

The FIP covers all government departments, which previously had approximately 30 separate logotypes. Crown Corporations and other organizations which are in commercially competitive situations are exempt (a total of 21 in 1974). The chief role of the FIP is advisory, as it is with the Provincial Government's identity programs. 18-20,000 government facilities are included in the FIP across Canada, for example, with no known total number of signs. Wodicka says that there must be millions. Though several surveys have been conducted, the sheer vastness of the project has led UW to stress communication over design purity. He has grown more interested in the broad issues rather than the strict application of grid systems.

INTERVIEW

Q Could you give me your view of what the objectives of the program are?

UW Basically, it is the consistent application of the symbols that the government adopted. Just as important, of course, is the aspect of the two official languages, which makes our program unique. In my opinion, having the two languages side-by-side consistently is probably as important as a recognition factor as a little symbol. Actually there are these three elements that are used consistently which immediately identify us as being federal. Then naturally we have the related aspects that deal with the standardization of design and materials that in an operation such as government with its size, has certain advantages. You could probably achieve that by means other than corporate identity, which just attach to the program for administrative reasons.

Q What was the first step in the implementation, the language issue?

UW I wasn't involved in the first three years of development, so I can't speak on that, but several things happened at the same time [see chronology]. The task force on government information really lead to Information Canada and then the FIP, and secondly, the official languages act which was passed in 1969, which created the demand for the federal institutions to project the visual aspect of the act. That's when we established these rules for the side-by-side handling of the official languages, and even though we dealt initially with the signature aspect, the implementation naturally then extended to texts in general and this standard, side-by-side treatment became a major feature, going much beyond the original objective of the corporate identity.

Q The signage came later.

UW Yes. The initial work was focused on stationery and forms - the things that bureaucrats use on a daily basis. We started working on signs several years later, and only issued design standards in 1979/80.

Q Your program is well known abroad.

UW It is interesting that, especially abroad, we are well recognized, and some reference is made to Canada's program. The Centre Pompidou in Paris is preparing an exhibit on corporate identity in the public sector, in spring of 1988. They selected the program as unique amongst identity schemes for public institutions. [See bibliography for a full citation of the catalogue, Images D'Utilite Publique].

Q On a program as big as yours, you must have chronic problems of standards and supervision. Is there any official method of inspection?

UW It's more or less self-regulating. In the beginning, we saw that the designs were executed and reproduced properly, and had a habit of approving different aspects, where departments had to come to us. But, considering the size of our operation here, it just doesn't make sense, and we also quickly realized that amongst the 30 or so organizations that we deal with (the departments and agencies) we certainly have some that are very design and quality oriented and will do a good job without question, and many others who are not oriented to corporate identity and design - all the things that we feel are important. They do their best, but it could be a lot better. We feel that it will probably come along whether they want it or not. It usually depends on the individuals who are involved.

Q One form of control must be the centralized production of signs.

UW Yes, that certainly helps to establish quality. On the other hand, in many other areas, especially publications and advertising, there is really no centralized control. These things are prepared all over Canada and the further you get away from Ottawa, there's a tendency to work a little more independently, and from my experience it's probably a little simplistic to expect that aspects of design excellence that we take for granted in central Canada are looked at the same way in Newfoundland or up in the North. Every region has its own concept of design and quality, and you have to expect that a range and a calling card produced in the smaller centers will not have the same quality.

Q Do you poll public reactions?

UW There was a Gallup poll which asked about the recognition of the federal symbol as opposed to the Ontario trillium, and the results were rather interesting, especially as far as Quebec was concerned [1979, see chronology]. The recognition of the federal symbol was high, but Ontario's had problems, even in Ontario. Beyond that we never had any polls. We had a major survey of signs in 1981/82, a photographic survey done by students who recorded signs right across Canada in various departments, and the results of that survey were then sent to the departments involved to create a greater awareness of quality and the deficiency in the way the symbols and the letterforms were reproduced, the handling of the official languages and all that.

Q Is there anyone who has the role of design manager, liaising with the higher echelons of government?

UW That concept has somehow not taken hold in government. We encouraged the establishment of the function of corporate identity manager, and with the exception of two or three departments who assigned that responsibility, and where the individual also took it on, in general there is no design management function as we know it.

Q So how is the position of the designer described in the organizational chart?

UW In the beginning of the program we foresaw that there would be a very strong body of government, in-house designers, who would then look after the execution. Actually, the opposite took place. From my perspective, the last ten years there has been a reduction in the number of in-house designers in the various departments, so a lot of the work is done outside. Policy requires that every deputy head of an agency or department appoints an individual to coordinate the corporate identity of the organization according to FIP. That individual can be an administrator or a person in the public affairs area. The treasury board cannot tell a deputy how to organize their department, so it is left to how they think that the function should fit into that particular area. That again makes it rather difficult, because communications are not that easy when you are talking to administrators. Traditionally it [identity] fitted in to the forms area, and sometimes public affairs, but it was never oriented, for instance, to signage, because most agencies have never had a function identified. You're dealing with property management or vehicle fleet management. If it's a small organization, it's easy to control. If it's a large one, with regional operations and offices, it is a mammoth undertaking for one individual to control.

Q Could we talk about the position of the FIP in relation to other aspects of government communications?

W The term "communications policy" is a Treasury Board term, and we certainly consider public affairs, advertising, and FIP as part of that. Our branch is under information management and we're dealing with all the intellectual property that the government acquires and dispenses. So that's a much broader term, and administratively we have been squeezed in to tnat mould. Certainly we are operating under the communications umbrella, which means communication with public in general.

Q Is there a formalized organization chart?

UW Individual departments may have, but there isn't a model that we recommend. Again, the Treasury Board cannot go as far as telling departments how to organize their internal functions. When I first joined the Treasury Board, we were under Material, then we were under Services, now at least we are related to Information Management. These are only handles. Some would question why we are under the administrative policy area - that has been debated many times. We could be under Supply and Services or the Secretary of State. I think it has proven that, unless you have a policy behind it, a program of this nature is very subjective, to say the least, and will probably not go very far. It will be changed for ever and re-started. One thing we learned too, is that a program of this nature could be considered very useful to meet certain political objectives. A case in point was the referendum in Quebec, where the federal identity became highly visible. What we always emphasize is that corporate identity has permanence and should not be used to serve particular, short-term objectives that can be dealt with elsewhere; that has become a principle that we have tried to apply. Although we have established design standards for the regular applications - stationery and signs - we avoid getting too rigid in areas such as advertising or publications, where we believe individual departments should have a lot of latitude and discretion to develop designs that meet their particular objectives. We do get involved, because of the application of the signature, and we make recommendations on how it can be applied effectively, but we will avoid being very rigid and say, "You must always do it that way".

Q Do the provincial identities use both a wordmark and a symbol because they are influenced by you, or have you all done the same research?

UW Actually, we were not the first. Certainly Saskatchewan had one, and Alberta. Quebec adopted one shortly after we did. I guess that the fact that the federal government had one encouraged others to do the same. Probably, it happens when they realize that certain communications should be identified more globally with a province (or in the case of the federal government, with the country) than with a particular signature of an agency. The only global signature we had before was "Government of Canada", but still it emphasises the bureaucracy, the government, but the wordmark is so general that it probably never has any negative connotations. We do consult from time to time. Usually the provinces call us (with some it's on a regular basis) and they get our manual. We notice that they make use of certain things that we developed and seem to work, so I guess there has been a spin-off from our work that has helped the provinces to deal with that subject. We have always been in the area of federal/provincial relations and jointly funded programs where the two identities have to be projected clearly and equally.

Q It's almost like Bell and its subsidiaries

UW Yes. It's the same problem with any organization. There's a tendency for part of a larger organization to want to appear unique, because it helps employee morale to identify with something that is cohesive and is easy to associate with and to be recognized. Very few people look at it globally from the top, except for the executives, and so the objectives are not always the same.

Q Even many executives have a problem with corporate identity. Davis Masten, of Cheskin and Masten, was talking to me about that.

UW Cheskin did some testing of public information symbols for us, and he did some eye-movement tests at the time. There was at that time (about 15 years ago) a tendency to associate corporate identity with marketing, because that's where it all started. Another aspect that was important was design management and design improvement. I think that over the years the emphasis has slightly shifted, at least in this operation. It has now become more of an ongoing function in government, and we would not want to associate it with marketing or with design, even. We want to say, "This is the way it's done, and we don't need any banners to march behind". This is part of the maturing process. When you've been associated with this for so long it's interesting how the emphasis has shifted, just through circumstances. It's unfortunate that many corporate identities are created essentially for marketing purposes, initially, and I guess the new airline identity, "Canadian" is an example, where they did something in an extremely short time through the advertising agency. We'll see whether this will stand the test of time.

Q Is there anyone further that you feel I should talk to about the FIP? There doesn't seem to be anyone in a liaising role between the design group and the government.

UW Gerry Bethell [the director of Information Management Practices] is not directly involved in the program. There is presently a vacuum that will probably not remain that way for ever. It's just a temporary situation where things change and we have just tried to adapt to it and do the best we can. There is also the general feeling that when something runs more or less smoothly, there's no need to put layers on top which would probably then be very active to create new initiatives. They don't want to have to staff certain positions at this time. On the implementation side, the different departments use very different approaches. If you want to get their views on that, you'd have to talk to a range of people. There are a few organizations that have a unique requirement and particular objectives, and they have therefore created their own corporate identity manual. These people naturally got their hands dirty, and dealt with all the issues that we deal with, on a departmental level.

Q You seem to have a rather "arms length" relationship with the Crown Corporations.

UW With some of them. Some are exempt, but those that are under FIP are treated like any other government department. We may operate in procurement slightly differently, but we don't really make a distinction when it comes to compliance. Examples are the Canada Mortgage and Housing Corporation and the Farm Credit Corporation. Initially the Post Office did, when they became a Crown Corporation. They are still officially under FIP, but if you study them you can see that the corporate identity is a bit out of hand. They already have consultants working on a new scheme. That's a typical example that it does not take much of an effort to let a corporate identity run down if you don't take care of it, and when it's run down, the easiest solution seems to be to start afresh, with a new scheme and symbol. CN, CBC, VIA all had good cases for exemption. Part of our exemption criteria is being in competition with the private sector, where the the federal identity would not help them.

Jim Donoahue 6/5/87

Jim Donoahue is one of the best known designers of corporate identity graphics in Toronto. He was taught by, and later worked for, Allan Fleming (the designer of the CN logo). Among his better-known logotypes are the "Canada" word mark, the Sports Network, the Global Television Network, and Wardair (examples are given in fig. 63). A recent commission was a new logo for CN hotels, who have always had a degree of autonomy from the overall CN identity scheme.

INTERVIEW

Q Could we start with the aims of corporate identity schemes and how they are set? How aware of the aims are the clients when they come to you?

JD That depends on the client. In some cases the client will come to you because he already has an established company and he realizes that he doesn't look as good as he thinks he should, but he's already printed a lot of stuff over a period of time and it tends to be all over the lot. He has a crummy logo to start with and it may be very badly applied. He does understand that a corporate identity program is, in a sense, pulling all those things together, so he's easier in many ways to start with because you can say, "Here's the logo and here's how its going to be applied". You can work your way through and you can end up with a good, strong corporate look. When a company is just starting out and they think they need a corporate look, they often haven't established the number of pieces, so it often may not have the same initial impact that doing a whole program may have. Sometimes there are companies that are doing a spin-off, and they know they're going to have a certain number of pieces, so you can take a good run at doing the whole show. As for client's awareness of how important it is, they tend to be aware of it because they've read of it in Fortune magazine or wherever, and they know that big companies go to big design houses and spend half a million dollars. They see it as a consistent image, and it gives them that kind of stability. It affects the people that they talk to, that they deal with and that work for them. I think companies of any size understand the value of a well rounded corporate identity. I don't think they're confused by it - they don't come in saying, "We don't know what we're doing". When we get a call, they know exactly what they're up to. How they're seen on the street is a big issue for them. A company can look Mickey Mouse if it has a Mickey Mouse logo; if it's print material is all over the lot and it's not well printed. It's no different to walking in to a really good-looking head office - everything from the front door to the Mies Van der Rohe furniture to the marble pillars.

Q Have the clients usually done some market research, or do they want you to cover that aspect?

JD They usually have a pretty good idea. Graphic designers are usually treated rather differently to an advertising agency. If a company is of any size, it will go to an agency rather than a graphic designer to get it done, then the agency will produce print, television, billboards or whatever it needs. The graphic designer has another role. He's worrying about how they look on the letterhead or the truck. He worries about what the logo looks like at the bottom of the ad., but he's not usually doing the ad. The advertising is a different department. Take AT&T in the states, for example, which about two years ago did a big, new re-design. There is a case where [designer Saul] Bass was bought in to do all that part of it; to apply the logo to all of the stationery and business cards - all the things that they needed. At the same time, an advertising agency are given the artwork. They make a commercial and they stick the logo on the back end of it. Their imagery is totally different, but the logo is critical to it, because it will be seen on a truck and so on. The commercial is a totally different ball-game to doing a piece of graphics; it tugs at your heart or makes you want to go out and buy an AT&T phone. Occasionally you have to liaise with an agency, and occasionally you get a logo designed through an agency.

Q The two things are really very different, though.

JD Yes. Oftentimes an agency will have an art director on staff who thinks he's a pretty good designer. A good example is the Sports Network (TSN). They went to Vickers and Benson for commercials and print. They needed all the things an agency does. They walked in the door and said "We're a new network. We've got our license and we want to make a big show". The agency started to think of ways to promote them through television and print, and I guess at some point that somebody said, "We need a logo". The agency tried to do one. But they're not logo people and they don't really know how to do them. Advertising is more about playing with words. It's a different attitude. I've worked in both, and I still do copy writing and ads, but I don't do that much of it, and it's not my career. Anyway, eventually TSN realised that they weren't getting a logo out of the agency, and because I'd done Global Television and Fist Choice [fig. 63] they came to me. The agency just blew it. They couldn't resolve it and so it came full circle, with the client coming to me.

On the other hand, years ago I did a logo for the Pork Institute to promote Canadian pork. McCann, Erickson were the agency and their art director phoned me. There's a case of an agency who told the client that they were going to get a logo done but they were going to buy an outsider to do it. If the two are separated, which they usually are, it's very clear that you use a designer to do one and an agency to do the other.

Q How about implementation? Do you find that you usually have a long term relationship with your clients, overseeing the application and evolution of the identity?

JD It's strange. You would think that you would, but what often happens is you do it - put the whole package together - and they take it away. From that point on, it's automatic. They tend to keep putting the stuff together themselves. They don't seem to feel the need to come back. Some do, because they believe that you should police it for them, but usually, over a period of time, the players that you dealt with have moved up, down or sideways, and they haven't really got any allegiance to you. I got a call, last fall, from Global Television, saying that their cars were not well enough designed, so I did them. What happens at a place like Global is that you do the logo, then it goes into the shop. They have their own interior design staff. It gets used; they play with it and they don't come back and ask you if they're doing it right.

Q Has anyone ever come back to you and asked you to modify or extend the use of the logo to reflect changes in the company?

JD No, I can't remember that happening. I know there have been times that I've done a logo that's been around for twenty years, and I see that the company has a brand new one. They've chosen to go somewhere else and they've not bothered to come back and ask me to do a new one. That's not really an issue. They've lived with it and they've decided to change. A good example is Mutual Life of Canada. I did their old "M L" logo easily 25 years ago, and about two years ago they came up with a new one. That's fine. A company can get bored with it.

Q Do you find that the life span of corporate graphics is getting shorter?

JD Not really. There are some products that do that, but IBM's been around for 30 years, the CBS "eye" logo could be forty years old. Coca-Cola and Ford have been modified. Ford tried a re-design, with a sans-serif Ford, but it never got off the ground and they came back to the old one again. It depends on the size of the company and on how good the logo is. Small companies might change more.

Last year Ed O'Brien, from Bell, came in, and said they were wondering about their logo, because it is, basically, just a typeface. He asked me if there was anything I could do to it, without making a major change, that could make it more effective in any way. I went through an exercise with them. I probably did about 10 or 12 things - minor changes, but they were all adding something to it, to enhance it or give it a slightly different look so that it was no longer just a piece of type, and I understand that at that time they had already gone through that exercise with Jean in Montreal. I think it's still good, though. I did a logo for Telecom Canada (which Bell is a member of) and got into seeing what it would look like with the phone company logo's. Bell was by far the best. Some of them even have phones in, which is hilarious when you think how much phones have changed. B.C. Tel have approached me about their logo, which is really awful. [see fig.45].

Q Generally, they do their own policing, and you don't get involved?

JD With any luck, they do, yes.

Q You tend to see that as a design management role?

JD Yes. A couple of years ago, I did a logo for Investor's Group in Winnipeg, and every once in a while they come back with a couple of forms that need doing. They've kept a fair eye on it, but they've got their own people inside, and there's almost a resentment from these designers in Winnipeg - "Why go to Toronto to do it? We could do it perfectly well". Once you've done the logo, they can butcher it if they want to. They've paid for it. You can't really go to them and say, "Hey, you've got to stop printing it in that colour". Going back can put a lot of noses out of joint, and frankly, I'm happy to be on to a new one that's fresh for me, because re-doing a bunch of forms is not that exciting.

Q So how would you compare the roles of designer and design manager.

JD The interior management role is a forms designer, to a certain extent, he polices and makes sure they keep using the same typeface, and they don't re-draw the logo or modify it in anyway. The designer is the one who sets the style.

Q Ed O'Brien said that he felt that the two functions should never be mixed.

JD Yes, once it's set up. A company of any size will have a design manual, and that should be the bible. Any new designer getting on board should just be told to follow it, so it's always consistent. But again, you watch them slide around, because everyone is creative, and they think they are going to to add something to it. That's probably why design manuals were invented, so that it wouldn't happen. It's the visual policy and shouldn't be debated.

Q There are many examples of identities which have not been reinforced and eventually have to be replaced.

JD Remember to, that if the designer formats the letterhead or the business card because it looks better that way, then it should be used that way. If he's decided on a flush left where the logo's here, fine. If it looks good enough in the beginning to be bought it should continue. If the next guy that comes along hates the logo, he can't touch it, but then he'll start playing with it, and then the format goes out of the window, which destroys it, because the logo was in fact designed to be used in a particular way. What breaks me up is watching a logo just disintegrate, because people are not using good stats. They're using xeroxes, and the thing gets distorted on the camera, and by the time you see it, two years later, it looks like a piece of shit.

Q Do your clients do a lot of research into public reaction?

JD Some do. Often, a really large company will research logos. If a company's big enough, and it's really nervous, and they have 4 or 5 that they think are really interesting, and one that the designer is really pushing, they'll do focus groups on them - hang them all up and ask people for comments. That's of some value, because sometimes what you get is playback of one with a bunch of guys saying that it's a feminine logo, or a bunch of women saying it's a feminine logo, and the company may say it doesn't want a feminine logo, but a middle of the road logo. Exactly the same thing can be true if it's too heavy. So you can get a playback, but the truth of the matter is that if the designer is any good, he shouldn't miss by that much. Certain things are conditions of the game - It shouldn't be bank script for a Mack truck.

Q One of the ways of distinguishing between corporate identity and brand identity is the long term, strategic angle.

JD Yes. A brand can have a very short life span. There are products (soaps, chocolate bars) that have that kind of constant recycling. The overall corporate identity should be the umbrella, the house mark, and what happens under that is a totally different thing.

Q So it co-exists with marketing, but the two things are separate.

JD Yes.

Q In organizational terms, where is corporate identity positioned in the firms you have worked for?

JD It is normally under marketing, because it is seen as a marketing tool. It may well start with the president, who may feel that what he has doesn't look as good as it should, and he may be very concerned with that kind of thing. On the other hand, the company president may not really care. As far as he is concerned, a logo is a logo and they're all the same to him. I was working on one a couple of months ago, a large company who were undergoing a name change, and the president was really involved. For him, he was going to wear this thing, and it was a top priority. He was in every meeting and he was the boss, all the vice-presidents were standing around saying, "Yes, sir". I was quoting on one a month ago. There was the president and the vice-president, not the marketing manager. Once they'd got the logo they would present it to him and tell him that was the logo. I'd rather have it that way. The problem with dealing with the marketing manager is that he's second-guessing the president. He's got to sell it and he's trying to guess what the president wants. The TSN was a good example. It's not a huge company, but the logo was very important, and I had to present to the president alone. He didn't care what anybody else thought.

Q You've obviously worked for a great variety of clients. Does one kind of company dominate?

JD No. That's what makes it fun, too. I'd like to think that there's no specific style, though I don't know if it's possible. The Swiss have a habit of doing a bit of a formula in design, and often you get the feeling, with logos coming out of Europe, that there's not as much humour as there should be, or inventiveness. There's a tendency to do these things because they like that kind of design, and I am really opposed to that. I think that every client should have their own look. Telecom Canada is a totally different look to L'Hotel, for example.

Chris Yaneff 6/5/87

Chris Yaneff, like Jim Donoahue, is one of the best-known corporate designers in Toronto, but the firm operates on a broader basis, being involved in marketing and advertising as well as graphic design. In addition to producing such identity programs as Canada Trust and Crown Life (fig. 64), Yaneff was an early consultant to the FIP. He is noted for his involvement with the re-naming of organizations, from government to newly-merged corporations. Yaneff has a strong marketing and packaging orientation, as can be seen from the interview.

INTERVIEW

Q Could you tell me about your involvement with the FIP?

CY I was involved before that. We were partially instrumental in getting the flag used. The leaf itself and the suggestion of colours was submitted by us. I ran a campaign against Diefenbaker when he didn't want the maple leaf. He wanted more, so I came up with a flag which I said he would like. It had an elk, a beaver and a kitchen sink. It appeared on national television across the country. I then printed the flag and had it mailed to every member of parliament. It was basically a stylized maple leaf on a white background. The other alternative I sent was a maple leaf with blue on each side - from water to water - but they didn't want that because it was red, white and blue. Anyway, that's how I first got involved in it. I was just so scared; they had those stupid three fig leaves. They bought in a heraldry man for that. It was traditional but really not in keeping with the times. The federal flag had to be different, simple and clean. I studied all the flags, and I guess the best one was the Japanese. The Swiss, with the white cross on a red background, was also very simple and stylized. The Russian, though it's weak, has worked through advertising and so on. The idea of a flag is quick identification. This is the whole business of image. That was the whole idea of the federal identity program; when a letter came in, you knew it was from the government. That's why I thought they weren't going to go for all these different images (Department of Transport, a different one for food, and so on).

Q The federal symbol replaced about thirty different, departmental symbols.

CY At one point, when Richardson was the minister at the Department of Supply and Services, a ruling was passed that no other image could appear other than the official symbol, which was the flag with just one bar. Then slowly they started to change. Somebody would bring out something for Atlantic Canada, for instance, and they'd use that. Donoahue's wordmark was designed as a promotional piece. Then somebody, as always happens in government or big business, said, "I like that, let's put it on the bottom of everything we do". So we ended up with the official symbol, and then the word Canada. What's wrong with the word is that it doesn't lend itself to being small; the flag just looks like a dot over the "a". It looks better on signage because Donoahue designed it for large-scale use. As things stand now, I notice they are allowing people to have other symbols, and that's a violation of what I was working towards with them. I don't know where the rules came from, or what the role of the Privy Council is, but it's all changed.

Q They now have four symbols: the wordmark, the flag, the flag with one bar, and the coat of arms.

CY Originally, the flag with one bar was the only federal symbol in the identity.

Q What you were saying about the original intention being watered down is born out by the account of ministerial pressure given to me by the FIP staff designers.

CY Unfortunately, the coat of arms looks like anybody else's. You don't know whether it's the town of Whitby or the federal government. I wouldn't have taken a bar off [the flag] for the federal symbol. I would have taken the flag and passed a law about its use, as they have in the States. The leaf wasn't protected. "Cease and desist" orders should have been issued.

In 1972, I think, we were doing a symbol for Supply and Services, and then told to stop and given our money. My initial involvement [with the federal identity program] was this. The Privy Council called me and asked me what I would do. They then paid me to go to Ottawa and spend two or three days with Supply and Services. I made a recommendation that they change the Department of Agriculture to Agriculture Canada. That idea of including the word "Canada" in official titles was mine. They then thanked me very much, and said that the thing had to be done locally (in Quebec). Barney Danson (the Parliamentary Secretary to Trudeau) told me they had to give more of the design work to Quebec, but they went ahead and implemented most of my recommendations. Another one of these recommendations was that they no longer use the name of the minister on the stationery, but just say "From the office of the minister", to save money when ministers change. I once saw a room full of advertising plates and folders - 200,000 copies of folders which were out of date because the minister's name had changed - thousands of dollars worth of printing that they weren't going to use. When there's an important announcement, you shouldn't be promoting the minister, you should be promoting the department. Everybody thought that was a great idea, but the ministers just shouted it down because they wanted to promote themselves.

Everything was the same. They asked me my opinion about offices. They told me that every time a guy gets elected, he throws out whatever's there, even if it's only been there six weeks. It goes downstairs and it's put up for auction, and often it's sold back to the interior decorator or furniture manufacturer. Often it's bought back by the government. Over-buying was also common, so that they wouldn't lose their quotas. I was trying to see how things functioned and how things were ordered, to see if we could save money on printing and equipment. When I do a search for a company, I treat it as a chance to save them money. At Canada Trust they had about 860 forms, and we reduced it to 300. They would order four sizes of envelopes instead of one, and nobody sat down with a window envelope and a typewriter to see how it all fitted, so I started with the girls and asked them for their complaints.

Q I wanted to ask you about the role of the designer and research.

CY We are in graphic communications, we don't just design the service. We go in and we start with the way they answer the phone. We do everything; it's all communications. The wastage is unbelievable. Forget Ottawa - everything was wrong - but at Canada Trust they ordered twice the stuff they needed. In Ottawa, I asked why they didn't cut an 8 1/2 x 11" in half for memos, but some minister wanted 5 x 9, so they cut the sheet down and threw it away. They then wanted metric. Paper isn't made metric here. Everything is US and will never, never be metric because of the cost (billions of dollars) to change over the paper-making machines. No binders are made in metric sizes in Canada or the US. We did the city of Toronto, later on, and they wanted to go metric. I said no, because the Graphic Designers of Canada decided, in discussions with the United States paper companies, that the norm would not be metric for stationery. Only the federal government went metric, which I would say costs 15%

more on everything, because you take a larger sheet of paper and wasted 25% of it.

Another thing was that Trudeau offered to pay for the printing of bilingual letterheads, to encourage companies to be bilingual. As far as bilingualism is concerned, the problem there is that half the letterheads in Quebec are not even in correct French. We tried; we submitted things to be done in correct French to the government, and they'd say it was fine, and then we'd submit it to the Quebec government, for the Liquor Board, for example, and they'd say it was incorrect French. We'd say that it came from Consumer Affairs, but you couldn't get anybody to agree on how things should be said. The French isn't really a problem - Swiss-style typography usually handles three languages in Europe. The problem we had, and I guess it hasn't changed, is that every minister wants to do something different.

The logo that Bell ended up with may not be great, but at least they picked a colour that wasn't common, which made it unique. They're consistent, and the trucks are clean - they stand out. It's a good graphic standards program. I think it's very successful. The only thing I would have added would be a safety colour at the front or back of the trucks. The other thing is that if you come up with a wordmark, without a symbol, the type must be unique. If you have a symbol, the type must be simple.

Q Bell is looking at changing it. One of their current problems is the integration of their subsidiaries.

CY Yes, I did work for Northern Telecom, and the Bell research people were upset because Telecom went to an outside expert, but to me, it's all part of Bell. The image of Bell, whichever way you look at it from a marketing point of view, has gone down. You'd never question Bell 25 years ago, but because of their services falling off, people started buying other things. Our system is Japanese, and I've worked for Erickson (the Swedish company) here. I don't know what Bell's market share is now. They got behind the times, like IBM and Xerox. We all know that Bell has the capability to come back, and they are doing, but they did allow these other companies to come in and steal their business. That's poor marketing, and eventually that affects the image. They're still a great company, but the image isn't what it was.

Q What, in your view, are the aims of corporate identity?

CY A quick, positive identification of the company. You get an image of what the company is. It's very important that you get an image of what business the company is in from the symbol. The Shell symbol, for instance, works without any words, and is used without the name now.

Q I know you've done a lot of work with the re-naming of companies.

CY What's happening is that a lot of companies are amalgamating or changing their business. What's happened, whether it's good or bad, is that it's cheaper to buy a company for $10 or $20 million than to start one. So the name has no meaning any more. There are some mistakes; Burroughs and Sperry-Rand merged and became Unisys. Instead of contacting an expert, having him analyse all the names in the business and coming up with something modern with a feeling of the electronics industry, they had a contest, which 30,000 people entered. Unisys has no meaning, but is supposed to be United Systems, or something. People are obviously going to call it Unisex. An image of a company is the most important thing it has, and therefore they should spend whatever it takes, and get the best expertise available.

We were hired by General Motors and Suzuki to come up with a name for a new, $600 million company, which is neither General Motors or Suzuki, but is a unique word which is to symbolize manufacturing. We came up with the word "Cami" Automotive Industries. Nobody was using it, except that with a "K", it's a Japanese god. Bad mistakes are made. "Nova" cars wouldn't sell in South America because the name means "don't go". "Cami" was tough because they wanted it short and sweet so that you could use it on a car. It was done 6 months ago. Another one was for Extendacare, when they bought Crown Life; we came up with "Crownx" [fig. 64]. I didn't add "Ex" to the Crown because it wouldn't have been unique. It was different. It was short, and when you add "x" to something, it gives you the feeling of modernity and multiples. That goes back to Xerox. You're coming up with a name which has no meaning in any industry, so Crown Life could be insurance, health, or computers, like when they invented Kodak. Mr. Eastman just wanted something with the letter "k". Esso is merely Standard Oil (S-O) a common usage acronym, though I don't really like acronyms because there are too many of them.

Q Is it a bigger problem when dealing with a company which is very diversified or involved in very abstract activities?

CY You then just come up with a name which is unique and lend itself to good marketing. I came up with the word Aabex for a computer servicing division of General Electric. The word looks modern; the double "a" gives it a futuristic look. Nobody knows why, except that if you look at kid's comic books or science-fiction, the guys from outer space have double letters in their names. We came up with a new milk for Oshawa, called Fieldfresh. That's very descriptive of the product. You either describe the company, the product or the service, and if you can't, you come up with a unique word like Aabex. The key difficulty is to register it. It's important how it sounds, phonetically. With Cami, for example, the meaning it will have is the meaning that we put into it; it's what you do with it. A good example would be Poison, the number one selling perfume in the world today in it's price category, but a name you'd be scared to have in your medicine cabinet. If you did a marketing study and put that name in a list of fifty, it would come fiftieth. But it's what they did with it. They took a unique word, as they did with Opium. There, the criteria was uniqueness, and the positioning of the advertising and the marketing created a unique product; it was properly introduced. You have to have the right name, the right product and the right launch. If you don't have all three, then you're in trouble.

Q How would you describe the relationship between product, or brand identity, and corporate identity?

CY You have to be careful there. There is no such thing as Lever soap, but there are Lever Brother products; I think Lever Brothers should have a better image. The parent company position is better in the whiskey business. I can buy anything I want from Eaton's, because I know that Eaton's will stand behind it. The brand must have it's own quality, and so should the company. I also feel that the product name should not be the same as the company name, because that ties them too much. If you have a product that flops, you don't want the company name on it. We were retained by Gilbey's to come up with a new name for them because their number one product is vodka, not gin. They want people to know that they're the makers of Smirnoff vodka, but, as it turned out, the management were too scared to drop the name Gilbey's. With food products, you go for the Nabisco name behind the brand, rather than, say ABC. Corporate image can be done through a trademark, through advertising and through public relations. Merrill Lynch have done it through sponsoring concerts. In two or three years, they're accepted by everyone as Canadian. MacDonald's are a great example of corporate image through public relations. The golden arches is terrible - that "m" - everything about it is wrong, but it doesn't matter.

Colour is also very important. Lippincott and Margulies made a terrible mistake with CP when they did the planes in orange, the trucks in blue and the ships in yellow or something. My recommendation is one colour (I've given lectures where I've shown the Coke symbol in blue to show how important this is). Colour gives meaning.

Q Do you get involved in the policing of corporate identities?

CY Whenever possible, when we do a corporate program we set up a corporate manual, and the manual tells them how to use it on stationery, how it's used with just the name, how it's used on a legal document, and so on.

Q Does your association continue over a long period of time?

CY Yes. I've been doing Maple Leaf Mills, and every few months they'll give me a call about a new problem (the president of the company uses us as an arbitrator). For instance, the flour division wanted to use a yellow maple leaf instead of a red one, but the maple leaf is red; if you make it any other colour, it's not the Maple Leaf Mills. They fought - even painted some trucks. Companies that police well (IBM, Xerox, and best of all, Olivetti) are the leaders in visual communication.

Q So you see the consultant designer's role as involving design management. How about the role of research?

CY Not everybody does this, but the most important firms in Canada are those that are marketing oriented. I'm a marketing consultant, not just a designer. We have a sales background, so we work from the beginning: in research, designing a product and testing it, and assisting right to the end. Lippincott and Margulies are the fathers of this, and they go right through - they do all the marketing studies - they do everything but create the ads. You must know who's going to buy the product and how they're going to use it. In the old days, we used to design packaging in the studio. Now, the first thing that we do is to go to the supermarket and study the shelves. We take photographs of the packs and see which ones stand out. We do our homework, spending one third of our time before we start designing. You find out what the rules are, and then how you can break them, because the key is to be different. But I don't believe in taking a pack and analyzing it - you can't ask people whether they're going to like something. Coca-Cola found that out. As I said with Poison, research would have shown that it wouldn't work. Research <u>can</u> show if there's anything wrong with the product; if it pours properly or if there's anything in Italian or Spanish that's negative. Research can tell you who your customer is; demographics can show where they live, the age group and the price category.

Q You're involved in the whole spectrum of corporate communication, from advertising to corporate identity. How would you describe the position of corporate identity within that spectrum?

CY The companies that succeed give design top priority. There's a tendency to spend $50-100,000 on research for a launch, and only $5000 on design. A company worth, say $100 million, with $10 million in sales, should spend $250,000 on public relations and $3 million on advertising, just to protect the company.

I'm not looking for any business, and my company is small, but I spend $25,000 a year just to keep the name before the public. I'm the only one who's been advertising (since 1960). So successful companies set it up, right at the beginning: research, corporate program, launch, and public relations for the whole thing. In the average company, you've got a public relations department that only knows PR, an advertising man who knows nothing about sales management, and a sales group that thinks advertising is a waste of money and that more salesmen would work better. Theoretically, advertising can reach 1000 people for $1, and a salesman can't. General Foods and other big food companies may register 700 products a year, launch 60, and pass with 5, and they're very happy because if they get 2-5% of a product category, they're making millions. If they stopped advertising, they'd be out of business.

Q So you see corporate identity as a global concept of corporate communications - every possible way you contact the target publics.

CY Yes. That's one reason why I prefer visual symbols to words. The visual is more recognizable by everyone, and more memorable. The other thing is to handle it properly. With Poison, for example, Christian Dior had a unique image. In the perfume business, you milk it for 3-4 years, and then hope for a 5% market share after that. They spent $25 million in eight weeks promoting it, and sold something like $1 billion dollars of perfume. The other thing is timing, you have to be first and be unique. In the old days, the artist just sat at the drawing board. MacDonald and all the others were employed just to sell printing and plates. The artist was at the bottom of the totem pole. There's no such thing as commercial art anymore.

F.H.K. Henrion 7/5/87

F.H.K. Henrion is seen as the father of corporate identity design in Europe, and is the founding member of the consultancy firm of Henrion, Ludlow and Schmidt. Clients of the firm are worldwide and have included: KLM Royal Dutch Airlines, Tate and Lyle, Audi NSU, British Leyland and Mitsubishi (fig. 75). Henrion is also widely-known as a theorist and educator. Though involved in a successful international business, he is still primarily concerned with design.

INTERVIEW

Q Though I've read some of the things you've written on the subject, could we start with your views on the objectives of corporate identity programs?

FH I think they've changed a lot over the years. You know the book Design Coordination and Corporate Design? Though old now, it's still one of the few books on the subject. When I wrote it, corporate design had just come across the Atlantic, and was rather suspect. It was the coordination of all the visual manifestations of a corporation. Since then it's advanced a lot and now we talk of corporate communications, but you can't stop at the word. It goes well beyond the visual; it's behaviour patterns of the firm and the employees; it's the way they're seen by the public and the way they sound on the telephone. We've also been in the area of re-naming firms so that they are more visually acceptable. It is really the whole communications mix, with the emphasis on the visual side (the obvious product packaging, print, publications, uniforms, but also architecture, internal architecture, exhibitions). It's gone further and further. Architecture is very important, if people really mean it - IBM, Olivetti, Braun. More people are doing it, like Wang, the computer people, who have distinct architectural features. So it's become very important, and I look at it in a very philosophical way (I always feel I have to justify my actions). One does create order, or at any rate, reduce existing chaos by some measure. By making a coordinated design effort, you do contribute in some modest way, to a slightly better human environment. I think this does tell, because in the free-for-all commercial, capitalist world we live in, it's fairly savage, and because it's so savage and hard-hitting, coordinated design effort begins to tell. It can make the man-made environment a little better than it was before, by using better colours and typography, symbols and design systems. Design can be life-enhancing, rather than life-damaging.

Q Corporate identity design is obviously an expanding area, with companies merging and changing direction.

FH Well, here we live in a sort of designer's paradise. It's a growth industry. Design Week tells you who got what commissions, and they always go into hundreds of thousands or millions of pounds. All design offices are looking for new staff; project leaders with three years experience. There's such a demand that they just aren't there. A typically English development is the conglomerate, which in the communication area need advertising, public relations, printing, television and design, so they must buy a design office. I found, for instance, that some people who worked with me here, who left in 1972 and set up a small office in Covent Garden, just sold their business for 5 million. There are now twelve design companies who are publicly quoted.

Q This leads to the changing role of the designer, and the emergence of a new kind of professional structure is part of that changing role.

FH I think very much so. I do feel that if you are interested to be on the cutting edge of design and opening new doors - this has always come from individuals, and always will come the individual. In some of the large offices, which have 200-400 people, the pressures and the deadlines are such that it is unlikely that really new ideas will come from that source. The general standards will rise; this is easy as they are appalling. There's no particular merit in it, but what happens, and this is all part of the image game, is that a building society, with offices all over England, has their offices re-designed by one of the big firms. Then the other building societies decide that they must do something about their image, too, so it's like an avalanche; it's not one job, but a dozen jobs. This happens in the retail trade in a very big way, and this creates a huge demand for design. The government sponsors it. Mrs. Thatcher supports it (for the wrong reasons - always, productivity is the thing). I don't think the government knows a lot about it, except that it will help exports and manufacturing, which is true enough, but there is a little more than that to it, and I'm very anxious to emphasize it. We've got a minister, John Butcher [Parliamentary Under Secretary of State, Department of Trade and Industry] who goes around talking about design and administering the large amount of money that government and the Design Council advances to industry. The scheme (£20 million over 5 years, I think) gives industries, who have never used a designer before, a designer for three weeks or so paid by those funds, to encourage the firms to use designers. That's very good, but the climate of everything for profit is really a terrible way of looking at life, and I feel that if it's only about making everybody and everything cost effective, a lot of real quality will never be there. I told John Butcher that there's more to it than just profitability, and he didn't know what I was talking about. This is typical; it also goes for clients, of course, but it also goes for designers, because they now fall over backwards to be commercial-minded design management. All this is very useful activity, like design management inside industry, by and with designers, but when you look at all the mergers and all the movement of marketing directors, design directors, communications directors and creative directors, design is a sort of by-product, down the line somewhere. There have never been enough good creative directors, but if you leave art school today, and you are not completely stupid, you get a job, which didn't happen in your time. There's a demand which can't be met. Everyone talks about images. People are aware of it, which is a good thing as long as the image that you project relates to the real facts. We have worked with very large firms (airlines, banks and various industries) and you cannot project an image which does not relate to the facts.

We found that, particularly with clients on the continent, but here too, that we are being consulted on a corporate philosophy, which is written down and revised. One of our clients in Germany has reached the twenty-ninth version. They take it very seriously, and of course they never admit that they're there to make money. They all have a "service to the community", and provide work for their employees and money for their shareholders. They want to be seen to be good, and in order to do that, they have to <u>be</u> good in some way. In Japan, Typoo (the big stores) have theaters and cinemas and art exhibitions, not in their stores but next to them, administered by independent artists, writers and actors, because they want to be seen to be doing something for culture. In the States it happens on what I call a lower level, such as Mobil sponsoring the arts. The banks here do it; Lloyds bank just gave 50,000 to the Royal Society of Arts student awards. I think to some extent it's conscience money, and being seen to act charitably, or being culturally involved is a good thing, but it rarely happens in the true spirit. Olivetti started it early this century. They did it because they believed that their workers should be properly housed and that their factories should be ideal. They built holiday homes in the Alps. They were really socially involved, and they carried this through in to their products, product promotion and architecture, on a world-wide scale. IBM, much later, have done the same thing, but there are still only a handful of people doing it; the others are in marketing. Every design office now is marketing mad; they're marketing consultants because they think that's the world design fits into.

Q One point here is the comparative roles of design and design management. In the cases I've been researching in Canada, design management is seen as an internal function, and the external design consultant is seen as the visual problem solver.

FH Design management stems from the recognition that design is a management activity. A few years ago, people of consequence were marketing or sales directors, or advertising managers, and since then, well - once design is seen as a management activity you want someone responsible for it. A few years ago, we did a big program for the German firm of Beiersdorf (makers of Nivea cream). They are a very large, world-wide firm, with their headquarters in Germany and production in Spain, France, Canada, Mexico, Japan and so on. Typically, they went to a management consultant to get their house in order, and as a result they said something must be done about design. That's also what happened to KLM and Volkswagon; design always came in in the wake of, or a little later than the management consultants. When we were appointed [at Beiersdorf] we met the board and we realised that they hadn't a clue why they had employed us, because they had never worked with designers before. We spent about 18 months (paid) explaining to them why they had employed us. I felt that they weren't ready to be shown any proposals because they didn't know what it was all about. We did three presentations, with slides and diagrams, and also publications.

We always do that because people go off on business trips and forget what it was all about. We produce a little book where the essential facts are illustrated and described. We say that what they have is no good, and give the reasons. We tell them that we are going to do a new logotype, and what it will do for them. In about 50 pages, we tell them how it will be used in packaging, marketing, public relations, employee relations, etc. We call this the explicit identity, which goes to the outside, explaining itself. What is more difficult is the implicit identity, which is the way your policy is seen to be implemented, in your buildings, your employer/employee relationships, in your shareholder relationships, the way you behave in the community and so on. Together, the explicit (I own this - sticking your mark everywhere) and the implicit, on a higher level, is the identity.

This is a kind of elementary educational job. We worked for them [Beiersdorf] for three years, did a huge manual, and installed a guy in Hamburg (where they are). I visited them about three years later (we no longer worked for them). They have a huge, grey concrete gasometer opposite to their headquarters, and when I went it was covered with very bright murals. The guy we worked with those three years eventually became the design manager, and when I saw him, I asked him what had happened. He said, "You told us about implicit identity, so we commissioned an artist to paint it all". Inside there was also lots of bright colour. We threw out lots of ideas like this, never believing they would take it all up. We also furnished a number of offices and canteens for them, and got cutlery, glass and crockery, etc., but they went on ordering. When they got new factories in France, they got a good architect. All these things, which I had set for my conscience, were really listened to and acted on. It rarely happens to this degree; it was very rewarding and I was almost in tears! You don't want to look like a teacher, but there is an evangelical side, where you are proselytizing people gently.

Q You find that one of the functions of corporate identity is that it gives the management group themselves a clearer idea of what they are about?

FH Very much. It's a question of how you get hold of these problems. We were consultants to the British post office. They didn't know what was designable. You have to work on methods - how to get hold of a problem of such size; how to analyze it and how to argue and rationalize it to yourself and to your clients, which is terribly important. One of the questions which has to be answered here is, if this is where you were and where you are today, where do you plan to be in twenty years? They don't necessarily like being asked those questions, but unless you know the answers, you can't come up with a good solution. This leads to (and this is now accepted corporate philosophy) what are we about? We have helped, most unexpectedly, in the case of Braun (in Germany), who were bought by Gillette about ten years ago. They thought that they were going to lose their identity (which they did, to a large extent) and wondered what to do about it. They commissioned some German professor to write a philosophy, which didn't quite suit them, so they came to us. Once the corporate philosophy has been agreed, they have to act on it, and in this case, every employee is given a copy of the corporate philosophy, so it really can be influential.

Q So you're a corporate culture consultant.

FH Yes. There must be some sort of delicate balance between research, analysis and design. Ideally, I feel that the designer is a better key man than the others, but he has to work with such factors as marketing and psychology.

Q Davis Masten said that the research and analysis that his firm does is a way of "making reasonable", of translating into numbers, an area which frightens people in management because they are "numbers men" and need quantified data.

FH Yes. My office does more writing than designing, not by choice but by necessity. You have to qualify and rationalize, to convince yourself and to convince others. Designers should become more managerial and speak the language of management. Jean Morin isn't just a designer, so he would work well with the people you mentioned.

Q Could we talk about corporate identity in relation to change?

FH This all depends what area you are in. Airlines are happy if they can stay for ten years with their image. KLM, which we did, has been going for 28 years, which is exceptional. We've done four manuals, so there have been changes. They [the airlines] all use the same aeroplanes, have comparable fares and fly to the same destinations. All they have left is the image and the service (the service being part of the image, of course), so they have to change. A bank doesn't want to change very often; it takes a long time to get established. Another point is the feasibility of change. When we worked for Volkswagen for four years (including Audi/NSU/Porsche) we suggested that they should change their colour from blue to orange. It just wasn't possible; worldwide it would have taken at least seven years, cost an enormous amount of money and caused more confusion than it would have done good. But when we worked for British Leyland, we re-designed their symbol, which was good because compared with the other car symbols it was the least visible. The new symbol was simpler and more dynamic, and could be seen side-by-side with the old one without causing confusion, which is a big constraint (in fact, very rarely do you start from scratch). Another major constraint is what the competition does, which you can't control (which does not, obviously, apply to monopolies like British Rail).

Q The CN symbol is another example of a very durable symbol.

FH Yes. The Royal Navy copied it, but not very successfully. Lots of other people have, but they're not as good.

Q After the production of the manual, do you continue to be involved in the implementation of identity programs?

FH What we try to do is to appoint a design manager, usually someone we've worked with during the design stage. It's always difficult. We've worked for Blue Circle for many years. We did all their manuals and then they paid us a retainer for a year, to consult us if there were any problems. After three months, they hadn't rung, so I asked them what was going on, and they said that the manual was so perfect that everything was provided for and there was no need to bother us. I asked if I could go and have a look, and of course everything had gone wrong, but they had failed to identify it. They said, "We see what you mean, but to change it now would upset too many people". So it's not satisfactory, and in any dynamic firm there's so much change, diversification and new ideas that it has to be an on-going thing. That's how it is with IBM, Olivetti and so on. Paul Rand had about six designers in New York, he went down to IBM once a week, and round the world once a year, to see what was being done in other countries. That's the ideal way - benevolent supervision. Not saying, "Don't do this and don't do that" (people don't like that). They should have some freedom, but there should be some kind of audit. People mis-administrate without being aware of so doing.

Q I know you take a very global view of identity and corporate communications. Could you talk about corporate identity in relation to other areas of corporate communications - say, the shorter-term ones such as advertising?

FH In recruitment advertising, to take that first, we always make very strict laws, because this is the image of the firm attracting people. One of our biggest customers, Coopers and Lybrand (the accountants) is constantly advertising for staff, and that is directly controlled by us in the book. The same applies to the LEB (the London Electricity Board). With general advertising, the agency should be left free, except for the proper use of the logotype.

Wally Olins 11/5/87

Wally Olins, following a successful career in advertising, is now the head of one of the largest corporate design companies in the world (Wolff Olins) in London. He is noted for his writing on identity, notably The Corporate Personality (1978). He has a management, rather than a design, background.

INTERVIEW

Q Your company is involved in corporate identity in a much broader sense than just design. Could you talk about the roles of design and of design management in corporate identity?

WO The key question here is where does identity fit within an organization, and how should it be managed? I speak from the point of view of dealing with large corporations. Their situation is, almost invariably, doing three things at the same time: they are diversifying, they are decentralizing and they are internationalizing. That means that they are moving from products with which they are familiar to products with which they are unfamiliar, from geographical areas in which they are well-known to areas in which they are unknown, and they are employing managers who, for the most part, are new to their own business. They are saying to these managers, "Get on with it", and the managers are saying, "OK, that's lovely", but if you allow that kind of thing to happen to too great an extent, you will tear the company to pieces. So all companies, at the same time that they are doing these things, which produce enormous centrifugal forces, are setting up countervailing centripetal pressures. It's another version of the old argument between centralizing and decentralizing. These centripetal pressures are very familiar. One of them is finance: all companies, in any group, have to report their figures on the same day and in the same way, at the same time. ITT under Geneen was the classic case of this, but everybody follows it, though not perhaps to the extent of his manic interest. There's investment: "We're delighted that you made $20 million in Canada last year, but you can't have it because we want to invest the money in Korea. It's not your business, it's our business". Then there's product quality, which has to be the same all the way round the world. These are all central, coordinating factors. There's human resources (personnel people). We can't allow the guys in South Island, New Zealand, to keep their star - we need him in Sao Paulo. There are six or seven of these; research and development is another one. Identity is another one. There is no question, it has to be managed as a central, coordinating resource. It doesn't work any other way. That's point one.

Point two. Because identity deals not with a whole series of big things, but with big things and an innumerable series of tiny things, you have to operate from a management platform, which enables you to make that work effectively. You have to find a model, and the main model which you can find to manage identity is the same model you use to manage finance. If you look at the financial model of the company, you will see that every department, in every company expects to have a relationship with the financial people. There is financial management; it has targets and it has controls. Every part of the organization is affected by finance. Every part of the organization is also affected by identity. The kinds of controls you have ought not to be very different. My two vectors are those. One: you put it in the centre. Two: you manage it a bit like finance. That means you have to have a director responsible for it, a V.P. responsible for it on the board, somebody responsible for it on a day-to-day basis and also representatives in all parts of the organization.

Q So it's a strategic planning role.

WO Inevitably, and of course it's tactical, too, because it has to be translated into reality. It has to be managed strategically, like everything else in the organization. It is <u>the</u> manifestation of the corporate strategy, the only one that anybody sees.

Q Do most of your clients already have design directors, or do you recommend that they should?

WO Most of the companies with whom we deal know that there is a weakness within the organization, and want discussions about the possibility of correcting that weakness and controlling identity and making it work effectively. Very few of them have any idea of how they ought to manage their identities, and almost none of them have any idea about the magnitude of the problem which they are proposing to address. If you have the ear of the chief executive, and the man is imaginative and sees what you're talking about, then you can make it work, and if you haven't, then you can forget it. Implementation - doing it - is the only thing that matters, but doing it is what most people are not interested in, including consultancies.

Q So you have a long term relationship with clients?

WO You have to have a relationship that varies in intensity. It is long term in the sense that you have to maintain the relationship over a long period of time; it's not long term in the sense that it has to be of continual intensity. It may well be desirable to have periods when you hardly see each other at all, because in the end it's theirs, not yours. If they can't install it with their system of management, then there's nothing you can do as a consultant that will make them put it into their system. We have a very good relationship with the Prudential [a client]. That relationship is coming to an end, in the sense that the first phase is over. They've now got to do it and it's important that we withdraw from the relationship for a time. In a year's time we'll come back, examine the relationship and change and develop it.

Q So if, for example, the company does not have a director responsible for corporate identity (whatever they call him) when you are first called in, you would suggest that they get themselves one, or create a position within their corporate structure for such a person.

WO We always suggest that, though not necessarily in the early days.

Q How does it usually fit in with the corporate structure?

WO There's no rule about this. There can't be, because you have to examine the vehicle, the method by which the identity most clearly communicates itself. In Ford, the main manner with which the identity is communicated to everybody with whom the organization deals is through the product - Ford is about making motor cars. It would be an illusion to create an identity manager who had nothing to do with the product. Where the weight of the identity management falls depends entirely on the nature of the business. If you're dealing with Harrods the main weight is on the environment. If you're dealing with a bank, the main weight falls on a mixture of the environment and communications. With fast-moving consumer products, it's all communication. So the answer to that question must be: the place from where the identity is managed must be the place where the critical mass of the identity emerges.

Q That leads to the question of corporate identity in relation to brand identity.

WO In the first place, the corporation has to have an identity which is separate from its brands. Sometimes the identity of the brands is so overwhelming that it seems greater than the identity of the corporation. But ... if you are an employee, in the end you are not working for the brand, but for the corporation. Having said that, I think one of the great problems about this area is that while corporations are beginning to manage their identities strategically, very few brands are managed strategically. Almost all the work done on brands is tactical. The whole idea of having a brand manager, a very junior individual responsible for a brand, is in my judgement dangerous to the point of lunacy. Brands also have personalities, though they are two-dimensional rather than three-dimensional. They don't have a real life in the sense that you can live within them, but they do have clear personalities in the eyes of the people who purchase them. They are simpler to manage than a corporation's identity, but nevertheless, you see them and handle them. The strategy of brands is much more of a marketing issue than corporate identity. You've got to relate the strategy of a brand to the identity of the corporation. There are some corporations which deliberately seek to project their brands as the outward and visible manifestation of what they are, and that's perfectly legitimate. You've also got to relate the brand strategy to what it's history has been. For example, if you look at a brand like Cross and Blackwell, it is a traditional, funny, quirky English brand with things like Piccalilly, and there isn't any point in ignoring that when you develop that or try to change it. You have to relate the whole brand issue to the extent to which the organization can nowadays afford to spend millions of pounds on projecting one product to consumers. In the days when brands were originally created, the retailer was a kind of supine, almost prone distribution arm, with no personality. He was simply the vehicle by which the brand was conveyed to the public. That is no longer the case. The retailer has his own personality and attempts to project his products and his brands to the consumer, so the place for the manufacturer's brands within that framework is more limited. That means the development of families of brands, creating identities not just for one product but for families of products, which is a much more complex, sophisticated thing to do. Then there is the question of the extent to which the brand ought to be endorsed by the manufacturer. I am beginning to take the view that if the consumer is becoming more educated, then it is inevitably the case that the consumer will be more interested in where the brand emanates from. If you look at an extreme example of a non-brand society, Japan (there are brands, but they are nothing like as powerful as in the west) those companies which have enormously powerful corporate names, like Mitsubishi, can extend them over banking, aircraft, cars and tinned salmon, with equal facility. That's very unusual in the west. I'm not saying there are no brands in Japan, because there are (Matsusitu use three or four brands) but I'm saying that branding strategy, as opposed to branding tactics, is intimately involved with corporate strategy, intimately involved with corporate identity, and must be treated much more strategically. I believe that the number of brands will reduce. They will have stronger personalities. There will be international, regional and local brands, which will not overlap with each other, and very often the corporation will feel the need to identify itself overall.

Q So you see a strong relationship between the future development of marketing and corporate identity?

WO Yes, though corporate identity is not about marketing. It's very often used by marketing people because they think it's about marketing, but it isn't. It embraces marketing, and certainly brand strategy and brand identity are all about marketing. Traditionally, corporate identity and marketing have always been kept separate, but that's no longer necessarily the only way to do it. It can get dangerous when the corporation has the same name as one of it's brands, there can be a terrible mess.

Q So eventually you could see identity design developing into a sort of mega-consultancy which handles every aspect of corporate communications?

WO You've raised a very interesting issue here, which is: how big is the business? If you look at any of the largest consultancies in the world, none have more than 200-300 people in them. We're a big one, not the biggest, but one of the top twenty companies in the world; in corporate identity alone, we're probably the biggest, along with Landor in California. If you look at the market share of these companies, they are ludicrously small; nobody's got more than 0.0005% of anything in world terms. If you look at advertising agencies, accountancy companies or architectural practices, all of which are broadly comparable, you see many which have thousands of employees, with many offices in different countries. I don't think there's the slightest doubt that in the next twenty years there will be huge design offices. There will be offices with 5000 people. We work for Unilever and ICI, for example. These companies are going to need our kind of consultancy all over the world, and we can't yet provide it all over the world. We are where accountants were in the 1930's. The people who have the staying power, endurance and commercial know-how (and that may be nobody who's around today) are going to be in an enormous business. There was a firm that tried to offer a universal service in the 1960's, called Unimark, but it was too early.

Q Presumably the scope is broadening beyond visual problem solving and becoming a process of culture consultancy.

WO Yes. We use the phrase "creative McKinsey", because there's no limit to what you can do. From this business you can get into product design, architecture, training, advertising - it all fits and everything is logical. From where we are, we can move into anything.

Q Could you talk about corporate identity in relation to change - how it responds to, and facilitates it?

WO Corporate identity is the corporate strategy made visible. If a corporation is changing its strategy (if it's diversifying, divesting, investing) unless it changes its identity as it changes its reality, its reality will change less quickly than it otherwise would. Identity can act as a catalyst to help that change to happen. On the other hand, there is the danger that if you introduce identity and give the impression that there is a change, and then you don't make the change, that's worse. So the critical question here is the point at which it [identity] should be introduced. If you introduce it too soon, it's perceived as hype, rubbish and not true. If you introduce it too late, or not at all, then you don't get the change you want. The trick is the timing, and that is very difficult, because corporate identity is not only a manifestation of corporate strategy, it is also a direct result of the corporate personality. In England, ICL [computers] developed a strategy which was to do the same thing that IBM did, but it was ludicrous because ICL doesn't have the same strengths that IBM did (financial, marketing or technical). They also adopted an identity which aped IBM's, and that showed the bankruptcy of ICL as an organization. Is it too early for a new identity to emerge for ICL? They are still unclear about what they want to do, so the answer to that is probably yes. On the other hand, the present identity simply reinforces the fact that ICL doesn't know what it is. There's no doubt that identity is a catalyst for change, but it's equally certain that it is disastrous to introduce it to quickly, and it slows things down if it is introduced too late.

Q This must be because of its internal awareness function, rather than its external awareness function.

WO Yes, internal awareness is much more important. That's why I keep on saying that it is not a marketing tool. Brand identity is a marketing tool. Corporate identity is used by marketing people and it is important in the marketing mix, but corporate identity is primarily for people who work in the organization. Our building is a major manifestation of our identity, very more important for the people who work here than the people who see it. We didn't design it to sell the company, although that was one of the ideas in our heads.

Q So the main function of corporate identity is to act as a focus for the internal publics?

WO If you look at mission statements, in the end there are only three things you can be: the best, the biggest or the most profitable. It's just possible that the company could achieve two of these three, though it's not likely, but I'm bloody sure you can't be all three. However, that's what most companies say they want to be. Identity enables you to demonstrate visually what you picked, which is why people eventually notice things, and why it's important. The aim of most organizations is survival; they are not as positive as they say they are, and they are not very often lead by the kind of people who have the fire in their bellies and the initiative that they had when they were aspiring to the job.

Q Do you do a lot of research?

WO We do a lot of investigation. We try to find out how the organization is perceived, both by the people who work in it and the people who deal with it. We spend a huge amount of time trying to find out what kind of company it is, and what makes it different. In other words, the front end loading in our business is very heavy, and we use a dozen business school graduates of various kinds, for example. As to conventional, marketing research, we don't do a lot of that, and I don't believe in it. We do a lot of checking to see how the company is seen after we've done our work, but there are a number of factors to take into account here. The first thing is that we are not talking about re-packaging sausages; there are a great many issues which will affect the way a company is perceived, of which identity is only one. If you take the Midland Bank, it's now got a new chief executive (MacMan) who has a very high profile and is much admired. There's no doubt that has changed the way the Midland Bank is perceived. The fact that we do a new identity for the Midland will have an effect, but people will say that it's another thing that the new CEO has done. The second issue is that most people don't take much notice of most things, and it's almost impossible to exaggerate the extent to which most people are ignorant about what goes on in the world. It is an error to believe that most people notice anything much, so if you ask them about change, you'll get an answer which will purport to give you an impression that people will notice things, when they haven't. An indirect gauge of all this is better. For example, if job applications have increased, and if the business has gone up. Since we've worked for the Prudential, job applications have gone up by about 80%. It's not important to walk round the city asking people what they think of the Prudential. It's a complete waste of time.

Q Once the identity is in place, do you get involved in policing it, or do you leave that to the corporation?

WO That depends on the corporation. We are spending more and more time on implementation (design management) and we're getting better results. I still think we're not involved enough. It's also a huge growth area, and you can make a lot of money at it, but in the end the company's got to be responsible for its own destiny, so there comes a time when they have to manage it themselves. We try to find people for them, usually someone inside the company who can do this job very well. Quite often it's someone unlikely, like the company secretary. Very often, people from PR or marketing are wrong for it because they have preconceptions about it. The company lawyer won't have any preconceptions about it, and he will immediately see that the analogy you've drawn between finance and identity makes sense, whereas the communications man might have enormous difficulty in seeing that, and might have defenses against it all. I asked one man who had been a company secretary and was now in charge of the corporate identity if it was a come-down, and he said, "Not the way I'm doing it".

Paul Strongitharm 27/5/87

Paul Strongitharm is Senior Secretariat Officer, Executive Services, Canadian Coast Guard. He is in charge of the implementation of the FIP in the Coast Guard organization, and therefore liaises between the Treasury Board (responsible for the FIP), Transport Canada (the department under which the Coast Guard falls, see fig. 69) and the Coast Guard. PS is an administrator without a design background who has filled the design management role for 14 years.

Synopsis (of first part of interview).

This organization is very large (225 vessels over 44 feet in length, for example) has a strong tradition and sense of its own identity, and fulfills different functions over a vast area. The chief functions are: responsibility for navigational aids, ice breaking, and rescue (rescue being a primary or secondary function of all Coast Guard vessels, and a function often carried out jointly with the defense forces). The organization is one with a strong tradition, and therefore Mr Strongitharm was not surprised by initial opposition to new colours, the wordmark and any changes in uniforms (the latter are still under review, see figs. 65-68 for the elements and some of the applications of the program). There was also some conflict over the degree of visual link with Transport Canada, a "motherhood situation" similar to Bell and it's subsidiaries.

The program is unusual in the wide range of large applications and the severity of it's climatic and geographical constraints. The art director of the program was Claude Béique, of the Bureau of Management Consulting, and the manual was produced with help of two design firms: Ove Design and Wawa Design. The chief designers, in addition to Claude Béique, were F. Dalphond and C. Labarthe. The program has been awarded "The Best of the '80's Award of Merit" by the Society of Graphic Designers of Canada.

INTERVIEW

PS We were hopeful that in coming up with our identity markings we would be able to pull stencils off the shelf or have some other easy way of obtaining the required signatures and wordmarks, through a central supplier [the common methods are plywood templates or bead welding the outline of the design in order to make repainting easier]. Our vessels are all different sizes, and consequently so are the sizes for the lettering, signatures and wordmarks required. We had carried out a study and identified all the various sizes, and found that for some applications we may only require three or four stencils, while for others we might require twenty or thirty. Since we couldn't guarantee any major supplier that we would have an ongoing requirement for that particular size, they insisted that we would have to purchase the original cutting dies for the stencils we were using. There was only one supplier who would agree to cover the cost of the dies, on the assumption that he would be receiving orders on an ongoing basis. As we had already received flack from the users (the stencils are difficult to use because ships are usually painted in the water), I couldn't guarantee that stencils would be appropriate. The identity elements, such as the Coast Guard signatures, on the vessels, are fine as long as you don't change them. We have recently received an indication from the Treasury Board that the bar and the maple leaf [the present federal symbol] are changing. The federal symbol is to become the flag symbol. This will have drastic implications on the Coast Guard markings primarily on our vessels, but will obviously affect everything else as well. This means repositioning, particularly on the left hand side of the vessel, and the proportions of the bar and maple leaf are different in the flag symbol.

Our primary identity elements on vessels are: the Coast Guard red, with white markings, white diagonal slash and white superstructure (except for the search and rescue activity which is indicated by yellow superstructure), and the red maple leaf on the white funnel (that has international significance in addition to identity role - the flag identification is the main international marine identifier). On the vessels with the yellow superstructure we identify the activity, rescue/sauvetage. The crest [indicating Royal patronage, fig. 68] appears on the bridge.

The development of the Coast Guard identity was initiated in response to the FIP, but it also fell in line with our own interests to have some backing for the promotion of a consistently applied identity. The Coast Guard had initiated a program for consistent identification, but it had not fully matured. We have been fortunate in being able to incorporate the federal identity elements and furthering our own issue of pride - we're there to help the public and we're proud of it. Life on a ship, particularly the ice-breakers which are out at sea most often and for long periods of time, makes morale an important issue, and we like to maintain the motivation - "You're identified with the

Canadian Coast Guard; you have a task out here and we should have something the public can recognize".

Q You've indicated strong feedback. Have you done surveys, or are there formal channels?

PS We get immediate feedback automatically. Changing the paint was one of the first ones. We were bombarded with concerns from the regional offices and the supply depots. They were worried about changing the colour of the paint, because the vessels had to be stripped, sand blasted, primed and then repainted [the traditional Coast Guard red was much darker, and the current one is not the same as the one used in the FIP, but the more orange, international buoy red, for reasons of cost and identification at sea]. The problem of the old colour coming through was another point in favour of staying with red and not being too drastic. Even at that, there was a significant cost felt. The impact of making the changes, minor as they seem to be, was major, and very expensive initially, but once it was in place, that began to taper off. We are a major user of paint, and it's expensive paint because it has to stand up to the most extreme weather conditions. Even prior to making the change, the fleet and navigational aids sections, who have their own budgets, were stealing from each other, and we were getting ships painted in the old dark red, or tinged with the buoy red. One of the areas which I'm most concerned with at the moment is monitoring the specific colour being used. The quality control from the manufacturer can slip a bit. On a national scale, I don't want to see orange vessels on one side of the country and deep red vessels on the other, or blotchy mixtures, because then the identity starts to slide. Then the morale deteriorates because nobody is seen to care how things are done.

Q Do you have people checking standards for you?

PS At present I have people who have been identified by the five regions as coordinators and communicate back and forth. These are centred in Toronto (regional office for the lakes, with other centres such as Parry Sound on Georgian Bay) Quebec City, Dartmouth/Halifax, N.S., St. John's, Nfld., and Vancouver/Victoria, B.C. My concern is that these people, for the most part, do not share this defined interest that I have. They are not personally specialized or technically oriented. My own orientation comes only from interest. It's an area in which some improvement will have to be made. I haven't yet had the opportunity to personally monitor these things. I'm very particular about colour, and I recently noticed, while in Quebec City, that our helicopters were not painted the correct red. Red does have a tendency to environmental breakdown, but I'm not satisfied that's the only problem.

Q Have you had much public reaction to the program?

PS We've had no unfavourable comments, except one or two unsubstantiated complaints that one of our vessels was marked in English only. Messerschmit, who supply our helicopters, have made a special request to use our colour scheme on their newest helicopters as a sales motivator.

Claude Béique 24/6/87

Claude Béique is a design consultant who trained as an industrial designer at the Pratt Institute in New York (but studied "art of the book", which included typography and layout). He has since had an extensive involvement with corporate graphics, particularly signage. While working at the Canadian government's Bureau of Management Consulting, he was art director on the identity program for the Canadian Coast Guard [figs. 65-68]. He worked on the FIP for its first five years, again mainly on signage, and drew the signage adaptation of the bar and leaf Federal symbol.

INTERVIEW

Q Could you talk about the Coast Guard program?

CB Bell and Bell Northern Research have won many design awards. They have design managers and a staff of designers. Most organizations in Canada have no formal program or desire to use design for more than a marketing tool for selling their products. Companies that have experience in the States or in Europe will use designers for packaging. The design (for moulding special plastics, for example) is done by the technical experts, then they put some images on top. But Bell has a management philosophy which includes the corporate look. There is a corporate mandate to project a certain image that is not just visual - it's a service- oriented organization, and it's a whole philosophy.

The major difference between Bell and the Coast Guard is that [at Bell] every vehicle is taken to a shop, and specialized people apply the identity over a period of time, or every new vehicle that you purchase that's specially equipped (with ladder supports, ventilation, compressors, etc.) is taken there to be fitted and painted. They have total control. At the Coast Guard, every local manager responsible for a fleet of vehicles sends it in to a local supplier, gets it painted, tries to find someone who knows how to apply decals, (hopefully) lends him the sheets of the vehicle markings (and gets them back) and then hopefully it's done the same way three weeks or three years later. Training everybody in the country who has a body shop to apply decals is not an easy job, so your guidelines will not accomplish that. You can't turn everyone into a sign maker, or make every body shop owner careful about your image, unless you bring all your trucks in to a shop which is specialized. That's why the helicopters are always brought back to Ottawa or Vancouver, where there is total control. Those three or four employees are trained to do it consistently and they understand why they are doing it. If a door handle gets in the way of the leaf or the "c", it's interpreted, but a local body shop will apply the sticker bang on, and if it doesn't fit he just cuts it out. You get some interesting finished products.

The Coast Guard had a very extensive, strong, traditional image (special insignia, flags, pennants and colours). Certain items on a ship are painted a certain way: wooden boats used to have green hulls with gold trim, grey decks and masts (when they were metal instead of spruce) were light cream, to copy the colour of the old wooden ones. Developing from the sailing boats, the metal boats were black with white wheel houses and black and cream rigging. The Coast Guard colour scheme was: red hulls (to distinguish them from most other ships, which were black) white wheel houses (to retain coolness - most ships were not air-conditioned) grey decks and cream rigging. Funnels had the maple leaf on them, and there was also the Coast Guard crest. They wanted to retain all these things. They also had the white, diagonal stripe (instituted about ten years ago) which was an extremely dynamic element.

The FIP came in around 1970. Most of the seamen spoke English, except in the Quebec region, which had many French captains on the St. Lawrence. Most of the upper-level professional staff of Transport Canada were, traditionally, English (engineers, architects, and lawyers working for air, marine or land transport). So the Coast Guard was run by English-speakers in Ottawa, and they were criticized for their image being English-oriented. They had the big words "Coast Guard", so they added "Guarde Cotiere" in a very "added on" fashion. They were criticized because they didn't want to use the bar and leaf [the Federal Emblem] and because they didn't use the colours of FIP.

I got close to the Coast Guard because my boat ran aground and they almost rescued me (the storm was too big). That was in 1979. Anyway, I approached them about the FIP, but you can't sell an image to people if it conflicts with their concept of what their look should be. What happened, two or three years later, was that the Coast Guard were told by cabinet that they had to abide by FIP and that they had to develop an image for their rescue vessels (they had the responsibility of all rescues on the marine side - all rescue operations have since been coordinated under a new body). They agreed to do a corporate image study, and to abide by the basic requirements of the FIP.

At the time I was at the Bureau of Management Consulting (a government consulting agency which offers services to just about every field in government, and to the provincial governments). I was the only design consultant. I used to have about six people on staff, but after a while the projects became so diversified that I hired external consultants for the various areas of expertise required. I had worked at the FIP for five years at the beginning of the program. I did the program for Parks Canada, the Wildlife Service and quite a few highway signs and a highway alphabet.

The Coast Guard hired us to do an assessment of what they looked like, spot the problems and say how much it would cost to fix the image. The subjects that we were restricted to consider were: the ships (that they should abide by the FIP) the road vehicles and anything printed (that was simple - there are guidelines in the FIP, so we just used those). They wanted the vehicle markings to be reminiscent of the ships, and they wanted red to be dominant. As the Coast Guard were responsible for laying navigational aids, they used to carry red, green and black paint, so they already carried two reds. At that time the international body for setting navigational standards came out with a range of colours, one of which was a red, a little more vibrant than the Coast Guard red, and quite a lot more vibrant than the FIP red. The FIP red would have been a very bad choice because it's very light and deteriorates quickly under sun exposure. So we moved towards the buoy-red colour to simplify the inventory of carrying so many gallons of each colour. The one red could be consistently ordered through mass-purchase. We looked carefully at the life-expectancy and deterioration of the materials. While choosing the red, we developed the new signature, because saying "Transport Canada. Canadian Coast Guard" on all the ships would have been much too lengthy. So we developed the simplified Coast Guard signature (the longer signature, in both languages, was developed for other applications). At the same time we developed interim signage guidelines for meeting FIP requirements (the Coast Guard was a very bad infringer of the rules). Then we moved on to the actual ships, but were told that the Coast Guard had two new helicopters coming in, plus another one in for repairs, so we moved from ships' colours to the signature, to the signage, to helicopters and then back to ships.

Eventually they realized that the program was more than just a patch-up job. They got exposed to some programs like British Rail, CN, VIA and Parks Canada, and they got serious about doing several chapters [of the manual] on various subjects. I formed a team of design firms from outside the Bureau, producing guidelines for the ships and working on presentations for search and rescue (for the various options). To produce the manual took about two and a half years. I coordinated about fifteen people from different firms. I would discuss and review the presentations with a team of three designers, and reach agreement on one set of directions to present to the Coast Guard, sometimes with options, with suggestions that abided by FIP and by good corporate image principles - something that they wouldn't have to fix in three to five years. They needed an image that would last ten - twenty years.

Just before this the Canada wordmark became one of the major elements of the FIP, and there was strong opposition to using it on ships. However, it was used, and the other elements we ended up with were the red leaf (by itself) on the funnel, and the crest. The Coast Guard crest was established as a traditional element to be used (like the Canadian Coat of Arms) in a decorative way. It was not to be used on helicopters or cars, or as the main item. It was too detailed and contravened the FIP. If everyone has a crest or symbol, you lose track of the identity. We standardized the signatures and the colours on the different applications. We had to go and physically measure the hovercraft and the ships, paint them, apply decals or templates, photograph them and bring the photos back to Ottawa, get them approved and send the directions back to the shipwrights to paint.

Lime-green yellow is used for fire appliances because it is the most visible under smoky conditions, in physical and psychological tests. School bus orange is the next best colour, and it became a strong colour to use on yield signs. It's recognized to be the best contrast with black, so for example, at Parks, Wildlife or Public Works, whatever vehicles operated under dangerous conditions were painted school bus orange with black markings. Red is not as highly visible, but it's traditional. It's better in the ice than at sea. Yellow superstructures for search and rescue didn't come out of this, but from a cabinet decision. Air Search and Rescue in the armed forces was using that colour. I think red and yellow, with black and white, look awful, but corporate image is a set of compromises between politics and the administrative difficulties of changing things. The search and rescue ships should have been all yellow with black trim, maybe leaving the superstructures white (like Holland did - but I think the States, Canada and England are using red).

The managers in the Coast Guard wouldn't give us any of this information; they wanted us to come up with solutions and they tested them against what was going on elsewhere. Cooperation was not always easy. They were traditionalists - old salts who don't want to change anything and won't help you to develop something different. The coordination was excellent though. The people who were responsible for the corporate image were very cooperative. The field, in certain regions or certain areas of the Coast Guard, like the vehicle fleet management people, there were more difficulties. Also, the Coast Guard would have liked the red on their building signs. The FIP convinced them that the signs should conform to the FIP grey. In the Quebec base, which is close to the old part of the city, we use the NCC [National Capital Commission] colours, which are more closely related, in some people's minds, with traditional buildings. There was a lot of resistance from some of the senior air people and some of the high level ship management. There are good reasons to paint a helicopter mostly red, with a little bit of white, rather than the other way around. It's more visible in the sky (particularly in misty or grey weather) or if it falls in the snow. The first helicopter we painted was a Sikorsky, about 63 feet long. It was an enormous animal, and it took about six weeks to paint it. The paint finishes for aircraft are very special ones made specifically for aluminium. They're lighter and more durable, and made in only a limited number of colours. We managed to get them almost the same colour as the ships. The resistance came only from very senior managers, but good corporate image is well implemented, and senior management have to be convinced. Then the staff implement anything, even if they don't agree.

I don't know how the implementation is going now. I know the manual looks all right. We tried to do something with this manual that is not normally done; to get exact, up-to-date measurements of all the vehicles, etc. We thought that if people knew what their boats looked like, and we positioned the markings extremely exactly, at a scale that was perfect, then it might be more acceptable. If you draw a helicopter with certain details that are inexact, they'll dismiss you as artists, with no credibility. It was an extravagant task, going to Victoria or Vancouver to photograph and measure ships, for some of which there were no drawings in existence. Sometimes we would have a drawing of a ship, but the superstructure or the bow had been drastically changed from its previous purpose since being purchased on the local market. If the Coast Guard wanted to lay buoys they would cut holes in the hull to make it easier, for example. If the drawings were accurate, hopefully the shipwrights or the naval architects would use them to apply the graphics properly. I think they have had extensive difficulties in using the artwork. When implementation started, our contract finished. All the publications, communication and printed matter were to be done, and they decided to do it with their own staff. We looked at the uniforms for close to three years without any success. That was a traditional element that they didn't want anyone from outside the Coast Guard to get involved with, so the uniform still has many varied elements of identification. I think that uniforms are no more difficult than a helicopter, if you feel that it should be done and have the authority it can be resolved very easily. We had worked on the uniforms for Fisheries and Oceans and had started to work on their fleet, but again they are a very traditional group of three or four entities: oceanography, mapping and fishing inspectors. I don't believe they did project an image that was very strong. Their colours weren't standardized.

Parks Canada and Wildlife were very successful, but the joke about that is that they came under Environment Canada, and their image was so strong that Environment Canada almost disappeared. We made an assessment study for them, and we came up with some compromise that could be acceptable to Parks, Wildlife and Environment Canada, but at that point a new minister came in and decided that it should be Environment Canada that dominated, so that we would have "Environment Canada Parks", and so on. It comes in phases. The image gets very strong, then some managers or some of the people responsible go away and it deteriorates. Then a political desire to increase the image acts upon some managers and the image gets improved. FIP had a strong mandate for a period of time. In signage they did extensive work, right across the country, but after a while nobody had the policing or control mandate, and very little was done. I don't know how things are now, but I think signage is a minor priority for many departments because it is so expensive.

With the Coast Guard signage, having done siting guidelines and the signage alphabet for the FIP and the

Canadian government exposition center, I knew how to interpret the FIP. You develop the guidelines to be used like a dictionary, they're not to be followed blindly, but to be bent and adapted to your needs. It's like language. French has rules for everything, but English can be bent. If your guidelines are extensive, there should be a way to find a solution to every problem that the client might face. In theory, the Coast Guard has 163 classes of boats, which we reduced to about fifteen major classes and sub-classes.

Q Tell me about the Bureau of Management Consultancy.

CB The Bureau normally offers consultancy services in human resources, economics, statistics, planning, productivity, performance measurement, organizational structure or other management activities of government departments or services. The BMC didn't offer much help in industrial or graphic design, or corporate image, before I went there, and it doesn't now I've left, though it's [corporate design] is part of management courses at universities now. People don't always understand what corporate philosophy should be in terms of visual projection of the image of a corporation, or of a government department. The main field of interest that I had there was in developing systems of graphic design and communications.

Corporate image is basically a modular or systematic approach to applying a set of guidelines to various items so that a consistent image can be projected, from equipment to uniforms, to the way people perform their jobs. This is certainly not well understood by most firms in Canada. Municipalities, too, if they have an image to project, don't do it extensively. Even large cities just have a coat of arms and a set of colours for different trucks.

Q What about design management?

CB Design management, in a service like the Coast Guard, is a posting like navigational aids or a region. Managers move around until they get a directorate. It's a position that some of the managers take very seriously. We had to train them and inform them as to how they should deal with the local requirements, and how to answer the questions they would get from the field. Some do an excellent job but others don't get support from their superiors, and it becomes too costly to do it properly, so they answer questions in a more evasive manner. If they don't have the support staff to interpret the guidelines, some of the problems never get resolved. The guidelines get implemented blindly, which is probably the case in some instances at the Coast Guard. Coast Guard should have had local representatives, like they had for signage, and semi-annual meetings for the people responsible for fleet management. If they have to convince their regional managers that they need a bigger ship or some new equipment, the details of the corporate image get lost. They become very decorative elements in their minds unless they are given the time.

I trained project and property managers in six or eight government departments: Public Works, Employment and Immigration, Customs, Parks, Wildlife, Coast Guard. I trained more than 800 property managers. Their responsibilities are numerous, from cleaning and toilet paper to ventilation, heating, facade deterioration, purchasing, leasing, and meeting the local by-laws. By the time they get to signage (they're responsible for both exterior and interior signage for their tenant departments) they couldn't care less, and I don't blame them, unless they're given enough freedom and time to do it. They don't usually take it seriously because they don't feel that their superiors are taking it seriously. It's just an additional task, and the identity is diluted in their daily activities. If a sign is a little dirty or a little crooked, well, they've only got so much time, and cleaning, security and so on take precedence when it comes to financial priorities. The same goes for the ships. If they spend weeks applying masses of paint to a ship, when it gets to the decals, they're not going to spend two weeks positioning them or making templates out of plywood. How long would it take to draw, properly, the maple leaf on the funnel with a bead of welding? They ask if it will be changed again once they've done it.

Q So standardization is a problem across all the applications.

CB The graphic adjustments made for signage would almost be valid for graphics, but they might be a bit too massive or too spaced out, in terms of inter-character spacing. It would be nice to have it [the flag symbol, which is replacing the federal emblem] on a computer, to avoid having to re-draw it each time. Now, if you want it on a computer, who's going to give it to you and who's going to have the proprietary rights to it? I think it's almost public domain. It becomes difficult for Ulrich to give it to me, because if he gives it to me, he's got to give it to everybody else. But I see things in the field that he can't see, unless I tell him about them, so if he gives it to me, I'll give it to the client. I might have an advantage over the next designer, because I can produce a publication on my computer, directly, without going to Letraset, but they will have the symbol used properly. Computers could cut down on bad interpretations. Letraset did sheets of bars and leaves. The first batch were too flimsy and were not properly spaced. The second batch was perfect, but did everyone know that the first batch was different. To get good results, you have to pass it on. I've seen all kinds of interpretations of the Canada wordmark. The printer, when asked to print a red maple leaf over a black word, doesn't necessarily care about the registration, but with better guidelines or separations he might do a better job.

Doing the signage alphabet for the FIP took a year and a half. I did an upper case alphabet, with more spacing, for the Coast Guard (we knew that all upper case was not desirable but ship's names are traditionally done that way, so it couldn't be changed). The alphabet was designed so that they could blow it up and have a decal cut. With the accents and everything, it took less than three weeks on the computer. The 1972 alphabet could probably be done in a week (without all the testing). The testing would be easy once we had all the letters and the inter-character spacing digitized.

Q Could you talk some more about the early days of the FIP?

CB Jan Gas headed the FIP, then at Information Canada. I worked with him on the Canadian participation at the Japanese world's fair at Osaka, in 1970, and he offered me a job on the FIP. I worked on signage, and Alan Way, Hans Peter Muntener and Jan Gas all worked on stationery, publicity guidelines and so on. Exhibits and displays were usually done by individual designers from outside, so they could bring their own flair to it. We developed the image of the Canadian government, with Hugh Stewart as the administrator of the program.

We took the elements that had been designed by CAC (Commercial Art Centre, in Montreal) and tried to refine and balance them. The story behind the bar and leaf was that the second bar was to be replaced by the name of the organization. One or two line names were easy, but names like the Canadian Mortgage and Housing Corporation were not. Also, for a period of about three years there was a trend to include the word Canada in every nomenclature, and then the Canada wordmark came in. With the two languages, this sometimes meant that in a fifteen-word signature, "Canada" occurred seven times - the redundancy was excessive. I commented, at the time when the wordmark came from the Office of Tourism, that perhaps we should use it as the main identifier, and put the department's name under it, to avoid this redundancy. The bar and leaf has always been regarded as two-thirds of the flag, though we changed the proportions. We made the leaf bigger in proportion to the bar than it was on the flag, to give it more mass than on the flag, and we specified the space around it. We tried to implement the bar and leaf for every name of every government department, and simplify the signatures (there was a trend to simplified communication devices at the time).

We ended up with too many elements. Using the whole flag could make it easier, but there will still be too much redundancy. There are also provinces that use very similar name wording, so there will still be a need for an extensive signature. Since we're using two languages all the time, we have three major elements and another one at the bottom [on letterheads] but at the time of its inception it was way ahead of other countries.

Colin McMichael 25/6/87

Colin McMichael worked in design at Bell from 1946 to 1977, when he retired as art director.

INTERVIEW

Q Was corporate identity at Bell always separate from advertising?

CM Advertising was quite separate from anything to do with my group. We were involved with staff magazines, the annual report, bill forms - anything that went to the public, even the stock certificates. We did exhibitions and displays, except for major ones such as Expo, where we still had to police such things as the use of type. It involved things like covers for the telephone directories. They wanted to look more involved with their customers, particularly in smaller towns (they didn't want just a big city image) so for the directory covers we would go to Canadian artists to do local scenes for each cover, much as they did in Britain. We would fan out to the managers and ask them to suggest what people were proud of in Kitchener, Windsor, or wherever, and then I would engage an artist, usually an ARCA, to go to the site and sketch it. That went on for many years, until it was decided to go to full colour.

Q So Bell had a very clear idea what corporate image was all about, from way back. What was your role?

CM Yes. Advertising and corporate design were two different things. However, the advertising agencies were, of course, using the trade mark, and the policing of the trade mark was the responsibility of the corporate design group. As art director, I was involved in design, design management and also in production of what was designed, such as the company magazine and the annual report. I had to follow through to the printing plant on what was designed. Now, design and design management have been split up, and it's also been regionalized to a certain extent. At that time all the design came from one source. I think that's the way it should be, to ensure that the company doesn't look different in two different places and that you have control of the image. For instance, you should look bilingual and not have separate English and French images.

Q In overseeing the program you must have had to liaise with many other people, such as architects, as well as printers.

CM Yes. I had to work with architects when the company name and trademark appeared on buildings (whether it was to appear in cement, steel or copper, for example). They were always very cooperative. I would explain things to them and they would ask my opinion.

We also had a very good raport with the art director at AT&T. They did a lot of contract work with Saul Bass in California and top designers in New York. We were always able to see what they were doing. I remember going to a presentation in Baltimore, given to AT&T when they were re-doing their image. Tom Ruzika was the art director's name. They weren't directly involved in what we did, but it was very rewarding to see how things were developed and what was rejected.

Q There's still plenty of evidence around (on buildings and manhole covers, for example) of the evolution of the Bell identity.

CM The bell gradually grew simpler. In 1976 I did the last version of the bell symbol, a flat side view [fig. 7]. The three-dimensionality was removed to give it stronger impact. That's the difference between a symbol and a picture of a thing. I felt the time had come to get away from the bell - once people can read (once they've got used to a name) they don't need an image. Also, that bell had belonged to AT&T in the States, and Bell had broken that association. There had also been more changes in the technology (such as fiber optics) than at any time since Bell himself. It had to change. After the bell symbol was disposed of, I designed the stacked signature, with Bell on top of Canada. Eventually, and quite correctly, I think, it was reduced to just Bell. This had more impact in public places, such as telephone booths. Once the public had got used to Bell Canada, to making the association, then the Canada could be implied and the word Bell could be used on its own. There was always a gradual approach at Bell. Rather than disturb the public they let evolution take its course.

When they commissioned the [rejected] designs for new symbols from various people at this time, they were just protecting themselves. Another reason for simplicity is that Bell is a conglomerate. Then, it still meant the telephone, but now it's all sorts of other things. The visual image of many companies can now only reflect an umbrella.

Charles Harris was my boss for about five years. He was hired because Bell wanted to change, and coming from CN he had a lot of inside know-how about how to achieve the standardization of corporate image. He was easy to work with because he was very experienced at making it work.

Q How long were you at Bell?

CM I retired in '77, but I was retained for five years as a consultant, because the structure of the work was being phased out and shifted in other directions (like external agencies) and I would go back and work on things like the annual report just to make the transition a little smoother. I worked with Jean Morin, a very good designer and delightful to work with.

Q Would you say that the way corporate identity was viewed at Bell changed in your long career there?

CM In the early days you designed a thing, then later we were designing an overall look. Everything has to look as though it belongs to the company, and the whole company is involved. Standardizing letterheads, bill forms and the introductory pages of the telephone books were stumbling blocks. The phone directories were a very difficult problem. Making it easy for the customer to find what he wants in the book doesn't result in anything that looks spectacular (if good design shows, there's something wrong with it). I was often on loan to many different departments, which were not involved with public relations or corporate design. Though the directory people had their own designers, design was not seen as important as it was later. The departments didn't have representatives who reported to me. That management structure came later, and it was gradual. People always have to be involved in the process. They have to want it. You have to listen, and then relate to the corporate look.

The appreciation of corporate identity as a factor in business is a fairly recent thing. Though Pick (at London Transport) and Behrens (in Germany) were much admired in the States, generally corporate identity is an American idea. Image first became very important with colour in advertising and in TV. There was no direct input from AT&T, though the people at Bell were certainly aware that AT&T had a very good image, and didn't want to be left behind. Image was always important for Bell because of their monopoly position (which necessitated the granting of leases and permits). They had to be very careful that it was never abused or seen to be abused (they're equally important). Appearance has to reflect reality. What kind of corporate image can you have if you have no performance? The railroads are a good example, despite

Charlie Harris's great work at CN. If it's a good company then what is being said is believable. Corporate image has to generate believability and acceptance, not in the product so much as in the people running the company.

At Bell new awareness was brought in to the company by new, younger people. Each generation has its own pattern of readable image, and earlier work becomes obsolete. De Grandpré [Bell president] was always open to new ideas. A corporate president doesn't have to have a sense of design, but a sense of the worth of the people who are designing for him. Designs were chosen by a sort of competitive examination. I would often commission an outside designer and we would sometimes present the work together in a closed-door meeting. It was expected that we would do most things in-house, or if we didn't do them we would have helped. We didn't use consultants much then, as the role of the internal art director was to observe and recommend.

Q Did you ever use surveys in the early days, to check on the company's image?

CM No, only for advertising.

Tom Ford 30/6/87

Tom Ford is the Director of Marketing and Public Affairs at the federal government office for the Calgary winter olympics. He was a member of the team which produced the Task Force report on communications, and worked at Information Canada for the six years of its duration. Information Canada had several main branches: Planning and research, Communications, the Graphic Design Secretariat, Expositions, Regional Operations and Publishing. These functions were wound up or transferred to other government departments when Information Canada was disbanded in 1976. Tom Ford was Director of Planning and Research (out of which came the FIP, see below) and Regional Operations.

INTERVIEW

Q When Information Canada was disbanded, Expositions and Publishing went to Supply and Services, and the FIP went to the Treasury Board. Presumably the other two branches, Communications and Regional Operations, were absorbed by other departments.

TF The communications unit was disbanded, and didn't go anywhere. The regional operations group had indigenous community information officers, to reach into communities that weren't exactly on the main line.

Secondly, they had bookshops, and thirdly, information enquiry centers (people could walk in, phone in, write in). The book shops were sold off to a private entrepreneur (Renouf). For a while, they maintained, under the auspices of Supply and Services, the enquiry service, but that has now been dropped as well. In addition to the areas you mentioned, there was a planning and research group, but its functions were simply dropped, and not picked up by anybody. To a certain extent, the function of the planning and research group was picked up by the Canadian Unity Information Office, but that's been disbanded as well now.

Q Could you talk about your involvement?

TF There was a Director General, the first being Jean-Louis Gagnon. I was one of the directors reporting to the Director General. I started off in planning and research, and took on the regional operations as well. They were my two functions. The FIP started with the planning and research group. We started the program and got it launched in government. Alan [Way] and Ulrich [Wodicka] have been there for a long time now.

We had many problems. Once the government had agreed to a common identification for the government of Canada, they went to a company in Montreal [CAC]. They came up with the bar and leaf. While this happened, there was a move to simplify the names of the departments (Transport Canada, and so on). It was a way of trying to get a less confusing form of address for these departments. With the two languages, the bar and leaf and the smaller names of the departments, we had a big hurdle. It soon became apparent that the design was deficient. We couldn't float the symbol - it looked funny with the leaf and one bar. We did what we could, because the government had accepted it. We made the leaf bigger, and scrapped the type they were using [fig. 36] which was artsy and almost unreadable. It was too bad. Even now, when I'm doing videos, I have a problem using that because it's very horizontal. It's one reason we brought in the Canada wordmark, which I still use a lot instead of the bar and leaf [on the winter olympics graphic material]. The wordmark has now been widely used for about fifteen years, and research tells me that people do associate it with the Government of Canada.

I remember the Prime Minister saying to me that the FIP was one of the good things that Information

Canada had done, and I think that's right, despite the problems. It did take something and bring it together out of absolute chaos, because we were just losing identification all over the place. In Canada, you're never sure if it's the provincial department of agriculture, or the federal, or who's doing what, so I think it has been good. It's interesting that the provinces came to us and sought advice and assistance, and we helped to clean up their programs.

We used to have endless arguments about the difference between image and identification. We just ended up calling it an identifier, because that's not a "colour" word, as opposed to image, which for many people is a "colour" word. Identification was the chief aim.

Q Could you give me some information about your own background?

TF Right now I'm Director of Marketing and Public Affairs at the Government of Canada's office for the olympic games in Calgary. After graduation, I started as a reporter; a year at the Winnipeg Tribune and nine years at the Toronto Star. I covered everything from politics to entertainment. Then I went into public relations and advertising in Toronto. From there I went into the Task Force and on to Information Canada. So I have a broadly-based communications background, with a bit of a lot things. I was with Information Canada for the duration [1970-1976]. After that I moved to Fisheries and Oceans (in communications) and then became Director General of Management Services (which was planning, computers, administration and finance). From there I moved to this job, which I've been doing for about three years.

We had a good crew at Information Canada. It was funny being a sort of "art department" in a government office building. Art departments play radios, shout and scream a lot and get fierce about things. People would get angry and walk out if things had not gone the right way, or if they they felt that what they were doing was being prostituted. I'd follow them and talk them into coming back. I liked the fact that it was important to them, and I learnt a lot from them about taking your work seriously. It was difficult though. Some departments didn't want to implement the FIP, or did it incorrectly. We couldn't keep the manuals moving out fast enough. We may have handled it badly, but it did get done. There was an impetus after the Task Force report and the setting up of Information Canada, and with ministers saying, "Yes, that's what we want". You have to go with that impetus. If you wait too long, everybody gets tired. You may get a terrific manual, but you've lost the opportunity to change. The program is there to be a change agent. We're dealing very strongly here with corporate culture. I didn't even know what a corporate culture was then; maybe that's why I took it on. We were changing a very entrenched corporate culture - the federal government at that time was a federalism running a federalism (probably still is) because the departments had a lot of autonomy (one set of federalism) and they were working with the provinces at another level. The best thing we did was, we went with the motion. We hit it when we could. I know some changes are being made now. The bad thing about bureaucracy is getting it to change. The good thing is that if you can get that change implemented, it'll be there for life - if you can ever get in there, it's there to stay! We would always take opportunities to highlight the program in interesting ways. One that Alan [Way] did was grain cars on the prairies. The government had thousands of these great big grain carriers for the railways, and so we put the FIP on them. On a highly visible, federal thing we were using French for the first time in western Canada. We weren't just changing design, but also attitudes towards language. Another aspect of that was getting French Radio Canada to use English.

We had endless arguments about the use of the two languages. When we started, they were loaded on top of one another, but that didn't work, so we tried various ways of putting them side by side. That took a long time, and in a sense it didn't have anything to do with the design, but it was indicative of the importance of the program. We were talking about more than the furtherance of good design. We were establishing a gestalt, a coordinated look for the government (the government of Canada as an entity, standing for more than 58 departments and agencies) promoting the use of the languages, and shortening the names. There were a lot of elements we had to play with.

Q Could you expand on the position of Identity design in relation to PR and corporate communications in general?

TF We got as far as we did because we had the backing of the Prime Minister and cabinet. The person at the top has to say that they want it implemented. If we had serious problems we would go back. Information Canada had its own ministry then. The minister was Mr. Stanbury. The minister working with the cabinet was the only way to do it. We still had to do a selling job with other people and get them excited, but it's driven from the top. The organization has to be positioned so that it can talk to the top. If it's buried away somewhere in a PR department, it will die, and also it tends to get stuffy and not respond to the real requirements of the head office. There can be too many rules and it [the identity] becomes too difficult to use. It's not contemporary anymore and the juice goes out of the program. The staff become paper shufflers and obsessed with design approval. Though you can't change corporate looks all the time, they have to be kept up to date. You change it over time so that the program maintains its vitality and its ability to serve the requirements of the department. If the program is positioned properly in the organization, it becomes more than just the corporate image. You can build in programs around it to make some changes in the corporate culture or how the corporation is viewed by its clients. Many people just look at it as pretty pictures, but it's got to be more. It's the graphic representation of a number of programs we're doing internally and externally to make our company contemporary and vital and real. Pretty pictures on a page, or doing it by numbers, are just bullshit. The difficult thing with graphics has always been, "where does it belong?" It's very hard to get people to appreciate the power of this thing if they use it properly and position it well. The toughest job has always been to make people aware of what can happen if it's done well.

Q Was a lot of research done on the FIP graphics?

TF No. We did some, but it was so obvious to us that it was chaos and we should do something about it. It was also obvious that it had to involve a red maple leaf. We weren't starting from scratch; the elements were there and we just had to put them together in a program. I don't think we even focus-tested it. We tested this thing [the Calgary winter olympics symbol] in Montreal, and they said it looked like a tombstone. So some people thought, "Oh my God, we're selling death". Once they get that into their minds, it's difficult to get it out. I ignored it and we went ahead. But I'm sure that on other occasions, if people were nervous, it would be back to the drawing board. What happens is that, instead of people talking about those things they know, they become quasi-graphic designers, so when I do focus testing, I ignore completely what they tell me about the look of the thing. I do want to get some sense of their emotional reading of it, but if you hire a graphic designer, you go with him or her. So I think we were well off not doing focus testing, particularly when we started working with the two languages. That could have driven us to distraction. The use of the languages was government policy, and that had to be the end of the argument.

Q It really made bilingualism a part of every-day life. How do you think the FIP fitted into the overall strategy of Information Canada?

TF The FIP was one of the best things we did because it was seen by other ministers and departments as a legitimate central headquarters function. They were always questioning other parts of what we did. They didn't like being coordinated, and they didn't like any comments on their writing. It was always what I call a headquarters/branch thing, and government's like that. They didn't always like identity, but after a while they accepted it. Our other jobs were simply not accepted that way, and it is arguable - "Why do I have to have somebody from Information Canada help me with my advertising. I know my problems in that field better than they do". Advertising is a faster pace and you have to stay sensitive to your clients. That was essentially the difference. Design really came to the fore as something that should be done centrally. The rest of it went by the boards, but it was a noble attempt at saving the tax payers some money and at communicating more effectively.

Q Centralized production was an important economic factor.

TF When we started, we tried to decentralize the production of signs, but we surveyed the results and it soon became apparent that what they wanted was a form and a post box to send it to. It's all done through the Exhibitions Commission now, and it works quite well. People understand it now and the signs are done dead on. It's incredible how you can give someone the layout and the manual and they still get it all wrong. The execution of it is just beyond certain sign makers. I hate over-centralization but you really do have centralize certain things. You can't get the signs done perfectly in Calgary, for example.

Q Did many of the designers come from the Exhibition Commission?

TF They did a lot for Canadian design. I think they did the Canadian flag. They were able to bring together very creative people and keep them going. Paddy Reid was their best boss - he recently did a lot of work on Expo 86. They became a pool of highly-trained and proficient people, who also knew government. It was nice to have that in-house capacity. I know you can buy a lot of stuff freelance, but it's good to have a cadre there of people who know what you're all about.

Burton Kramer 4/8/1987

Burton Kramer is a leading designer of corporate graphics in Toronto. Amongst his best-known work are the symbols for the CBC and the Reed Paper Company (fig. 70). He also produced one of the designs which was rejected by Bell in 1975 (fig. 38).

INTERVIEW

BK I act, far more than I ever used to, as an advisor to clients. The design aspect is part of what we do, but in fact I help them to conjure up solutions to their problems, and/or I help them to make them happen. I say "make them happen" because sometimes it means calling in other expertise to work with us, and sometimes pointing them at someone and saying that they can help with that problem. We'll monitor what's happening if we think we should, or if they would like us to. At the moment we're working on a presentation for an identity for a new company. I've also been asked to name the company. This involves questions like, "who are you?, what are you about?, who are your clients?, where are you going?, who's your competition?, how do you see yourselves in relation to your competition?, how do you see yourselves in relation to your market and how do you want your market to see you?". I'm using the word "see" in the broad sense - I don't mean it strictly in the visual sense, but how you perceive it.

Q So research is very important?

BK I don't mean to make a mountain out of it. Sometimes the answers are forthcoming from very few people, but at others it's much bigger. Sometimes the client doesn't see the necessity of going through that process, and they may be right, but I would give an example: some of the things we're going to show a client tomorrow night involve stationery, but neither we nor they know at the moment whether it's going to have to be bilingual, exactly what the registered full name of the company is going to be, or even where it's going to live, but we still want to show something which says "this what you ought to feel like (or, we think you ought to feel like)". We've plunged ahead based on the name, which is based on the fact that the organization has two founding partners that have joined to form this company, and it also relates to what they do. We started out by designing a wordmark, a logotype, for them, because the name is a memorable one. Then the client said he would like a mark [symbol] as well, so we designed a mark, which creates a "who's on top" situation. I normally think that if you have a good mark, then everything else plays second fiddle, but we've had clients who insist that the name is very important. Then, of course, the mark becomes meaningless. That's the problem of the client not understanding how people react to these things. You want to come to the point where you see the mark and it registers the name. If it doesn't do that, the whole thing is useless, and you don't need a mark. For example, one company we've been doing work for is called Teknion. I did a wordmark and no symbol, and the wordmark functions as a name and as visual thing. If you remember the name or recognise the look of it as Teknion, then it's done its job. Every year or two someone comes round and writes another badly-informed article on corporate identity. They put a bunch of them together and say, "can you guess what these are?". You can't, and so that's supposed to prove that the whole thing is nonsense.

Q Logos aren't the end of corporate identity.

BK Yes. The orientation of some designers is still not towards systems, and that's the difference. You can do a pretty good identity program with a fairly mediocre symbol or wordmark, or with a good one. The way in which the applications are done, has a kind of energy and strength, with or without the world's best wordmark. If you have the world's best wordmark or symbol, and everything else is going for you too, then that's dynamite, but you can do a pretty good job without those things. You have to be involved in implementation because people make such a shambles of it. There's that nice old line, "forgive them, for they know not what they do".

Q In terms of research, what do you think a designer really needs to know?

BK Everything. The perception of many designers of what counts is not terribly important to me; they're very limited. Designers are not just funny guys doing decoration.

Q Do you find that you are often called in in the wake of change or after corporate consultants?

BK We've had people coming to us who're just beginning a company, or who have a company which has been around for a little while but has suddenly started growing rapidly and competing in a class which it is totally unused to. They find they don't have the wherewithal to compete with the heavyweights. They are aware that we can help them, but their perception of who and what they are and my perception of that are not necessarily the same at all. We have a client who thinks he is in a technical business, and we think he's in a fashion and interior design business. We're both sure of our perceptions. The outcome will depend on how much either one of us will compromise. I'm convinced, though, that the way to make yourself totally ineffective is to raise such a fuss that you are no longer in a position to affect anything. They are pursuing a path which they believe to be right.

Q Do you have specialists in other disciplines, such as writers, on staff, or do you contract out?

BK We do a mixture of things. I do some writing (I don't consider myself a writer, but on the other hand, I'm fairly nauseated by most of what I read). A lot of people we work for don't need great writing, just someone who can put things down in reasonably clear, literate, organized language, so that common folk can understand it.

Q Do you have any copies of the design work you did for Bell?

BK No, though I did eight or nine. The one you have was in response to a brief which wanted something "tough, aggressive, etc". Ironically, the ones they liked were the most wimpish things imaginable. Either I misread the brief, or the brief was off-base.

Clive Chajet 30/11/87

Clive Chajet is the Chief Executive Officer of Lippincott and Margulies Inc., of New York and Los Angeles, possibly the largest corporate identity consultancy firm in the world. The company's work covers a very wide variety of identity designs, including A&P, RCA, American Express, Coca-Cola, Amtrak and Standard Oil (see fig. 71). It is well known for its work in naming or re-naming corporations, for example: Tambrands (for Tampax), Ameritrust (for the Cleveland Trust Company), Enron Corp (for the merged Huston Natural Gas and Internorth companies), Meritor (for the Philadelphia Savings Fund Society), United Technologies (for United Aircraft), Nynex (for the New York and New England telephone companies) and Primerica (for the American Can Company). In most cases, these names were created because of changes in the clients' primary products or services, their expansion into new products or services (or new geographical areas), or corporate reorganization (in the case of Nynex, the break up of the Bell System). Details of these and other case histories can be found in the company publication, Lasting Identities (1987).

A short portion of the interview was taped (see below). In conversation, CC stressed the following points:

(a) Corporate identity design is the visible aspect of corporate strategy.

(b) This visible aspect is disproportionately significant, because it is what people are most aware of.

(c) Corporate identity design must be closely aligned to corporate culture.

(d) The chief importance of corporate identity lies in unifying the internal audiences. "Unless the company is unique, success or failure depends on internal attitudes. Corporate identity is the catalyst".

INTERVIEW

Q Could you discuss corporate identity and marketing?

CC You can't make a simple generalization about the relationship between a corporation's identity and its marketing effort. A marketing identity is, by definition, different from a corporate identity. The marketing identity has the goal of increased sales (to over-simplify it), but the corporate identity does not

- it speaks to its own audiences. Most often, these are the financial community and the internal audiences. However, there are instances where the corporate and marketing identities have parallel needs, and that happens most frequently where the two identities are shared. I'll give you two examples which are at opposite ends of the spectrum. Nobody can go out and buy a Proctor and Gamble anything (they buy Tide, or Crest, or whatever). The name Proctor and Gamble has no existence as a marketing entity. The law requires that the name of the manufacturer should appear on the package, but it plays such a minor role in the sales effort that it's just a response to a legal, rather than a marketing requirement. On the other hand, there's AT&T. You can, because of recent de-regulation, buy an AT&T something - you, as a consumer, can do business with AT&T (you couldn't before de-regulation). Therefore the marketing and corporate identities, in that instance, become one. Where you have a meeting of the two identities, there's a different set of rules which come into effect, in terms of how you develop your corporate identity practices and emphasize or de-emphasize certain aspects. So there is a strong relationship between the marketing and corporate identities among those companies where the identity is a shared one. Then there's a third category, which is even more interesting and more complicated. The best example is Coca-Cola. You can buy a product called Coca-Cola, or buy stock in the Coca-Cola Company. You can also buy a product called Minute-Made or Sprite, or go to a Columbia movie, and see an endorsement from the Coca-Cola Company. So in this category, marketing and corporate identity can be the same in some instances and in others the corporate identity is just used as an endorsement.

Q There seems to be a general awareness of the the strategic and cultural role of corporate identity amongst the people I've interviewed.

CC Yes. Modern corporate identity was virtually invented by one of the founders of this company, Walter Margulies. He's dead now, but he was a pioneer. To some extent, the history of corporate identity is the history of this company. He was Viennese, trained as an architect, and his partner, Gordon Lippincott, was a professor of design at Pratt Institute. They started this business at the end of World War 2. The army had requisitioned a large number of hotels as troop facilities. Walter and Gordon started their business re-converting these facilities back into hotels. From there, they got into product design, and then packaging design. They built the biggest packaging design group in the world, with 150 people working for them. Gordon left quite early in the game, but Walter kept going. One of their packaging clients was Johnson's Wax (this is the story Walter always told). Johnson's were bringing out a health food product, and Mr. Johnson was telling Walter about it. Walter said, "A wax company, selling health food. Are you crazy?". Supposedly, this is what gave him the idea that a corporation needs its own identity. The visible identity of a corporation has an effect on how people think of it. That was when the company changed direction. In the early days, packaging engaged the attention of the chief executive officer, but it was beginning to deteriorate, in the sense that the CEO's were not getting involved in it anymore, and were relegating it to a lower level. When it came to corporate identity, the CEO's were very involved, so Walter and Gordon decided to get out of the packaging design business. When it started, corporate identity was defined in terms of logo's, because that's all these guys knew. That's the extent of what people imagined corporate identity could be (still is, in many cases). Then Walter came to the insight that though design is important, you've got to use words, too. So we have a nomenclature department, which has invented a huge number of corporate names. Both design and words are vital in communicating a corporation's identity. Then I came along and acquired the company from Walter several years ago. What really drives corporate identity today, in my view (though design and words are important) is that it has become a component of corporate strategy, no less, or more, important than finance, assets, or product mix. Corporate identity is the communications part of it, and while the visual aspect is what you see, it is now a part of the strategic process. It is increasingly viewed as a mainstream business activity, and less and less as a cosmetic, decorative exercise. Its whole purpose is to try to position the corporate community - it's not an esoteric, weird kind of thing.

Jean-Patrick Amisse 9/8/88

Jean-Patrick Amisse is a freelance communications consultant with a background in advertising. He has worked for Esso and then for Bell, and is now working with Axion Design Inc. on Bell's corporate identity strategy. As the first stage in this process he is helping Axion with an assessment of the current situation (a "visual identification audit"), starting with a program to monitor Bell's visual identity in the business market, before moving on to products. Several points which had emerged in other interviews were made in the part of the discussion which was not taped:

(A) It is often easier for new identity design to gain acceptance with management than modifications of existing programs, because the need for change is often apparent (see Wodicka interview).

(B) The future of identity design lies in implementation and management (see interviews with Henrion and Olins).

(C) There is a fundamental problem with research in assessing the effectiveness of identity programs (see Masten and Perry).

INTERVIEW

JPA I started to work with Jean [Morin] about six months ago, and the reason why we got in touch was that I was working on a number of communications projects for Bell, and the management felt that we should work together on a visual identification audit. I developed the structure of the report, and we decided to work together on other projects. My background is not one of design - I'm a communications consultant. I wrote the strategic development for their new mission communication. I deal with written and oral communication.

Bell, like many other huge companies, particularly high-tech products and services companies, are managed by engineers. Their way of looking at identity is a bit quaint. They are guided by figures and measures, and if they don't have that they are really at a loss. They have to trust somebody to come once in a while to tell them how much money their program is worth. A number of years ago, when I started to work on their communications, I noticed that nobody could agree on a company mission - whether they were on the product development side (close to R & D and close to Northern Telecom, for example) or whether they were on the marketing and sales side. They all had a different perspective of what the company was doing, and that had an impact on the corporate identity. They thought they were a modern, high-tech company, world leaders in tele-communications, yet in 1975 a study showed that they were not, in the public's eyes at least. They were perceived as being a very cold, distant company. The high-tech was perceived in as much as they were dealing with electronics and so on, but not so much in terms of leadership. So they had a lot of catching up to do. Fortunately the company had a very bright communications vice-president, Charles Harris. Under him, visual identity was put on the map. At that time, I don't remember seeing a document which said, "as of now, in terms of design management, this where we are and this is what we want to improve". It was really put together in terms of the elements of identity that they had - the new logo, trucks, buildings, stationery and so on. Without clear visual identity communication objectives, I have to assume that advertising was linked in to developing a better identity for the company. When Jean [Morin] came, it is obvious in retrospect that things improved a lot, because he introduced discipline and identified the major identity components. The new logo was applied in a very methodical and coordinated way, and suddenly things fell in to perspective. I still don't know of any study that can prove the effectiveness of that; they haven't measured it, although they have had numbers of tracking studies for corporate advertising which tell them where the image is. None of that was related to design. They are now putting together a study for that. They are looking at the future of the Bell identity. This is their first attempt. They have a lot of problems because they don't have a research methodology that can tell them how a logo or corporate identity program can affect their image. It's well-measured and well-defined in advertising and written communication. It is difficult to separate visual communication from written and spoken communication. The program we can see in the last twelve years is that of a very clean, well-designed program, put together as needed.

At the moment, we have two major problems at Bell Canada. The first one is that the company, in terms of numbers of divisions and affiliates, has exploded in the last six years. We went from the one Bell Canada, known as a telephone company, to a lot of smaller companies, and Bell Canada Enterprises was born. The smaller companies either sold Bell's know-how in product development or in management of telecommunications, computer systems, marketing research and so forth. All these smaller entities felt that they were placed in a situation where they needed something of their own, and they did this quite freely, without the consent of the internal policy group. We ended up with a mess, with a Bell Canada visual identity and a number of other parallel identities which all seemed to take a piece of the mother company and run with it without realizing that they were all Bell.

They had a similar problem internally; they didn't control the internal groups, the little departments, the clubs and the programs, all of whom wanted their identity as well. Let's imagine that a support department wanted to motivate their people with a little visual something to put on their bulletin and so on. The Bell group of internal designers saw nothing wrong with helping those guys with a little visual motif here and there, but what happened a year or two later was that they started to appear on everything, even on business cards. So both the internal and external worlds of the company were starting to explode.

Jean Morin and I were called to make a visual audit; to see where the problems were and how they had occurred. However, management cannot agree to fixing the problem just by looking at it. They can't <u>see</u> that something is wrong; they need proof that says how important it is compared to other priorities in the company. So we are in the process of making presentations to every level of management to get everyone in line. One would conclude that someone at the top of the company didn't worry too much about those little people in corporate identity, especially since the VP in communications is not involved and it is now handled at the level of regional management. The present VP could have come from marketing or research and development, has no visual training and will probably last for only two years, like the previous one, and then move on to finance or another department. We have to bring everybody up-to-date on the visual identity of the company, why it is important to protect it and enforce it, and to free the people working on it from constraints and let them do their work. We also have to educate them on what the role of the outside consultant is. I think the present problems will be solved in the next six months, and meanwhile they will have a study in their hands to help them decide if they need a new logo or not - if their new business mission will require a new visual identity altogether. This is obviously a major decision for such a big company because of the expenditure. The program is still solid, but they are a bit weak in the applications.

The company has been developing a new corporate mission. For people outside it may seem that there is nothing new, but in fact there is something drastically new. They realized that competition is coming at them from all sides. Other conglomerates are getting together, even their friendly neighbors like CN and CP. It was not enough for them to claim in their advertising that they were world leaders, that they had the technology and so on. They have to do it more forcefully. They have to prove that they are not the monopolistic telephone company anymore; they are in competition. It may well be that they fall back in the same track, but I feel that if the corporate communications group succeed in proving that the new mission needs a new visual identity it force everyone to accept the fact that they have changed. They will want to prove to everyone that they are the leaders, even though they are not accustomed to acting as leaders because the CRTC and other bodies who are regulating them, and government pressure groups, tend to react. Bell waited a long time to react to competition and they were not structured to react fast. They formed little groups of marketing and merchandising, and they didn't really know how to go at it. Finally, because they are big and have technical know-how and momentum, they managed to go through that period of deregulation quite successfully. Now they are launching new products like the Alex project, against the Minitel French-Canadian group, so it seems that they are over that period and a new identity would actually back up their effort and put them on the right track. We have not been involved in the research for the new identity.

Q. Generally, how would you describe the objectives of communications strategy in a large organization such as Bell?

JPA There are several levels of objectives. There is a corporate communication objective, ie. establish them as a world leader in telecommunications, helping people manage information. Then there are second-level objectives for products. There would be an overall objective for residential and business telecommunication. A second objective here would be to prove to business that they offer the best service, the best products available, the best value in the market. A secondary objective in the residential market would be turning around long-distance. Long distance is the biggest money maker at Bell Canada, and they are trying to convince people that it doesn't cost very much to call, per minute. The third level would be tactical, advertising-type objectives such as in July, giving people information about changing their numbers when they move - practical things like that. Those are the three major components. In broad terms they have all sorts of objectives. For example, they are a regulated company, so they have to keep talking to the CRTC and to pressure groups. They are very much involved in community projects, supporting orchestras, clubs. They are also involved in sponsorship. Each of these elements of communication is used to help to attain one of the other, main objectives. You have to realize that Bell Canada was a research and development, and a sales driven company. Even the word marketing is not well understood, and the technique of marketing is not very well practiced. Because they were a monopoly and had no problem in selling the service, they didn't need an image. If people wanted to use another telephone company they had to move out of the area, so nobody recognized the need for identifying objectives.