

# Corporate identity: the concept, its measurement and management

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## **Corporate identity: clarifying the concept**

There are divergent views within the literature as to what is meant by corporate identity. In this article the authors refer to three main developments in the area which variously equate corporate identity with graphic design, with integrated corporate communication and last, with a multidisciplinary approach which draws heavily on organizational behaviour. Each of the three approaches has tended to follow a separate line of development and it would appear that the literature on each of the three strands has started to reach maturity. Increasingly, writers are drawing on several of these strands and this has led to a multidisciplinary approach. The characteristics of each of the three aforementioned strands will be discussed in the next section.

### *Corporate identity: the graphic design paradigm*

Originally, corporate identity was synonymous with organizational nomenclature, logos, company housestyle and visual identification. Many corporate identity practitioners had (and have) their roots in graphic design and understandably a good deal of importance was assigned to graphic design. The authors contend that graphic designers have been hugely influential in two regards, in that they articulated the basic tenets of corporate identity formation and management and succeeded in keeping the subject on the agenda of senior managers. Of note are North American practitioners who were the first to create managerial interest in the area and include Selame and Selame (1975), Margulies (1977), Carter (1982) and Chajet (1992). They were followed by UK design and communications consultants such as Olins (1978, 1989), Bernstein (1986), Jackson (1987), Ind (1990) and Pilditch (1970) and then by German (Birkight and Stadler, 1980), Dutch (Blauw, 1989) and French (Hebert 1987) practitioners.

The role of symbolism is now assigned a greater role and has grown from its original purpose of increasing organizational visibility to a position where it is seen as having a role in communicating corporate strategy. Notable with regard to the latter is Olins (1978) who classified visual identity into three main types

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(monolithic, endorsed and branded) which he observed was used by organizations to reflect an organization's strategy, branding and communications policies.

*Corporate identity: the integrated communication paradigm*

The realization by graphic designers and marketers of the efficacy of consistency in visual and marketing communications led to a number of authors arguing that there should be consistency in formal corporate communication (Bernstein, 1986; Schultz, Tannenbaum and Lauterborn, 1994). The breadth, complexity, and importance of corporate communications was pointed out by Bernstein who argued that organizations should communicate effectively with all of their stakeholders. Implicit in Bernstein's (1986) comments, and those made more recently by Grunig (1992), is that the corporate communication mix and its management is fundamentally different from and is more complicated than, the marketing communications mix.

*Corporate identity: the interdisciplinary paradigm (marshalling the corporate identity mix)*

Starting with Olins (1978) and followed by Birkight and Stadler (1980) the understanding of corporate identity has gradually broadened and is now taken to indicate the way in which an organization's identity is revealed through behaviour, communications, as well as through symbolism to internal and external audiences. Both academics and consultants have realized that defining identity can be problematic and as such the recently formed International Corporate Identity Group (ICIG) whose steering committee includes academics from Strathclyde, Erasmus and Harvard Business Schools, together with leading consultants, have decided not to give a definition of corporate identity but rather a statement which articulates the multidisciplinary nature of the area and its difference from brand management. The so called "Strathclyde Statement" will be found in the Appendix.

In recent years academics have produced important work on the area such as Abratt (1989), Albert and Whetten (1985), Balmer (1994, 1995), Larçon and Rietter (1979), Ramanantsoa (1989), van Rekom (1993), van Riel (1992, 1995) and Wiedmann (1988). Increasingly academics acknowledge that a corporate identity refers to an organization's unique characteristics which are rooted in the behaviour of members of the organization. Many of the above scholars conclude that the management of an organization's identity is of strategic importance and requires a multidisciplinary approach. They argue that senior managers can narrow the gap between the actual and desired corporate identity through marshalling the corporate identity mix (communications, symbolism and behaviour).

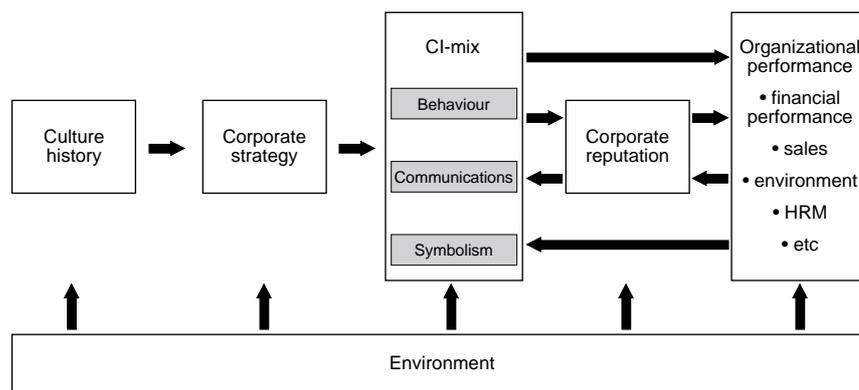
**Corporate identity management (CIM)**

*The rationale for CIM*

The objective of CIM is to establish a favourable reputation with an organization's stakeholders which it is hoped will be translated by such stakeholders into a

propensity to buy that organization's products and services, to work for or to invest in the organization (Balmer, 1995; van Riel, 1995). There is evidence to support the notion that a favourable corporate reputation gives an organization a competitive advantage (Beatty and Ritter, 1986; Caves and Porter, 1977; Fombrun and Shanley, 1990; Greyser, 1996; Klein and Leffler, 1981; Maathuis, 1993; Milgrom and Roberts, 1986; Stigler, 1962; Wilson, 1985 and Worcester, 1986).

The literature on corporate identity sees corporate identity management as taking into account an organization's historical roots (Ramanantsoa, 1989) its personality (Balmer, 1995; Birkight and Stadler, 1980; Olins, 1978), its corporate strategy (Wiedmann, 1988) and the three parts of the corporate identity mix (behaviour of organizational members, communication and symbolism) in order to acquire a favourable corporate reputation (Fombrun 1996) which results in improved organizational performance (Fombrun and Shanley, 1989; Wang, 1994). Reputation and performance are also influenced by developments in the external environment such as changes in the behaviour of competitors, as well as by corporate stakeholders such as customers, personnel and government. Schematically, this is shown in Figure 1.



**Figure 1.**  
Interaction between  
corporate identity  
formation, reputation,  
improvement and  
organizational  
performance

Source: van Reil Balmer (nd)

### Methods used to reveal the actual corporate identity

#### *Determining the actual corporate identity*

During the last decade, several methods have been developed which have the objective of revealing an organization's actual corporate identity. Many of the available methods come from "traditional" consumer behaviour research, which draws on survey techniques in order to ascertain an organization's external image (Gray, 1985; Poiesz, 1988). Such methods have been adopted for use within organizations (De Cock, 1984 and Keller, 1990). Other methods have also been advocated including the use of semi-structured interviews (Bernstein, 1986; Lux, 1986), ethnography (Balmer, 1996) and heuristic analyses of historical sources (Ramanantsoa, 1989).

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A popular method used by design consultancies and others is the visual audit which has the objective of revealing some of the basic traits of an organization's identity (Napoles, 1988; Olins, 1989) by interpreting organizational symbolism. More academic in character is heuristic analysis which examines an organization's historical roots and looks for areas of conflict within the organization (Ramanantsoa, 1989). Balmer's (1996) affinity audit (BAA) is a specialized method using the principles of ethnography. This requires wide access within an organization and combines a number of qualitative methods of data collection such as semi-structured interviews, observation and an examination of documentary evidence. There is also the laddering technique which relies on means-end interviews resulting in Hierarchical Value Maps (van Rekom, 1994) and the Rotterdam Organizational Identification Test (ROIT) (van Riel, Smidts and Pruyn, 1994) which reveals the degree of acceptance by personnel of the desired corporate identity as articulated by senior managers.

The following section provides an explanation of three of the above methods: the laddering technique, Balmer's affinity audit (BAA) and the Rotterdam Organizational Identification Test (ROIT).

#### *Laddering technique*

The laddering technique was originally developed to determine the image of products and brands. It is based on the central notion of the means-end theory, as developed by Reynolds and Gutman (1988), which explains human behaviour as a series of "meant-end" actions. People act purposely "applying means" to achieve "ends" such as earning money, getting external respect, etc. Ends are classified hierarchically from abstract attributes to functional consequences. The values which are important to employees are ascertained by asking the question "What is important to you?" The question is repeated until a chain of meanings is built up which leads through levels of increasing abstraction from the concrete attribute, via its consequences, to the underlying values. Van Rekom (1993) transformed the technique to the area of corporate identity. The laddering method (Van Rekom, 1993) is useful in that it helps to explain what is important to employees. The method includes open interviews whereby employees are asked to describe what they do (i.e. their job description), how they do it (i.e. their work activities), why they work in this way (i.e. behaviour) and why they consider this type of behaviour to be important.

The objective of this is to describe the behaviour of personnel and to reveal important insights with regards to the dominant values of individual employees. In their aggregate, the values of personnel give important insights into an organization's identity.

#### *Balmer's affinity audit (BAA)*

This method has the objective of explaining the driving forces which sustain an organization's corporate identity. Balmer's (1996) audit grew out of his research on the identity of BBC Scotland. His methodology used the principles of

grounded theory (Glaser and Strauss, 1967). This resulted in the hypothesis that corporate identity formation is grounded in a basic social psychological process (BSPP) based on affinity. The research showed that the basic social psychological process (bspp) underpinning corporate identity was complex and multilayered in that personnel had an affinity with a range of values and beliefs. These values and beliefs take many different forms including those of the organization's founder, those of the holding organization, those of the subsidiary and business units, those of a professional class and those of an external culture. Balmer is of the view that the composite of values and beliefs forms the corporate personality which he sees as a key determinant of an organization's corporate identity.

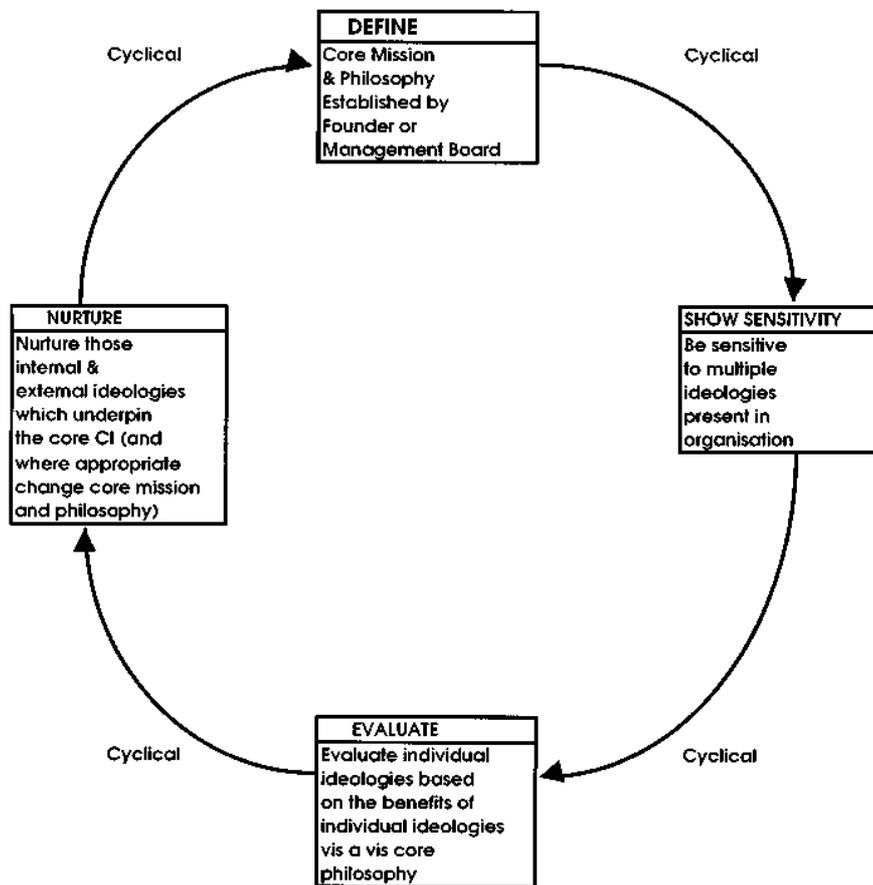
Balmer's affinity audit (BAA) requires the researcher to gain wide access within the organization in order to reveal the dominant systems of values and beliefs. Researching the system of values and beliefs is achieved by referring to the everyday language, ideologies, rituals and beliefs of personnel (Pettigrew 1979). As such, the researcher relies on a variety of methods of data collection, i.e. semi-structured interviews, observation and an examination of organizational documentation. In analysing the data the coding process advocated by Glaser and Strauss (1967) is used. Figure 2 illustrates the basic steps involved in the audit.

The BAA involves a basic four stage process:

- (1) establish the corporate mission and strategy;
- (2) reveal the dominant systems of values and beliefs within the organization;
- (3) evaluate such systems of values and beliefs against the corporate mission and strategy; and
- (4) nurture those values and beliefs which support the corporate mission and strategy.

The audit has certain similarities with the type of research undertaken by classic corporate identity consultants in that it requires first, wide access to the organization under study and second, relies exclusively on qualitative methods of data collection. The advantage of the audit is that it reveals the organization's corporate personality: this being a prerequisite to an understanding of the organization's identity. This has been pointed out several times over the last 15 years by Olins (1978, 1995) who explained that the tangible manifestation of a corporate personality is its corporate identity.

Balmer is of the view that it might be possible to develop a similar audit which is undertaken among an organization's external stakeholders. The results of such an audit may be of use in determining the branding structure to be adopted (parent visibility) in devising corporate communication strategies and even whether or not there needs to be a change in corporate mission and strategy. Figure 3 is a conceptual model based on the above.



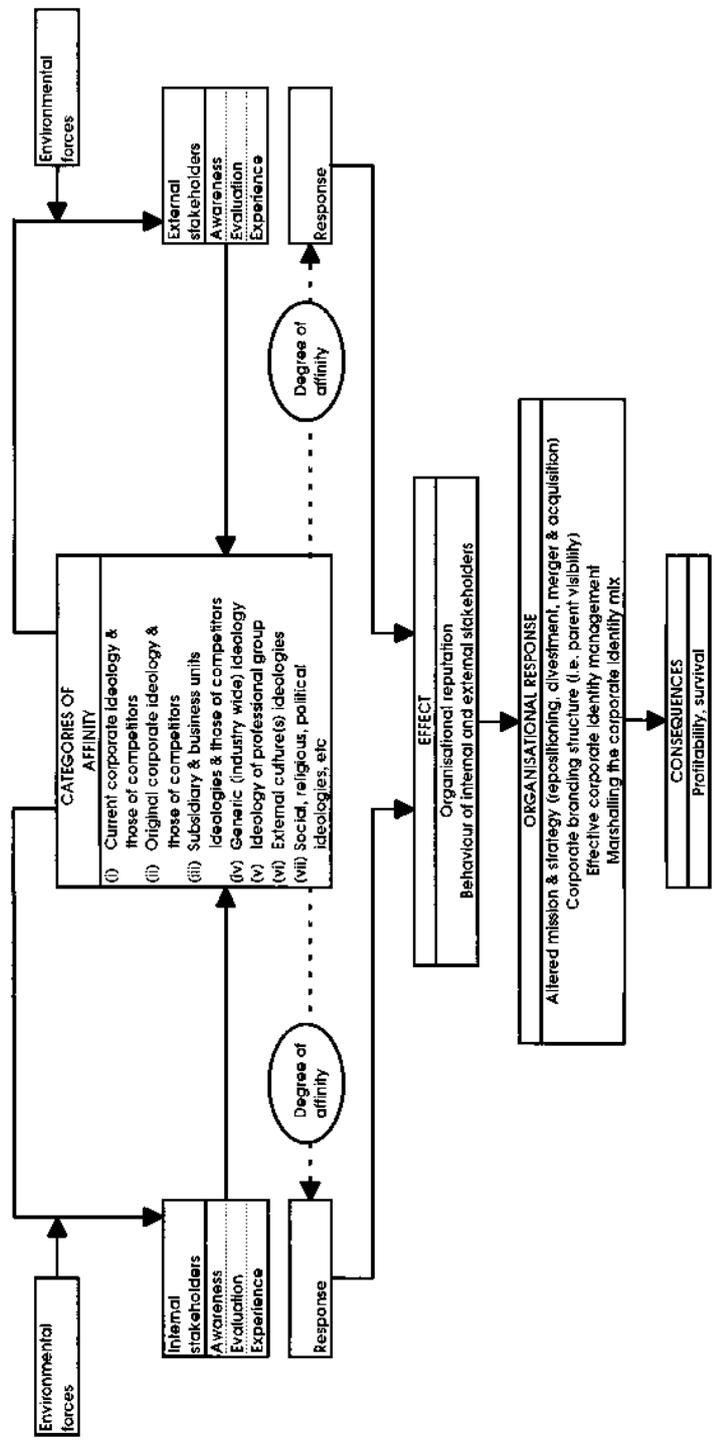
Source: Balmer (1996)

**Figure 2.**  
Basic steps in managing  
the corporate  
personality

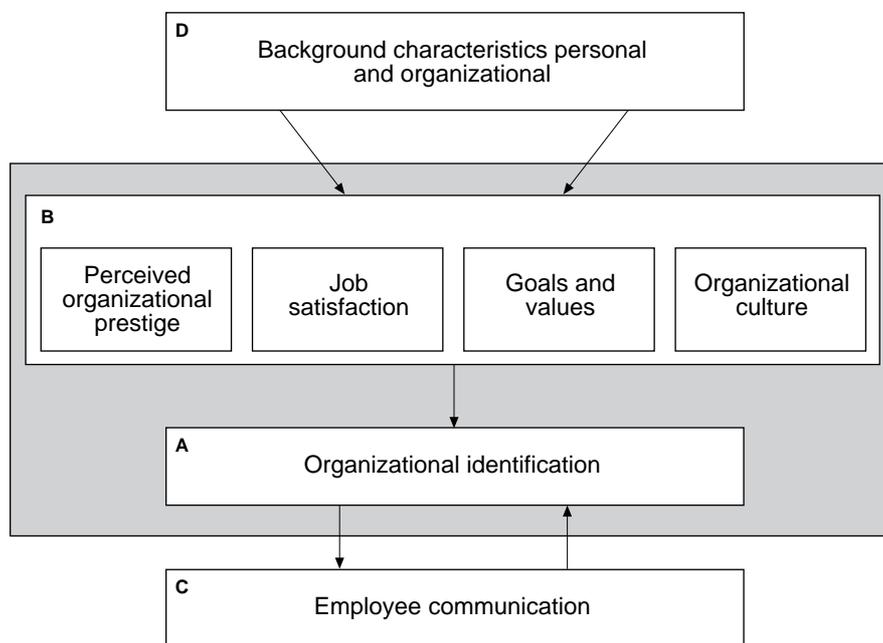
#### *The Rotterdam Organizational Identification Test (ROIT)*

The view that the behaviour of personnel has a direct effect on an organization's corporate identity and image (Kennedy, 1977) would clearly suggest that personnel should identify with an organization's ideals and goals. While effective employee communication is one method of meeting this objective, other elements are of at least equal importance such as job satisfaction, management style, corporate culture and perceived organizational prestige. The impact of these variables on employee identification with the company can be measured with the help of the so called ROIT scale (Rotterdam Organizational Identification Scale (van Riel *et al.*, 1994). The preliminary model of the ROIT scale consists of the focal points shown in Figure 4.

The central point on the ROIT scale is the identification of an employee with his or her organization. Based on the concept of social identity (Ellemers, 1991) together with other relevant literature (Cheney, 1983; Mael and Asforth, 1991;



**Figure 3.** Conceptual model based on Balmer's affinity audit (BAA)



**Figure 4.**  
Preliminary model  
ROIT scale

Mowaday, Steers and Porter, 1979) a 15-item organizational scale was constructed, including affective elements, but excluding behavioural intent. In order to determine an individual's strength of identification with an organization, it needs to be established whether there is:

- a feeling of belonging;
- congruency between organizational goals and values;
- positive organizational membership;
- organizational support;
- recognition of distinct contributions;
- a feeling of acceptance; and
- security.

These aspects were used as a basis of a 15-measure scale to measure organizational identification. The complete questionnaire consists of 225 Likert statements to which the respondents have to indicate their degree of agreement or disagreement (on five point scales). The questionnaire is divided into four modules (see Figure 4: A, B, C, D). In addition to the measurement of OI (organizational identification) (A) the five antecedents of OI are ascertained, (B + C) (perceived organizational prestige, job satisfaction, implementation of goals, organizational culture and employee communication), followed by questions about employee communication (C) and personal and organizational characteristics (D).

Applying the ROIT survey enables management to detect “weak spots” (to be located in one of the five “antecedents”) in the organization, creating or avoiding a supportive attitude towards the company as a whole (e.g. IBM worldwide) or predominantly towards only the part of the company in which they are operating (e.g. IBM France, sales department, etc.).

The ROIT scale is a “standardized” instrument, to be used to measure the actual corporate identity. It is easy and cheap to apply. However, the method does not reveal the nature of the corporate identity of a company since it only provides information about the consequences of a given corporate identity.

### **Determining the desired characteristics of a corporate identity**

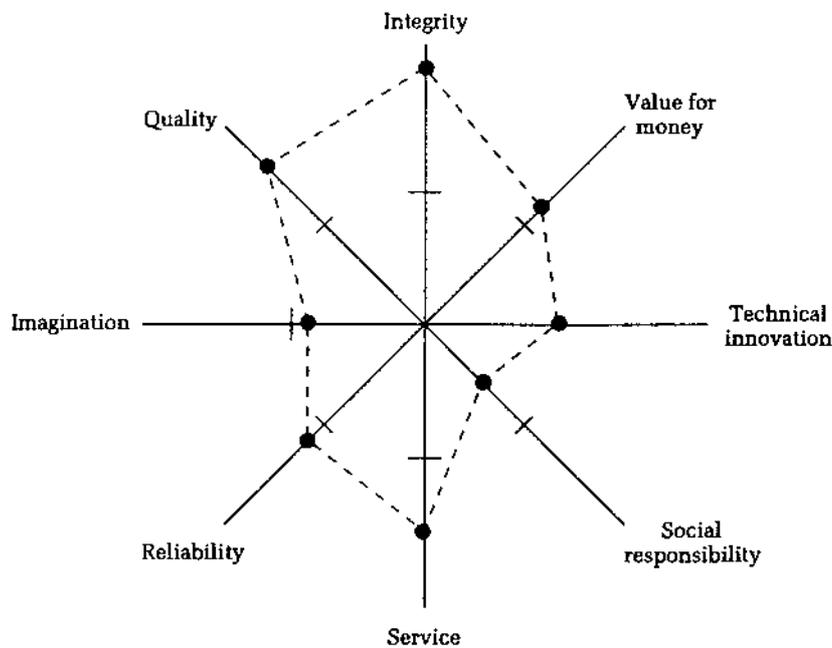
Establishing the desired corporate identity entails “positioning” the entire company. Some authors describe this as “corporate branding” (Balmer, 1995) or vertical brand image transfer (van Riel and Maathuis, 1993).

The problem in establishing the desired corporate identity is that many of the available methods were developed for the positioning of product brands rather than the corporate brand. The IDU method of Rossiter and Percy (1982) is one of these methods but it can be adapted for use in determining an organization’s desired identity. This method is aimed at the discovery of those benefits that are perceived by key stakeholders (especially external) as important (“I”), being delivered by the organizations (“D”) and finally are perceived as unique, or better, or distinctive (“U”) when compared to other organizations. The IDU method can only be applied by using quantitative (survey) research.

Revealing the desired corporate identity can also be undertaken in a more pragmatic and less time-consuming way. This can be done with the help of the Spiderweb method (Bernstein, 1986) (Figure 5). This is a qualitative technique, based on a group discussion with top management, communication managers and one or more representatives of the organization’s business units. An external consultant leads the discussion, stimulating participants to describe their organization first in general terms (how do you describe your company at a party?), followed by more specific descriptions to be summarized in individual formulation of concrete characteristics of the company. This will result in a large amount of attributes (on an average ten per person). During the next stage of the Spiderweb method, participants have to choose, again individually, the eight most important characteristics. The session is nearly completed when all participants fill out a form rating the finally selected eight characteristics with a school figure (from one to ten), regarding the actual (perceived) and the desired corporate identity. The aggregated averaged group score will be presented in a wheel with eight spokes, representing a ten point-scale, with the zero value in the middle (centre) and the maximum ten value at the end of each spoke. This will result in a representation of the ideal attributes of the corporate identity. Figure 5 shows the attributes as found recently in a Dutch company.

### **Managing the corporate identity programme (CIP)**

Much space has been devoted in literature to the ideal way of setting up an effective corporate identity programme (Abratt, 1989; Balmer, 1995; Cutlip,



**Figure 5.**  
Bernstein's spiderweb  
method

Center and Broom, 1994; Dowling, 1986, 1994; Grunig and Hunt, 1984; Olins, 1978; Van Riel, 1995). They all provide various checklists, and action plans, which can be helpful in decision making. Many of these plans have a great deal in common in that they tend to adopt a basic four-stage process:

- (1) problem recognition;
- (2) development of strategies;
- (3) execution of action plan; and
- (4) implementation.

These plans are not "traditional" multi-phase plans, but iterative search processes. Most corporate identity programmes (CIP) are a result of internal change (reorganization, employee reductions) or external turbulence (privatization, merger, threat of decreased market share). Before embarking on a plan of action, senior managers should consider the organization's original as well as current identity (Wilkinson and Balmer, 1996), following Balmer's (1994) adage that organizations in examining their past often find their future. Furthermore, the above plans begin by examining the relative strengths and weaknesses *vis-à-vis* the external environment and whether the current or original identity failed through a mismanagement of the corporate identity mix. Only if the results of the above suggest that a new identity is required and when the organization has ascertained the image of its many stakeholders should an action plan be developed.

If a new identity is required, the organization's new strategy will also require a new communication profiling strategy. The implementation of the profiling strategy takes five core elements into consideration:

- (1) defining the communication objectives (cognitive, affective and conative);
- (2) choosing the target groups to communicate with (perhaps by applying the linkage model of Grunig and Hunt (1984) for corporate stakeholders);
- (3) segmenting commercial audiences (using the model of Rossiter and Percy (1987)) before choosing the most effective channels to create awareness and appreciation among selected audiences;
- (4) identifying the key message of the corporate identity programme, i.e. what should be said and how. And, last;
- (5) organizing the corporate identity programme.

This will invariably involve senior managers from a variety of departments including different communication specialists. The main tasks will be to ensure consistency between behaviour and corporate communication as well as evaluating the programme in order to determine whether or not the objectives have been met, e.g. analysing changes in knowledge, attitude and behavioural intent. The above described process is illustrated in Figure 6 (van Riel, 1995).

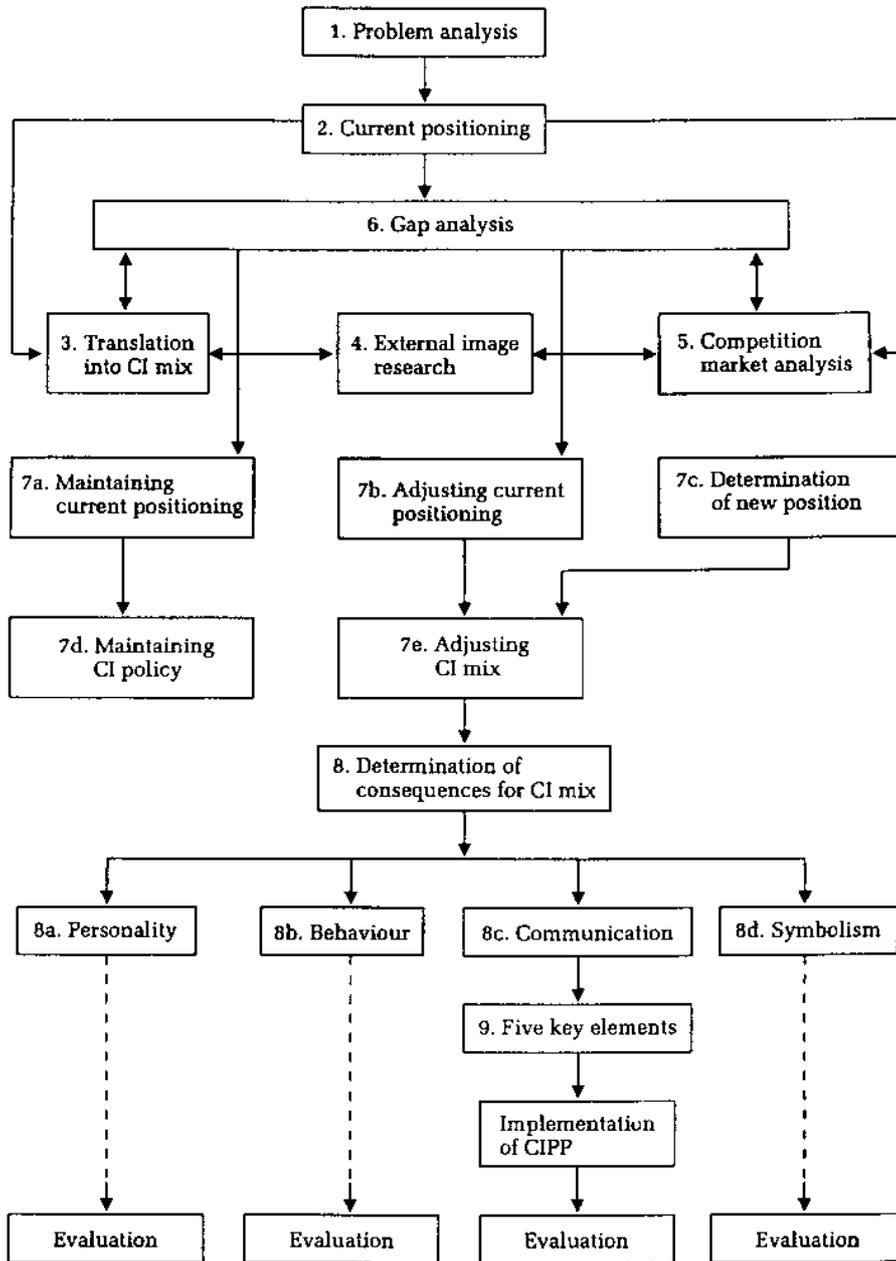
### **Concluding remarks**

The corpus of knowledge on corporate identity is beginning to reach maturity. Management academics are showing a renewed interest in the area who, in addition to marketers, include those undertaking research in organizational behaviour, human resources, strategic movement, graphic design, public relations and communication studies.

The multidisciplinary character of the area has long been recognized by consultancies who employ the skills of experts drawn from different disciplines. This multidisciplinary approach may also be usefully applied by management academics in order to provide knowledge that is based on a more intense dialogue and greater cross-disciplinary research. Marketing has the potential to make an important contribution in this respect since marketing is expanding into new areas which have direct and indirect links to corporate identity such as social marketing, marketing of services and the recent interest in corporate branding.

Several areas deserve the attention of empirical research, including an explanation of the corporate identity formation process. Another is applying the techniques of the corporate identity management to related areas, i.e. generic identities (banks, building societies), national identities (Scotland as a brand) and professional identities (solicitors, teachers, dentists). The impact of strategic alliances on corporate identities is also likely to be a fruitful area of research and is also highly topical.

Future research in corporate identity is likely to benefit from an interdisciplinary approach. The authors predict that in time there will be a large



Source: van Riel (1995)

**Figure 6.**  
Corporate identity  
programme

and distinctive body of knowledge on corporate identity coupled with a realization by both academics and practitioners that a favourable corporate identity is one of an organization's most important assets and therefore is

worthy of constant management attention. As such, the writers anticipate corporate identity studies occupying a place of importance in marketing and business courses in the early years of the next millennium.

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#### **Appendix: The International Corporate Identity Group's (ICIG) statement on corporate identity**

##### *The Strathclyde Statement*

Every organization has an identity. It articulates the corporate ethos, aims and values and presents a sense of individuality that can help to differentiate the organization within its competitive environment.

When well managed, corporate identity can be a powerful means of integrating the many disciplines and activities essential to an organization's success. It can also provide the visual cohesion necessary to ensure that all corporate communications are coherent with each other and result in an image consistent with the organization's defining ethos and character.

By effectively managing its corporate identity an organization can build understanding and commitment among its diverse stakeholders. This can be manifested in an ability to attract and retain customers and employees, achieve strategic alliances, gain the support of financial markets and generate a sense of direction and purpose. Corporate identity is a strategic issue.

Corporate identity differs from traditional brand marketing since it is concerned with all of an organization's stakeholders and the multi-faceted way in which an organization communicates.

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