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The Branding Constellation

A New Identification Technique for Branding Problems

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Abstract

This paper reports on an exploratory study of a new technique for the identification of branding problems: the branding constellation. It is a spatial metaphor of the brander's mind-set of a problem, and uses human representatives to symbolize the key brand elements and their relationships. The purpose of the study was to generate knowledge and insights on the usefulness of the technique. Six aspects of 'usefulness' were identified and measured: relevancy, falsification, reliability, validity, timeliness, and ease of use. Thirty case studies form the core of this study, in which twenty-four branders - of whom six twice - were questioned on their application experiences. Three different situations were considered: branding experts' forum seminars, seminars for branders only, and public demonstrations. It was found that all branders experienced the technique as very relevant and easy to use. Most branders considered the information as trustworthy, high face validity, and timely. The opportunities for falsification were reported to be limited. Similar results were obtained independent of the situation. The final conclusion is that a general consensus existed among branders and branding experts that the branding constellation technique was very useful as it generated a better understanding of branding problems from a brander's perspective.

1. Introduction

In marketing research in general, and in branding research in particular, not much attention has been paid to problem identification. Based on a literature study, Butler (1995) concluded problem identification to be the most important stage in marketing research; however, it attracted more interest in the general management field than in marketing. Marketing research literature generally starts with a problem and refers to problem formulation as 'an intuitive process'. Chapman (1989), Gibson (1998), and Picken (1998) argue that the decision maker often does not know what the precise problem is as symptoms, memos, records, opinions, and egos obscure the problem.

In addition, Chandler & Owen (2003), Gordon (2003), Vorst (2004) and Zaltman (1994/5/6/7, 2003) state that marketing researchers have to find better ways to get 'the inside out' as only a small proportion of the human experiences is processed semantically by being thought about, analyzed, and integrated with existing ideas. These 'preconscious' experiences are stored in simple metaphorical structures like Front-Back, In-Out, and Up-Down, called 'mind-sets', 'cognitive maps', or 'schemata'. However, marketing research literature does not seem to consider that branders have much preconscious brand knowledge stored in metaphorical terms in their mind-sets. Although 'metaphorical', 'projective', or 'elicitation' techniques to deal with the human preconscious are current practice in qualitative research, they are rarely applied to branding problem identification: the techniques used to identify the branders' problems are in general limited to ask-and-you-will-be-told techniques.

Therefore, this paper addresses an explorative study to the identification phase of branding research by applying a spatial metaphorical technique. Section 2 considers the origin of this technique, and section 3 deals with the status quo of the research on the technique. Section 4 describes the implementation to branding problems. Section 5 covers the theoretical background and section 6 the research method. Section 7 gives an overview of the results to date, and section 8 discusses these results. Section 9 closes this paper with the implications.

2. System Constellation Technique

The 'system constellation technique' was developed by Hellinger in the 1980s from 'psychodrama' and 'family constellation therapy' (Wade, 2004). The technique uses a spatial metaphor to create visual and sensory images. It is based on the connection between physical and psychological space (Downs, 1973): people structure the elements of an image in spatial terms. It is the complement of what is done in 'brand maps' (Shugan, 1987). The original form of the 'system constellation technique' is the 'family constellation technique' that is used in group therapy. Hellinger lets clients choose 'strangers' to represent their key family members. The client places these 'representatives' intuitively in the room. After a while Hellinger asks them how they feel, to whom they feel connected, what movements they would like to make, and whether they feel someone is missing. If so, Hellinger brings in the missing person(s), and moves the representatives until they feel they are in a 'right' place.

The family constellations seem to enable clients to deal with their problems more effectively. In the 1990s the technique was also applied to organizational problems, which resulted in the 'organization constellation'. *The International Association for Systemic Resolution after Bert Hellinger* claims on its website that the technique 'is not only helpful and effective in the context of psychotherapy, but that it is also highly effective in other areas - in appropriately modified form. Hellinger (1999) argues that the technique should also work in marketing. As marketing researchers feel comfortable with thinking in organic metaphors in terms of brands-as-people, and have used personification techniques since the 1970s (Callingham, 2001), this does not seem illogical.

3. Research on the System Constellation Technique

In a phenomenological study design Franke (1996) concludes that the relevancy of the family constellation technique is in the visual information it produces as complementary to the verbal information normally worked with in psychotherapy. Höppner (2001) shows in a quasi-experimental design - in which he used seven validated psychological questionnaires -, that the relevancy of the family constellation technique was in the improvement of the client's self-image and psychic state. Several investigators, for instance Weber (2000), are currently studying the organizational constellation technique, and their preliminary conclusion is that it seems to generate insights for managers that verbal techniques do not. The abundant general literature on system constellations claims the technique not only as relevant, but also as valid and reliable. However, until now, there have been no studies of its reliability, or of its validity, or the application of the technique to identify branding problems.

4. Branding Constellation Technique

In the *preparation phase* - about seven to ten days prior to the branding constellation as in the Zaltman Metaphorical Elicitation Technique (Zaltman, 1994/5/6/7, 2003) - branders formulate a preliminary research question, define and prioritize up to six key brand elements, and state a first step to develop the brand: a change in one of the brand elements or the addition of a new one. In the *opening interview* the brander states this question and the chosen key elements to a facilitator, who watches the brander's bodily signals and tries to ascertain if these match with what the brander says, as the body is considered to show the 'preconscious truth'. Next is the *projection phase*, in which the brander chooses people to symbolize the key elements in the problem, and leads them one by one to a place that intuitively feels right. The initial constellation is a spatial metaphor of the brander's mind-set on the problem. Then there is a quiet moment to see and feel the preconscious attributions to the elements as well as their distances and directions.

The following phase is the core of Hellinger's system constellation technique and is new to branding research: the people who symbolize the elements are considered to have the ability to report information from within the brand system. In this *questioning phase*, the facilitator asks the people symbolizing the elements how they feel and to whom they feel connected, and sometimes performs some balancing interventions. The heart of the technique is the *brand development phase*, where the brander introduces a change in the constellation, for example by replacing the current logo by a new logo, or by bringing in a possible line-extension. Then there is *another questioning phase*, in which the 'elements' are asked how they feel. In the final *conditional phase* the facilitator and the brander search how this element can optimize the constellation, for instance by asking the 'elements' to find their 'right' place. Finally, the witnesses are asked to share their experiences. In a *closing interview* the facilitator stimulates the brander to verbalize his or her experiences and insights generated regarding the problem.

5. Theoretical Background

Evidently, the technique is scientifically still in the introductory phase. It is also clear that it is difficult to study metaphorical, preconscious knowledge. However, other metaphorical techniques were validated too, such as for instance the ZMET. The validation studies on ZMET considered whether it generated more relevant insights, and timely, valid, and reliable data (Zaltman, 1994/5/6). The overall term was 'useful'. Proctor (2003) uses 'useful' as a generic term too, and distinguishes it as relevant, reliable and valid; timeliness he does not consider. Zikmund (2003) specifies four aspects of usefulness: relevance, quality, timeliness, and completeness.

Relevance regards whether information clarifies the question a marketer faces as decision maker; 'quality' considers accuracy, validity, and reliability; *timeliness* concerned whether the provision of the information was at the right time; and 'completeness' as covering all relevant aspects. Miles (1994) refers to 'completeness' as 'descriptive or contextual validity'. Here, this aspect is also considered as a part of the validity question. Davis (1989) distinguishes between 'perceived usefulness' as the degree to which persons believe using the technique enhances their performance, and 'perceived ease of use' as using the technique free of effort. In this study, perceived usefulness is regarded as equivalent to relevance. Larcker (1980) differentiates 'perceived importance' as the relevance for the decision maker, and 'perceived usability' as the unambiguousness of the information. This last criterion is considered in this study as equivalent to the *falsification* criterion that Popper (1963/97) considers as basic to science: when a technique generates accurate information, it can be tested; when not, it has to be considered as a metaphysical technique. Miles (1994) calls it 'The Question'. In this way the explorative study on the technique came to the following six aspects of usefulness: relevance, falsification, reliability, validity, timeliness, and ease of use.

6. Research Method

A *grounded theory approach* (Charmaz, 2000; Strauss, 1998) was chosen to ground the explorative validation in data. The approach combined the conventional, positivistic approach to investigate an external, consistent world with a more constructivist perspective that focused on the individual experiences. Data generation, coding, and analysis occurred simultaneously and in relation to each other. The *sampling* involved decisions about the setting and the people to question (Miles, 1994). The technique was implemented several times in different *settings*: three branding experts' forum seminars, four branders' only seminars, and ten public demonstrations. In this way the 'ecological validity' could be explored too: the dependence of the results on the setting. Two *populations of interest* were defined: branders and branding experts, and especially those with a high reputation in the branding field: as the technique was new, it needed to be judged by experts (Miles, 1994). For the sake of impartiality, these had neither a personal connection to the researcher, nor to the facilitator before the study.

The *sample method* was a combination of convenience, purposeful, stratified sampling, and reputation case selection (Miles, 1994), and experience, snowball sampling (Zikmund, 2003). Seven branding seminars were used to invite branders of brands and branding experts with 'a name in the field' personally. However, the sample was open for all branders and experts. In this way a broad variety was reached. The *branding problems sample size* was thirty, based on Hillebrand (2001), Robson (2002), and Yin (1994). Miles (1994), Robson (2002) and Smith (2003) mention fifteen as a rule of thumb, but argue that the number is related to variation in the phenomenon being studied. The thirty branding problems were connected to twenty-four branders, as six did two or more constellations. The *expert sample size* was fifty: twenty-seven branding advisors, fifteen academics, and eight marketing researchers. Of these fifty, twenty-five experts joined two or more seminars.

Two questionnaires were used to generate knowledge and insights on the six usefulness' aspects: one directly after the constellation 'on the spot', and an e-mail questionnaire the day after. Further, the brander's comments on these six aspects during the constellations were transcribed. Besides, six branders kept a diary on the development of the insights on the problem, six were interviewed two or three months afterwards, and ten branders reflected on the technique and their problem in front of a forum of branding experts. In two cases the video was watched afterwards with other members of the decision-making unit. Finally, next year there will be a branders' check and a branding experts' check on the researcher's description on its relevancy, falsification, reliability, validity, ease of use, and timeliness.

7. Results

The next overview of the initial results is limited to the results from the e-mail questionnaires.

<i>Usefulness</i>	Branders	Branding Experts
<i>Relevancy</i>	All branders experienced new insights, considered latent insights confirmed, and became more aware of their mind-set on the problem. 90% valued the new questions they obtained, and 80% the answers on their preliminary question too.	All 50 thought it was clearly visible that the brander received relevant insights. 80% regarded the technique especially valuable for confronting the brander with his mind-set. 80% considered the value especially in the bodily sensations seen and felt in the room
<i>Falsification</i>	90% considered some statements made by the representatives of the branding elements regarding their relationships with other elements as open to falsification.	80% considered detail interpretation to be subjective: 'Just as beauty is in the eyes of the beholder, here the results are open to the same sort of interpretation.'
<i>Reliability</i>	90% thought the outcomes of the constellation to be trustworthy. The six branders who did two branding constellations all thought they harmonized very well.	90% thought a different facilitator and/or representatives would have resulted in a different outcome. 20% regarded the trustworthiness of the generated information as a dangerous aspect.
<i>Validity</i>	All branders sensed the relationships between the elements. All regarded the constellation as complete. All thought it made them aware of unconscious knowledge and feelings. 90% stated that it was a good representation of their mind-set.	60% sensed the relationships between the elements themselves. 50% thought the facilitator was more open to internal factors and missed a notion of branding and market segmentation. Only 10% bothered about the fact that only few key elements were constellated.
<i>Ease of Use</i>	All branders regarded the technique as working effortlessly and straightforwardly. The verbalization of the insights was not so easy.	All experts considered the technique as dependent on the - sensitive - quality of the facilitator. 80% mention the facilitator needs a sense of branding too.
<i>Timeliness</i>	90% considered it took some time to process the - many - insights obtained by the constellation	60% considered it to take attention to process the - many - insights obtained by the constellation

1. Overview of the Results from the E-Mail Questionnaires

8. Discussion

All but two branders considered their constellation as really relevant, and the information as somewhat falsifiable, trustworthy, face valid, rather easy to use, and rather on time. The same holds true - but in a minor degree - for the branding experts. Thirty percent of the experts mentioned being really amazed the technique 'worked' at all, considering the fact that it was applied by a facilitator who started with saying that 'he had a feeling for systems, but neither commitment with brands nor any sense of branding'. Besides the fact that the facilitator did not know the branding problem only superficially, and was assisted by people who did not know it either. In spite of this, it was clear that something really useful came to light for the branders, both when the people symbolizing the elements were recognizably named and when the people were just given abstract values such as A, B, and C. The results from the other data sources are similar. Also, the three situations did not seem to make any difference.

As was expected (Bakan, 1954; Vermersch, 1999), time and attention influenced the branders' verbalization: during the constellation branders could rarely verbalize their insights, and the interviews generated more specific statements on the relevancy than the questionnaires. The fact that most branders and branding experts were not concerned with the small number of branding elements in the constellation - in comparison to the twenty to thirty in consensus maps on brand associations (Zaltman, 1996) - might be connected to representational studies showing that a smaller set of objects and relations is advantageous to understanding (Van Bruggen, 2003). Of course, the external validity of the study is limited, as the branders and the branding experts needed to have enough confidence in the technique to be used as 'guinea-pigs' (Proctor, 2003).

9. Implications and Further Research

In the preparation phase the branders mentioned 70% external branding elements, but when it came to the constellation they constellated 70% internal elements. This could underline the current attention for internal branding (Bergstrom, 2002; Keller, 2001; Mitchell, 2002). However, it might also be connected to the organizational background of the facilitator. This requires a follow-up study, in which a branding expert facilitates the constellations. It may be fruitful to consider a phenomenological design (Giorgi, 2003; Moustakas, 1994; Smith, 2003) as many branders and experts thought the questionnaire - that formed the core of this study - to be positivistic, while the system constellation technique is regarded as phenomenological.

Transcriptions can be made and used for further research, for instance to analyze the 'response latency' (Aaker, 1980): the insights generated by the time it takes a brander to choose people to symbolize an element. Systematic research on falsification can also be done using the transcriptions. In addition, examining the parallels and gaps between independent branding constellations made by different members of Decision Making Units could be a useful further research project.

Zaltman (1997) argues that the frontiers of knowledge are found especially at the intersections between fields. It seems that the development and understanding of the branding constellation technique can be deepened, as the technique was only built on the system constellation technique, branding, qualitative marketing research, and problem identification in this explorative study. Connecting the technique to the knowledge and insights from for instance human learning, introspection, mind theory, neuroscience, phenomenology, and systems theory, might broaden its development and understanding. For example, the technique seems to fit in well with the systems perspectives of Keller (2001) and Macrae (1997): a good branding strategy implies activating the leverage elements that create the most effective positive feedback loops in the branding system.

To conclude, the technique seems to fit in well with the way the mind of the brander works, and the way marketing researchers are already accustomed to thinking in spatial metaphors and in terms of brands-as-people. Given the challenges and opportunities affecting brand management (Shocker, 1994), the future for research in this area seems promising. Both the branders and the branding experts indicated that the technique was useful and involving. However, general acceptance in the marketing field is low. As one CEO commented, when his brander told him enthusiastically about the constellation: 'I assume you did this constellation work in your own spare time?' Still, the fact that the technique is not yet validated, does not make it less useful for branders. As a branding expert stated: 'Before we held the knowledge, the earth was already orbiting the sun. The earth did not wait to make its orbits, until mankind understood exactly what was going on and why.'

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