# CREATING A STORM
# BRAND AND BUSINESS REPORT

# PART 1

SW252608_STORM WIGGETT

AS PART OF FULFILMENT FOR THE FALMOUTH COURSE MA_GDE750
CRITICAL REPORT
_

# THE CHALLENGE

>> BLOG

# CONTENTS


**1 EXECUTIVE SUMMARY** 4

>>

**2 INTRODUCTION** 6

2.1 Research Questions 7
2.2 Objectives 7
2.3 Methodology 7

**3 INTERVIEWS AND SURVEYS** 9

3.1 Introduction to Client Interviews 10
3.2 Client Interview Feedback Analysis 12
*3.2.1 Client Feedback Analysis - Brand* 12
*3.2.2 Client Feedback Analysis - Systems* 12
*3.2.3 Client Feedback Analysis - Acquisitions and Retention* 13
3.3 Expert Interviews and Workshops 14
*3.3.1 Haldon Burns* 14
*3.3.2 Bryan MacDonald* 15
*3.3.3 Candice de Beer* 16
*3.3.4 Frederik Theron* 17
*3.3.5 Siena Hickey* 18

**4 DESKTOP RESEARCH** 19

4.1 Desktop Research - Brand Development 20
*4.1.1 Brand Development - Outcome* 20
4.2 Desktop Research - Business Structure: Sole Proprietor 21
*4.2.1 Business Structure - Outcome* 21
4.3 Desktop Research - Systems, Processes, and Operations 22
*4.3.1 Project Management Systems* 22
*4.3.2 A Current Operational Approach to Project Management* 22
*4.3.3 Project Management System Trial Outcomes* 22
*4.3.4 Cost Capture* 23
4.4 Competitor Analysis 23
*4.4.1 Competitor Categories* 23
*4.4.2 Positioning of Creating a Storm* 27
*4.4.3 Cost Analysis and Design Rates* 28

**5 SWOT ANALYSIS** 29

5.1 Brand SWOT Analysis 31
*5.1.1 Brand - Analysis* 31
5.2 Systems, Processes, Business Functioning SWOT Analysis 32
*5.2.1 Systems, Processes and Business Functions - Analysis* 32
5.3 Client Acquisition and Retention 33
*5.3.1 Client Acquisition and Retention - Analysis* 33

**6 CONCLUSION** 34

>>

***Word Count 5246***

**7 REFERENCES** 36

## LIST OF APPENDICES


| | | |
|---|---|---|
| APPENDIX A | Client Survey and Interview Standard Questions and Responses | 43 |
| APPENDIX B | Expert Interviews: Interviewees | 48 |
| APPENDIX C | Anatomy of a Brand Roadmap | 53 |
| APPENDIX D | Project Management Products and Systems | 59 |
| APPENDIX E | Competitors | 64 |


**>> Concent Forms**

## LIST OF ABBREVIATIONS

| | |
|---|---|
| CAS | Creating a Storm |
| CEO | Chief Executive Officer |
| MD | Managing Director |
| PMO | Project Management Officer |
| SWOT | Strengths, Weaknesses, Opportunities and Threats |

## LIST OF FIGURES


| | | |
|---|---|---|
| Fig. 1 | Client Survey Infographic | 10 |
| Fig. 2 | Bryan MacDonald Portrait | 15 |
| Fig. 3 | Candice de Beer Portrait | 16 |
| Fig. 4 | Frix Theron Portrait | 17 |
| Fig. 5 | Siena Hickey Portrait | 18 |
| Fig. 6 | Monday.com Logo | 22 |
| Fig. 7 | Competitor Table | 24 |
| Fig. 8 | CAS Positioining Infographic | 27 |
| Fig. 9 | Client Survey Questionnaire | 44 |
| Fig. 10 | Automated Client Survey Responses Table | 45 |
| Fig. 11 | Calendly Logo | 52 |
| Fig. 12 | Hootsuite Logo | 52 |
| Fig. 13 | Sprout Social | 52 |
| Fig. 14 | Airbnb Logo | 54 |
| Fig. 15 | Harley-davidson Advert | 54 |
| Fig. 16 | Mailchip Advert | 55 |
| Fig. 17 | Adidas Logo | 55 |
| Fig. 18 | Tesla Logo | 56 |
| Fig. 19 | Patagonia Logo | 56 |
| Fig. 20 | Wework Logo | 56 |
| Fig. 21 | Apple Logo | 57 |
| Fig. 22 | Instagram Log | 57 |
| Fig. 23 | Nike Just Do It Logo | 57 |
| Fig. 24 | Disney Logo | 58 |
| Fig. 25 | Cadbury Logo | 58 |
| Fig. 26 | Trello Logo | 60 |
| Fig. 27 | Asana Logo | 60 |
| Fig. 28 | Monday.com Logo | 61 |
| Fig. 29 | Calendly Logo | 61 |
| Fig. 30 | Microsoft Teams Logo | 62 |
| Fig. 31 | Zoom Logo | 62 |
| Fig. 32 | Xero Logo | 63 |
| Fig. 33 | Sage Logo | 63 |
| Fig. 34 | Quickbooks Logo | 63 |

# SECTION _01

CREATING A STORM BRAND AND BUSINESS REPORT
PART 1 - THE CHALLENGE

# EXECUTIVE SUMMARY

MA_GDE750

# 1 EXECUTIVE SUMMARY

*Creating a Storm is a specialised brand and packaging design studio, operating as a sole proprietor business out of Cape Town, South Africa.*
*I am Storm Wiggett, and I'm the graphic designer behind the brand. Over the past thirteen years, the business has grown organically, offering world-class design and technical execution services.*

I have conducted a critical review of all the legacy operational and strategic business systems and strategies pertaining to Creating a Storm. This critical review has been performed along with an analysis of its key success drivers, and compared against industry best practices. I have also cross-referenced this with interviews from clients, experts, and competitors.

The aim is to propose changes to operational systems where required, and inform on changes to the brand. In so doing, the idea is to leverage technology and increase the robustness of the overall business – *with a specific focus on the Brand, Operational Systems, Client Acquisition, and Retention.*

The outcome of this review indicates that early client engagement can be automated, and that routine communication during this phase of engagement can be standardised and provided from the website. This automation will allow for more selective face-to-face engagement, and more focused leveraging of the enthusiasm and energy identified as key success factors.

Selective changes to the accounting and project management system are recommended. These recommendations are primarily to ease the administrative burden on a sole proprietor. However, the balance of the business's corporate structuring was revealed to be appropriate and has therefore been left unchanged.

I have also developed a focussed roadmap into thought leadership. This roadmap improves and increases the digital footprint of the already excellent work portfolio. The major aim of this roadmap is to further support the identified sales mechanism that has up until now been reliant on preceding reputation and referrals.

Brand strength, recognition, and influence of the brand on prospective clients have been identified as a strategic weakness. Hence, a rebranding exercise forms part of this study. The aim of this rebrand is to align the corporate identity with the fiery enthusiasm that has been a key driver of the studio's success to date.

*Though changes are recommended in key areas, the overall business strategy of Creating a Storm has adapted well over the years.*
*Creating a Storm has continuously developed its creative and technical offerings in brand and packaging design. Furthermore, it is through its current reputation that it is well positioned to continue its foray into European and UK markets.*

>> *CAS Brand and Business Report* ***Part 1*** ***The Challenge***

# SECTION _02

CREATING A STORM BRAND AND BUSINESS REPORT
PART 1 - THE CHALLENGE

# INTRODUCTION

MA_GDE750

# 2 INTRODUCTION

Creating a Storm (CAS), is founded and run by myself, Storm Wiggett. CAS celebrates its thirteenth successful year as a premier brand and packaging design studio in Cape Town, South Africa. The business has grown through experience, opportunism, and problem-solving. Nonetheless, to retain the agility and competitiveness of the business, I conducted a periodical review of business strategies and approaches.

> *The objective of this study is to review and validate the business model for CAS. I examine this through client and market research, and cross-reference the findings alongside strategic interviews with industry experts in a variety of fields.*

**>> Appendix** *For citations and references please refer to the Appendix.*

## 2.1 _ RESEARCH QUESTIONS

**How suitable are CAS current operational and business strategies, and how can they be improved and streamlined to support an international trajectory?**

## 2.2 _ OBJECTIVES

In the context of the research question, the following strategic objectives were identified as the focal points for this study:

Identify key success factors for CAS.

- Investigate the outsourcing of business operations to reduce the time required to fulfil administrative requirements.
- Investigate potential new digital technologies aimed at increasing operational efficiency.
- Develop a long-term strategy to continuously reaffirm the business's reputation and portfolio as competitive with global leaders in packaging design.
- Improve and refresh the Brand, Corporate Identity, and Website to speak directly to the target audiences and clients.

## 2.3 _ METHODOLOGY

There were three main aspects to this research:

- I conducted a desktop analysis of creative business operations to determine where CAS is positioned relative to the market norms.
- I performed key client surveys and interviews that focussed on the "outside-in" client experience.
- I held strategic interviews with industry or functional experts, in a wide variety of business fields.

To achieve the objectives set out, this study critically evaluates each of the following three business segments and assess their cross-functional impact or required action points:

- **CAS Brand**
- **CAS Business Systems, Processes, and Operations**
- **CAS Client Acquisitions and Retention**

# HOW SUITABLE ARE CAS CURRENT OPERATIONAL AND BUSINESS STRATEGIES, AND HOW CAN THEY BE IMPROVED AND STREAMLINED TO SUPPORT AN INTERNATIONAL TRAJECTORY?

*Research Question*

# SECTION _03

CREATING A STORM BRAND AND BUSINESS REPORT
PART 1 - THE CHALLENGE

# INTERVIEWS & SURVEY

MA_GDE750

# 3 INTERVIEWS

## 3.1 – INTRODUCTION TO CLIENT INTERVIEWS

I interviewed a selection of CAS's past and present clients, to form the basis of the client research for this study. I conducted the interviews telephonically, face-to-face, or through video conferencing.

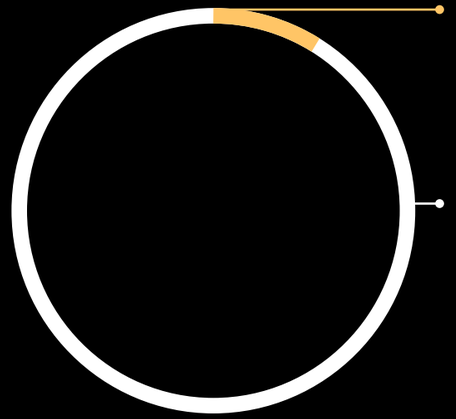
Additionally, I sent a digital survey questionnaire to eighteen former clients, and eight responses were received back from company founders, Chief Executive Officers (CEOs), Managing Directors (MDs), and Heads of Marketing.

**I then collated the responses, and the results are displayed in the infographics that follow.**

**>> *Appendix A***

*Appendix A contains detailed listings of the client survey and interviews.*

### HOW DID YOU HEAR ABOUT CREATING A STORM?



10%
Internet Searches
Portfolio
LinkedIn

90%
Referrals

### WHAT DO YOU LOVE ABOUT WORKING WITH CREATING A STORM?

| | |
|---|---|
| Creativity, Innovation and Uniqueness | 65% |
| Quality Of Work Output | 50% |
| Energy, Passion, Personality and Fun | 40% |
| Insight, Experience and Knowledge | 40% |
| Professionalism | 30% |
| Customer Relations | 30% |
| Flexibility | 10% |
| Speed and Efficiency | 10% |

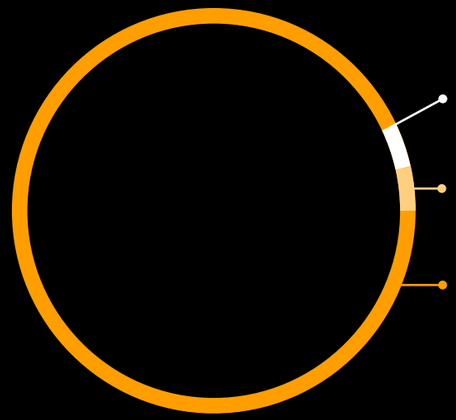
### WHAT MADE YOU WANT TO WORK WITH CREATING A STORM?

*Fig. 1.*
*Wiggett, 2022.*
*Client Survey Infographic.*

## HOW DOES CREATING A STORM DIFFER FROM OTHER AGENCIES AND DESIGNERS?

- Speed and Efficiency
- Creativity and Innovation
- Personal Focused Approach
- Professional Operations
- Enthusiasm

## HOW COULD I IMPROVE MY OFFERING?



- 5% Clone Yourself
- 5% Share Industry Trends and Knowledge
- 90% Don't Change Anything

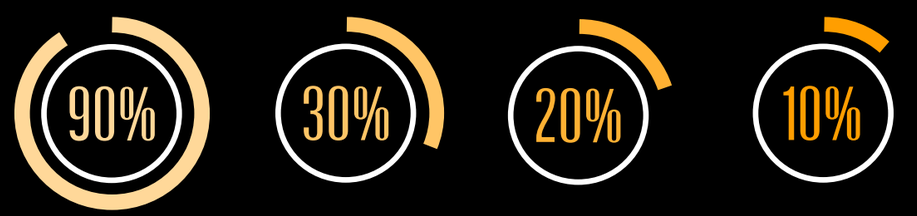
## WOULD YOU RECOMMEND CREATING A STORM?

100%
_YES

## WHAT HAS CREATING A STORM ACHIEVED FOR YOUR COMPANY?

- Increased Brand Awareness
- Positive Customer Feedback
- Great Packaging and a Strong Brand Identity

## WHY WOULD YOU RECOMMEND CREATING A STORM?



- 90% Creativity Innovation Quality of Work
- 30% Personality
- 20% Customer Satisfaction
- 10% Professionalism

## WHAT WORDS WOULD YOU USE TO DESCRIBE YOUR CREATING A STORM EXPERIENCE *(Erwee, DeLabesse, Roussea, Louw, Malan, Grant and Stander, 2022), (Kempshall, 2022), (Malan, 2022)?*

- Fun and Friendly
- Inspiring
- World-Class
- Imaginative
- Creative
- Passionate
- Enthusiastic
- Energetic
- Fast
- Efficient

## 3.2 _ CLIENT INTERVIEW FEEDBACK ANALYSIS

I conducted client surveys to understand key success drivers, to investigate engagement efficiency, to assess whether client selection could be automated, and to develop the robustness of the sales pipeline.

The client engagements indicated that CAS's key success factors are a combination of professional services, exceptional quality, and the individual enthusiasm and energy of face-to-face engagements. Personal engagement was revealed to be a critical factor in the referral network and added to the success of initial client conversations.

Further differentiation and engagement preference revolves around the smaller, more focused nature of being a single entity that provides focussed yet agile solutions.

*These two fundamental success factors, personality and enthusiasm, and delivery through personalisation, should remain nurtured and at the core of any future CAS strategy or adjustment.*

In this context, the following observations were made from the client engagements.

### 3.2.1 _ CLIENT ANALYSIS FEEDBACK - BRAND

CAS branding is primarily built around a reputation for high-quality work delivered professionally and enthusiastically. As such, the brand is established through operational engagement instead of through systems, or other conduits. The brand is powerful and well established, however there are limitations regarding exposure. The risk is that increasing exposure could diminish CAS's well developed exclusivity.





Furthermore, it is evident that the brand does not play a key role in referrals or securing clients. The majority of clients are secured through referrals from previous work. In contrast to the low brand awareness, reputation is high, which results in CAS being approached by prospective clients.

Public showcases are mechanisms to leverage the existing reputation of CAS and to create proof of excellence to a broader audience. This strategy will expose the brand to a broader audience without diluting its reputation.

### 3.2.2 _ CLIENT FEEDBACK ANALYSIS - SYSTEMS

The current key success factor in early client engagement is primarily face-to-face engagement. While highly effective, it's not efficient or scalable, and should be the last step on the journey.

*Face-to-face communication should "seal the deal" as opposed to "create the deal".*

The current systems for early customer engagement should be updated to act as an information source, and should be an easy-to-navigate journey roadmap that provides automatic engagement.

The automated systems should provide the necessary information to set the expectation, and funnel potential clients through a system, as far as possible, before personalised contact is required.

The automated system will disseminate the following information:

- Price point
- Project timelines
- Client responsibilities
- CAS specialisation and brand message
- Client case study successes

"FACE-TO-FACE COMMUNICATION SHOULD "SEAL THE DEAL" AS OPPOSED TO "CREATE THE DEAL".

### 3.2.3 – CLIENT FEEDBACK ANALYSIS – CLIENT ACQUISITIONS AND RETENTION

*"Companies seek to work with studios; clients seek to work with individuals" (Malan, 2022).*

Early client engagement, outside of the referral framework through conventional avenues and media, is less efficient and plays a reduced role in CAS's overall success. Therefore, developing conventional avenues could play a more significant role. However, reliance on these systems alone don't suffice.

The digital portfolio and website need to be tailored to the high referral rate in order to achieve two key objectives. These objectives are to verify and enforce the referral, and to encourage and ensure that a personalised conversation takes place.





Extreme care should be taken so as not to place barriers in the way of potential clients through automated systems. The intention is not to remove the fundamental personalised approach that clients value and seek out, but rather to enable this attribute to be focussed, and selective.

"COMPANIES SEEK TO WORK WITH STUDIOS; CLIENTS SEEK TO WORK WITH INDIVIDUALS"

*(Malan, 2022).*

# 3.3 EXPERT INTERVIEWS AND WORKSHOPS

As part of the research component, I conducted interviews with various industry experts. These experts span a wide array of expertise. This section provides a brief introduction to each expert, and I have summarised the feedback and outcomes.

**>> Appendix B**
*(The detailed interview and workshop questions and processes can be found in Appendix B.)*

## 3.3.1 HALDON BURNS

***Haldon Burns is a professional brand engineer and naming specialist who has worked as the head of the brand strategy for Spotify. His speciality is creating distinctive and memorable brands.***

### 3.3.1.1 *HALDON BURNS - OUTCOMES*

Haldon provided vital feedback on the process of brand creation, and the underlying nuances that need to be considered in this process.

A step-by-step brand creation process:

- Establish the brand positioning and positioning statement
  - **WHO is the brand targeting?**
  - **WHAT does the target audiences need?**
  - **HOW will the brand deliver?**
  - **PROOF that the brand can deliver.**
- Brand name and tagline creation

Once the brand positioning is established, the positioning statement is written to benefit clients. However, this benefit is brought about by adherence to the statement from the brand itself (Burns, 2022b).

*The brand name and tagline should be based on research and insights. The result needs to be memorable, distinctive, and communicate the unique value proposition in a way that ties back into the name (Burns, 2022a).*

Tangential research has also shown that establishing a strong brand, positioning, and identity is the only avenue for growth and reputational validation. This relates specifically to companies that sell branding as a service. *The CAS brand needs to serve as an advertisement for its capabilities.*

CAS is successful, despite not having a defined or targeted approach, having opted instead to shift organically with the markets and trends over time. Hence there is a disconnect between Storm, the passionate, enthusiastic individual, and the classic, professional appearance of the current brand.

**THE CAS BRAND NEEDS TO SERVE AS AN ADVERTISEMENT FOR ITS CAPABILITIES.**

## 3.3.2 _ BRYAN MACDONALD

***Bryan MacDonald is the CEO of The Digital Board, with twenty years of experience advising boards on technological implementation.***

CAS discussed the process of establishing a thriving business with Bryan.

The most crucial advice Bryan could impart was that the starting point for any business is establishing a business philosophy and business process roadmap.

### 3.3.2.1 _ *BRYAN MACDONALD - OUTCOMES*

*Based on the conversations with Bryan, the suggestion was that CAS would benefit from a critical review of the business's strategy and roadmap.* The current trajectory is not wrong, but it is prudent to conduct periodical reviews to ensure that strategies remain aligned with changing market conditions.

*Bryan also advocates outsourcing and creating an ecosystem of contractors that support CAS, enabling efficient use of time and resources (MacDonald, 2022).*

CAS WOULD BENEFIT FROM A CRITICAL REVIEW OF THE BUSINESS'S STRATEGY AND ROADMAP

BRYAN ADVOCATES OUTSOURCING AND CREATING AN ECOSYSTEM OF CONTRACTORS THAT SUPPORT CAS

*Fig. 2.*
*Monstarlab, 2022.*
*Bryan MacDonald Portrait.*

# CAS DIGITAL FOOTPRINT SHOULD BE IMPROVED AND ALIGNED WITH CURRENT BEST PRACTICES.

*Fig. 3. de Beer, 2022. Candice de Beer Portrait.*

## 3.3.3 _ CANDICE DE BEER

***Candice De Beer is a digital content strategist with ten years of experience helping businesses and individuals to build their authority and pipeline. Candice has been published in Forbes Magazine and Business.com.***

An 'expert authority' discussion with Candice evolved into strategies to improve CAS's social and digital footprint, and how to automate and optimise structures.

### 3.3.3.1 _ *CANDICE DE BEER - OUTCOMES*

The interviews with Candice spanned many topics:

- *CAS's digital footprint should be improved and aligned with current best practices.* Specifically periodical LinkedIn articles and blog posts.
- CAS should conduct periodical and automated client surveys aimed to help CAS understand if and when market conditions or client expectations change.
- *CAS should invest in automated digital tools to assist clients during the initial contact phases of their customer journey.* These should include smart forms, readily available pricing information, and case studies success stories (de Beer, 2022).

## 3.3.4 _ FREDERIK THERON

***Frederik Theron is a Chartered Engineer and Project Management Officer with a B.Eng. and M.B.A. from Stellenbosch University.***

Frederik is an engineer and PMO who sets and maintains standards for project management throughout an organisation. He also creates procedures and best practices that help operations run smoothly and on time. He is uniquely qualified to assist CAS with business systems, functioning, processes, and client onboarding.

The interview with Frederik outlined strategies or approaches to optimise CAS's limited time and capacity. It also helped to ascertain how to reduce the time spent vetting, onboarding, or advising clients on the project processes or communicating the client's responsibilities.

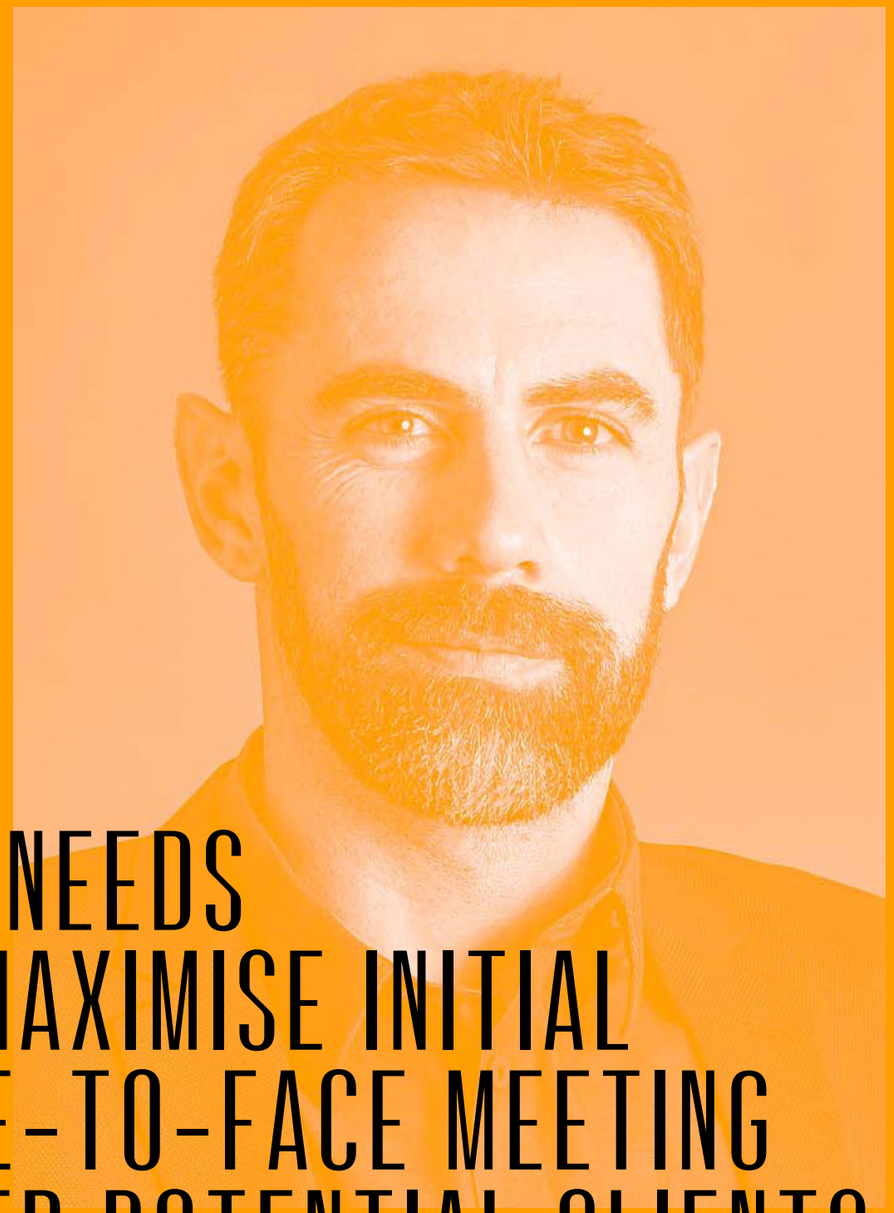
### 3.3.4.1 _ *FREDERIK THERON - OUTCOMES*

Client research revealed that although CAS attracts clients via word-of-mouth recommendations, face-to-face meetings during the initial onboarding phase have a 90% success rate. CAS needs to maximise initial face-to-face meetings after potential clients have been vetted through an automated system.

Frederik suggested that CAS develop three standard project types. These will consider cost complexity barriers, and price and timeline guidelines that prospective clients could use to start their internal evaluation and budgeting process.

*Frederik further advised that high-level time recording would allow CAS to conduct quarterly reviews of major time sinks (Theron, 2022). This would serve to optimise the time spent on creative work and limit the time spent on administration.*

*Fig. 4.*
*van Lill, 2022.*
*Frederik Theron Portrait.*



**CAS NEEDS TO MAXIMISE INITIAL FACE-TO-FACE MEETING AFTER POTENTIAL CLIENTS HAVE BEEN VETTED**

## 3.3.5 _ SIENA HICKEY

***Siena is a marketing and customer strategist with an M.B.A from Dartmouth. She worked as a Senior Strategist at Frog, which was responsible for Apple's brand strategy.***

The informal interview with Siena Hickey focused on the strategic approach for CAS's systems, processes, and client onboarding.

Siena advised that as a single entity, CAS has to maximise efficiency to increase profitability, and streamline workflow and client onboarding (Hickey, 2022).

*Siena proposed CAS investigate software packages for operational day-to-day use.*

### 3.3.5.1 _ *SIENA HICKEY - OUTCOME*

Based on Siena's insight of CAS's limited available time, digitisation becomes necessary for efficient time usage.

CAS spends a substantial amount of time quoting and fielding extensive meetings and calls that don't result in work. *Siena proposed removing CAS's direct contact information from the CAS website and replacing it with an automated smart inquiry form that serves as a vetting process for potential clients (Hickey, 2022).* The form will give CAS information about the client, company, budget, timeline, and scope of work to decide whether to pursue the potential client. This process allows CAS to focus time and efforts on clients with a solid potential to sign with CAS and interest.

**SIENA PROPOSED A SMART INQUIRY FORM THAT SERVES AS A VETTING PROCESS FOR POTENTIAL CLIENTS**

*Fig. 5. Hickey, 2022. Siena Hickey Portrait.*

# SECTION _04

CREATING A STORM BRAND AND BUSINESS REPORT
PART 1 - THE CHALLENGE

# DESKTOP RESEARCH

MA_GDE750

# 4 DESKTOP RESEARCH

*I embarked on desktop research after taking guidance from the client and expert interviews. This research also served to both validate and augment the information received.*

The outcomes of this research are discussed in the following sections.

## 4.1 – DESKTOP RESEARCH - BRAND DEVELOPMENT

From client feedback, the current CAS brand identity, established in 2009 isn't considered as strong.

The research confirmed and aligned with comments and recommendations received from both the client and expert interviews.

*Research into the development and essential components of a brand, why they are important, along with examples from well-known brands, are contained in Appendix C, together with citations.*

**>> Appendix C**

### 4.1.1 – BRAND DEVELOPMENT - OUTCOME

*The brand positioning began, by choosing to highlight large agency output with a small studio focus. This has historically played to CAS's strength as a sole entity that offers world-class design output at competitive rates.*

***The positioning must create and communicate the brand's core competencies to show that the brand is irreplaceable. The idea is to place CAS in a unique category that no one else occupies. CAS will further adopt the distinct and memorable strategy of positioning Storm, the individual, as the business.***

*The approach seamlessly filters into the personality and tone of voice that is based on client research. Clients consistently identify my personality as what endears them to the business.*

**CAS WILL ADOPT THE DISTINCT AND MEMORABLE STRATEGY OF POSITIONING STORM, THE INDIVIDUAL, AS THE BUSINESS**

# 4.2 DESKTOP RESEARCH - BUSINESS STRUCTURE: SOLE PROPRIETOR

***CAS is a sole proprietor. A sole proprietor is not a legal entity, but a business owned and operated by a natural person. The business has no existence separate from the owner who is called the proprietor. The simplified business structure reduces the administrative burden and cost, but makes the natural person, liable for the financial health of the business.***

This structure is widely used by small South African businesses run by individuals. *While the personal liability sounds daunting, good governance coupled with sound contracts will mitigate most risks.*

Sole proprietor are cost-effective to register and maintain, and fiduciary duties are limited to a single, natural person.

Sole proprietors can employ freelancers on limited-time contracts, but cannot employ full-time staff.

It is difficult to raise debt and maintain a significant credit score, due to an unwillingness of financial institutions to accept a sole entity's exposure to liability. Businesses that look to grow through external financing should not operate as sole proprietors, but rather as LLCs (Moneyweb, 2021w).





## 4.2.1 BUSINESS STRUCTURE - OUTCOME



### BENEFITS OF CAS TRADING AS A SOLE PROPRIETOR:

No legal business registration

- Profits are retained by the sole proprietor
- A sole proprietor is a sole decision-maker
- Less tax and expenses compared to companies

### DISADVANTAGES OF CAS TRADING AS A SOLE PROPRIETOR:

- Unlimited liability
- Possible credibility issues
- Unfavourable loan rates
- Fewer tax planning opportunities

***CAS currently trades as a sole proprietor and will continue as such for the foreseeable future.***

# 4.3 DESKTOP RESEARCH – SYSTEMS, PROCESSES, AND OPERATIONS

## 4.3.1 PROJECT MANAGEMENT SYSTEMS

Basic project management is part of the successful execution of every CAS project – from designing a single label to executing multiple lines and variants.

Project management is the application of processes, methods, skills, knowledge, and experience to achieve specific project objectives. These objective are reached according to the project acceptance criteria within agreed parameters that help a business run smoothly, thus impacting the bottom line (APM, 2019).

*In the post-Covid era, CAS is expanding into more sophisticated markets, building on current success, and accepting more complex projects. As a result I reviewed the current and potential project management tools. These tools ensure work is delivered on time, and within budget. Another outcome of reviewing these tools is to improve communication, reduce collaboration complexity, understand resources allocation and prioritisation, and make smarter data-driven decisions.*







## 4.3.2 4.3.2. A CURRENT OPERATIONAL APPROACH TO PROJECT MANAGEMENT

CAS has been successful in using basic project management principles across a variety of platforms. Estimation, planning, and scheduling are done using simple calendar breakdowns, and changes are made on the fly. However, as the complexity and work volume has increased, this approach no longer works.

*Therefore there is a need to identify, trial, and migrate workflow to a more formal, cloud-based digital project management platform that allows seamless collaboration. My findings are as follows:*

## 4.3.3 PROJECT MANAGEMENT SYSTEM TRIAL OUTCOMES

***I completed a month-long trial of Trello, Asana, and Monday.com. At the end of the trial it was revealed that Monday.com has the most suitable blend of features and usability. Additionally, scheduling can be transitioned from the current basic calendar layouts to a more sophisticated Gantt chart structure.***

*Fig. 6. Monday.com, 2022. Monday.com Logo.*

**>> *Appendix D***

*Detailed discussions, comparisons and citations can be found in Appendix D.*

## 4.3.4 _ COST CAPTURE

Regarding cost capture, I conducted month long desktop research into the Sage, Xero, and QuickBooks accounting software. I analysed the software's ability to cater to small business needs, the ease of operation, the ability to sync with my bank, and overall functionality.

**>> *Appendix D*** *I have provided a detailed discussion and comparison in Appendix D.*

I found Sage frustrating because it showed slow technological advancement, poor customer-orientated software, poor customer service, and problematic bank integration.

Although QuickBooks is cheaper, at $25 a month (Quickbooks, 2022), and its offering and functionality similar to Xero, Xero's specific design and functionality for small businesses makes it the best choice. This could account for the fact that it has over three million users (Xero, 2022).

> ***CAS shifted its cost accounting to rely on Xero due to ease of operations. I also found that it had many additional time-savers because of automation. Features such as multi-currency billings, receipt capturing, and accurate bookkeeping were suitable for CAS. Furthermore, software efficiency, app plugins, and automation resulted in a substantial cost reduction in terms of accounting.***

More accounting operations have been outsourced to the accounting firm Webb Accounting, to free up time for creative work.

## 4.4 _ COMPETITOR ANALYSIS

I conducted a competitor analysis of local and foreign individuals and companies as part of this study. The primary objective was to verify what was known about the industry, uncover new information, and assess risks or threats to the business.

While not the primary goal of the research, similarities and differentiating factors between CAS and local competitors are discussed below.

The research for the competitor analysis was done in two phases. Firstly, I held a series of interviews and discussions with various design professionals from a wide variety of enterprises and backgrounds. Secondly, I performed an Internet desktop study. *Sources and references for both are listed in Appendix E.*

**>> *Appendix E***

### 4.4.1 _ COMPETITOR CATEGORIES

Competitor entities were categorised into the following categories. I then investigated their core operating models, portfolio depth, flexibility, expertise and cost.

**The following broad categories were identified for the majority of competitors:**

- **Freelancer**
- **Sole Entity Studio**
- **Design Studio**
- **Agency**

**>> *Appendix E*** *See Appendix E for a detailed summary of all competitors and categories.*

*The following table summarises competitors in various categories.*

## COMPETITOR TABLE

| DESIGN ENTITY CATEGORY | SIZE | COMPANY | DESIGNATION | LOCATION | PORTFOLIO RATING | WEBSITE RATING | LOGO RATING | CLIENT OFFERING | TURNAROUD TIME | COMPETITION TO CAS |
|---|---|---|---|---|---|---|---|---|---|---|
| **SOLE ENTITY** | | | | | | | | | | |
| | 1 | **THE MARK STUDIO** - Frederik Peens<br>EST. 2001 (Peens, 2022)<br>*themarkwebsite.co.za* | Brand and Packaging Design | Cape Town South Africa | ★★★ | ★★☆ | ★☆☆ | Niched<br>Alcohol Design<br>Only Type Logo's | Fast | High |
| | 1 | **CARGO COLLECTIVE** - Simon Frouws<br>EST. 2013 (Cargo Collective, 2022)<br>*cargocollective.com/simonfrouws* | Luxury Wine and Spirit Packaging Design | Cape Town South Africa | ★★★ | ★☆☆ | ☆☆☆ | Niched<br>Luxury Alcohol | Fast | Medium |
| | 1 | **SUPERELASTIC** - Terence Kitching<br>EST. 2015 (Kitching, 2022)<br>*superelastic.co.za* | Brand, Packaging and Illustration Design | Cape Town South Africa | ★★☆ | ★☆☆ | ★☆☆ | Niched<br>Luxury Alcohol | Fast | Medium |
| **SMALL STUDIO** | | | | | | | | | | |
| | 5 | **HAUMANN SMAL**<br>EST. 1998 (Smal, 2022)<br>*haumansmal.com* | Wine Packaging Design | Stellenbosch South Africa | ★★☆ | ★★☆ | ★★☆ | Niche Wine Design<br>Guaranteed Market Placement | Fast | High |
| **MEDIUM STUDIO** | | | | | | | | | | |
| | 2-7 | **MONDAY**<br>EST. 2007 (Monday, 2022)<br>*mondaydesign.co.za* | Brand Identity, Graphic Design and Packaging | Cape Town South Africa | ★★★ | ★★★ | ★★☆ | Broad<br>Packaging Specific | Medium | Medium |
| | | **ONE DESIGN**<br>EST. 1998 (One Design, 2022)<br>*onedesign.co.nz* | Brand and Packaging Design | New Zealand | ★★★ | ★★☆ | ★★☆ | Broad<br>Packaging Specific | Medium | Low |
| | | **RDP DESIGN**<br>EST. 2004 (RDP Design, 2022)<br>*ricardopletes.design* | Brand, Packaging and Environmental Design | Brazil | ★★★ | ★★★ | ★★☆ | Broad<br>Packaging Specific | Medium | Low |

| DESIGN ENTITY CATEGORY | SIZE | COMPANY | DESIGNATION | LOCATION | PORTFOLIO RATING | WEBSITE RATING | LOGO RATING | CLIENT OFFERING | TURNAROUD TIME | COMPETITION TO CAS |
|---|---|---|---|---|---|---|---|---|---|---|
| **LARGE STUDIO** | | | | | | | | | | |
| | **8** | **STRØMME THRONDSEN DESIGN**<br>*stdesign.no*<br>*(Stromme Thorndsen Design, 2022)* | Brand, Strategy and Environmental Design | Norway | ★★★ | ★★★ | ★★★ | All Encompassing<br>Multi-disiplined | Medium | Medium |
| | **15** | **M&A DESIGN**<br>EST. 1987 (M&A Design, 2022)<br>*madesigncapetown.com* | Brand and Packaging Design | Cape Town<br>South Africa | ★★☆ | ★★☆ | ★★☆ | Broad<br>Packaging Specific | Medium | Medium |
| | | **JUST DESIGN**<br>EST. 2002 (Just Design, 2022)<br>*justdesign.co.za* | Strategy, Brand and Packaging Design | Cape Town<br>South Africa | ★★★ | ★★☆ | ★★☆ | Broad<br>Packaging Specific | Medium | Low |
| | | **BRAVO DESIGN**<br>EST. 2007<br>*bravodesign.co.za* | Brand and Packaging Design | Cape Town<br>South Africa | ★★★ | ★★☆ | ★★☆ | Broad<br>Packaging Specific | Medium | Low |
| | **9** | **MABA**<br>*estudiomamba.com*<br>*(Studio Maba, 2022)* | Strategy, Naming, Brand, Packaging and Website Design | Spain | ★★★ | ★☆☆ | ☆☆☆ | All Encompassing<br>Multi-disiplined | Medium | Medium |
| **AGENCY** | | | | | | | | | | |
| | **52**<br>**+** | **PEARL FISHER**<br>EST. 1992 (Pearlfsher, 2022)<br>*pearlfisher.com* | Brand and Strategy Design | London<br>New York | ★★★ | ★★★ | ★☆☆ | All Encompassing<br>Multi-disiplined | Medium | Low |
| | | **& WALSH**<br>EST. 2019 (& Walsh, 2022)<br>*andwalsh.com* | Creative Agency | New York | ★★☆ | ★★☆ | ★★★ | All Encompassing<br>Multi-disiplined | Medium | Low |
| | **300**<br>**+** | **BULLETPROOF**<br>EST. 2007 (Bulletproof, 2022)<br>*wearebulletproof.com* | Brand, Strategy and Envirnomental Design | Global<br>London, New York etc. | ★★★ | ★★★ | ★★★ | All Encompassing<br>Multi-disiplined | Medium | Low |
| | | **TURNER DUCKWORTH**<br>EST. 1990 (Turner Duckworth, 2022)<br>*turnerduckworth.com* | Brand and Strategy Design | London<br>San Francisco<br>New York | ★★★ | ★★☆ | ★★★ | All Encompassing<br>Multi-disiplined | Medium | Low |

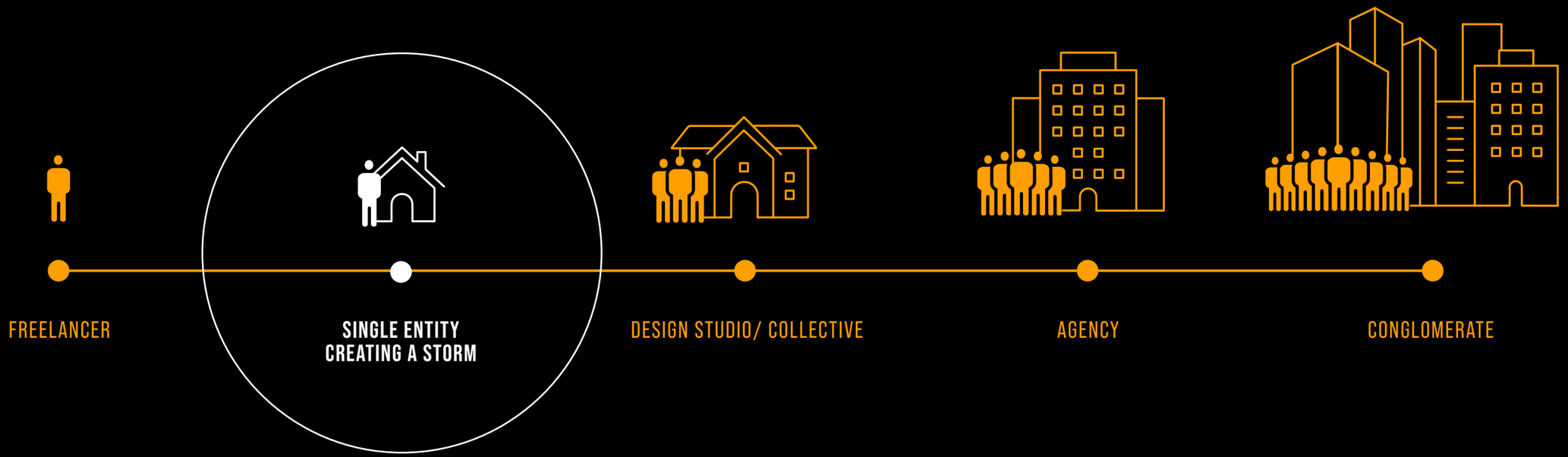
| COMPETITOR CATEGORIES | SIZE | COMPANY | DESIGNATION | LOCATION | PORTFOLIO RATING | WEBSITE RATING | LOGO RATING | CLIENT OFFERING | TURNAROUD TIME | COMPETITION TO CAS |
|---|---|---|---|---|---|---|---|---|---|---|
| | **27** | **BIG FISH**<br>EST. 1984 (Big Fish, 2022)<br>bigfish.co.uk | Brand, Strategy, Marketing, Research, Film and Animation | London | ★★★ | ★★★ | ★★☆ | All Encompassing Multi-disiplined | Medium | Low |
| | **15** | **MIDDAY**<br>EST. 2012 (Midday Design, 2022)<br>*middaystudio.com* | Brand, Strategy, Packaging, Structural, and Digital Design | London Vancouver | ★★★ | ★★★ | ★★☆ | All Encompassing Multi-disiplined | Medium | Low |
| | | **TOGETHER DESIGN**<br>EST. 2003 (Together Design, 2022)<br>*togetherdesign.co.uk* | Brand, Packaging, Publications and Digital Design | London | ★★★ | ★★★ | ★★☆ | All Encompassing Multi-disiplined | Medium | Low |
| | **11-50** | **BACKBONE BRANDING**<br>EST. 2010 (Backbone Branding, 2022)<br>*backbonebranding.com* | Brand, Packaging, and Editorial Design Naming | Armenia | ★★★ | ★★☆ | ★☆☆ | All Encompassing Multi-disiplined | Medium | Low |

*Fig. 7.*
*Wiggett, 2022b.*
*Competitor Table.*

## 4.4.2 _ POSITIONING OF CREATING A STORM

CAS is classified as a sole entity design studio that consists of an individual, me, who occasionally subcontracts work elements to freelancers.

*The infographic below shows CAS positioning in relation to other industry competitor categories.*




**DEGREES OF OVERLAP BETWEEN CREATING A STORM OPERATING AS A SINGLE ENTITY IN COMPARISON TO OTHER ENTITY TYPES**

*Fig. 8.*
*Wiggett, 2022a.*
*CAS Positioining Infographic.*

## 4.4.2.1 – COMPETITOR ANALYSIS - OUTCOME

***CAS's main competition is from small to midsize design studios that include food and non-alcoholic beverages in their focused offerings.***

The intuitive expectation was that other single entity designers or freelancers would constitute the main form of competition. However, the profitability of the niche alcohol sector reduces this threat substantially. In South Africa, there does not seem to be another single entity studio or freelancers that specialises in the same service offering as CAS in multi-product strategic design and technical execution.

In comparison to small design studios, CAS has a good portfolio and established digital presence. Leveraging this aspect further may widen this gap and lessen these agencies' threat to CAS's client base.

The current market sentiment, gleaned from interviews, is that there is enough work for the Cape Town ecosystem with supply and demand being fairly evenly balanced. It is expected that local design studios and agencies will penetrate deeper into international markets in the post-Covid era.

Across South Africa, or internationally, the market is too wide to be included in this research study.

## 4.4.3 – COST ANALYSIS AND DESIGN RATES

The topic of cost and design rates is convoluted, and historically secretive.
While the topic has been briefly touched on above, in the context of the known profit levels for bespoke alcohol design, the topic of cost becomes more opaque. This is down to varying enterprise models.





It is also particularly true for larger enterprises that can afford to do strategic work at low cost or break-even, with the view of securing a longer-term contract.

My research into global costs included desktop investigations, conversations with industry professionals and former colleagues both in SA and abroad, published surveys, and competitor and client interviews.

## 4.4.3.1 – COST ANALYSIS - OUTCOME

Rates for individual designers and agencies are highly varied and tailored according to client budgets, the complexity of work, and perception of value. This makes it virtually impossible to establish a set model.

It is industry practice to have flexible or negotiable rates that are dependent on urgency and availability.

***CAS rates are in the middle of the market, and approximately 10% below market in comparison with small design studios. Single entity design studios bill roughly the same as smaller design studios with lower overheads, making them cost-competitive.***

***The UK and European markets are roughly 30% more expensive than South Africa in hourly billings and design studios and agencies are upward of 50% more expensive (Williams, 2022), which makes great South African single entity designers competitive and sought after.***

# SECTION _05

CREATING A STORM BRAND AND BUSINESS REPORT
PART 1 - THE CHALLENGE

# SWOT ANALYSIS

MA_GDE750

# 5 SWOT ANALYSIS

I incorporated the research and derived outcomes in the above sections to develop a comprehensive SWOT analysis. The SWOT analysis was conducted to identify internal and external factors that identify, offer or pose Strengths, Weaknesses, Opportunities, or Threats to CAS.

THE SWOT ANALYSIS WAS CONDUCTED TO IDENTIFY INTERNAL AND EXTERNAL FACTORS THAT IDENTIFY, OFFER OR POSE STRENGTHS, WEAKNESSES, OPPORTUNITIES, OR THREATS TO CAS.

# 5.1 – BRAND SWOT ANALYSIS

## STRENGTHS

Well-established and presented Portfolio.

The unique and memorable brand name ‘Storm’.

## WEAKNESSES

Weak brand identity.

Business name not known by clients.

Dated website.

Google rankings have fallen due to lack of reviews.

## OPPORTUNITIES

Effectively leverage a world-class portfolio.

Adjust brand and portfolio to cater to a global market.

ZAR cost base makes international work competitive.

## THREATS

Competitors with stronger websites and competitors coming up higher in Google rankings.

Strong photographic portfolios by alcohol industry competitors.

Memorable studio identities stand out more in online searches.

Perception of better reputations for competition winners.

## 5.1.1 – BRAND – ANALYSIS

The brand can be strengthened by:

- A stronger positioning communication to the market via a better digital footprint.
- Stronger leveraging of the memorable name “Storm”.
- Leveraging the existing portfolio through competitions, and website display.
- Exposing the brand to first-time online searchers by increasing the brand presence in competitions and exhibitions.

## 5.2 – SYSTEMS, PROCESSES, BUSINESS FUNCTIONING SWOT ANALYSIS

### STRENGTHS

As a single entity, CAS has no reporting noise and is aware of all business aspects.

CAS controls the finances and has a clear idea of profitability and cash flow.

### WEAKNESSES

Limited time results in administration as a trade-off to creative work.

No digital automation and project management.

Risk of litigation exposure due to outdated contracts.

Dated, time-consuming accounting software.

Non-standardised administration and filing systems.

### OPPORTUNITIES

Improved time efficiency through digitisation and automation of business systems and staff functions.

Migration to an efficient accounting platform.

Outsourcing accounting and administration.

Digitisation and automation of client service, accounts, administration, traffic, and project management.

Time-saving through template creation for rates, quotes, and client inquiries.

### THREATS

Devaluing ZAR makes equipment, design programs and applications expensive.

Difficulty acquiring specialised computer hardware in South Africa.

Outsourced administration reduces visibility on profitability, cash flow, and reaction time.

Freelancers are too expensive for competitive use.





## 5.2.1 – SYSTEMS, PROCESSES AND BUSINESS FUNCTIONS - ANALYSIS

As stated in previous sections of this SWOT, digital automation of basic administration and customer engagement functions is a key future success factor for CAS.

It was also revealed that high visibility into the company's financial position should not be compromised at the cost of automation and delegation. Visibility should be ensured through adequate and detailed reporting if accounting is outsourced.

Another aspect to consider is the outdated business functions that pose a risk to CAS should be updated. Furthermore, there's a need for the standardisation of filing and communication archives that will increase time efficiency.

# 5.3 – CLIENT ACQUISITION AND RETENTION SWOT ANALYSIS

## STRENGTHS

Technical print and production knowledge and experience. This allows for rapid and effective client communication.

Effective one-on-one client relationships.

Strong personality of myself as the owner results in a high success ratio from initial face-to-face meetings.

CAS is established enough to pick and choose clients and work.

## WEAKNESSES

A single entity lacks redundancy and cannot delegate, resulting in limited time for adequate account management. CAS has limited resources to:

- Maintain client relationships.
- Field extensive calls and meetings.
- Capitalise on clients' networks and recommendations.
- Connect clients to the CAS network.
- Respond timeously during high workload periods.
- Increase the capacity for new clients owing to a long lead client pipeline

## OPPORTUNITIES

Administrative time saving through automation in:

- Client onboarding.
- Capitalising on client networks and recommendations.

Including the website testimonials and clients results.

CAS website value offerings to potential clients:

- Brief templates.
- Packaging legislation information.
- Affiliates information and recommendations.

A devalued ZAR makes CAS affordable to overseas clients and profitable for CAS.

Consultancy service addition.

## THREATS

Sole proprietor status may be a deterrent for larger clients.

A flooded freelance market.

Increased online "off-the-shelf" services.

Lower barrier to entry due to increased access to the Internet.







## 5.3.1 – CLIENT ACQUISITION AND RETENTION – ANALYSIS

It was revealed through case studies that there is a need to optimise printing costs. Reduced printing costs are desirable to clients, and need to form part of the initial core discussions.

CAS's success is built around long-term relationships with fewer clients, as well as having longer termed product lines. Client account management and pipelines should focus on identifying where these needs exist and approaching companies that exhibit these needs.

Additional value can be provided to clients free of charge from the website. This move will increase the Google footprint and open up opportunities. The potential fit can be measured using data that's been automatically gathered from the website or a client matrix.

Focusing on technical and niche clients and projects will mitigate the threats from an abundant freelance market

# SECTION _06

CREATING A STORM BRAND AND BUSINESS REPORT
PART 1 - THE CHALLENGE

# CONCLUSION

MA_GDE750

# 6 CONCLUSION

*The legacy operational systems developed by CAS over the past thirteen years have served the company well. However, the research shows the need for changes across almost every aspect of the business. Although no critical weaknesses were identified, there are areas for the business to develop and grow. However, none of the recommended changes should be regarded as disruptively invasive to the day-to-day running of the business.*

*The core strength of the sales pipelines stems from the inter-personal enthusiasm and energy from face-to-face contact.* The success of these interactions results in referrals and indirect marketing through preceding reputation, as opposed to occurring from direct target or traditional marketing.

The client interviews that were conducted highlighted that the current brand imaging is weak, and does not contribute much to the sales process or memorability of the business. *A redesign and re-branding exercise is therefore advised.*
CAS's corporate structure is well suited for its operational style and scale and should not be changed.

*Overall, CAS has adapted well to the increasingly digitised business landscape and has started to take advantage of the post-Covid 19 markets.* This has been achieved through offerings in Europe and the UK. The current business strategy can benefit from some minor changes to key areas and a fresh approach to the company's brand.

*>> CAS Brand and Business Report* ***Part 2, 'The Opportunity'***

**A continuation of the review encompassing design, execution and implementation form part of The Brand and Business Report – Part 2, 'The Opportunity.'**





THE LEGACY OPERATIONAL SYSTEMS DEVELOPED BY CAS OVER THE PAST 13 YEARS HAVE SERVED THE COMPANY WELL.

HOWEVER, THE RESEARCH SHOWS THE NEED FOR CHANGES ACROSS ALMOST EVERY ASPECT OF THE BUSINESS.

# SECTION _07

CREATING A STORM BRAND AND BUSINESS REPORT
PART 1 - THE CHALLENGE

# REFERENCES

# 7 REFERENCES

*Bibliography included*

***References also include information cited in the Appendices***


Ahmad, I. (2019). *Why Brands Should Care About Good Design*. [Online] Digital Information World. Available at: https://www.digitalinformationworld.com/2019/10/why-good-design-matters-for-businesses-infographic.html [Accessed 20 Mar. 2022].

Airbnb (2022). *Vacation Rentals, Homes, Experiences & Places*. [Online] Airbnb. Available at: https://www.airbnb.co.za [Accessed 20 Jul. 2022].

APM (2019). *What is Project management?* [Online] APM. Available at: https://www.apm.org.uk/resources/what-is-project-management/ APM Body of Knowledge 7th edition.

Asana (2022). *Home Page.* [Online] Asana. Available at: http://asana.com [Accessed 2 Apr. 2022].

Backbone Branding (2022). *Home Page.* [Online] Back Bone Branding. Available at: https://backbonebranding.com [Accessed 20 Mar. 2022].

Big Fish (2022). *Big Fish – Brand, Design and Marketing Consultancy.* [Online] Big Fish. Available at: https://bigfish.co.uk [Accessed 20 Mar. 2022].

Bravo Design (2022). *Bravo Design Packaging Design Studio.* [Online] Bravo Design. Available at: https://bravodesign.co.za [Accessed 20 Mar. 2022].

Bullen, E. (2019). *11 of the Best Brand Story Examples.* [Online] Nicely Said. Available at: https://medium.com/nicely-said/11-of-the-best-brand-story-examples-af098e4ea911 [Accessed 20 Mar. 2022].

Bulletproof (2022). *We are Bulletproof Brands*. [Online] Bulletproof. Available at: https://www.wearebulletproof.com [Accessed 20 Mar. 2022].

Burns, H. (2022a). *Brand Creation Process.* 6 Feb.

Burns, H. (2022b). *Brand Name and Tagline Workshop.* 12 Apr.

Burns, H. (2022c). *Brand Positioning Workshop.* 16 Apr.

Calendar (2022). *Home Page.* [Online] App Store. Available at: https://apps.apple.com/us/app/icalendar/id492076105 [Accessed 29 Apr. 2022].

Calendly (2022). *Pricing - Calendly.* [Online] Calendly. Available at: https://calendly.com/pricing [Accessed 20 Mar. 2022].

Cargo Collective (2022). *Simon Frouws / Packaging Design Studio.* [Online] Cargo Collective. Available at: https://cargocollective.com/simonfrouws [Accessed 20 Mar. 2022].

Cole, M. (2019). *An In-Depth Look At The Brand Colors Of 100 Top Companies.* [Online] Design Wizard. Available at: https://www.designwizard.com/blog/brand-colors [Accessed 17 Apr. 2022].

Corporate Finance Institute (2018). *Outsourcing - Learn About the Advantages and Disadvantages.* [Online] Corporate Finance Institute. Available at: https://corporatefinanceinstitute.com/resources/knowledge/strategy/outsourcing/ [Accessed 4 Mar. 2022].

Couchman, H. (2017). *The Search For Value: Defining Clear Brand Values For Your Company.* [Online] Fabrik Brands. Available at: https://fabrikbrands.com/how-to-define-brand-values/ [Accessed 11 Mar. 2022].

de Beer, C. (2022). *How to Become an Expert Authority.* 30 Jan.

DeLabesse, H. and Roussea, F. (2022). *Creating a Storm Client Survey.* [Online] Google Forms Online Survey. 18 Feb. Available at: https://docs.google.com/forms/d/e/1FAIpQLSdM5CEVu3DvRtWXPjdEbfYa_Tb6OmvTJlYcdVGSqfOlmyslaA/viewform.

Ebaq Design (2022). *7 Best Examples of Brand Tone of Voice.* [Online] Ebaq Design. Available at: https://www.ebaqdesign.com/blog/brand-voice [Accessed 20 Mar. 2022].

Erwee, A. (2022). *Creating a Storm Client Survey.* [Online] Google Forms Online Survey. 17 Mar. Available at: https://docs.google.com/forms/d/e/1FAIpQLSdM5CEVu3DvRtWXPjdEbfYa_Tb6OmvTJIYcdVGSqfOImysIaA/viewform.

Evolve Creative (2019). *Why Your Brand Name is Important and Reflects Who You Are.* [Online] Evolve Creative. Available at: https://www.evolvecreative.com/why-your-brand-name-is-important-and-reflects-who-you-are/ [Accessed 20 Jul. 2022].

Fell, J. (2011). *Apple's Simple Marketing Manifesto.* [Online] Entrepreneur. Available at: https://www.entrepreneur.com/article/220603 [Accessed 12 May 2022].

Getman, C. (2018). *17 Inspiring Brand Manifestos.* [Online] The Agency Arsenal. Available at: https://theagencyarsenal.com/12-inspiring-brand-manifestos/ [Accessed 22 May 2022].

GoDaddy (2020). *Mission Statement vs. Vision Statement – What's the Difference?* [Online] GoDaddy Blog. Available at: https://www.godaddy.com/garage/mission-statement-vs-vision-statement/ [Accessed 15 May 2022].

Hauman Smal (2022). *Hauman Smal.* [Online] haumansmal.com. Available at: http://haumansmal.com [Accessed 20 Jul. 2022].

Haumann, E. (2022). *Small Design Studio Costs and Operations.* 2 Apr.

Hickey, S. (2022). *How Can CAS Streamline Their Systems, Processes, Client Onboarding and Retention.* 7 Mar.

Hootsuite (2022). *Hootsuite - Social Media Management for Teams using Twitter, Facebook, Linkedin.* [Online] Hootsuite. Available at: https://hootsuite.com/billing/create-account?plan=PROFESSIONAL_PLAN [Accessed 20 Jul. 2022].

John (2019). *Patagonia Mission Statement 2020 | Patagonia Mission & Vision Analysis.* [Online] Mission Statement Academy. Available at: https://mission-statement.com/patagonia/ [Accessed 12 Jun. 2022].

Just Design (2022). *About Us*. [Online] Just Design Available at: https://www.justdesign.co.za/about-us/ [Accessed 20 Jul. 2022].

Kempshall, T. (2022a). *Creating a Storm Business and Brand Review.* 12 Mar.

Kempshall, T. (2022b). *Creating a Storm Client Survey.* [Online] Google Forms Online Survey. 5 Mar. Available at: https://docs.google.com/forms/d/e/1FAIpQLSdM5CEVu3DvRtWXPjdEbfYa_Tb6OmvTJIYcdVGSqfOImysIaA/viewform.

Kitching, T. (2022). *Home Page.* [Online] Super Elastic. Available at: https://superelastic.co.za [Accessed 20 Jul. 2022].

Lazzaro, C. (2020). *21 Powerful Mission Statement Examples That Stand Out.* [Online] Wix Blog. Available at: https://www.wix.com/blog/2020/12/mission-statement-examples/? [Accessed 15 May 2022].

Louw, A. (2022). *Creating a Storm Client Survey.* [Online] Google Forms Online Survey. 2 Spring. Available at: https://docs.google.com/forms/d/e/1FAIpQLSdM5CEVu3DvRtWXPjdEbfYa_Tb6OmvTJIYcdVGSqfOImysIaA/viewform.

M&A Design (2022). *M&A Design - About.* [Online] MA Design. Available at: https://www.madesigncapetown.com [Accessed 20 Jul. 2022].

MacDonald, B. (2022). *How to Establish a Thriving Solopreneurship.* 6 Feb.

Malan, N. (2022). *Creating a Storm Business and Brand Review.* 7 Mar.

Malan, N. and Grant, G. (2022). *Creating a Storm Client Survey.* [Online] Google Forms Online Survey. 22 Feb. Available at: https://docs.google.com/forms/d e/1FAIpQLSdM5CEVu3DvRtWXPjdEbfYa_Tb6OmvTJIYcdVGSqfOImysIaA/viewform.

Manilall, A. (2022). *Creating a Storm Accounting Structure.* 2 Apr.

Midday Studio (2022). *Midday - Award-winning Brand Design Agency.* [Online] Midday Studio. Available at: https://middaystudio.com [Accessed 20 Mar. 2022].

Mind Tools (2009). *Crafting an Elevator PitchIntroducing Your Company Quickly and Compellingly.* [Online] Mind Tools. Available at: https://www.mindtools.com/pages/article/elevator-pitch.htm [Accessed 23 Apr. 2022].

Monday Design (2022). *Monday Design Studio - Thinking, Design and Branding.* [Online] Monday Design. Available at: http://www.mondaydesign.co.za [Accessed 20 Jul. 2022].

Monday.com (2022). *Welcome to Monday.com - A New Way of Working.* [Online] Monday.com. Available at: https://monday.com [Accessed 29 Apr. 2022].

Moneyweb (2021). *Setting up a Business: Sole Proprietorship, Partnership, or Private Company?* [Online] Money Web. Available at: https://www.moneyweb.co.za/financial-advisor-views/setting-up-a-business-sole-proprietorship-partnership-or-private-company/.

Name cheap (n.d.). *What Is a Tagline? Everything You Need to Know - Namecheap.* [Online] Guru Guides. Available at: https://www.namecheap.com/guru-guides/what-is-a-tagline/?gclid=CjOKCQjwyYKUBhDJARIsAMj9IkE1ySMDuGrXdUXdd-nFf-ZNNpRmgtQsYmTUzpjH1hxPhLoVJjs-ZdIaAp9WEALw_wcB [Accessed 15 May 2022].

Nelson, E. (2020). *Best Mission Statements: 12 Examples You Need to See*. [Online] Fond. Available at: https://www.fond.co/blog/best-mission-statements/ [Accessed 12 May 2022].

One Design (2022). *One Design - Brand & Packaging Studio.* [Online] One Design. Available at: https://www.onedesign.co.nz [Accessed 20 Jul. 2022].

Pearlfisher (2022). *Creative Design & Branding Agency - Pearlfisher - Design for Life.* [Online] Pearlfisher. Available at: https://www.pearlfisher.com [Accessed 20 Mar. 2022].

Peens, F. (2022a). *MARK Studio.* [Online] The Mark. Available at: The Mark [Accessed 20 Mar. 2022].

Peens, F. (2022b). *Sole Entity Costs and Operations.* 1 Apr.

Psychologytoday.com (2010). *Vision and Mission.* [Online] Psychology Today. Available at: https://www.psychologytoday.com/us/blog/smartwork/201004/vision-and-mission [Accessed 12 Mar. 2022].

QuickBooks (2022). *QuickBooks Official Site, Paragraph 1.* [Online] Quick Books. Available at: https://quickbooks.intuit.com.

Qureshi, A. (2020). *Microsoft Teams vs. Zoom:* A Side-by-Side Comparison. [Online] Intradyn. Available at: https://www.intradyn.com/microsoft-teams-vs-zoom/.

RDP Design (2022). *Ricardo Pletes RPD Design - Design para Pequenas e Médias Empresas. São Paulo.* [Online] Ricardo Duplesis Design. Available at: https://www.ricardopletes.design [Accessed 20 Jul. 2022].

Romano, J. (2021). *How to Create a Compelling Brand Story.* [Online] Wix Blog. Available at: https://www.wix.com/blog/2021/02/brand-story [Accessed 20 Mar. 2022].

Sage (2022). *Control your Business Finances with Sage Accounting.* [Online] Sage. Available at: https://www.sage.com. [Accessed 18 Jun. 2022].

Side Bean (2022). *Elevator Pitch Examples from Successful Startups.* [Online] Side Bean. Available at: https://slidebean.com/blog/elevator-pitch-examples-and-templates [Accessed 17 Mar. 2022].

Sprout Social (2022). *Sprout Social: Social Media Management Solutions.* [Online] Sprout Social. Available at: https://sproutsocial.com [Accessed 20 Mar. 2022].

Stander, D. (2022). *Creating a Storm Client Survey.* [Online] Google Forms Online Survey. 1 Mar. Available at: https://docs.google.com/forms/d/e/1FAIpQLSdM5CEVu3DvRtWXPjdEbfYa_Tb6OmvTJIYcdVGSqfOImyslaA/viewform.

Stromme Thorndsen Design (2000). *Strømme Throndsen Design - Pakningsdesign*. Available at: https://stdesign.no [Accessed 20 Jul. 2022].

Talbot, S. and McDonald, J. (2016). *The 7 Key Elements of Brand Identity Design + 10 Corporate Identity Examples.* [Online] Lucidpress Blog. Available at: https://www.lucidpress.com/blog/the-7-key-elements-of-brand-identity-design [Accessed 12 Apr. 2022].

The Acrolinx Team (2018). *What Is Tone of Voice and Why Does It Matter? | Acrolinx.* [Online] Acrolinx. Available at: https://www.acrolinx.com/blog/what-is-tone-of-voice/ [Accessed 23 Jan. 2022].

Theron, F. (2022). *Systems, Process, Client Onboarding and Retention.* 2 Mar.

Together Design (2022). *Home Page.* [Online] Together Design. Available at: https://togetherdesign.co.uk [Accessed 20 Jul. 2022].

Trello (2019). *Home Page.* [Online] Trello. Available at: https://trello.com [Accessed 2 Apr. 2022].

Wave (n.d.). *Project Management Tools: Asana vs Trello vs Monday.com.* [Online] Wave Freelance Hub. Available at: https://www.waveapps.com/freelancing/overview/asana-vs-trello-vs-monday [Accessed 29 Apr. 2022].

Williams, M. (2022). *SA Design Agency Costs.* 21 Apr.

Xero (2022). *Beautiful Business and Accounting Software.* [Online] Xero. Available at: https://www.xero.com/za/.

## *List of Figures*

Figure 1. Wiggett, S. (2022c). *Client Survey Infographic.* [Digital Presentation] Brand Business Report.

Figure 2. Monstarlab (2022). *Bryan MacDonald Portrait.* [Online Image] Monstarlab. Available at: https://monstar-lab.com/ae/board-of-directors/bryan-macdonald/ [Accessed 20 Jul. 2022].

Figure 3. de Beer, C. (2022). *Candice de Beer Portrait.* [Online Image] LinkedIn. Available at: https://www.linkedin.com/in/candice-sian-de-beer/?originalSubdomain=za [Accessed 20 Jul. 2022].

Figure 4. van Lill, M. (2022). *Frix Theron Portrait*. [Photographers Archive] Mattphoto. Available at: https://mattphoto.co.za [Accessed 20 Jul. 2022].

Figure 5. Hickey, S. (2022). *Siena Hickey Portrait.* [Online Image] LinkedIn. Available at: https://www.linkedin.com/in/sienahickey/ [Accessed 20 Jul. 2022].

Figure 6. Monday.com (2022). *Monday.com Logo.* [Online Image] Monday.com. Available at: https://monday.com [Accessed 20 Jul. 2022].

Figure 7. Wiggett, S. (2022e). *Competitor Table*. [Digital Presentation] Brand and Business Report.

Figure 8. Wiggett, S. (2022b). *CAS Positioining Infographic.* [Digital Presentation] Brand and Business Report.

Figure 9. Wiggett, S. (2022d). *Client Survey Questionnaire.* [Google Forms] Online Survey. Available at: https://docs.google.com/forms/d/e/1FAIpQLSdM5CEVu3DvRtWXPjdEbfYa_Tb6OmvTJIYcdVGSqfOlmyslaA/viewform.

Figure 10. Wiggett, S. (2022a). *Automated Client Survey Responses Table.* [Digital Presentation] Brand and Business Report.

Figure 11. Calendly (2022). *Calendly Logo.* [Online Image] Calendly. Available at: https://calendly.com [Accessed Jul. 2022].

Figure 12. Hootsuite (2022). *Hootsuite Logo.* [Online Image] Hootsuite. Available at: https://www.googleadservices.com/pagead/aclk?sa=L&ai=DChcSEwiPjqm8-ob5AhUlsuOKHbXvDv4YABABGgJkZw&ae=2&ohost=www.google.[Accessed 20 Jul. 2022].

Figure 13. Sprout Social (2022). *Sprout Social Logo.* [Online Image] Sprout Social. Available at: https://sproutsocial.com.

Figure. 14. Airbnb (2022). *Airbnb Logo*. [Online Image] Airbnb. Available at: https://www.airbnb.com [Accessed 20 Jul. 2022].

Figure 15. Harley-davidson (2022). *Harley-davidson Advert.* [Online Image] Harley-davidson. Available at: https://www.harley-davidson.com/aa/en/index.html [Accessed 20 Jul. 2022].

Figure 16. Mailchip (2022). *Mailchip Advert.* [Online Image] Mailchip. Available at: https://mailchimp.com/en-gb/grow-with-mailchimp/?gclid=Cj0KCQjwz96WBhC8ARIsAATR251NogxfSxgOJ65RdxdTqUeApcb4P-ZtyDzjQWB1-4scOyZDmNFFdrQaAixIEALw_wcB&gclsrc=aw.ds [Accessed 20 Jul. 2022].

Figure. 17. Adidas (2022). *Adidas Logo*. [Online Image] Adidas. Available at: https://www.adidas.co.za/outlet?gclid=Cj0KCQjwz96WBhC8ARIsAATR2515yNMvbYMYcunOk4ANz4vVjROchhw66FehJk8xFhTFVzGvx9vPJXQaAkzSEALw_wcB&gclsrc=aw.ds [Accessed 20 Jul. 2022].

Figure 18. Tesla (2022). *Tesla Logo*. [Online Image] Tesla. Available at: https://www.tesla.com [Accessed 20 Jul. 2022].

Figure 19. Patagonia (2022). *Patagonia Logo.* [Online Image] Patagonia. Available at: https://www.patagonia.com/home/ [Accessed 20 Jul. 2022].

Figure 20. WeWork (2022). *Wework Logo.* [Online Image] Wework. Available at: https://www.wework.com/en-GB [Accessed 20 Jul. 2022].

Figure 21. Apple (2022). *Apple Logo*. [Online Image] Apple. Available at: https://www.apple.com [Accessed 20 Jul. 2022].

Figure 22. Instagram (2022). *Instagram Logo.* [Online Image] Instagram. Available at: https://www.instagram.com [Accessed 20 Jul. 2022].

Figure 23. Nike (2022). *Nike Just Do It Logo*. [Online Image] Nike. Available at: https://www.nike.com/za/ [Accessed 20 Jul. 2022].

Figure 24. Disney (2022). *Disney Logo*. [Online Image] Disney. Available at: https://www.disney.co.za [Accessed 20 Jul. 2022].

Figure 25. Cadbury (2022). *Cadbury Logo.* [Online Image] Cadbury. Available at: https://www.cadbury.co.za [Accessed 20 Jul. 2022].

Figure 26. Trello (2022). *Trello Logo*. [Online Image] Trello. Available at: https://trello.com [Accessed 20 Jul. 2022].

Figure 27. Asana (2022). *Asana Logo*. [Online image] Asana. Available at: https://app.asana.com/0/home/1202112188872945 [Accessed 20 Jul. 2022].

Figure 28. Monday.com (2022). *Monday.com Logo.* [Online Image] Monday.com. Available at: https://monday.com [Accessed 20 Jul. 2022].

Figure 29. Calendly (2022). *Calendly Logo.* [Online Image] Calendly. Available at: https://calendly.com [Accessed Jul. 2022].

Figure 30. Microsoft Teams (2022). *Microsoft Teams Logo.* [Online Image] Microsoft. Available at: https://www.microsoft.com/en-za/microsoft-teams/log-in [Accessed 20 Jul. 2022].

Figure 31. Zoom (2022). *Zoom Logo*. [Online Image] Zoom. Available at: https://zoom.us [Accessed 20 Jul. 2022].

Figure 32 .Xero (2022). *Xero Logo.* [Online Image] Xero. Available at: https://www.xero.com/za/ [Accessed 20 Jul. 2022].

Figure 33. Sage (2022). *Sage Logo.* [Online Image] Sage. Available at: https://www.sage.com/en-za/ [Accessed 20 Jul. 2022].

Figure 34. Quickbooks (2022). *Quickbooks Logo.* [Online Image] Quickbooks. Available at: https://quickbooks.intuit.com [Accessed 20 Jul. 2022].

# APPENDICES A-E


APPENDIX A – CLIENT SURVEY AND INTERVIEW STANDARD QUESTIONS AND RESPONSES

APPENDIX B – EXPERT INTERVIEWS: INTERVIEWEES

APPENDIX C – ANATOMY OF A BRAND ROADMAP

APPENDIX D – PROJECT MANAGEMENT PRODUCTS AND SYSTEMS

APPENDIX E – COMPETITORS

# APPENDIX_A



# CLIENT SURVEY AND INTERVIEW STANDARD QUESTIONS AND RESPONSES

## CLIENT SURVEY

*A Google Forms client survey questionaire was sent out to CAS clients.*

>> *Google Forms Client Survey Questionnaire*

# Creating A Storm Client Survey

I'd love to hear from you! Simply answer a few questions down below (won't take you more than 5 minutes).

Sign in to Google to save your progress. Learn more

* Required

What's your name? *

Your answer

How did you first hear about Creating A Storm? *

- ○ Internet search
- ○ Referral
- ○ Social media
- ○ Other:

Think back to when you first began your search for a creative agency. What made you want to work with Creating A Storm? (e.g., my portfolio, personality, etc) *

Your answer

What do you love about working with me? *

Your answer

How does working with Creating A Storm differ from past agencies or creatives you've worked with? *

Your answer

What have you achieved as a result of working with Creating A Storm? (e.g., increased revenue, greater brand awareness, positive customer feedback) *

Your answer

How can I improve my service offering? What can I do better? *

Your answer

Would you recommend Creating A Storm?

- ○ Yes
- ○ No

If you answer yes to recommending Creating A Storm, would you explain why?

Your answer

What words would you use to describe your Creating A Storm experience? *

Your answer

Submit Clear form

Never submit passwords through Google Forms.

This form was created inside of Successwise. Report Abuse

Google Forms

*Fig. 9. Wiggett, 2022c. Client Survey Questionnaire.*

**CREATING A STORM CLIENT SURVEY**

| Timestamp | Name | Position | How did you hear about Creating a Storm? | What made you want to work with Creating a Storm? | What do you love about working with Creating a Storm? | How does Creating a Storm differ from other agencies & designers? | What has Creating a Storm achieved for your company? | How could I improve my offering? | Would you recommend Creating a Storm? | Why would you recommend Creating a Storm? | What words would you use to describe your Creating a Storm experience. |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **2022/02/17 20:27** | Anton Erwee | Cecilia's Farm CEO | Referral | Recommendation by Anneligh Jacobsen. | Your speed, effeciency & fun. | Your speed, effeciency & creativity. | Chat to me in 12 months time. | Nothing. | Yes. | You are good at what you do. | Fun.<br>Friendly. |
| **2022/02/18 08:30** | Hervé DeLabesse | Premier Cru Founder & CEO | Referral | Quality of work.<br>Professionalism.<br>Bubbly, energetic personality. | High energy.<br>Quality of work.<br>Understanding of market, solutions & unique approach. | Your ability to quickly visualise concepts, solutions & results. | A brand I love & treasure. | Clone yourself. | Yes. | High quality of work. | Effective.<br>Fast.<br>Fun. |
| **2022/02/18 09:28** | Francois Roussea | Galito's Managing Director | Referral | Portfolio.<br>Word of mouth. | Creative ideas.<br>Your experience.<br>Great approach to customers. | Your personal and focussed approach. | Vastly improved brand awareness & innovation.<br>Positive customer & industry feedback. | Share more of your knowledge & industry trends. | Yes. | Customer satisfaction & focused approach. | Inspiring.<br>Enthusiastic.<br>Quality.<br>Innovative. |
| **2022/02/21 07:41** | Anton Louw | Sunbird Rooibos Founder & CEO | Referral | References.<br>Portfolio | Understanding of brief, concept & solutions.<br>Creativity & design results. | Your professionalism & enthusiasm. | Positive customer feedback | Nothing. | Yes. | Customer satisfaction & quality of work. | Fun.<br>Enthusiastic.<br>Imaginative. |
| **2022/02/22 11:10** | Nicola Malan | Engen Head of Product Development & Packaging | Referral | Personality & energy.<br>Attention to detail.<br>Competency. | Excelled design solutions.<br>Energy & personality. | Your one on one approach & being smaller is a huge strength. | Phenominal product packaging. | I'm very happy with the status quo. | Yes. | Professionalism.<br>Personality.<br>High calibre of work. | World class.<br>Great personality.<br>Professional. |
| **2022/02/22 17:11** | Gregory Grant | Pharmacy at SPAR Managing Director | Referral | Creativity.<br>Personality & passion for work.<br>Portfolio & quality work. | Outstanding level of professionalism. | You are on a whole new level of creativity & innovative thinking. | Great packaging design, brand awareness & positive customer feedback. | Nothing. You are outstnading. | Yes. | You are the best in your field. | Absolutely Awesome. |
| **2022/03/01 14:14** | Danielle Stander | Agera Pharmaceuticals Managing Director | Internet Search | Portfolio.<br>Creativity.<br>Energy. | Felxibility.<br>Professionalism.<br>Unique approach. | Your different persepctives & thinking outside of the box. | A distinctive brand with unique character. | Nothing. | Yes. | Your unique creations. | A pleasure. |
| **2022/03/05 16:10** | Tina Kempshall | Cape Cookies Head of Marketing | Referral | Creativity.<br>Passion & energy. | Unparalleled creativity & design executions.<br>You are a master at your craft. | You are in a league of your own when it comes to design.<br>A true creative master. | Great brand awareness & a stronger brand identity. | Nothing. | Yes. | You are the best at what you do. | Inspiring.<br>Creative. |

*Fig. 10.*
*Wiggett, 2022a.*
*Automated Client Survey Responses Table.*

(Erwee, DeLabesse, Roussea, Louw, Malan, Grant, Kempshall, Stander, 2022).

# SUMMARISED SURVEY QUESTIONS AND RESPONSES

**1 How did you hear about Creating a Storm?**

90% Referrals

10% Internet search, portfolio, LinkedIn

**2 What made you want to work with Creating a Storm?**

65% Passion, energy and personality

65% Portfolio

50% Professionalism

40% Referrals and reputation

35% Creativity

**3 What do you love about working with Creating a Storm?**

65% Creativity, innovation and uniqueness

50% Quality of work output

40% Energy, passion, personality and fun

40% Insight, experience and knowledge

30% Professionalism

30% Customer relations

10% Flexibility

10% Speed and efficiency

**4 How does Create a Storm differ from other agencies and designers?**

- Briefs and turnaround times are speedy and efficient
- Solutions are creative and innovative
- Personal, focused approach
- Professionalism
- Enthusiasm

**5 What has Creating a Storm achieved for your company?**

- Increased brand awareness
- Positive customer feedback
- Great packaging and a strong brand identity

**6 How could I improve my offering?**

90% Nothing

5% Increased capacity / shorter lead times (clone yourself)

5% Share more of your knowledge and industry trends

**7 Would you recommend Creating a Storm?**

100% Yes

**8 Why would you recommend Creating a Storm?**

90% Creativity, innovation and quality of work

30% Personality

20% Customer satisfaction

10% Professionalism

**9 What words would you describe your Creating a Storm experience?**

- Fun
- Friendly
- Passion
- Enthusiastic
- Personality
- Inspiring
- Imaginative
- World Class
- Creative
- Efficient
- Professional

# INFLUENTIAL CLIENT INTERVIEW

## NICOLA MALAN INTERVIEW

*Engen Petroleum Head Of Product Development, Food Technology And Packaging.*

**1 How did you hear about Creating a Storm?**

- Referrals - It is the most vital asset for your business.
- Suppliers, competitors and clients ask me who my designer is every week. Sometimes I am reluctant to tell them because I don't want the competition.

**2 When you recommend Creating a Storm to clients, what do you say?**

- Whenever people ask me who my designer is and what agency she works for, I say a 'Storm' or 'a storm in a teacup'. I cannot remember your company name.

**3 Would you recommend Creating A Storm?**

- I recommend you all the time to suppliers, clients and competitors asking about the designer behind our awe-inspiring packaging.
- Your work is in a league of its own.
- Your reputation is recognised and respected in the industry.
- You need to capitalise on your name and make it easier for people to share.

**4 What do you love about working with Creating a Storm?**

- Your energy, experience and confidence.

**5 How does working with Creating A Storm differ from past agencies or creatives you've worked with?**

- An agency offers focused expertise across many diverse areas. They have the resources to cater to a client's diverse needs across different mediums. Your strength lies in your specialisation and niche. You are a brilliant brand and packaging specialist, don't try to offer more to that detriment.
- Focus on your niche and stay in your lane.
- Companies want to deal with a business but recommend a person—a single entity design studio in essence services a company's wants and needs in this respect.

**6 How can I improve my service offering? What can I do better?**

- Stick to what you are good at. Focus on brand and packaging design.

**7 What have you achieved as a result of working with Creating A Storm?**

- A substantial increase in brand recognition.
- Creative, innovative, unique and beautifully designed packaging.
- Our biggest competitor, Woolworths, a packaging and retail design leader, tried to torpedo our plans early on because our designs threatened their market domination.
- An increase in revenue and sales.
- Our Q&CO water is now the biggest seller in our convenience stores, ahead of all competitors. Customer feedback attributes this to the visual design and cost.

**8 Are there improvements you envision for the brand, website, visuals, and communication?**

- I feel that your brand has evolved since you initially started. You are now more confident, experienced and passionate. Your personality, creative energy and excellent portfolio of work define your brand. Your identity and website don't reflect who are currently are.
- Companies are open to and expect change for the right reasons. Updating your brand identity and communication to reflect you accurately is good.
- My suggestions include:
  - Play to the strength of the word storm
  - Capitalising on your fun, playful, energetic nature
  - Be mindful of keeping the brand professional and reputable – these are essential to big corporates

**9 Are my services sustainable long-term, and is there room for improvement?**

- In a post covid world, you can now design for a global audience, and you should do so. Make sure your branding choices work in your favour here and cater to everyone (Malan, 2022).

# APPENDIX_B



# EXPERT INTERVIEWS: INTERVIEWEES

A summarised account of the expert interviews is provided below.

## INTERVIEW AND WORKSHOPS WITH HALDON BURNS

CAS conducted an interview and workshops with Haldon Burns to establish the process of creating a brand and strategic brand positioning, its importance and the tactical and marketing decisions that influence name generation.

> *Brand positioning is a vital first step in creating a brand. The positioning provides a focus for every short-term and long-term strategic decision and is used as an internal tool to align all marketing and communication efforts with the brand and value proposition (Burns 2022c).*

**The anatomy of a brand positioning needs to include:**

- BRAND NAME
- TARGET AUDIENCE
- DIFFERENTIATING FACTOR
- MARKET CATEGORY
- PRIMARY SELECTION CRITERIA
- CREDITABLE RATIONAL
- COMPETITIVE OR ALTERNATIVE BRAND

*To better inform the positioning, Haldon created a worksheet questionnaire for CAS.*

**Positioning worksheet**

- FOUNDATION – Where are we now?
  - What is CAS's mission?
  - What are CAS's three most important goals?
  - Why was CAS created?
  - What is CAS's vision?
  - How will CAS achieve this vision?
  - What is CAS's unique value proposition?
- DIFFERENTIATION
  - How is CAS different/ what is CAS's competitive advantage?
  - Why would your clients choose CAS?
  - What does CAS do better than everyone else?
  - Who is the CAS competition?
  - Is there a competitor CAS admires?
  - What problems do CAS competitors have that CAS solves?
- CLIENTS
  - Who are CAS clients?
  - Describe CAS's ideal client?
  - Prioritise CAS stakeholders in order of importance.
  - How do you want to be perceived by your clients?
- VISION – Where does CAS need to go?
  - How will CAS sell their services?
  - What are the trends and changes affecting the design industry?
  - Where will CAS be in five years?
  - How would CAS measure success?
  - What values and beliefs drive CAS?
  - If CAS could communicate a single message about the company, what would it be?

**The brand positioning is also comprised of the Brand Personality, Tone of Voice, Values and Narrative. Haldon broke these down into easily workshopped outcomes.**

- BRAND PERSONALITY
  The "personality" are the characteristics of the brand, the distinct character it has compared to competitors that define how the brand communicates.
- TONE OF VOICE
  The 'tone of voice' is the representation of the characteristics of the brand in the communication practice.

  *The personality and tone of voice were selected from defined profiles that are funny vs. serious, formal vs. casual, respectful vs. irreverent, and enthusiastic vs. a matter of fact.*
- NARRATIVE
- VALUES





# INTERVIEW WITH BRYAN MACDONALD

The interview with Bryan centred around the process of establishing a thriving business through a business strategy and roadmap.

**Business Strategy**
A business strategy begins with establishing a business philosophy, which serves as a roadmap for a company, helping executives and contractors understand the goals and values they are continually working towards to ensure effective outcomes. CAS can establish this by answering the following questions.

- *What is it that I do?*
- *Why do I do it?*
- *Why do others use me?*
- *How do I get it done?*
- *Why do I do it the way I do it?*

**Business Roadmap**
A business roadmap outlines the direction a company will take to achieve their business plan and successfully meet long-term strategic goals. CAS can establish this by answering the following questions.

- *How do I get business?*
- *How do I complete the business I do?*
- *How do I keep the company after completion?*

**CAS must establish what chunks of the business process can be outsourced or supported by creating an ecosystem of contractors.**

# INTERVIEW WITH CANDICE DE BEER

**Candice's advice for becoming an expert authority in packaging design includes:**

- Align CAS with a team of experts with over ten years of experience.
- Pursue paid for public speaking.
- Blog articles.
- A Linked and Instagram plan to generate leads and drive business through one article a month and three posts a week.
- Broadcast to existing customers .
- Activate dormant customers by writing an email asking how their company is doing - remember that businesses lose clients through apathy.
- Post client testimonials on the CAS website.
- Include downloadable value additions to the CAS website for clients, including information on affiliates, packaging legislation, brief templates and examples.
- Create an infographic that lays out the entire creative process from research, concept, artwork build, design, finished art, presentations, and print production for clients.
- Create world-class branding.
- Create a world-class website and portfolio.

**Candice's advice for building a successful studio includes putting systems in place for:**

- Onboarding Clients.
- Create a discovery questionnaire linked to the CAS website to determine whether you would cost the project or take on a potential client. The questionnaire should include the company size, turnover, needs, timelines and if they are commercial or bespoke. If the company is commercial, the project should be profitable. If the company is bespoke, the budget should be smaller, but there is potential for a portfolio of award-winning work. Perhaps two bespoke clients are taken on every year to serve the CAS portfolio and feed the creative soul.
- Consider charging for the first client meeting. The fee will be deducted from the overall billings should a working relationship ensue. If only a third of meetings result in work, at least CAS will get paid for their time.
- CAS should also target international clients with bigger budgets.
- Nurture and develop referrals.
- Advertise to clients that in place of extensive marketing spend, CAS keeps costs to a minimum and asks that in return for great work could clients refer 1-3 people to CAS once they are satisfied with the project outcome.
- Joint Venture Partnerships.
- Create affiliate links on the CAS website that generate income through an affiliate fee. Negotiate contracts with suppliers and affiliates to create passive income and use referral fees.
- Increasing passive income.
- A business goal should maximize returns for minimal time and effort invested. CAS can achieve this through paid for speaking events, affiliate fees, podcasts, video courses and a consulting offering.

**Candice's advice for building a successful brand and business includes ascertaining who the ideal CAS client is. CAS should survey current clients, asking the following questions:**

- How did you hear about Creative a Storm?
- What do you love about us?
- How does working with us differ from your past experiences?
- I want to know the words you would use to describe us?
- What would you improve on?
- What has Creating a Storm achieved for your company?
- How could I improve my service offering (de Beer, 2022)?

**Client Acquisition and Retention**

- Identifying and understanding a target market will help CAS communicate with their clients in their own words and across media, they consume effectively.
- CAS will consider targeting international clients to create a global presence and grow its reputation and revenue.

- One of the first steps CAS should undertake is to conduct a client survey of existing clients to help CAS understand key success drivers and investigate if engagement efficiency can be improved, if client selection can be improved or automated and if additional exposure and, as such, robustness to the sales pipeline can be developed.
- Becoming an authority in packaging design is essential for CAS because it unlocks a new professional accomplishment and achievement level. It increases the strategic visibility to attract clients to CAS services and followers to CAS online content.
- CAS will investigate avenues to achieve this, including public speaking events, writing blog articles, posting on Instagram and LinkedIn, creating a collaborative CAS team of experts, having downloadable website value additions on legislation and brief templates, creating world-class branding and a world-class website and portfolio.
- CAS client onboarding strategy would benefit from a discovery questionary posted on the CAS website to vet potential clients and brands.
- CAS values the strategy of asking clients to refer them for a reduced rate but feels that will dimmish their value. To date, clients refer CAS voluntarily, proven that nearly all CAS work comes through word-of-mouth referrals.

**Systems, Business Functions and Processes**

- CAS will discard the suggestion to charge for the first client meeting and instead rely more heavily on vetting potential clients through the website questionnaire. Charging potential clients for a first meeting is a risk that may alienate potential clients.
- Creating Joint Venture Partnerships through affiliate links on the CAS website will capitalise on the relationships CAS has built in the industry over the years, generate income and offer clients a value proposition.
- Future ventures CAS could consider to increase revenue, and reputation and grow their presence as an authority in packaging design can include paid speaking events, podcasts, video courses and consulting.





# INTERVIEW WITH FREDERIK THERON

**Suggested an automated client form including:**

- Company name
- Years in business
- Budget
  - R25 000 – R100 000
  - R100 000 – R250 000
  - R250 000 upwards

  This conveys to a client the broad scope of CAS capabilities, appealing to a start-up or larger company while excluding clients with tiny budgets.
- Timeframe
- No. of line items or SKUs
- Brief project description

**Further suggestions:**

- CAS should not charge for initial meetings and instead of building those costs into the scope of work. The first 10% of a project should be costed towards planning. The initial client meeting is free, the next meeting is charged at 50% of the CAS hourly rate and the 3rd meeting is billed at CAS hourly rate.
- CAS needs to set up a template with full cost estimates for all work and projects so that any given quote takes no longer than 5 minutes to cost.
- Budget estimates based on the standard projects CAS creates should be created to give clients estimated costs in conversation and mitigate the need for sending clients a rate card or spending excessive time quoting projects that do not fall within a client's budget.
- Similarly, CAS should have a template with estimated timelines for standard projects that can be conveyed to clients quickly, saving CAS time if the proposed timeline does not meet a client's deadline.

**Quarterly Review Process**

- CAS should conduct a quarterly review of projects to determine which sectors are profitable and adjust the business model accordingly.
  - % Time on Administration vs. $
  - % Time on Conceptualisation vs. $
  - % Time on Execution vs. $ (Theron, 2022).

- CAS's goal is to utilize time efficiently by minimizing the time spent onboarding clients through an automated online vetting system that will allow CAS to pursue strong potential clients with an initial face-to-face meeting and set up cost estimation and timelines templates.

- CAS should conduct quarterly reviews to streamline work processes to maximize profits and utilize time efficiently.

# INTERVIEW WITH SIENA HICKEY

The interview with Siena centred around strategy for Creating a Storm's systems, processes, client acquisitions and retention. Siena advised that as a single entity, CAS has to maximize efficiency to increase profitability and streamline workflow and client onboarding (Hickey, 2022).

> *Siena proposed CAS investigate and adopt a digital time management approach and select a software package for use in day-to-day operations.*

**The following Time Management Software Solutions were suggested:**

- *Calendly*
  Calendly enables clients, freelancers and contractors to book your time effortlessly across multiple time zones, reducing CAS administration in setting up meetings (Calendly, 2022).

*Fig. 11.*
*Calendly, 2022.*
*Calendly Logo.*



- *Hootsuite*
  Hootsuite is a social media management platform that supports social network integration across multiple platforms, saving scheduling time for posting. Hootsuite will save CAS time when it comes to Instagram and LinkedIn posts. Hootsuite is not a viable option for CAS due to the cost of $49 p/m (Houtsuite, 2022).

*Figure 12.*
*Hootsuite, 2022.*
*Hootsuite Logo.*

- *Sprout Social*
  Sprout Social is a social media management and intelligence tool for brands and agencies of all sizes to manage conversations and surface the actionable insights that drive real business impact. CAS business comes through referrals and not social media, which does not warrant the cost of $99 p/m (Sproutsocial, 2022).

*Figure 13.*
*Sprout Social, 2022.*
*Sprout Social Logo.*

# APPENDIX C





# ANATOMY OF A BRAND ROADMAP

## BRAND ARCHITECTURE AND THE BRAND DEVELOPMENT ROADMAP

*Brand Architecture was confirmed and limited to the following aspects:*

- Positioning - Narrative, Personality, Tone of Voice, Values
- Vision / Elevator Pitch / Manifesto
- Brand Name
- Tagline
- Design Presentation
- Logo and Identity Design
- Website (Burns, 2022c)

Defining each element in the brand architecture, why it is important, how to establish it and referencing inspirational examples provides insight into creating a successful brand for CAS.

**Brand Positioning**

> *The brand positioning forms the foundation from which all brand elements stem. A brand positioning is a space a brand wants to occupy in people's minds. The purpose of the positioning strategy is to provide a focus for every short-term and long-term strategic decision concerning the brand, that shapes how the target audience perceives a brand and the major difference a brand offers, that is both valuable and believable compared to competitors.*

A positioning statement is a brief description of the service, target market, and how the service fills a particular need. It's meant to be used as an internal tool to align all marketing and communication efforts with the brand and value proposition. A brand positioning statement benefits clients, but this benefit is brought about by adherence to the statement from the brand itself (Burns, 2022b).

*The brand positioning includes the brand narrative, personality, tone of voice, and values.*

**Brand Narrative**

> *A good brand narrative communicates who you are, and what you stand for, by telling the story of the brand's origins, values, goals and mission in a manner that activates emotions and humanizes a business so people can connect with it, fostering a sense of familiarity and personality that set it apart from the competition. The brand narrative sets the stage for every interaction clients have with a brand (Bullen, 2019).*

A brand narrative is formed, by determining why the brand was created, understanding the brand's offering, understanding the target audience, creating connections through human stories, and keeping the message authentic, concise and consistent (Romano, 2021).

A brand narrative creates an emotional connection with an audience that results in a stronger following, support and increased client base.

**A good example of a strong brand narrative is that of Airbnb - a trusted community marketplace for consumers to list, discover, and book unique accommodations for unique travel experiences, essentially, 'welcome home'. This narrative worked in that it challenged the hotel industry and redefined an experience, resulting in a community of loyal users (Airbnb, 2022).**

*Fig. 14.*
*Airbnb, 2022.*
*Airbnb Logo.*

**Brand Personality**

> *Brand personality is the basis of a brand and the distinct set of human characteristics attributed to a brand in the eyes of a customer. A brand's personality is what shapes the public perception of a brand based on how it acts, what it says and what it looks like. It's a prerequisite that defines how the brand communicates to the target audience and thus its effective engagement with the target audience (Dvornechcuck, 2022).*

Various avenues can be used to establish a brand personality, from using brand archetypes to listing a core set of adjectives that describe the personality. A brand personality can also fall into the extreme dimensions of formal vs. casual; funny vs. serious; respectful vs. irreverent.





**There's a lot to be learned from Harley Davidson's brand personality, which embraces the rebellious spirit of its customers and takes pride in going against the grain of everyday society. Harley-Davidson has a rugged, macho, rebellious, America-loving, freedom-seeking personality. This rugged personality suggests that the product is powerful and the motorcycles are mean and tough machines. There are few brands in the world that represent who their audience is as well as Harley Davidson does (Dvornechcuck, 2022).**

*Fig. 15.*
*Harley-davidson,*
*2022.*
*Harley-davidson*
*Logo.*

**Brand Tone of Voice**

> *The tone of voice is how the character of your business comes through in your words, both written and spoken. It's not about what you say, but rather the way you say it, and the impression it makes on an audience. It's a part of a brand expression that together with more tangible visuals defines a brand identity (Dvornechcuck, 2022).*

A brand's tone of voice makes the brand human, fosters connection with an audience, builds trust, and authority and sets a brand apart from its competition (The Acrolinx Team, 2018).

A brand's tone of voice is defined along a spectrum of funny vs. serious; formal vs. casual; respectful vs. irreverent; enthusiastic vs. matter-of-fact. The tone of voice should be described in three adjectives that all communication reflects (Burns, 2022b).

**Mailchimp is a champion of brand tone of voice. Mailchimp makes email sending easy with a tone of voice that's clear and friendly, but professional. "We write the same way we build apps: with a person-first perspective." The homepage feels like a one-on-one conversation with the audience, "your business was born for this," and "you'll be in good company, Mailchimp is successful because it doesn't talk to business owners or people who want more customers, it talks directly to the audience and assures them, they have the solutions they need while making every visitor feel like they are part of the Mailchimp team (Schroeder, 2019).**

*Fig. 16. Mailchimp, 2022. Mailchip Logo.*

**Brand Values**

> *Brand values are the internal part of the brand that shapes the culture and community of a brand, ensuring it connects with its customers in a meaningful way and guides a brand's purpose, personality, and proposition. The brand value proposition differentiates a brand from its competitors.*

The best brand values work because they're reflective of the customer's ideology, but embrace the passions of a brand or business. Brand values should be memorable, unique, actionable, meaningful, clear and timeless (Couchman, 2017).

**Adidas places its core values in the frame of a competition, "we play to win." Their core values include their purpose 'Through sport, we have the power to change lives,' and their mission, 'to be the best sports company in the world.' It's all about winning—improving their competitive position, achieving peak performance—and, in that, Adidas' values match those of their customers (Wachtel, 2019).**

*Fig. 17. Adidas, 2022. Adidas Logo.*

**Vision Statement/ Mission Statement/ Elevator Pitch/ Manifesto**

If the positioning statement is the internal brand communication, then the vision statement, mission statement, elevator pitch and manifesto would be versions of external brand communication.

**Mission Statement**

> *A mission statement communicates the purpose of the brand, by describing its values, aims and what makes the brand different from its competition (Blasbalg, 2020).*

***"To accelerate the world's transition to sustainable energy." Tesla***

**The mission statement narrows the focus down to Tesla's core purpose: to provide clean energy electric vehicles to the public, while still acknowledging the ongoing transition between fossil fuels and sustainable energy. This self-awareness that its market is still relatively young sets Tesla apart from its competition (Nelson, 2020).**

*Fig. 18.*
*Tesla, 2022.*
*Tesla Logo.*

**Vision Statement**

A vision statement details what a brand aims to achieve in the future by defining the strategy and objectives required to reach those goals. (GoDaddy, 2020).

***"We're in business to save our home planet". Patagonia***

**Patagonia's vision statement emphasizes the overall impact that its products and business model have on the world through the conservation of resources and protection of the environment. Its benefits include distinguished quality, improving lives and saving the planet (John, 2019).**

*Fig. 19.*
*Patagonia, 2022.*
*Patagonia Logo.*



**Elevator Pitch**

An elevator pitch is a brief, persuasive, inspirational speech used to spark interest in a brand by introducing the brand, its purpose, goals, core values, passions, philosophies and unique value proposition in a manner that reflects the brand's uniqueness and what sets it apart from its competitors (Sidebean, 2022).

***"There are 40MM independent workers in the US: consultants, freelancers, and small business owners. Solving office space is tough and expensive, especially in cities like New York. We created the concept of space as a service. We have 20 locations in the city- where people can rent a desk or an office without any of the complications of a traditional lease, effectively saving at least 25% of the cost. They get access to a shared front desk, mailroom, and a community of like-minded people". WeWork Elevator Pitch***

WeWork's elevator pitch delivered the purpose, goals, values, passion and UVP in a short, persuasive speech that enticed investors and clients alike (Sidebean, 2022).

*Fig. 20.*
*Wework, 2022.*
*Wework Logo.*

**Manifesto**

> *A brand manifesto is a public declaration that explains the motivation behind a brand and what sort of change it hopes to affect through its mission. A manifesto is a combination of a mission statement, vision statement and call-to-action meant to inspire others to unite around a shared cause, regardless of their relationship to the brand (Getman, 2018).*

***"Here's to the crazy ones. The misfits. The rebels. The troublemakers. The round pegs in the square holes. The ones who see things differently. They're not fond of rules. And they have no respect for the status quo. You can quote them, disagree with them, glorify or vilify them. About the only thing you can't do is ignore them. Because they change things. They push the human race forward. While some may see them as the crazy ones, we see genius. Because the people who are crazy enough to think they can change the world, are the ones who do." Apple***

**Steve Jobs' ability to think differently fuelled Apple's innovation and transformed it into the most valuable brand in the world. Apple's powerful manifesto is a call to action to inspire people to think**

**differently and challenge the status quo, to propel society forward and change the world, just like Steve Jobs did (Fell, 2011).**

External brand communication plays an integral part in a brand's success (Pschyology Today, 2010) by clarifying purpose, determining direction, creating interest and connecting with potential clients. The external communication is derived from the positioning, but talks to the audience with the brand personality and tone of voice at the forefront.

*Fig. 21.*
*Apple, 2022.*
*Apple Logo.*

**Brand Name**

> *A brand name is the ambassador of the business and often the first element a client or customer encounters. It should be distinctive, authentic, memorable, and enduring, so it resonates with the target audience, sticks in their mind, and builds and maintain trust to establish a strong brand reputation (Evolve Creative, 2019).*

A brand name should reflect the tone of voice, be simple, memorable, meaningful, easy to pronounce, clever, and well researched.

**The name Instagram is a portmanteau, a combination of two things: Instant and Telegram. It is easy to remember and fun, seeing itself as the polaroid picture for the Smartphone generation. Not being limited to photography in the name itself helped Instagram to grow into a visual-based communications service (Toolbox Humandeluxe, 2022).**

*Flg. 22.*
*Instagram, 2022.*
*Instagram Logo.*

Instagram





**Tagline**

> *A tagline is a quick and memorable statement associated with a brand, used in marketing as part of the overall branding strategy to help a brand stand out among competitors and stick in a potential client's mind.*

Taglines work in conjunction with the brand logo. Taglines are either imperative, descriptive, specific, provocative, or superlative. Taglines identity key values and what others need to know about the brand in a short, all-encompassing, straightforward, catchy, definitive, clear manner.

**Nike. *"Just Do It"* is arguably the most recognizable tagline in modern advertising history: Just saying it immediately creates an association with Nike (Guru Guides, 2022).**

*Fig. 23.*
*Nike, 2022.*
*Nike Just Do It Logo.*

JUST DO IT.

**Brand Identity Design**

> *Brand identity is the face of a brand. A brand is an emotional and even philosophical concept, while brand identity is the visual component of a brand that represents those larger ideas. Brand identity includes logos, typography, colours, packaging, and messaging, and it complements and reinforces the existing positioning of a brand. Brand identity design is the actual process of creating the logo, colour palette and typography.*

Brand design is a marriage of function and aesthetics. A strong brand identity adds value to the brand in terms of revenue and consumer loyalty by attracting new customers and making existing customers feel at home. It's both outward- and inward-facing.

**Brand Logo**

A brand should come first, followed by a logo that matches, complements, and enhances the brand. A logo is central to the brand identity design and should be memorable and encourage a strong emotional response. It's the piece of the brand identity that people will be exposed to the most. It needs to line up with all the other elements of your brand identity, as well as the broader emotional appeal of the brand.

**The Disney logo instantly enlists thoughts of nostalgia, magic and laughter, with a playful script that oozes creativity and fun (Ahmad, 2019).**

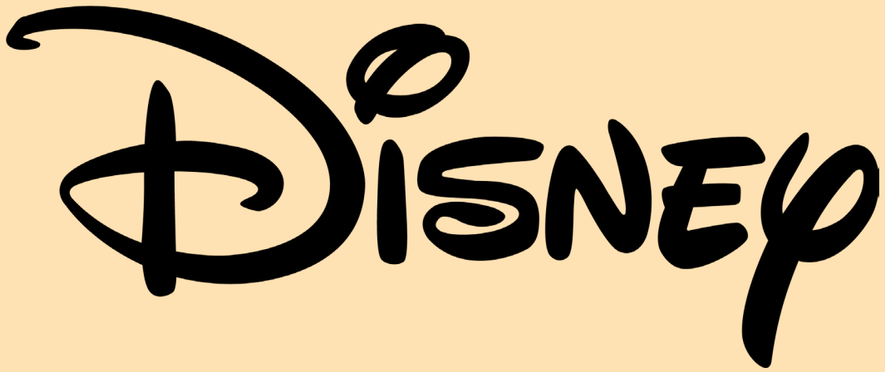



*Fig. 24.*
*Disney, 2022.*
*Disney Logo.*

Logos are also comprised of icons, illustrations and symbols that communicate an idea or concept and invite an audience to interpret them. Today, logos are becoming simple typographical executions that easily translate across various print and digital mediums, but lack creativity and craft resulting in limited emotional connection and communication.

**Brand Colour Palette**

A simple, attractive brand colour palette should be one to three primary colours that enlist an emotional response from the target audience. There is a psychology to colours that convey intuitive emotions a brand must harness to accurately reflect the distinctive personality of a brand. Blue expresses calm, while red and yellow are synonymous with passion and energy. A light tint of blue conveys tranquillity, while a darker shade coveys trust.

Colour enables brand recognition and distinction, who can forget the iconic colour of Coca-Cola, the Facebook blue or the welcoming yellow of the McDonald's 'M' (Cole, 2019).





**Brand Typography**

Typography works in harmony with a brand logo and colours to reflect the brand's traits and represent what the brand stands for. Typography achieves this by communicating the tone of voice, grabbing the viewer's attention, creating brand recognition, and personality (Carton, 2020) expressing different moods, atmospheres and emotions (Hannah, 2020).

**The iconic Cadbury's script logo is based on William Cadbury's signature. The New York Times calligraphy typeface communicates how mature, well-established and experienced the brand is (Goldring, 2021).**

*Fig. 25.*
*Cadbury, 2022.*
*Cadbury Logo.*

A single primary typeface should lead a brand design, with no more than two complementary, supporting fonts that work well with the logo and colour palette.

**Brand Style Guide**

Once the core elements of a brand identity have been established, clear brand guidelines need to be outlined in a brand style guide. The style guide should provide clear direction on how the logo, brand colours and typography should be used. A style guide can also include business cards, email signatures, social media banners and content templates as examples to streamline brand guideline adoption (Talbot and McDonald, 2016).

# APPENDIX_D



## PROJECT MANAGEMENT PRODUCTS AND SYSTEMS

### PROJECT MANAGEMENT SOFTWARE COMPARISON

**Trello**

*Trello is a Japanese workflow management system that emphasises the importance of visualising your work to find ways to become more efficient and create better outcomes. With Trello, you create virtual boards, and then add tasks you need to get done. It's built to work like a physical whiteboard where you add tasks on sticky notes and place them on the board.*

Each Trello task card can be loaded with information in the form of checklists, due dates, attachments, photos and a comment section. There is also a notification system that updates team members if their task gets updated or changed (Wave, 2022).

- *Pricing*
  - Pricing: Basic Plan: Free
  - Standard Plan: $10.00 p/p, p/m – required CAS option
  - Premium Plan: $12.50 p/p, p/m
- *Customer Support*
  The only support you can access with Trello's free plan is through their online resources and video tutorials, although like Asana there are also user forums to ask questions. You can receive priority email support if you pay for a premium plan.
- *Integration*
  Trello is also able to integrate with popular apps and programs like Google Drive, Slack, Microsoft Teams, and Zapier through Power-Ups.
- *Simplicity*
  rello is the simplest program. Trello is intuitive and doesn't require training.
- Workflow views
  Trello focuses on the simplicity of using a visual board to organise (Trello, 2019).

*Fig. 26.*
*Trello, 2022.*
*Trello Logo.*

**Asana**

*Asana is the most traditional web and mobile project management system designed to help teams organise, track, and manage tasks around projects. With Asana you separate a project into lists of different tasks. Asana has multiple project views. The calendar and timeline let you see what you need to be doing today and two weeks from now, as well as identify potential bottlenecks where tasks overlap. One of Asana's great features is its ability to streamline your processes and cut down on time wasted doing common tasks. There are also more than 50 templates to choose from to help you create the ideal project management process and save yourself some valuable time (Wave, 2022).*

- *Pricing*
  - Pricing: Entry Level: Free (15 members or less)
  - Premium Plan: $10.99 per month – required CAS option
  - Business Plan: $24.99 per month
- *Customer Support*
  Asana has help guides and webinars, as well as user forums. There are also handy Asana Use Cases, where you can see how other freelancers have used Asana.
- *Integration*
  Asana offers the most integrations, including Dropbox, Microsoft Teams, Mailchimp, Zoom, and many others that are popular with freelancers.
- *Simplicity*
  Asana is ideal for complex projects, especially if the project involves several team members. Asana is also intuitive and doesn't require training.
- *Workflow views*
  Asana offers several different ways to view your project, including lists, Gantt charts, calendars, and Kanban boards, as well as advanced views that are good for small to medium sized companies, which monitor all company functioning (Asana, 2020).

*Fig 27.*
*Asana, 2022.*
*Asana Logo.*

**Monday.com**

> *Like Trello, Monday.com uses a visual board system to display every task you need to undertake to complete your project. You have the option to create your board or take advantage of 200 ready-to-use templates. You can customise boards by adding columns where you can do things like assign tasks, prioritise projects and resources, establish timelines and dependencies, and control how work gets done. One of the major advantages of Monday.com is the ability to quickly see several different views of your project.*

Monday.com also offers easy-to-use reporting and allows you to perform different calculations just like you would on an Excel spreadsheet (Wave, 2022).

- *Pricing*
  - Basic Plan: $11.00 p/p, p/m
  - Standard Plan: $14.00 p/p, p/m – required CAS option
  - Premium Plan: $14.00 p/p, p/m
- *Customer support*
  Monday.com provides much of the same type of support as other plans. There are webinars, tutorials, help guides and forums, and you can email questions if you pay for the Basic plan.
- *Integration*
  The same integrations for Trello and Asana are available for Monday.com. Interestingly it also integrates with many project management programs and syncs with Asana and Trello.
- *Simplicity*
  Monday is simpler than Asana, intuitive and doesn't require training.
- *Workflow views*
  Monday.com has the best workflow system that offers the most ways to view a project, including tables, charts, timelines, maps, calendars and a Kanban board and customisation (Monday.com, 2020).

*Fig. 28.*
*Monday, 2022.*
*Monday.com Logo.*

# SCHEDULING SOFTWARE REVIEW

*CAS has to date used i-calendar for all its scheduling needs. Calendly was investigated as an alternative.*

**iCalendar**

> *iCalendar is a media type which allows users to store and exchange calendar and scheduling information such as events and journal entries. iCalendar implements the quickest way to navigate between dates and has powerful search functionality and time zone support (Calendar, 2022).*

- *Pricing:* Free

**Calendly**

> *Calendly is an app for scheduling appointments, meetings, and events. Its goal is to eliminate the problematic back-and-forth when trying to nail down times, by sending your availability with a Calendly link. Calendly also helps coordinate across multiple time zones (Calendly, 2022).*

- *Pricing*:
  - Essential $8
  - Professional $12
  - Teams $16

*Fig. 29.*
*Calendly, 2022.*
*Calendly.com Logo.*

# VIDEO CONFERENCING REVIEW

In a time when everyone is more physically distant than ever before, technology has made it easy to stay connected. Video conferencing systems have become an asset to organisations everywhere, enabling collaboration amongst remote teams and maintaining strong relationships with business partners from all corners of the world. From virtual meetings to presentations, video conferencing systems allow for meaningful face-to-face interactions regardless of location, making freelancers and business partners feel more engaged (Qureshi, 2020).

*Microsoft Teams and Zoom are two of the video conferencing platforms CAS uses for video conferencing. The team is a paid-for platform and CAS then only uses this if clients have created meetings on the platform. Zoom although it has a 40 min cut-off for the free versions has proved the most effective platform as most client calls do ideally need to be kept short for efficient time management. Zoom is also easy to operate a platform that individuals and businesses are familiar w*ith.

*Fig. 30.*
*Microsoft, 2022.*
*Microsoft Teams Logo.*

*Fig. 31.*
*Zoom, 2022.*
*Zoom Logo.*

# ACCOUNTING SOFTWARE COMPARISON

**Xero**

- R560/ $35 a month
- Easy to use software that is both customer and accountant oriented
- Access from multiple devises
- Administration automation
- Better accounting with app integration
- Software specific for small businesses
- Free and regular updates
- Multiple currency billings
- Good, quick and concise customer service
- Easy syncing of bank and financial information
- Apps to customise and streamline tasks
- 30-day free trial period
- Everything in one place – capture bills and receipts from mobile
- Recommended by small businesses and friends (Xero, 2022)

**Quickbooks**

- R370/ $25 a month
- Easy to use software that is customer orientated
- Access from multiple devises
- Automation
- App integration
- Software for small or large businesses
- Free and regular updates
- Multiple currency billings one at a time
- Good customer service
- Easy syncing of bank and financial information
- 30-day free trial period
- Everything in one place – capture bills and receipts from mobile
- Recommended by freelancers (Sage, 2022)

**Sage**

- R494/ $31per month
- Dated programming
- Not user-friendly – software tailored to accountants
- No automation
- All-in-one single system solution for complex inventory management.
- Expensive updates
- Paid for multiple currency billings one at a time
- Bad and slow customer service
- Problematic syncing of bank information
- 30-day free trial period
- The recent addition of bill and receipt capture – is not yet effective
- Only recommended by Accountants (Quickbooks, 2022)

*Fig. 32.*
*Xero, 2022.*
*Xero Logo.*

*Fig. 33.*
*Sage, 2022.*
*Sage Logo*

*Fig. 34.*
*Quickbooks, 2022.*
*Quickbooks Logo.*

# APPENDIX 1



# COMPETITORS

## DIFFERENT TYPES OF DESIGN BUSINESSES

*Design businesses fall into various categories that individuals fit into based on their skills, values and aspirations.*

**Freelancer**
A freelancer is a self-employed, singular person who offers services for several jobs and multiple clients. They typically work for agencies for a fixed period and fixed rates that are either pro-rata or hourly based (Freelancer – What is a freelancer? 2022). Freelancers have flexibility but less financial and job security.

**Single Entity Studio**
A single entity studio comprises an independent designer who runs a studio by themselves, managing their clients. Many talented, business-savvy freelancers like Theo Inglis will position themselves as a studio over time once they have built up a large enough client base (Theo Inglis, 2022).

**Collective/ Cohort**
A collective is a group of entities that share or are motivated by a common interest or work together to achieve a common objective (Collective – Wikipedia, n.d). Lovers is an award-winning creative agency with a collective model. Established in reaction to a talent exodus to freelancing, Lover's new model and methodology repositions bright, unretainable creative professionals around genuinely motivating projects (About – Lovers, 2022).

**Design Studio**
A design studio is characterised as a niche company, with the main difference being that studios focus on specific services rather than the full range of services offered at agencies. Studios like that of Stockwell subcontract various project elements, such as writing and programming video or photography. External services would also include accounts, HR and IP lawyers and freelancers (About Studio Moross - Studio Moross, 2022).

Building up a design studio gives you an asset that you can in the future sell, unlike a freelancer or single entity studio, which is entirely reliant on the individual that runs it.

**Agency**
An agency is a one-stop shop because they provide a wide range of services with the brunt of the work done in-house. Services include public relations, media buying, research and creative design. Within these agencies, you have access to various professionals, from art directors and videographers to writers and strategists. They are usually hired on a retainer or project basis (Freelancer, Studio or Agency? Find the Right Match for Your Business - Appleton Creative, 2021). You are more likely to make a name for yourself in the design industry in an agency, but your financial prospects can be limited due to a fixed salary.

**Design Group/ Conglomerate**
A Design Group like Super Union, Ante and Pentagram align multiple agencies with streamlining complex structures and offerings, allowing clients to access talent and resources globally in a 'power of one' strategy (O'Reilly, 2021).

# DIRECT COMPETITION IDENTIFIED

31 single entities, design studios and agencies were investigated for comparison and analysis.

**Mark/ Simon Frouws/ Terence Kitching - Single Entity studios**
*The following attributes apply to all three studios.*

- Profits R100 000 – R200 000 per month, similar to CAS.
- Hourly rates R950 – R1500, slightly higher than CAS.
- Bespoke, and very niched luxury alcohol design and packaging.
- Low levels of active marketing and a footprint in exhibitions and awards.
- Advertising includes Instagram, websites and word of mouth.
- The majority of their sales pipeline is through referrals rather than active marketing.
- All operate as individuals under a studio name and are set up as a company rather than a freelancer.
- The existing portfolio of work is exceptionally good.

All three of these studios are based in Cape Town and are the process of expanding to international clients for increased profits.



*There exists a notion in the design industry that niche, limited run or bespoke alcohol design attracts the best clients, and offers greater margins, but also demands the most creative and flexible lead times.*
*Although exceptionally good, their narrow focus and specialized nature imply that these single entity studios are not a direct threat or in competition with CAS at this time.*

**Hauman Smal / Anthony Lane Design - Small Design Studio**

- 2 to 7 people
- Profits R100 000 – R200 000, profits equal to or less than CAS.
- Hourly rates R1100 – R1500 higher than CAS.
- Specializes in bespoke packaging.
- The studios have larger overheads.
- Focus on alcohol design.
- The sales pipeline comes from word-of-mouth referrals.
- Neither advertises.
- Clients enter awards or competitions on the studio's behalf.

Less profitable than the specialised single entity studios above, and focused on more mainstream alcohol packaging, these studios may prove to be a threat if they decide to pivot away from alcohol in search of increased margins, or wishes to expand their product offerings to their existing clients.

*Both of these studios are small enough to compete with CAS on personalized offering and flexibility.*

**Monday / One Design - Mid Design Studio**

- 7 and 15 people
- Specialise in strategic brand, and packaging design for larger clients and retail.
- Frequently enter awards and have a focused advertising campaign, with visibility on social media.
- The studios are very profitable.
- Fixed staff and fixed offices result in high overheads per working individual.
- The focus is on strategic packaging design, boutique designs and rollout of multiple lines.

- Broad spectrum packaging design offering.
- Great websites and portfolios.
- The studios can pick and choose clients and work.

These two studios can be considered to be in direct competition with CAS, and pose a threat based on their larger size and ability to execute a wider spectrum of services in the same domain as CAS. They are however more expensive, and at this time are not attractive to the smaller-sized customers that form the core of CAS clients.

**Just Design, Bravo Design, M&A Design - Large Design Studio**

- 17 - 50 people
- Packaging, brand, creative strategy and advertising services offering.
- The studios mimic larger agencies but do not offer all services in-house including design, production, strategy, copywriting, legal and accounting.
- These studios frequently enter awards and competitions and have dedicated marketing and sales teams.
- No information on their overheads or profit margins could be obtained.
- Their client base is established and is both in SA and International.

The larger nature of these design studios and their apparent journey to mimic or compete with full-fledged agencies excludes them as direct competition for CAS. Traditionally these studios would not work on the relatively small projects that form the core of CAS's portfolio, and it is expected that their base price point for typical work packages would be prohibitively expensive for CAS's existing client base.

**Turner Duckworth. Pearl Fisher, Big Fish, Landor - Agency**

- 50+ people
- Well-established agencies with full-spectrum capabilities, track records and portfolios.
- Multi-million turnover, but with unknown profitability.
- These agencies cater to big companies in need of a wide variety of services, over a long time frame and having relatively big budgets.



The nature of agencies in Cape Town does not position them as direct competition for CAS. The success factors that have been identified as key to CAS, are almost completely absent in the engagement and execution format of large agencies.

The flexibility of agencies is varied. While being able to provide a full spectrum of services, many agencies rely on relative junior staff for large portions of the design and execution with guidance and oversight from experienced professionals.

The result of this operational strategy, coupled with the fact that their client base tends to be more traditional corporate clients, results in design output that is less risky and more conventional. This in itself furthermore caters for a slightly different audience than CAS's current client base, reducing the likelihood of direct competition.