Breathing Life into Business Documents

The fourth annual s.a.x. conference was hosted by s.a.x. Software GmbH in the Schlosshotel Bühlerhöhe, Baden-Baden, Germany, on Friday the 21st of June 2002. Under the title "Documents Alive", it examined the impact, relevance and acceptance of internal and external business documents, and how design and technology can combine to increase the possibilities for lively communications.

Enduring Design

Among the topics covered in what moderator René Kerfante described as a "typographical kaleidoscope of ideas", Günter G. Lange, a hugely influential lecturer and practitioner of type design and typography for more than 50 years, talked about the theory and practice of creating lively and enduring designs. Fundamental to this are motivated designers with an awareness of both timeless design values and the changing design landscape. He proposed that in the realm of type design, continued relevance has most of all to do with subtle differences, not immediately obvious to an untrained eye, that serve to improve the legibility of text rather than promote the font itself.

Mr. Lange's remarks were prompted by an earlier presentation by Jürgen Barthel, Director of Communications at Siemens AG, who explained the principles and process involved in renewing the corporate design at Siemens. Making Siemens a fascinating and unusual world brand needed to reflect the long history of the brand while also being true to the zeitgeist. It also had to accommodate 14 discrete groups within a single company, and respect the cultural issues involved with operating in 190 countries. To accommodate the apparent paradoxes in this goal, the new brand is based on the core idea of how the company sees its role, augmented by the brand character (defined by universal, long-term characteristics of the company), and complemented by the brand personality, which reflects both local and current qualities. Mr. Barthel and his team used this core, character and personality to derive the brand philosophy and strategy, which then helped to define the brand elements (logo, claim, font, colour, layout, and style).

The team chose the elements to strike a balance between freedom and consistency, and to combine room for expression with easily understood guidelines. In terms of raster, the progressions of font sizes and half tones, and other elements, the Fibonacci sequence (also known as the golden section) was selected, and has proved significant in achieving a simple, flexible yet consistent approach that has already received enthusiastic acceptance from management, designers and users.

Though the rollout of MasterLayout across the organisation has yet to be arranged, it has been chosen by the 5-person strategic branding team as the most effective way of providing the full flexibility of the brand guidelines across the 450,000 employees in a controlled way. Those employees who have already downloaded and used it have praised the look, feel and usability of MasterLayout.

Effective Tools

Hans-Dieter Hoffmann, of s.a.x. Software GmbH, used data collected from the experiences of s.a.x. customers, general market data, and s.a.x.'s own market research, to indicate how much value a comprehensive management system for business document design can add to the production of internal and external communications. Effective documents were identified by the surveys as applying layout consistently to reinforce and highlight brand and other information. It is also important that the "fixed" information in documents, such as contact details or legal text, is current. Nevertheless, in an environment where 74% of enterprises pre-print more than just logos on their business stationery, and just 5% use external expertise for the electronic preparation of documents, only 22% of companies indicated they were satisfied with the appearance and the consistent use of their forms and the adaptation of their corporate design.

While applying the corporate design to e-mail is seen as the next challenge, it is word-processed documents, presentations and documents from ERP applications that are most important. In automating the production of such documents, the trend is away from insular solutions that only look after a single department, site or type of document, to global solutions that minimize development and support costs, simplify administration, and implement the corporate design consistently and reliably across the organization for all users and applications.

Apart from MasterLayout, which fulfils the criteria for such a global solution, s.a.x. also sees their role as applying their project management experience to coordinate efficient communication between external agencies and typographers, and the internal marketing, IT, purchasing and controlling departments – that is everybody required to put such a solution into practice.

Efficient Colour

Steffen Papke, JetCAPS Program Manager at Hewlett-Packard GmbH, focussed on the role of colour in the effectiveness of professional communication. Whereas most home PCs have a colour printer, many companies still see colour printing as a luxury, and colour laser printing, in particular, is only used for special documents. With increased awareness of the communicative power of correctly applied colour, this perception is starting to change, and access to colour laser printers is becoming more normal – one real example is the use of colour in invoices to reduce payment time from 45 days (for plain black and white documents) to 28 days. Indeed, as the range of products expands to meet different printing requirements more exactly, the quality of colour laser printing is becoming an office standard.

Despite the acknowledged benefits of hardware, software and design working together in colour to produce consistent effective documents, the perceived costs still put off many companies. The purchase cost of the printer is only part of it. Total cost of ownership includes other factors, such as reliability, performance, and compatibility with existing and new business processes. The current range of HP Color LaserJets addresses such issues, but the last hurdle often remains controlling the running costs. The easiest approach here is to raise awareness of the printing costs among the users – just tracking the costs, with a product such as JetCAPS MegaTrack, can help considerably. Other solutions include simplifying maintenance

and stocking by leasing the printers under the HP PrintAdvantage program, or even completely outsourcing printing capabilities with HP Managed Print Services (MPS).

Good Return

In his presentation, Jürgen Barthel of Siemens had quoted Pricewaterhouse Cooper that "On average, brands make up more than half of the value of a company." Stefan Kirschke, Chief Financial Officer at MetaDesign AG, referred to this in his argument that corporate identity should be seen as an investment, depreciated over a number of years, rather than an immediate expense. Viewed in the short term, such expenditure is a cost factor to be minimized. However, return on expenditure is evaluated with respect to the decision horizon, and if it can be viewed in the long-term, expenditure in the brand value can be seen as an investment that needs to be optimized. It will be another 3 to 6 years until the IAS (International Accounting Standards) allow the capitalization of brand value. In the meantime, brand expenditure has to show success in the short-term. While this short-term view prevails, Mr. Kirschke stressed that expenditure on branding needs to focus on strengthening the weakest link in the communications chain. The goal of branding is increasingly to keep communications consistent, rather than to reach the largest possible number of potential customers. The overall effect of communication is dependent on the number of channels and the customer's expectations. Parallel or supplemental channels can either confirm or destroy these expectations so that, for example, a weak internet presence can lower expectations that have been carefully built up in other media. The final willingness to buy depends on the consistency of the brand and the strength of the weakest link. Strengthening the weakest link brings the greatest return on expenditure, and this is where appropriate technology, such as MasterLayout, plays an important role.

Looking to the long term Mr. Kirschke proposes company visuals rather than mission statements as an important area for improving brand consistency. Words and sentences have too many uncontrollable connotations, whereas identifying an enterprise with an appropriate image is internalised more dependably, and disseminated by employees, at a sub-conscious level, more repeatably, independent of the subject matter or the medium, resulting in a more consistent projection of the corporate image to the outside world.

Consistent Delivery

Michael Schubert, Head of the Department for Service Delivery at Robert Bosch GmbH, described the role of the s.a.x. MasterLayout in providing a well accepted and efficiently managed environment for consistent corporate design across 100,000 PCs in 50 countries. Even though the Bosch corporate design is well established, with continuity symbolized by the long life of the word- and logo-marks, making sure it is used consistently is not as simple as it may seem – for example, the internal and external designations of the various divisions are often different. So, when the European central IT group, which sets the standards for Bosch worldwide, first looked into setting standards for hardware, software and solutions they realised, that among other things, they needed a design and management system for Office templates (Outlook, Word, PowerPoint, Excel) – capabilities that Microsoft does not

provide. After limited success in developing a system themselves, they turned to s.a.x. MasterLayout.

MasterLayout helped them reduce 900 pre-printed forms to 13 electronic forms where the correct logo and the current legal, location and personal data is added automatically. The electronic forms also reduce the overhead, as they can be updated instantaneously, and administered centrally to ensure corporate design compliance. MasterLayout has even been applied to automatically identifying internal and external e-mail in Outlook, controlling distribution, and printing e-mails in the format of the existing internal memoranda - all of which is very welcome added value for users.

By keeping the needs of the end-user in the foreground during the implementation, MasterLayout provides extra value that has helped employees see the advantages and the potential of the approach. Indeed local users are free to use their own templates, but high acceptance at all levels, and a competitive price with respect to the pre-printed forms (at Bosch, a cross-charge of about €0.50 per head each month) means MasterLayout is used almost universally.

Measurement of Success

With much discussion during and around the presentations, an additional presentation from Sabine Lenk, PR and Communications Consultant of the Design Center Stuttgart, on the facilities available from the state-run Design Center Stuttgart for small and medium sized companies, the emphasis of the day was definitely on the role of design in creating effective and attractive documents. An exhibition of "Excellence in Stationery", by the German Committee of the Type Directors Club of New York (with the support of s.a.x. Software GmbH), premiered the evening before the conference, and on display during the conference, provided a backdrop that emphasized how good design can bring business documents alive.

By providing a forum where agency, IT and marketing people could meet and exchange practical and theoretical ideas, the goal of the conference was to help close the gaps between design, implementation and use. The final success of the conference will be measured in how those ideas are put into further practice, and are applied in the production of documents alive with communicative possibilities.