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ARTICLE REPRINT

**Design
Management
Journal**

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Reprint #03142BUR17

**This article was first published in *Design Management Journal* Vol. 14, No. 2
Fusing Design, Strategy and Technology**

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Strategic branding: Leveraging technology and design at Ernst & Young

by Peter J. Burger with David Reyes-Guerra

You've entered
The Branding Zone

In an organization with more than 100,000 people around the globe, The Branding Zone is the digital resource that maintains the consistency, power, and integrity of Ernst & Young communications. Peter Burger and David Reyes-Guerra outline the structure of this valuable technology and explain how it contributes to acculturating new employees, strengthening relationships with clients and vendors, and supporting the corporate vision and strategy.

In January 2002—four short months after accounting irregularities at Enron first surfaced in the press—the value of the most innovative name in energy dropped to virtually zero in the eyes of investors and the public. So, too, did the reputation of its auditor, Arthur Andersen, once the premier name in professional services. Just as suddenly, the Big Five had become the Final Four.

This unique confluence of events resulted in a remarkable transformation. As the Andersen brand name imploded around the world, the remaining major professional services firms engaged in a spirited competition to attract Andersen partners and practices and merge them into their organizations. In the end, Ernst & Young acquired more Andersen country practices than any other firm. (The global



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professional services firms are comprised of individual country practices conforming to national regulations.) Approximately 25,000 former Andersen employees—some last seen bearing placards proclaiming “I am Arthur Andersen”—became part of Ernst & Young almost overnight.

In an industry in which brand assets and people assets are one and the same, Ernst & Young now faced a daunting but critical integration challenge. Significant investments in training and education would be necessary to acquaint these new employees with the firm’s technology systems, practice methodologies, and independence requirements. Beyond these areas, however, was the critical aspect of corporate culture and how the ex-Andersen employees could most rapidly

comprehend and be assimilated into an organizational ethos different from the one they knew. The success or failure of large integration efforts like this often depends on the effectiveness of enculturation.

Fortunately, Ernst & Young was well prepared for the challenge, for the same reason it garnered the largest share of *Business Week* Global 1000 auditor changes (post-Enron) of any Big Four firm: a vibrant, unified, and brand-centric culture. And if you ask how we developed a brand-first culture to begin with, our answer is that we did it in no small part by leveraging technology, design, and interactive learning to create *The Branding Zone*, the Ernst & Young global branding intranet. This dynamic tool has helped our people not only to understand the competitive advantages associated with a strong brand, but also to realize their collective responsibility in building our brand assets.

Introducing *The Branding Zone*

The Branding Zone is the authoritative source of information and tools for Ernst & Young employees and vendors wishing to portray the firm's brand powerfully, consistently, and effectively around the world. Whether the focus is advertising, marketing, or client relations, the *Zone* provides virtually everything necessary to understand and communicate the Ernst & Young brand and image, including the firm's business and marketing strategies, advertising campaigns, visual identity standards and design templates, and naming process and architecture.

Practicing global brand leadership

When the firm's brand strategy and management team was formed in early 1999, the Ernst & Young brand was clearly in need of revitalization. Market research had revealed that the firm's target audience (C-suite executives such as chief executive officers, chief operating officers, and chief information officers) did not think of Ernst & Young first when choosing a professional services firm. There was a need, therefore, to create a much higher level of brand awareness. But how? By cutting through the clutter of the marketplace. Yet while a company like Coca-Cola, whose top-down, hierarchical structure seems more conducive to centralized brand management, a partnership like Ernst & Young, with its multiple service lines and entrepreneur-

ial culture, presented a much more complex set of branding challenges. At the time, for example, our firm consisted of numerous country practices, with 660 locations around the world, as well as functional "silos" of tax, audit, corporate finance, and consulting services. Moreover, our fractured brand image—reflected in the conflicting portraits shown in our brochures, Web sites, and advertisements—undermined our identity as a global firm (see figure 1).

We faced an unprecedented opportunity and challenge: to reshape our organization's brand leadership and to unite the many pieces of the firm into a single, global brand. To do this, we needed to recreate and implement a strong, progressive brand identity system and associated naming architecture to communicate a unified brand vision and "look" (see figure 2).

Determining that online technology would allow us to economically disseminate information and design elements—and extend the reach of brand management to people all over the world—we conceived *The Branding Zone*.

Employees as brand ambassadors

Since its inception, the *Zone* has helped people across the firm take ownership of the brand by becoming virtual "brand ambassadors"—people at any functional level, in any business unit, who embrace and nurture the brand in their daily activities. The *Zone* has created a knowledge-



Figure 1. Prior to the *Zone*'s introduction at Ernst & Young, the firm's brochures, Web sites, and advertisements often featured conflicting looks that undermined Ernst & Young's visual identity as a global firm. The branding team created a clear brand vision, visual identity, and naming architecture to communicate a unified message for all 660 locations worldwide.

sharing community, cutting across silos to connect with as many of our 100,000 people as possible around the world (as well as our advertising agencies, public relations firms, and other vendors). Capitalizing on the accessibility and speed of the Web, the *Zone* allowed the branding team forge a bond between these brand ambassadors and the firm by helping them experience the Ernst & Young brand hands-on.

By centralizing our global branding and marketing information and tools, the *Zone* focuses on an audience comprising three diverse global groups (the first was our initial target audience):

- 1) *Marketing and other practice-support professionals*
 - Graphic designers and marketing communications executives
 - Project managers
 - Sales and marketing professionals
 - Administrative assistants
- 2) *Service-line professionals*
 - Tax
 - Assurance and advisory
 - Corporate finance
- 3) *Partners and firm leaders*

An initial objective of the *Zone* was to win over a small target audience of designers and programmers for ey.com (the Ernst & Young corporate Web site), and brand-savvy marketers. Once we had secured their loyalty, we noticed that the site had begun to generate a “buzz” around the firm, and this attracted even more visitors. We broad-

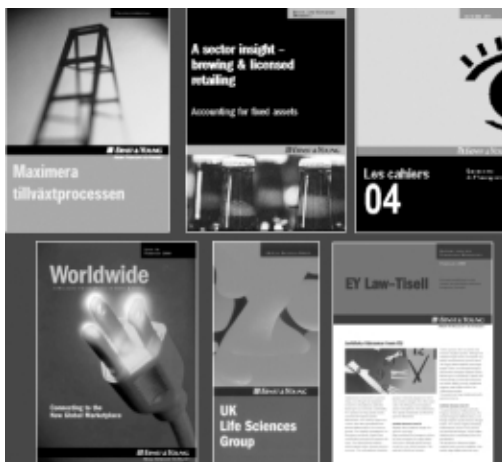


Figure 2. To see how the firm is now communicating our global brand vision, simply conduct a “visual audit” by comparing a representative set of collateral resulting from our old identity system with collateral based on our new one.

ened the *Zone*’s deliverables to include less-sophisticated versions (e.g., PowerPoint and Word applications) of similar tools provided to the graphic design community (e.g., Quark Xpress). Then, over a period of two years, we widened the scope strategically to encompass the whole firm—by giving everyone the information and tools they needed to get their work done successfully and efficiently within a brand context. Ultimately, the far-reaching power of the *Zone* resulted from its ability to embody the key element of the firm’s new go-to-market strategy—quality—reflected in our new tag line, *Quality In Everything We Do*. The *Zone* has helped put quality—and, by extension, the firm’s strategy—in action by allowing its people to create a look that embodies quality not only in its consistency, but also in the power with which it enables the firm’s people to portray the brand globally.

Located on the *Zone*, “Mike Cullen Speaks: A Letter from the Executive Brand Champion” is a communication vehicle that the branding team has leveraged to achieve this goal. In it, Cullen, the firm’s global managing partner for markets, articulates how the site is not only about branding and offers more than just the graphics tools necessary to make the brand come alive. Cullen also illustrates how one can use the brand as a strategic catalyst to improve client relationships. He suggests, in other words, that branding—and hence, the *Zone*—is not merely an abstract theory, but rather a tool that can be put to work in the marketplace in pursuit of market leadership:

How can we most effectively communicate [to our clients] the many changes that are making Ernst & Young an even stronger firm? By leveraging the Ernst & Young name and brand identity to speak to our markets with one voice. A single, global brand image is powerful and compelling. Even in our business, it is a proven differentiator. And this is not just rhetoric. The marketplace notices the difference between a firm that says it’s global and a firm that IS global. Many of our newest clients have told us that our unified brand presence, in combination with our world-class people and services, was the deciding factor in their choice of Ernst & Young. Staying this course will surely enable us to emerge as the leader in global professional services.

**Tools of the trade:
Leveraging design and technology**

The *Zone* helps acculturate new recruits—such as former Andersen employees—into the firm by giving them what they need to fully comprehend the enterprise, its business and branding strategies, and to optimize the brand (and by extension their performance) with clients. This logic is reflected in the structure and nomenclature of the site’s main navigation (see figure 3), which includes these pages:

- *Why the Brand?* (allows our professionals to validate the level and extent of senior management support for the branding program)
- *Tools to Use* (provides our fully digitized visual identity system, design templates, proprietary image library, and other elements)
- *Our Ad Campaign* (provides the firm’s television and print ads, and resources to adapt national ads for local usage globally)
- *Brand Champs* (showcases best-in-class practitioners of the brand, from designers to salespeople)
- *Let’s Play* (includes the interactive learning game, *Who Wants to Be a Brand Ambassador?*)
- *Marketing Library* (provides resources, including an events calendar and suggested reading, for professional development in marketing, branding, advertising, and so forth)
- *Talk to Us* (features a variety of feedback mechanisms, which allow visitors to communicate directly with the branding team or with each other as a user community)
- *Links and Info*
- *Shortcuts*

As reflected in the *Zone*’s main navigation, the site’s design is structured around a key objective: to offer both “big-picture” knowledge and practical tools in an intuitive, user-friendly environment. The structure progresses from the contextual *Why the Brand?* to the more-specific *Tools to Use* (figure 4). Similarly, while the main navigation on the left features the general *Our Ad Campaign* and *Links and Info*, the right side offers secondary navigation tailored to frequent users, and features building blocks of branded design, such as a photo library and tips on “everyday branding.” Moreover, as the *Zone*’s purpose is to promote “on-brand” design

throughout the firm, it not only contains the key elements of design, but also embodies best-practice design itself. For example, a wide band of bold red, blue, or green streams across the top of the site, commanding users’ attention and focus (the *Zone* enables users to customize their interfaces by choosing their favorites from these “on-brand” colors).



Figure 3. The *Zone* is designed to make branding not just practical, but also stimulating. So its tone is personal and friendly—it greets each person by name upon login, thanks to Lotus Notes-based intranet technology that tracks users’ names. More important, it offers current and critical branding information on issues such as the change in the Ernst & Young tag line to “Quality in Everything We Do.”

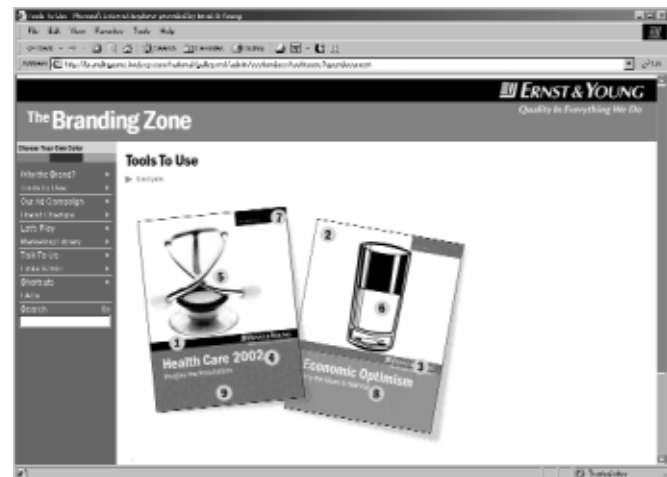


Figure 4. The *Zone* helps acculturate new recruits—such as former Andersen employees—into the firm by giving them what they need to fully comprehend the enterprise, its business and branding strategies, and how to optimize the brand (and by extension their own performance) with clients. Tools to Use features brochures employing the unique iconographic look of the Ernst & Young brand. On this interactive page, visitors can click on the numbered parts of the illustrations to access the tools they need. For example, clicking the headline takes the user to the Typography section, selecting the photo of the stethoscope will bring them to the Photo Library, and clicking the glass icon takes them to Icons.

The *Zone* is designed to make branding a pleasure, which is why its tone is personal and friendly. That's why its sections include the light-hearted *Brand Champs* and *Let's Play*. Moreover, its Lotus Notes-based intranet technology is used to identify users' names, enabling a program that greets each visitor upon login with a friendly and personalized message, such as, "Welcome to the *Zone*, Peter." The *Contact Us* (a subsection of *Talk to Us*) section even features photos of the branding staff so that the larger community can connect names to faces and appreciate the human effort that goes into maintaining and constantly improving this world-class resource.

Yet the *Zone* is much more than user-friendly, it's also data-friendly. Our newest technical feature allows the branding team to track detailed usage patterns throughout the site. This enables us to listen to our customers more closely, giving us the opportunity to provide customized, value-added content to certain user groups. We can also measure the effectiveness of site features like the above-mentioned Photo Library, which is a collection of images whose rights the firm owns (figure 5). With our high-tech tracking, we are able to maximize the efficiency of our photo spending by deciding which photos to renew and which to remove from the library based on actual usage.

We have also spent time and effort to make the *Zone* intuitive. Our navigation structure has always kept this foremost, as evidenced by our adoption of the "three-click rule." A prominent finding in most Web navigation research, the three-click rule asserts that users must reach the information they're looking for in no more than three clicks or the site risks losing them as return visitors.

Creating a branding community

In addition to its high levels of functionality and intuitiveness, the *Zone* also serves as a nexus of interaction and education for the firm's brand ambassadors. Norbert Becker, the firm's global managing partner for finance and infrastructure and a former Andersen partner, points out the way in which the *Zone* immediately improved his marketing communications. According to Becker, "I am curious by nature, so I went to look for *The Branding Zone* after I heard about it. . . . I was impressed. It immediately helped me

to enhance my presentations and other communications." The *Zone* presumably helped Becker implement the firm's new strategy, whose goal is as simple as it is difficult to attain: to become the leader of the Big Four by achieving market-share dominance, securing "anchor relationships" with clients, and solidifying our reputation and brand, as well as fulfilling other proprietary objectives. How? By presenting Ernst & Young as the provider of the highest-quality services and, to echo Mike Cullen's earlier point, by making us the firm that truly *is* global—and therefore the one that can best serve the largest clients, whose value often corresponds to the extent to which they are global.

Indeed, the branding team has also used the *Zone* to make the firm's people and, by extension, our new colleagues from Andersen, feel part of a global branding community. We have achieved this, for example, through vehicles like the Ernst & Young Brand Champion award for the firm's most outstanding brand ambassadors. The team presented the first award to Christophe Ballegeer, a public relations and communications coordinator for Ernst & Young in Belgium. The award recognized his dedication to the brand, including his application of the firm's visual identity standards on various projects that helped make the Belgian firm the most recognized and preferred brand in that country's professional services industry.



Figure 5. *The Zone's* photo library, a collection of images whose rights Ernst & Young owns, saves the company nearly \$1 million per month on the cost of decentralized photo purchasing. Not only that, but because the branding team can track usage patterns throughout the *Zone*, it can renew or remove photos based on actual usage.

Satisfying a need for knowledge

Just how useful a tool is the *Zone*? According to Patricia Intriago, manager of the *Zone*, “A number of marketing people have asked me if it’s available on CD so that they can carry it with them all the time.” (It’s not, because it’s attached to servers whose content changes frequently. We do, however, provide the firm’s external marketing vendors with extranet access to the *Zone*, so it can be utilized even from outside the firm.) “It’s the only way to do things right,” says Lilian Ferreira, director of marketing for Ernst & Young in Latin America. The *Zone* has been instrumental in helping Ferreira integrate six

The Branding Zone has created a knowledge-sharing community, cutting across silos to connect with as many of our 100,000 people as possible around the world (as well as our advertising agencies, public relations firms, and other vendors)

former Andersen firms (Argentina, Chile, Paraguay, Peru, Ecuador, and Bolivia)—some of which use external agencies—into the Ernst & Young organizations in those countries. In addition, according to Mauricio Galindo, marketing manager in Mexico, the *Zone* gives him all the elements he needs to “live” the brand in his everyday work:

[The *Zone*] has all the information related to Ernst & Young standards, photos, icons, advertisements, proposals, tem-

plates, and so forth. [Moreover], we have developed our own advertising campaigns in line with the highest quality standards shown in the [*Zone*] . . . [The *Zone*] has helped us understand and live our brand.

People in the professional services industry have long known that Andersen folks were on board when it came to branding. So it makes sense that, according to Dina Sender, a graphic design manager at the Ernst & Young firm in Germany, a major role of the *Zone* is to fast-track the process of acquiring and applying Ernst & Young branding knowledge for people new to the firm. As Dina’s comments illustrate, the *Zone* serves as a branding encyclopedia that educates

former Andersen people as they become integrated into the firm:

When the combination in Germany started, two complete marketing teams from E&Y [Ernst & Young] and AA [Arthur Andersen] met. It showed that the former AA people are really keen on brand rules and guidelines . . . *The Branding Zone* was very useful to help them accept and learn Ernst & Young corporate design and use the Global Identification Standards.

We also used the *Zone* as a reference when E&Y and AA people started to discuss whether the new combination in Germany presented an opportunity to rebrand the firm. These conversations were stopped short because the *Zone* helped people to understand the considerable global investment already made by the firm in a unified brand and brand identity.

Moreover, the *Zone* helps make former Andersen people feel comfortable as a part of Ernst & Young by giving them the ability to take care of their branding needs on their own by accessing the site directly.

The brand is job one

Now, three years in the making, the branding team has used the *Zone* to communicate the firm’s visual identity system to our core audience of global marketers and designers. We have also fostered the development of virtual brand ambassadors in a variety of service lines, creating a “brand-first” culture around the *Zone* to accomplish the following goals.

- Align the entire firm with senior management’s leadership vision and strategy. The *Zone* communicated to the firm’s people an inspiring brand vision congruent with the firm’s strategy. It did this by clarifying the meaning of such key branding elements as our new tag line, *Quality In Everything We Do*.
- Expand the strategic role of brand management. The branding team ensured that the firm’s brand identity was not only an organic outgrowth of its strategy, but also helped implement that strategy in a unified, brand-centric manner when approaching clients and prospects.
- Ensure that brand impact is considered in decisions involving strategic acquisitions,

alliances, or other initiatives designed to extend the enterprise. For example, we considered the effect the acquisition of Andersen practices around the globe would have on our brand and determined that our ability to integrate former Andersen people into Ernst & Young would mitigate the potential damage caused by any negative associations with the failed firm's brand.

- Develop a knowledge-sharing community and brand culture that promotes inclusion and integration. We accomplished this objective by using the *Zone* to create a relationship with the firm's people that continually reinforced the importance of—and gave them the ability to live—the brand.
- Create a compelling and differentiated visual identity system with proprietary logo fonts, typefaces, and a digital image library. The branding team created a unique look for firm materials, including advertisements and brochures, that clearly distinguished it from its competitors.

The *Zone* has facilitated optimal brand compliance by offering corporate visual identity, marketing, and advertising standards and templates. It has also generated significant cost efficiencies.

At many companies, however, management misperceives branding as purely an overhead cost center rather than a growth driver. The *Zone* has partially corrected this negative perception by creating millions of dollars in savings for the firm. For example, at current rates the photo library is saving the firm nearly \$1 million per month on the cost of decentralized photo purchasing. The *Zone* also produces efficiencies by offering marketing templates in a limited number of common sizes, so that every brochure need not be a custom design. The all-digital nature of the site's materials also reduces the need for paper artwork and mailings. And it saves our people time by allowing us to disseminate information and distribute files electronically from a central location.

Most important, the *Zone* has played a large part in helping the firm progress toward its goal of becoming the most recognized and preferred brand in the industry. According to a survey of CFOs and senior executives of large companies conducted in 2002, we have closed the gap—coming in a close second to

PriceWaterhouseCoopers (PWC)—in terms of overall opinion and reputation of the firm. At the same time, we've extended our lead over Deloitte & Touche and KPMG. And in terms of our status as a global entity, a trusted business advisor, the quality of our people, and our understanding of companies' critical business needs, Ernst & Young posted the highest ratings in the survey, along with PWC.

People want to be part of, and support, a successful venture. That's why we communicate the popularity of the *Zone* to our constituencies and back up our claims with data. In this way, we generate support not only from people who approve budgets, but also from those who provide us with perhaps the most valuable form of promotion: positive word-of-mouth. More than 10 percent of the firm visited the *Zone* in its first 90 days. It had 39,000 individual visitors, comprising nearly half the firm, in its first year, and according to our IT department, it's one of the most heavily used sites in the firm, registering 2,500 unique user sessions per day on average. An average of about 10,000 people use the site every month, and it has nearly 3,000 registrants and 200 extranet accounts for agencies and vendors. These statistics led our IT brain trust to bestow bookmark status on the *Zone*, a rare accomplishment.

The field-of-edreams antidote

In a word, the *Zone's* success in retaining a loyal audience comes down to *interactivity*. Despite the myth created by the film *Field of Dreams*, we've never felt that users would automatically come to the *Zone* just because we built it. That's why we promoted it using a variety of interactive internal communications, including a global identification standards videoconference and a free gift to the first 250 people to register on the site. Moreover, the *Zone* guarantees 48-hour turnaround on generating answers to users' questions by routing them to our specialists in marketing, design, branding, naming, and visual identity. By being reliable—and thereby creating a consistently positive user experience—this fulfillment capacity cultivates trust in the *Zone*, and converts our visitors into loyal customers. We also regularly update the design of the site, and we've introduced quiz-games at strategic mileposts along the way to reenergize our users. For instance, even during serious crunch times—such

as when our designers were up all night creating proposals to former clients of Andersen firms around the world—we introduced Level 2 of our *Who Wants to Be a Brand Ambassador?* quiz-game (figure 6). And now, with the firm undergoing a tag-line change (to Quality in Everything We Do), we still find room on the homepage to promote the quiz-game. Why? Because it makes the site fun, as well as informative.

End Zone

Today, as Ernst & Young moves forward in implementing our new strategy, the *Zone* remains an important tool for the firm to employ in helping corporate America and the accounting profession regain the trust of investors, regulators, and the public. How? By educating the firm's people on how to communicate our brand clearly, powerfully, and distinctively. According to James S. Turley (chairman and CEO) and Rick Bobrow, (global CEO), how the firm communicates is integral to its strategy:

Quality is front-and-center in the minds of clients as they evaluate their existing service relationships and consider new ones; in the minds of investors who have grown skeptical about the reliability of our services; and in the minds of regulators and lawmakers who have our profession under scrutiny. Therefore, quality must be front-and-center in our strategies,



Figure 6. The brand team has introduced quiz-games to reenergize the *Zone's* visitors. Even during crunch times—such as when our designers are creating proposals to secure new business—we keep the *Who Wants to Be a Brand Ambassador?* quiz-game front-and-center on the site. Now, even with the firm undergoing a tag-line change (to Quality In Everything We Do), we still find room on the homepage to promote the quiz game. It makes the site fun, as well as informative, for the firm's people, and it encourages them to be enthusiastic “brand ambassadors.”

actions, and communications—because our reputation and success are based on the trust and confidence of all these constituencies and stakeholders.

And in the global business of the Big Four, where perception matters almost as much as reality, *trust* and *confidence* derive from the ability to communicate effectively. So, getting the “quality” message through is what branding is all about. And the reason we harness technology and design to do it? They automate, expedite, and augment the branding process.

Through the *Zone*, the firm's branding team has helped transform a disjointed Ernst & Young culture into a brand-first enterprise. By developing a new global visual-identity system—and using technology and design to create a self-serve, enterprise-wide knowledge-sharing platform with which to communicate it—the team systematically broke down the barriers to global brand leadership. By making branding a firmwide, shared responsibility, we've helped Ernst & Young professionals grasp the importance of approaching clients and prospects in an integrated, unified fashion that befits a powerfully branded enterprise. Now, former Andersen people who have joined Ernst & Young understand branding, embrace the tools provided on the *Zone*, and are busy leveraging the power of the brand to help the firm win in the marketplace. As a result, the very design and technological elements that make up the *Zone* are serving a fresh and innovative purpose: to bring new people into the fold by helping them to get intimately acquainted with the firm's brand culture. In the end, the ability of the *Zone* to propel the integration of people into Ernst & Young illustrates that technology and design are key to driving brands—and transforming organizations. Indeed, the *Zone* has helped us build our brand by becoming highly popular with our people, and by combining the incredible reach of intranet technology with the vigor of electronic design. This has allowed Ernst & Young to put the brand first. ■

Reprint # 03142BUR17

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From Interbrand's Brandchannel.com

H&R Block

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by Peter J. Burger

April 11, 2005 issue

Spring is in the air for the northern hemisphere, and that means tax preparation in the US. Along with the green of new buds on trees, financial services and tax preparation firm H&R Block hopes you'll notice its own striking green retail locations.

Founded in 1955, H&R Block's former identity included three different logo versions of the name: one red, one blue, and one black. In 2000, the company rolled out a new identity consisting of a snappy, neon-green block next to the company name.

The quest for a new identity began July 1999, when H&R Block decided to align its brand image with its business strategy and reposition the company for expansion. Known as a personal income tax preparer, H&R Block now wished to promote an array of financial services besides tax prep, including home mortgages, financial planning, and investing advice.

However, research showed that, while the H&R Block brand was strong, the company was known solely for its tax work in a market that included American Express Tax and Business Services, Intuit, and Jackson Hewitt. To compete against its new rivals in a financial advisory world populated by names like Dean Witter, Schwab, Morgan Stanley, and Merrill Lynch, the company needed to stand out.

The idea was to breathe new life into the H&R Block brand, to make the customer stop and say, "That's not the H&R Block I think I know."

The fresh, contemporary green (a contrast to the dark green of another American classic brand John Deere) is intended to communicate a progressive identity and reposition H&R Block as a full-service financial provider. With a core market in the US and Canada, H&R Block also offers services in the UK, Germany, Italy, Japan, Korea, and the Philippines. The company's visual look needed to play well globally.

Green, but Not Unseasoned

Why green instead of a more traditional business color like blue? Color impacts the senses immediately, and H&R Block needed to look different from its competitors to stand out.

Indeed, color is a tool many companies use to duke it out in the market. Think of UPS ("What can brown do for you?") and its competitor DHL's response in advertising ("Yellow. It's the new brown"). Not to mention ING's orange, Pepsi's use of blue against Coke's red, and FedEx's color-coded divisions. Some companies even own their color in casual reference (IBM as Big Blue).

But aside from being "different," what are the benefits of green? In their book *The 22 Immutable Laws of Branding*, Al and Laura Ries identify green as a color to depict the environment and health. H&R Block's green, one can argue, associates the company with health—financial health.

Grounded in Tradition

While green may seem an edgy ingredient of H&R Block's visual identity, the block logo does not. A graphic representation of the company name, the square element stands in stark contrast to the original logo, which featured the name but no block. The square, according to the designers, balances out the edgy green, by grounding the company's new brand identity in H&R Block's traditional role of tax-preparer. The Block name remains but the green square offers a new twist.

Winning the Name Game

While color and shape are critical elements of brand identity, so is a company's name. Company founders, Henry and Richard Bloch, named the company after an easy-to-pronounce, slightly altered spelling of their last name, to allow the name to roll off the tongue. The layout of the block and name adheres to the Ries's suggestion of "Law of Shape." Since our eyes are positioned side-by-side on the face, it's easy to view the horizontal layout.

More than a Logo


Five years ago H&R Block's business goal was to expand its service offerings to target a wider range of financial needs and individuals with higher net worth.

Today the tax unit still represents nearly half of the firm's US\$ 4.3 billion in sales. This year, the company estimates that more than 19 million taxpayers will file through its tax preparation services at one of its more than 11,000 tax offices throughout the US.

However, competition from cheaper preparers and even do-it-yourself options like Turbo Tax from Intuit, dig into H&R Block's core business, placing more urgency on the goal to diversify. Unfortunately, not all the divisions at H&R Block are producing. Particularly hard hit have been the mortgage division and

the financial advisors unit (which is under evaluation for a new plan of action).

On a positive note, H&R's stock price grew more than threefold (from about US\$ 15 in early 2000 to just over \$50 in early April 2005). But it remains to be seen whether the company will see more green across the organization as a whole in the near future.

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Peter J. Burger, a strategic communications professional at Ernst & Young, develops articles like this to broaden understanding of marketing within the firm and build compliance with the company's brand identity system. Peter can be reached at peter.burger@ey.com.

H&R Block's company chairman, Mark A. Ernst, descends from the same Ernst family that led to Ernst & Ernst, a predecessor to Ernst & Young, in 1903. The Ernst family emigrated from Germany to the US in the 1850s.