

STRATEGY:

LITERATURE

REVIEW

Literature reviews are undertaken as a starting point for all other research

strategies. A literature review is a comprehensive investigation of all documents, publications, articles, websites, and books regarding a specific area of study. This first step in the research process can also include a client’s corporate communications, as well as those of their competitors, in which case it is often referred to as a communications audit.

TACTICS COVERED:

- Communication Audit (p 44)
- Competitor Profiling (p 46)

RELATED:

- Visual Anthropology (p 62)
- Demographics + Psychographics (p 68 + 69)

► **A literature review is an important initial step, allowing the researcher to become familiar with historical references and parallel associations, as well as current market conditions. Literature reviews can also clarify research problems and be influential in the development of investigation strategies during later phases of the creative process.**

Literature reviews help save time by enabling the design team to frame their problem and understand how similar communication problems may have been approached in the past. A comprehensive literature review will ensure that the researcher does not redouble efforts undertaken during previous investigations of the same subject.

Literature reviews are a formative tactic, used to orient the researcher to the current body of knowledge in a given area. In client/designer relationships,

a literature review can be undertaken to gain insight into corporate culture, competitor analysis, and market trends. It can even influence search engine optimization, use of social media, and media buying practices.

Literature reviews are a relatively easy task compared to many of the other forms of investigation discussed in this chapter. Literature reviews require a strategy for finding and extracting relevant information, which can be aided by the help of a librarian or other research professional. Librarians, whether at community or university institutions, are trained professionals who have extensive knowledge of and access to proprietary research tools unavailable to average Internet users. They can help guide a search and may also assist in locating credible source materials directly or tangentially related to the area under study.

## LITERATURE REVIEW

► *Literature reviews compile secondary research from multiple sources to help the investigator become familiar with the area or problem being studied.*



## TACTIC:

# COMMUNICATION

## AUDIT

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### What is it?

A communication audit is a comprehensive review of an organization's marketing materials and an assessment of the channels they use to communicate with clients, customers, or constituents. The goal is to better understand what a company is saying about itself, to whom, and how.

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### What can it do?

Communication audits outline the messaging an organization intends to project, and analyze how it actually resonates with an audience. These audits determine if those messages are being received and understood. This undertaking builds on the information gathered in literature reviews by engaging with the audience through actions such as interviews, focus groups, surveys, and questionnaires. A communication audit can tell you if internal perspectives of an organization match external perspectives—and if not, where the messaging breaks down.

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### How is it used?

Communication audits are used to illustrate how an organization's internal image and external image overlap, and identify contradictions. This assessment can help reveal which components of current communication strategies are working, where there are disconnects, or even new or missed opportunities.

Design teams can analyze the results of a communication audit, looking for holes, and then propose actions aimed at filling the gaps.

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### When is it used?

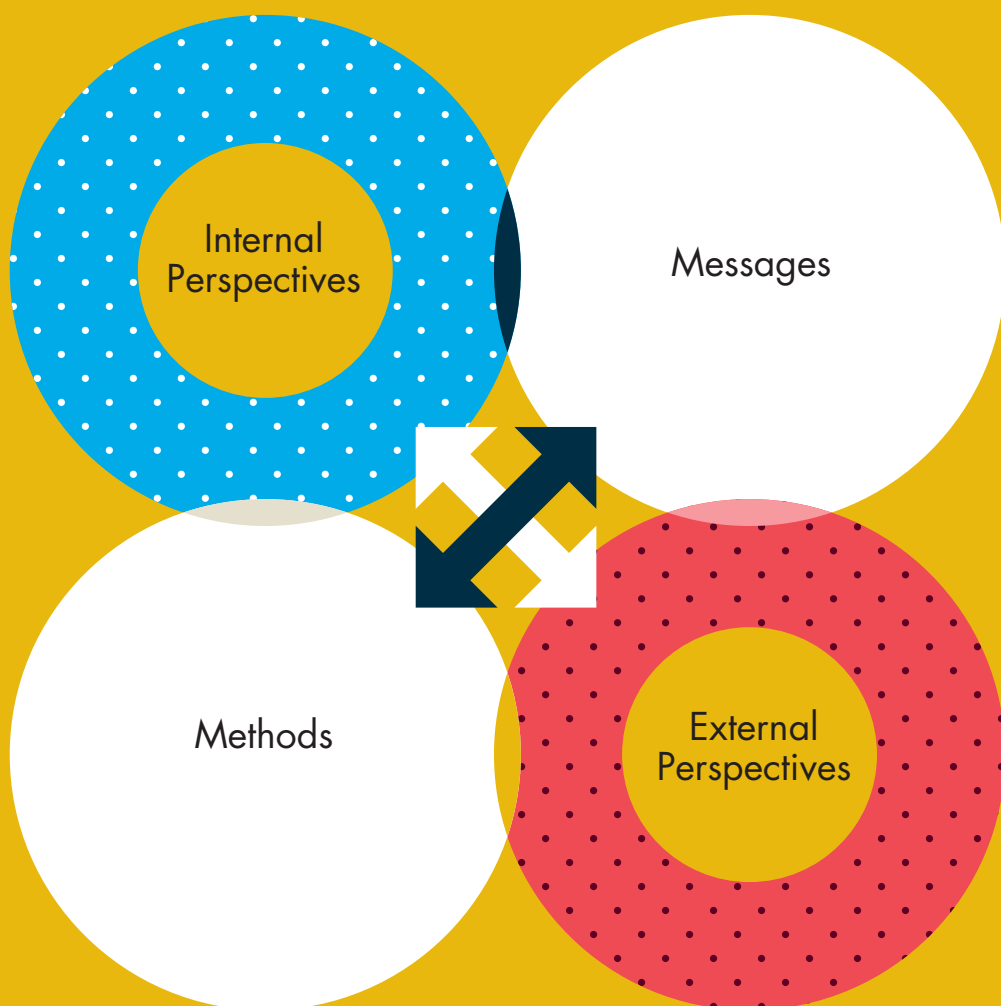
Communication audits should be undertaken early in the research process to help diagnose breakdowns in existing messaging. Data collected through this exercise can inform which media channels to use, influence project messaging and approach, and support aesthetic rationale.

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### Level of difficulty/complexity?

Communication audits are approachable. Most designers already collect information from new clients to establish a better understanding of history, brand, and audience. This extends the basic literature review process by assessing how those communication materials were received. In addition to basic business acumen and secondary research experience, interviewing know-how and strong interpersonal communication skills will help establish dialog and moderate discussions.

# COMMUNICATION AUDIT



Communication audits investigate how an organization views itself, and how it is viewed by others. Designers use communication audits to see if a client's messaging matches their internal vision, and if it resonates

with their intended audience. Alignment of these criteria indicate that communication programs are successful. Gaps may indicate that communication efforts are breaking down.

**TACTIC:****COMPETITOR****PROFILING**

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**What is it?**

Competitor profiling is the process of evaluating the strengths and weaknesses of an organization's competition. It uses open-source intelligence—information published in the public domain (secondary sources)—to determine competitive advantages.

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**What can it do?**

Competitor profiling helps differentiate. This information can be used to enhance brand position, adjust or confirm mission, and focus communication strategies—revealing unique qualities that help a product, service, or organization stand out in a crowd.

Competitor profiling provides the designer with a broad understanding of their client's market conditions. This knowledge can help a creative team communicate empathy for the factors influencing a company's bottom line, the shared understanding mitigating perceptions of risk in new designer/client relationships.

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**How is it used?**

Think of competitor profiling as a communication audit of the competition. The goal is to draft approachable summaries of companies or organizations practicing in the same market (read more about communication audits on page 44).

Competitor profiling requires the collection of open source information. Assembled profiles may include details about competitive companies' history, finances, products, markets, facilities, personnel, brand positions, and marketing strategies. The facts, stats, and observations gathered are assembled into reports, used to determine the following about industry peers:

- What does Competitor A say about itself, to whom and how (social media presence, advertising, press releases, corporate communications pieces)?
- What do external audiences (customers and strategic partners) say about Competitor A?
- What are Competitor A's discernible strengths and weaknesses?

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**When is it used?**

Competitor profiling is a formative tool; use it at the beginning of a research plan to help the creative team understand market conditions and history. Combine with a communication audit and identify a client's unique strengths and assets

by comparing those of peer companies. This exercise is part of a comprehensive literature review strategy, not a stand-alone method.

Level of difficulty/complexity?

Competitor profiling is a feasible research strategy for many designers. While careful investigations may be time intensive, they can prove beneficial when applied to a larger communication campaign. The information gathered can help determine messaging, media buys, target audiences, and other factors, and is essential to differentiating a client from other companies in their marketplace.

When discussing competitor profiling, the term “competitive intelligence” can arise. Competitive intelligence combines the secondary source tools

of competitor profiling with primary research. The goal of both strategies is the same, but competitive intelligence often employs much more aggressive tactics. Some corporations have gone as far as hiring “informants” on their competitor’s staff, or releasing—and then rehiring—an employee after he or she has worked for the competition. Many businesses now use no-compete clauses and confidentiality agreements in an effort to prevent such practices. For the purposes of this discussion of research techniques and how they aid design practice, competitor profiling is a useful and ethical strategy when compiled from previously published material.

Matchstic, a brand identity firm in Atlanta, shared a unique technique employed before designing corporate identity programs. They catalog the use of shapes, colors, even typography in competitors' logos (similar to the chart shown here). The resulting report outlines that market's aesthetic culture, providing easy points of differentiation for their client's new mark.

PRIMARY USE OF <b>COLOR</b>	PRIMARY USE OF <b>FORM</b>
<div>●</div> Red <div>●●</div>	<div>■</div> Square <div>●●●●●</div>
<div>●</div> Orange <div>●</div>	<div>●</div> Circle <div>●●●●</div>
<div>●</div> Yellow <div>●●●</div>	<div>▲</div> Triangle <div>●</div>
<div>●</div> Green <div>●●●●</div>	<div>⊠</div> Pictographic <div>●●●</div>
<div>●</div> Blue <div>●●●●●</div>	<div>✿</div> Organic <div>●●</div>
<div>●</div> Purple <div>●●</div>	<div>&amp;</div> Typographic <div>●●●●●●</div>
<div>●</div> Neutral <div>●●</div>	<div>⊕</div> Combination <div>●●●●●●●</div>