

THE DEVELOPMENT OF A GUIDE FOR DESIGNING A UNIVERSITY
SPIN OUT CORPORATE IDENTITY PACKAGE

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DEDICATION

For the sacrifices parents make
before they even meet their children

For the love, encouragement, generosity
and patience parents offer
even after they know them

Mom, Dad – thank you.

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I would not have been able to complete this thesis without the help of Marcelle Hanson who made sure I had my paperwork done.

Thanks for putting up with me.

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SPIN OUT CORPORATE IDENTITY PACKAGE

by

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The purpose of this thesis is to document and explain the creation of a guide on the fundamentals of corporate identity design for researchers interested in designing a corporate identity package for a spin out company. The guide was created to help university based scientific researchers who have limited design experience and are unfamiliar with the process involved in the creating of an identity package. The identity design guide was posted online for evaluation by selected researchers and entrepreneurial personnel experienced in spinning out biotech companies. The guide contains information on preliminary design questions (purpose and audience), graphic design principles and techniques (color, typography,

repetition, proximity and similarity), technical considerations (screen and print resolution and color systems), and a glossary of terms. The thesis focuses on the design of a corporate identity for Dr. Garner and the holographic imaging spin out company, Holocept, and the creation of an interactive corporate identity design guide using the Holocept identity as an example.

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LIST OF DEFINITIONS

- Acronyms - Abbreviations written as the initial letter or letters of words, and pronounced based on this abbreviation (e.g., NASA, National Aeronautics and Space Administration).
- Bandwidth - Refers to data rates when communicating over certain media such as the internet. Lower bandwidths require more time to transmit and receive data.
- Coining - A word, term, or phrase which is created often to apply to new concepts, or to reshape older terms in newer language form especially useful in identifying inventions, new phenomena, or old ideas which have taken on a new cultural context.
- Color Scheme - The choice of colors used in design for a range of media.
- Compression - The process of encoding information using fewer bits or amounts of data in order to store or transmit the data in a faster and more efficient form.
- Corporate Identity - The "persona" of a corporation designed to attract business usually visibly manifested by branding and the use of trademarks.
- Design - Refers to both the process of creating and developing a plan for an illustration, page layout, web site, etc. or the result of implementing that plan, the illustration, web site, etc.
- Domain Extension - Used by a particular class of organization, these are three or more letters long, and are named for the type of organization that they represent (for example, .com for commercial organizations).
- Domain Name - An address or online identity containing two parts: the name and the extension, or top-level domain, separated by a 'dot.'

DPI (dots per inch) - A measure of printing resolution, the number of individual dots of ink a printer can produce within a linear one-inch space. Printers with higher dpi produce clearer and more detailed printouts.

Font - A particular typeface of text (e.g., Times, Courier, Arial).

Formatting - To create or edit the layout of a document so it will fit onto a different type of page, style or criteria.

GIF (Graphics Interchange Format) - An image format for pictures with up to 256 distinct colors used mainly for graphic illustrations.

HTML (HyperText Markup Language) - Language designed for the creation of web pages with hypertext and other information to be displayed in a web browser.

Hyperlink - A reference in a web page to another page or resource.

IP Address (internet protocol address) - A unique number that devices use in order to identify and communicate with each other on a network such as the internet.

JPEG (Joint Photographic Experts Group) - An image file format used extensively for photos and other continuous tone images on the web. The quality can vary greatly depending on the compression settings.

Layout - The process of arranging editorial content, advertising, graphics and other information to fit within certain constraints

Navigation - Within the worldwide web, is the act of clicking on a link or button that will lead from one web page to another. Also refers to the arrangement of these links along with other content on a web page.

Optimizing - The process of improving an image in certain ways to reduce the effective runtime, bandwidth or memory requirements.

Pixel - One of the tiny dots that make up the representation of an image on a computer.

Pixelated - Very low quality image, where colors of individual pixels are visible to the eye

Point Size - The measurement used to describe text height (1 point is equal to 0.01384 inches, 72 points equal 1 inch).

PPI (Pixels per inch) - A measurement of the resolution of a computer display, related to the size of the display in inches and the total number of pixels in the horizontal and vertical directions also referred to as the pixel density.

Resolution - 1. A reference to the number of pixels that make up an image. 2. The image clarity of a graphic. 3. The monitor specifications used to display information.

Scrolling - The act of sliding a horizontal or vertical presentation of content, such as text, drawings, or images, across a screen or display window.

Site Map - An outline or diagram that illustrates the pages of a web site, typically organized in hierarchical fashion.

Tag Line - A memorable phrase that will sum up the tone and premise of a company and reinforce itself in the subject's memory.

Thumbnail - Reduced-size versions of pictures or sketches, used to make it easier to scan, recognize or reproduce quickly.

Trademark - A distinctive sign used by a business to uniquely identify itself, products and services to consumers and to distinguish the business from others. A trademark comprises a name, logo, and tag line or a combination of these elements.

Typography - The art and technique of arranging and formatting text.

Uploading / Downloading - Related terms used to describe the transfer of electronic data between two computers. *Upload* is to send data from a local system to some remote system, such as a website, server, or other similar systems. To *download* is to receive data from a remote system.

URL (Uniform Resource Locator) - Also called a web address, a sequence of characters used for referring to resources by their location, which is usually shown in the address bar at the top of a browser (e.g., <http://www.holocept.com>).

Web Browser - Software application that enables a user to display and interact with text, images, and other information typically located on a website.

Web Server - A computer that is permanently connected to the internet and accepts web files from clients, usually HTML documents, to be displayed for web sites.

CHAPTER ONE

Introduction

The Importance of a Corporate Identity

Throughout history many have tried to find a way to leave a mark for themselves as a means of expressing who they are. From the early cave paintings to religious symbols and national flags, the same remains true today. As new countries emerge so do new names, new flags, new rituals and traditions. They celebrate their presence with pageants and national monuments whose symbolic value far outweighs their cost (Olins 23). People need a sense of belonging.

“...they need to know where they stand, they need their loyalties underlined and emphasized, and they desperately need – we all desperately need – the magic of symbolism.” (Olins 23)

Within the corporate world, companies are continuously searching for a simple and effective means of communicating who they are and what they do. When done properly, an identity system puts forth the company’s best traits and improves the ability of individuals to understand what a company does (Fombrun 290). The concept of an identity system, also referred to as “branding”, is important because it is an expression of the company’s big idea,

the expectations that an individual develops about the company and its products or services. Branding helps individuals form an emotional connection to a company. They develop a trust and become loyal to them. They believe in their superiority and establish personal and business relationships with them (Wheeler 1-2).

Branding can quickly and efficiently identify a company's presence as a viable and unique entity. It can effectively communicate its ideas and present its growth and development. Most importantly, a corporate identity distinguishes a company from others with similar products or services (Charmasson 5). Brand identity has become a strong and effective business tool because it makes a connection with the audience. Companies incorporate brand identity into the design of their website and ad campaigns to communicate who they are and what they do. In short, brand identity increases awareness and is critical for the promotion of the company (Wheeler 3).

The major components of a corporate identity are; company name, logo and tag line. Although there are many resources and instructional materials on these subjects, the time required to read the sources may not be practical for a full-time researcher. The goal of this thesis was the development of an interactive guide to help university based laboratories create an identity for a start up company also referred to as a spin out company.

Development of Corporate Identity Design Guide

The guide was designed for researchers with little to no design experience. The guide will help outline questions that an entrepreneurial group should consider when producing an identity for the company they intend to create. It would focus on and address key concepts,

theories and procedures and draw upon several available resources to help in the development process. This should then enable these entrepreneurs to develop an identity package for their new entity by developing an awareness of what makes up a corporate identity package and how to approach the design of each component. The topics addressed in the guide and their extent was determined from research on designing corporate identities and by designing an identity for the holographic imaging company arising from the light biology laboratory headed by Harold "Skip" Garner, Ph.D., at the University of Texas Southwestern Medical Center at Dallas.

The implementation of the guide utilized a similar format used in a guide developed for another project, The Development of an Instructional Module on the Basics of Web Design for Scientists Interested in Creating a Web Site by Marla R. Wilkins from the Biomedical Communications Department at the University of Texas Southwestern Medical Center at Dallas. Part of this project looked at the use of a hybrid slide show/web page format as a means of presenting the material and determined that it worked particularly well. Because of its slide show format and the ease of web page navigation allowing interactivity, researchers found it to be very familiar and were able to follow and navigate to specific sections for future reference without a problem. Another point taken from this project was the successful application of the software chosen to produce the interactive guide.

The Importance of Identity Design

Brand identity is the fastest, shortest most prevalent means of communicating who a company is (Wheeler 4). It becomes the face of the company and the way it is recognized. It

can be seen, touched, held and heard. It begins with a name and grows into a matrix of communication tools that are visual and interactive. From logo to letterhead, from web site to ad campaigns, brand identity increases awareness and becomes a cornerstone for business. It does not undermine the quality of a product or service but bolsters its value and helps set it apart.

Visual Design

The visual elements of an image are very important. Eighty-five percent of our learning is done by sight (Chajet 121). For a company's image to be the most effective the visual identity should be easily recognized, remembered and well designed. It must be easily reproducible at any size on various media, both in print and projection (Wheeler 29). A mark having many fine lines and detail may look great on paper and printed on half a page but when reduced to a size that can fit on a business card the details may be lost, making it unrecognizable. The same mark may have colors that are very subtle or low in contrast making is difficult to distinguish when projected on a screen. As the identity is expanded to printed materials and the web, a layout that is not well organized and visually pleasing becomes distracting, causing loss of interest.

Goal of an Identity

Each component of an identity has a specific task to a common goal. A name and logo present the company while a web site or PowerPoint presentation informs a targeted audience. Every part of an identity is subject to unique standards and criteria from proper

shape and balance to resolution and color gamut. A good design scheme is what maintains unity and cohesiveness between all the components of an identity. When this is successfully achieved, the unique image design is of great value to a company (Chajet 7-9). It can be protected by law and serve as both a shield and weapon for growth. Therefore, properly applied design techniques to each component of an identity helps achieve a unified corporate image and the overall goal of promoting a company.

Lack of Audience-Specific Literature

Literature on designing corporate identities is readily available. The same is true for literature on design principles and techniques. Unfortunately, these resources are not written specifically for researchers interested in designing a corporate identity.

Although there are many resources available on designing corporate identities, a scientific researcher hoping to use these resources will quickly find themselves in several dilemmas. The first dilemma would be which resources to use. Many of these resources, although informative, are written for an audience familiar with the ideas and concepts of design, more specifically, other designers who are looking for ideas or inspiration from successful identities. Further more, many of these resources do not cover basic concepts of design due to the fact that they are intended more so for designers or those who are already versed in these basic principles. As a result, a researcher who is not familiar with these principles will need to seek out further resources to aid in the understanding of the first.

Time Limitations of Researchers

More frequently researchers are involved in the development of new technologies which are best matured in a start up company. Although these researchers are keenly aware of the science and technology they are developing, they may not be skilled in all the business components that are required to initiate a start up company. These include identifying and hiring management, obtaining funding, intellectual property, space to conduct business, writing of a business plan and design and development of all the components that make up an identity. As a result, the time required to review all the literature to each one of these issues is prohibitive.

Objectives of Thesis

The objectives of this thesis were 1) to research the steps necessary to develop an identity package for a spin out company, 2) to determine the needs and design skill levels of researchers wishing to create an identity by working with such a group in creating a corporate identity, and 3) to apply the information acquired to the design and development of a guide presenting the fundamentals of designing a corporate identity package to researchers. Completing these objectives helped accomplish the goal of this thesis, namely the creation of a corporate identity design guide to educate university based researchers on the fundamentals of creating a corporate identity for a spin out company and addressing key concepts, theories and procedures of graphic design to meet their needs.

CHAPTER TWO

Review of Literature

Purpose of Review

The purpose of the literature review was to examine the information that is available on the creation of an identity package. This information was also used to better understand the type of information needed in an instructional guide for researchers on designing a corporate identity and to implement it in the creation of an identity package for a spin out company.

Currently Available Resources

There are many books and resources available on designing corporate identity but very little specifically for researchers. Many of these do an excellent job of demonstrating the solutions others have reached in creating an identity but are lacking in explanations of the steps taken in creating their design (Olins 148). Many of these books are written for other graphic designers who are already familiar with concepts of design and are more useful as inspiration from the examples illustrated than a source of instruction. A scientific researcher would need to consult several sources in order to find the proper information on designing and creating and identity package. This would include materials on designing each component of a

corporate identity, instructional materials or guides for software programs used to design the identity and materials on design principles.

Corporate Identity Design Sources

Books such as Designing Corporate Identity: Graphic Design as a Business Strategy by Pat Matson Knapp offer examples of the creative pathway that was taken from sketches to the final logo, but its strength is in explaining the reasons a company took a particular direction in creating their identities. Another book, Designing Brand Identity: A Complete Guide to Creating, Building, and Maintaining Strong Brands by Alina Wheeler, is a very comprehensive resource on building an identity, offering a vast number of easily recognizable company logos, but only a few examples of logo evolution. This source was also meant for those with a more solid foundation in graphic design. There are other sources that are specific to one or two aspects of corporate identity. The Name's the Thing: Creating the Perfect Name for Your Company or Product and Logos: the Development of Visual Symbols, give extensive information and specific examples on creating names and logos respectively.

Resources on Design

Other sources such as The Non-Designer's Design Book present basics on typography and design principles very simply and clearly with examples of how they are applied to a variety of formats from business cards to web sites, but only briefly touches on identity creation. These sources can be useful, but do not expand beyond the design of the logo to include web

design, power point templates and business plan layout. These may not be the main components of an identity but they are also important in communicating who a company is and what that company does.

Another issue that needed to be addressed was the use of various computer software programs in designing and creating an identity package. To the average graphic designer the use of such programs as Adobe® Photoshop®, Illustrator® and Macromedia Dreamweaver®, to only name a few, are synonymous with graphic design. Programs such as Microsoft® Word®, PowerPoint®, Excel® and Adobe® Acrobat are more likely to be familiar to a researcher. These are some of the tools they use to record, write, publish and present their findings to colleagues, grant providers and other researchers. Therefore any resources available on designing a corporate identity package may require additional searching for literature on how to use these graphic design programs.

Resources on Starting a Company

Several resources are also available containing information on starting a company. Many of these offer general and useful information on writing a business plan, doing market research, creating a management team and seeking venture capital. Some discuss the development of a corporate identity however it is only brief and not detailed enough to include all aspects of an identity package. Other books such as Starting a High-Tech Company, by Michael L. Baird, are written for researchers in technology fields but do not cover designing of corporate identities. These sources are best suited for acquiring information on sound business practices.

Specific Resources for Researchers

Although there was a lack of audience specific resources for scientific researchers to use in creating a corporate identity, there were some resources written for researchers that could aid in this process. Mary Helen Briscoe's A Researcher's Guide to Scientific and Medical Illustrations (1990) offers helpful information on design and layout of printed material and graphics specifically for scientific researchers. Because many researchers are already familiar with this resource, the techniques acquired from it can be used as a stepping stone in the understanding of designing and creating a corporate identity package.

Two excellent sources of information include the thesis works of Marla Wilkins and Meredith York from the University of Texas Southwestern Medical Center at Dallas. Wilkins' work included the creation of a guide for researchers in designing their own web site and has also served as a model for this thesis in the creation of a guide on designing a corporate identity package for university company spin-outs. This guide will be supplemented by the work of both Wilkins and York in the section regarding the creation and design of a web site.

General Source on Designing Corporate Identity

Although there is information on creating scientific figures, graphics and illustrations specifically for researchers, books on these topics contained no information on their application in designing a corporate identity package. Also, because of a lack in training in art and design and perhaps even entrepreneurship, a researcher may not be aware of what a

corporate identity package is let alone how to create one. They may find it very frustrating trying to design an identity package that is creative, appealing and congruent from one component to the next without some kind of instruction or guidance. The interactive guide discussed in this thesis provides a researcher with the necessary information on designing a corporate identity package to better communicate and present their ideas for the success of a company spin out.

CHAPTER THREE

Methodology

Purpose of Corporate Identity Design Guide

This project was created with the intent of providing concepts in design for developing a corporate identity in a simplified, web-delivered format. From the beginning it was clear that a comprehensive yet simplified guide would be needed that explained basic principles of design in order for those utilizing it to better understand why certain formats, techniques or methods were used. These basic principles were also discussed in more detail as they apply to each component of a corporate identity. Finally, the implementations of these techniques were illustrated by designing a corporate identity for a spin-out company. This design process served as a model that could be followed by those utilizing the guide.

Target Audience of Corporate Identity Design Guide

The guide was created for researchers from laboratories at the University of Texas Southwestern Medical Center at Dallas interested in designing an identity for a spin out company, but who may not be familiar with the necessary components of an identity, the process of designing an identity, how to design an identity or even where to begin. No design experience is necessary to follow this guide. A section of the guide discusses design

principles and their application. However, for those who may have knowledge of design or of corporate identities this guide can re-introduce key concepts and perhaps demonstrate a different approach to solving design problems.

Development of Holocept Identity to Establish Subject Matter for Guide

A corporate identity was designed for the holographic imaging company, Holocept, arising from the light biology laboratory headed by Harold "Skip" Garner, Ph.D. at the University of Texas Southwestern Medical Center at Dallas. As the Holocept identity was in the process of production, a better understanding was gained of the concepts that needed to be addressed within the corporate identity guide. This along with research of available resources and literature dealing with corporate identity and principles of graphic design helped the guide evolve into a piece that was both comprehensive and concise as well as being able to present the material with a specific example from a university laboratory.

The idea for the development of this guide came from Dr. Garner and his experiences in creating spin out companies. He recognized a need for an instructional or reference source that was specific and tailored to the needs of researchers who may not have the background in graphic design to put together a complete corporate identity that was both informative and visually appealing. Because of the opportunity in the creation of a new company, Dr. Garner saw it as an opportunity to utilize it as the testing ground for this instructional source. Every component of this identity needed to be developed and could therefore be used in analyzing

the information required and included within the guide as a specific example from a university laboratory.

Purpose of Corporate Identity and Intended Audience

Dr. Garner and his team were in the process of spinning out a company and needed materials to help promote it and identify it as a viable company to multiple audiences. This included potential investors, other laboratories, researchers and colleagues, future graduate students and post doctorate fellows. Because of the comprehensive and multifaceted nature of an identity package, the information presented about the spin-out company and the materials generated as part of the identity package, would both be a source of information to all. Since each component serves a unique purpose and may be used as a separate and individual tool in promoting the company, there is a need to maintain a common and unifying variable between them. From name, logo and business plan layouts to business card and web site, the visual design of the corporate identity would be used to maintain a consistent and unified package.

Components of a Corporate Identity

The key elements of an identity are name, logo and tag line. These are the foundation upon which an identity package stands and are applied to the rest of the identity which includes letterhead, business card, business page, web site and url, power point template and fax sheet. Although the entire identity shares a common design scheme, each part contains unique characteristics and challenges to its purpose and design that will be discussed individually.

Name

The name is the unique identifier of a company. It is usually a word or short phrase that gives a company its formal presence. Names create the first impression about a company to a consumer or investor (Fombrun 35). Attitudes about the company can be shaped by the first contact that a name provides. The name endows a company with character, personality and distinction to make it appealing or desirable to others. When a name is appealing or desirable, it is set apart from the competition making the company more profitable. Therefore, a name takes on three roles: first as a promoter, second as protector, and finally as a profit generator (Charmasson 12).

The characteristics of a good name include being on target, motivating, memorable and strong legally (Charmasson 38). When a name is on target, it addresses the intended audience. A name targeted for a teenage female audience would differ from one targeting a middle aged male audience. There are a countless number of audience specific variables that must be taken into consideration when creating a name. Therefore a good name is one that is right on target. Once the name is on target, it must also be motivating. A name should stir an emotional response and cause its audience to choose it over any others. In order to be chosen over others, the name must also be memorable. It has to stay in the mind of the audience or be recalled first. In order to be remembered, a name should be distinctive. When a name is distinctive it is unique. It is not confused with any other name and as a result, it is legally strong. It can be protected by law so no others can exploit it.

Creating a name for the holographic imaging company began with brainstorming a list of words that were associated with what the company is working on. This list included words about the technology being developed, possible applications of the technology and descriptive words (Table 3-1).

hologram	show	element	element	inspired
holographic	sight	dynamic	factor	focus
holography	envision	motion	new	focal point
three dimensional	graphics	time	novel	hub
dimension	illustrate	live	innovative	core
display	system	real time	unique	heart
image	method	instant	ground-breaking	crucial
imaging	technique	active	pioneering	television
view(ing)	concept	function	military	professional
screen	matrix	phase	medical	tactical
monitor	medium	sign	technology	
projection	space	signal	technical	
visual	interferrometry	wave	tactical	
visualization	optical	oscillation	beneficial	
vision	optics	pulse	imaginative	
scene	laser	flux	ingenious	

Table 3-1. Initial associated word list for company name.

These words were then cross-referenced in a thesaurus and dictionary to find alternate words and meanings, definitions and possible root words in Greek or Latin.

From the list of words, other words and phrases were put together to begin unraveling a possible company name. Some of the simplest names created were merely descriptive of the technology. These included Dynamic Holographic Imaging, Dynamic Holographic Projection Systems, True Space Visual Technology and True Space Holographic Projection.

These names may let someone know what the company is involved with but were not easily remembered and more than likely may not be acceptable for trademark.

Other short names that were considered included Holographic Television or HoloTV. This was followed by HOTV, similar to HDTV, but a possible negative connotation ruled it out. Another name was Provision, however, this name was already in use. These names in one way or another alluded to the idea of television and consequently undermined the many other possible applications of this technology. These names were discarded. This, however, sparked an idea to use two names that would imply two different applications of the technology. With the combination of two words for each name, holographic and medical and holographic and tactical, the names Holomedic and Holotactic were evolved. To add a bit more flare and uniqueness, an X was used in place of the letter C, which indicates or gives a connotation of high technology (Chajet 98), yielding Holomedix and Holotactix.

Holomedix and Holotactix became the leading candidates for the company names. These would work out great due to the two target markets, medical diagnostics and the military. Holomedix would actually be carried a bit further by the creation of a possible logo which is discussed later and remained as the company name for a short period of time. Nonetheless, these two names seemed to corner the company into only these two markets. Another problem with having two names was creating two different identities for the same company. Therefore a name that encompassed many possibilities was needed. A name that was more general. The final name was then created from the phrase holographic concept, Holocept. This name works very well in many levels and meets the characteristics of a good

name. It is short and memorable, it addresses the very ideas the company is working on, it universally addresses multiple audiences and it is unique.

Logo

A logo is the graphic element of an identity. It is usually a simple and unique design used to draw attention to the company and serves as its visual representation to make it easily distinguishable from others. If the name introduces the company to its audience, the logo is the face a company presents to the public (Skaggs 7). It is the visual representation of the company and not only identifies the company but also sends feelings and connotations in the process.

The qualities of a good logo include being simple, versatile, memorable and responsive (Logo). Logos can be segregated into a few categories: pictographs, ideographs, logotypes, monograms and letterforms (Skaggs 80-84). Each of these types has distinctive characteristics, advantages and disadvantages. Regardless, if the logo is too complex, containing several elements, it may not withstand being reduced in size or it may not be printed well in black and white. In such a case the logo is not as effective. By maintaining simplicity, emphasizing one or two elements such as its subject content or form, a logo is more easily recognized and therefore more memorable.

The design process began with a definition of the problem. The goal of this company is the production of an imaging device that reproduces true three dimensional holographic projections in real time. Therefore, the logo should somehow allude to these ideas just like the name. Because the logo is a visual cue of the company, in this case it should imply the

idea of a three dimensional object or scene. To help generate ideas, the possible applications of this technology were kept in mind as well as the method in which the holographic projection works. These concepts may seem complicated to visually represent but if they are broken down to smaller, simpler ideas, a wide range of possibilities arises.

To begin with, the idea of a three dimensional object was explored. Taking the work of M.C. Escher as an example, sketches of figures demonstrating depth were created. Others were simply abstract designs that came to mind but did not relate specifically to any one concept (Figure 3-1).

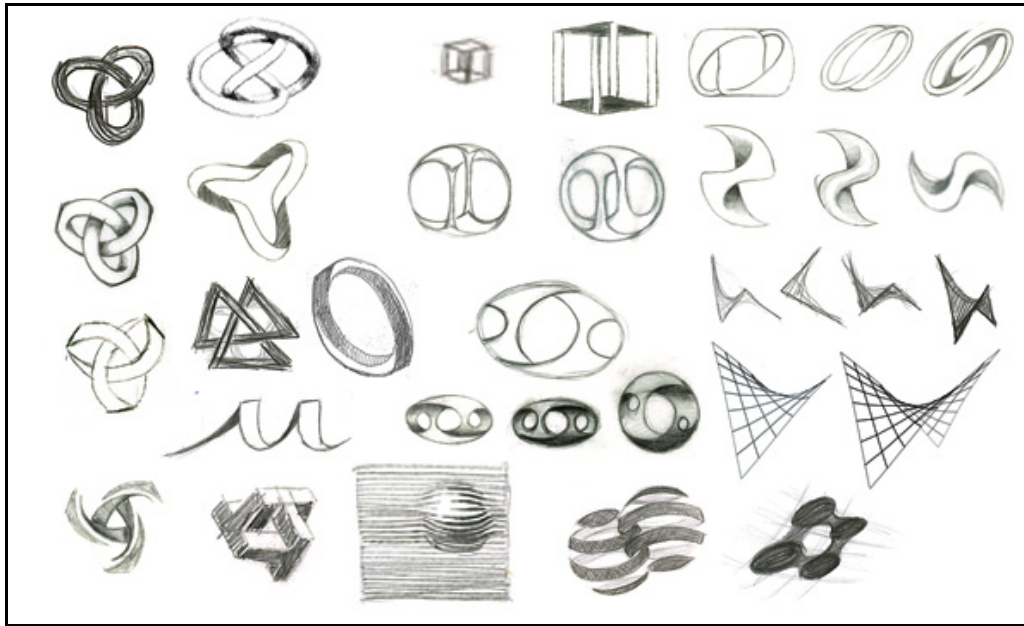


Figure 3-1. Preliminary sketches demonstrating depth.

Sketches taking one point perspective were looked at more closely due to the fact that they touched on another idea, how the three dimensional image would be reproduced. In brief, the way the holographic images would be reproduced can be thought of as a series of slices staked together and projected into a volume containing a medium for the image to appear. Therefore, the idea of how a figure might look sliced inside a cube was explored. This led to other ideas of slices in different forms and views. The possibility of using this concept to come up with a logotype was looked at briefly although it was determined that this would be a little difficult to read at a glance and that would be something that needed to be avoided (Figure 3-2).

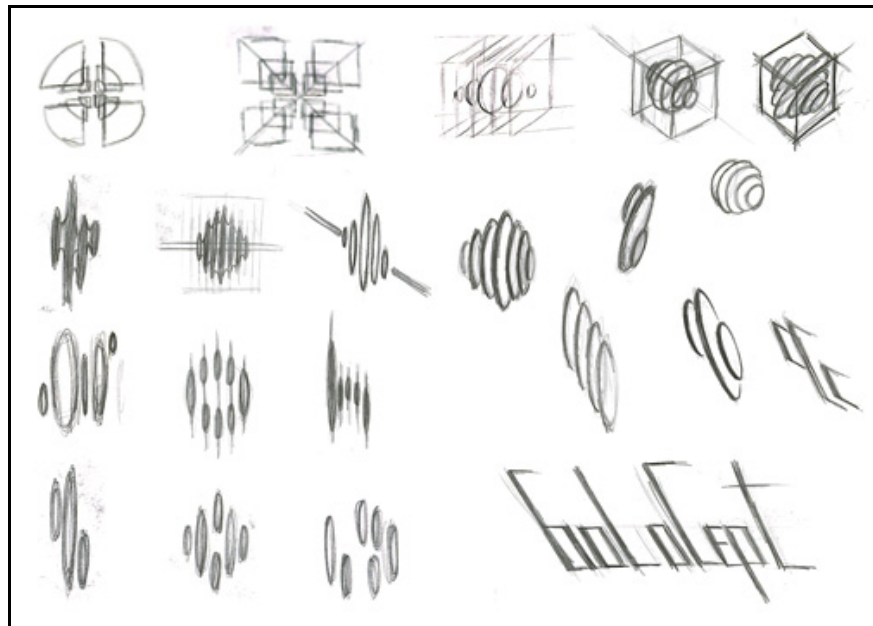


Figure 3-2. Perspective and slice sketches.

Because a foreseen application of the holographic technology is for medical diagnostic equipment, the idea of incorporating a caduceus, the symbol of a serpent around a staff used in materials associated with medicine, was examined. Another idea was that of the planes of reference used in medicine when describing the human body such as sagittal, coronal and transverse, applied to simple geometric forms (Figure 3-3).

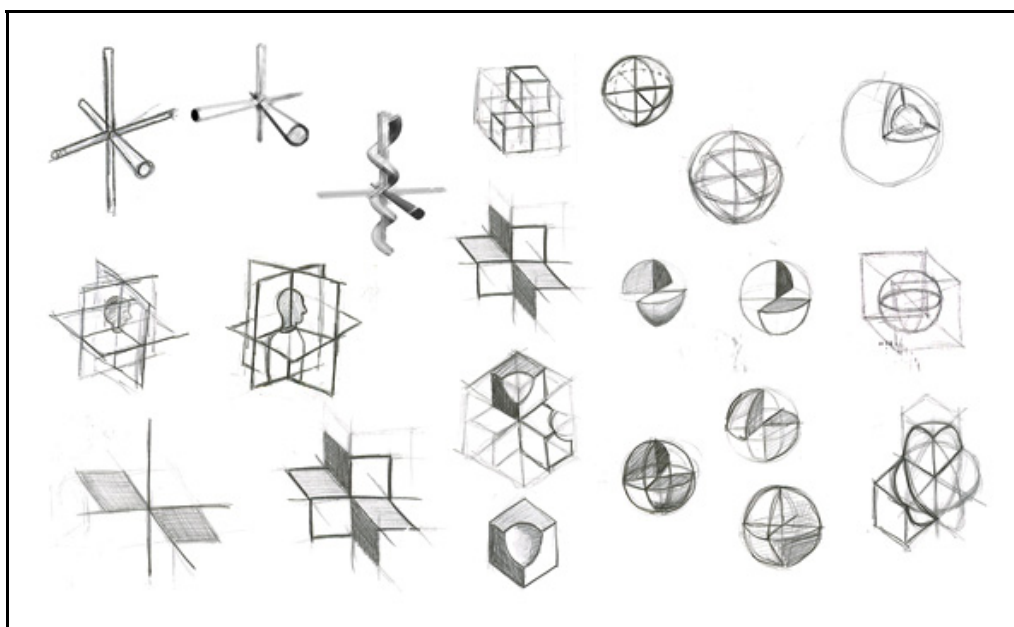


Figure 3-3. Sketches depicting the planes of reference.

As mentioned earlier, for a brief time the leading name candidate was Holomedix due to the fact that it implied medicine, a foreseen market for this technology. As a result, the thought of using the caduceus was looked at further. A clever scheme that arose from the name Holomedix was that of turning the letter E around so that it looked like the number 3.

Because it laid next to the letter D, these two would spell out what this technology does implicitly, 3D images. Taking this idea and that of the caduceus, resulted in a combination of the letter D with the number 3 wrapped around it (Figure 3-4). This would then be incorporated into the name to come up with a logotype that implied three essential concepts; holograms, medicine and three dimensional. However, since the company's anticipated applications extended further than medicine, Holomedix was dropped and Holocept was adopted instead.

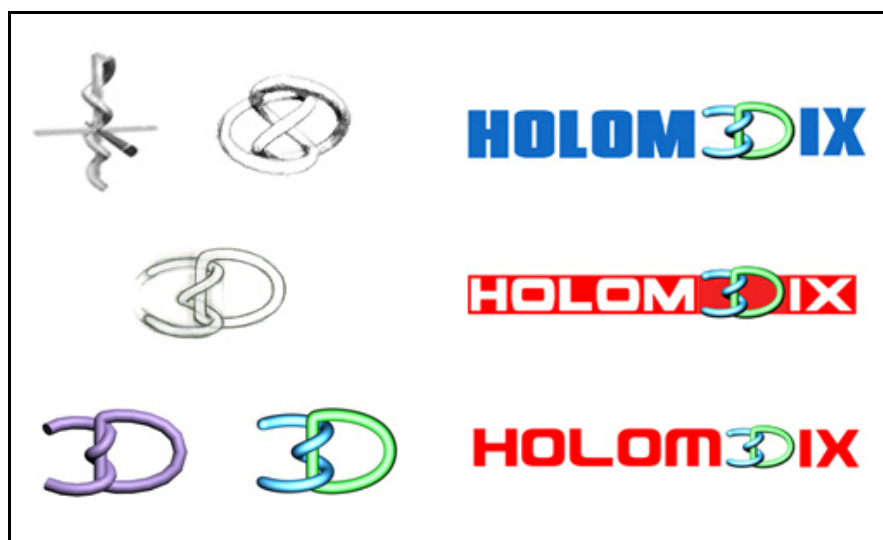


Figure 3-4. Preliminary logo design.

The idea of using planes was looked at again after Holocept was adopted as the company name. Since a good example was already worked out, the next step was using a computer drawing program, in this case Adobe® Illustrator®, to yield more precise drawings

(Figure 3-5). First, different angles of view were considered. In the end, the view with the most symmetry was determined to work best. After this, the use of color and another shape to form a boundary was applied.

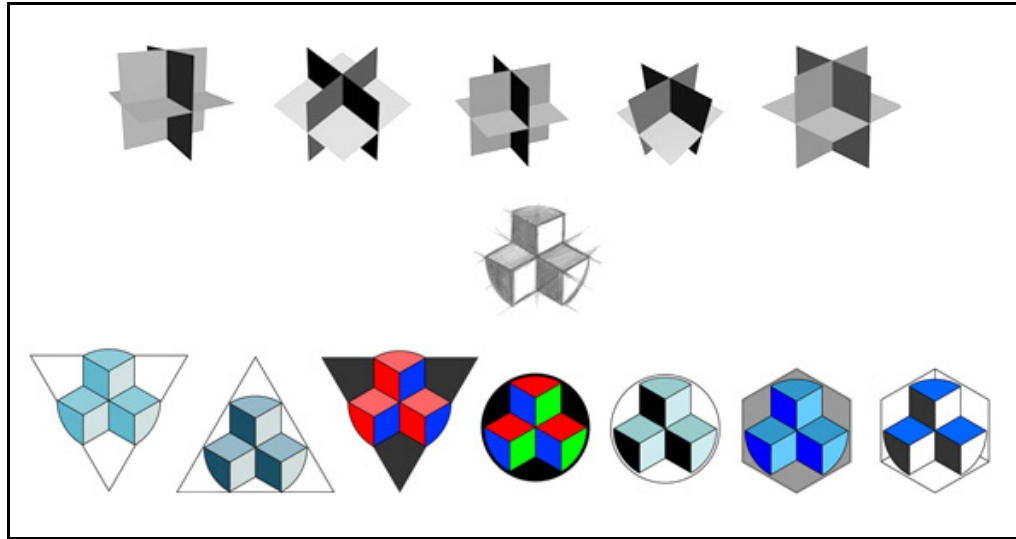


Figure 3-5. Design study of logo mark.

Finally a heavy font style was applied to the name that accompanied the logo as well as a final shift in the color scheme (Figure 3-6). This design worked well in detailing the technology being created. Its design is simple and implies something very precise, schematic and mathematical and very importantly three dimensional.



Figure 3-6. Final logo design.

Tag Line

A tag line is a short phrase that quickly explains your product or company's unique selling position. The tag line follows the company name and, if used correctly and consistently, creates an opportunity to seal your position in a consumer's mind (Goodgold). It also serves as a quick reference system to redirect consumers in your direction reminding them of your company's unique point of difference.

A good tag line is consistent with the company name and position. It is an outgrowth of it. The most effective tag lines convey the message using consumer language. There is no need for elaborate vocabulary because it will only hinder its ability to be remembered. The tag line also communicates one simple idea in a short and concise note (Goodgold). An attempt to communicate more than one idea would significantly increase the size of a

message also hindering its ability to be recalled. Lastly, a good tag line is unique. Even though the tag line is an extension of the name, it should not be confused with any others.

Because brainstorming for name ideas had already been done and a preliminary list of associated words was already compiled (Table 3-1), the same list was used as a stepping stone for tag lines. More words were added to the existing list including words that evoke certain feelings costumers would associate with the company such as how different or what benefits the company can offer (Table 3-2).

imagine	future	additional	picture	ingenious
imagination	3D	true	expect	progressive
experience	next step	authentic	new	revelation
three dimensional	realistic	actual	novel	glimpse
dimensional	real life	live	innovative	point of view
interactive	exciting	real time	unique	new viewpoint
image	visionary	instant	ground-breaking	new perspective
new	possibilities	instantaneous	pioneering	new encounter
revolutionary	perception	next generation	striking	prodigious
revolution	more	era	imaginative	unparalleled
basic	ultimate	final	Intense	extreme

Table 3-2. Expanded associated word list for tag line.

Once a good list of words was developed, they were combined to make short phrases (Table 3-3). The phrases that were put together built upon one another. Each phrase created a spring board that lead toward another idea. Some of these might be able to stand on their own but more analysis of these ideas was needed. After testing some of these ideas it was concluded that something was missing from the overall message.

vision becomes reality	imagine life with another dimension
reality becomes vision	imagine life in another dimension
vision with dimension	vision true to life
vision with more dimension	vision with true perception
visualize with an added dimension	vision in a new perspective
imagine with more dimension	vision in the next dimension
experience more dimension	vision in another dimension
experience life with more dimension	new viewpoint in imaging
	glimpse into another dimension

Table 3-3. Preliminary tag line ideas.

One of the innovations of the holographic technology being developed is that it can be projected in real time. Another words the holographic images can be viewed live as they are happening. This is an aspect that has not been exploited yet. From the phrases that were created the idea of images being three dimensional has been used but not the fact that they are live or in "real time." As a result, the idea of "real time" was interjected with some of the previous ideas and the tag line for Holocept was created.

Another dimension in real time imaging

This phrase works well in imparting two key aspects of the holographic technology. One, that it is three dimensional not two dimensional as we know a typical monitor or screen to be but truly in a three dimensional space, and the other being that it is live. These are two of the biggest selling points for this company. With a tag line that emphasizes these two points, it is clear what the company's position is and where it is headed.

Letterhead and Business Card

When so many new businesses are being created, having a well designed letterhead helps demonstrate your company's commitment to business. Although the content of your letter carries the most substantial weight, the subconscious influence of a pleasing design can not be overlooked (Haller). This idea also applies and is carried over to the design of a business card that correlates with the letterhead. The business card may not contain the same amount of text a letter would but the limited information contained on the business card is crucial.

With the name, logo and tag line ready, different layouts were reviewed to determine which ones worked better. The first was the traditional layout, everything placed in the upper left corner (Figure 3-7a). Because of the amount of text, this layout looked a little cluttered. One solution was to move the address and contact information so it is separated from the name, logo and tag line. By placing it on an opposing side, a nice balance is created on the page so that one corner is not heavy with content (Figure 3-7b). This appeared to be more effective although placing everything along the bottom seemed more promising. This layout works well because all the weight is on the bottom which is what we associate with when we think of something being heavy. To add more interest to the design, a graphic was added behind the name and logo. This was a simple black bar to add contrast and make the design more dramatic (Figure 3-7c).

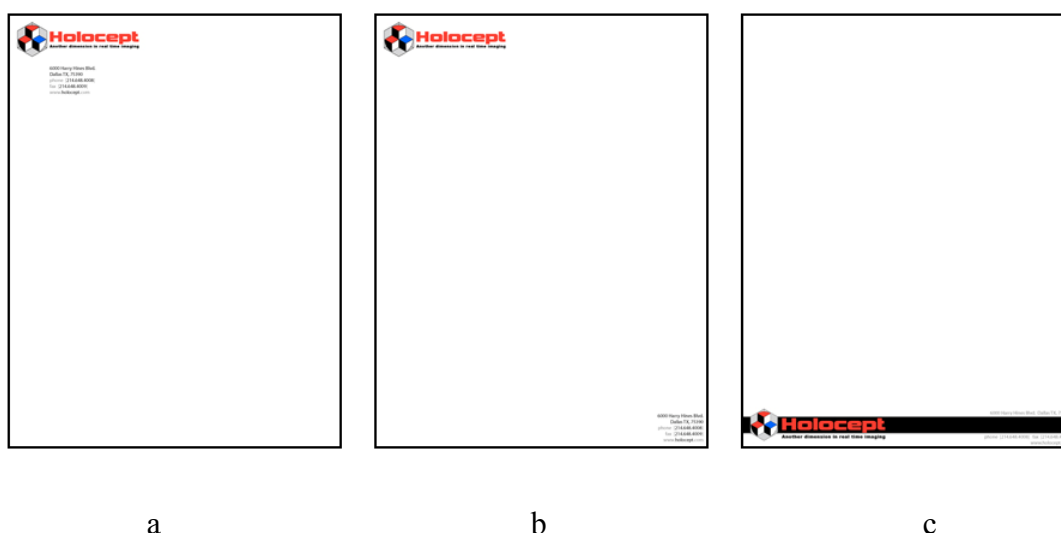


Figure 3-7. Letterhead layout design.

a) Traditional layout. b) Revised layout. c) Final layout.

The use of colored paper was also considered. There is, however, a problem that arises when using colored paper for letterhead, whether it can be legibly reproduced on a photocopier or fax machine. Because white reflects the most light, it is the best at being reproduced. If the paper color a letterhead is printed on is too dark or has a pattern, when copied it may become a shade of gray that makes text difficult or impossible to read.

Therefore, careful consideration was taken in deciding if colored paper should be used. To determine this, the paper was tested to see how it would photocopy and fax with text.

Although the paper was still very legible when the letterhead was photocopied, the same was not true when faxed. The colored background became a shade of gray that still allowed the text to be legible but future photocopies and faxes of these copied documents would not.

The business card design was fashioned along side the letterhead. While some of the criteria for letterhead design did not apply to business card design, such as the use of colored paper, as mentioned earlier, design consistency must be maintained between these two pieces. Consequently, as the letterhead design changed, so did the business card to match (Figure 3-8).

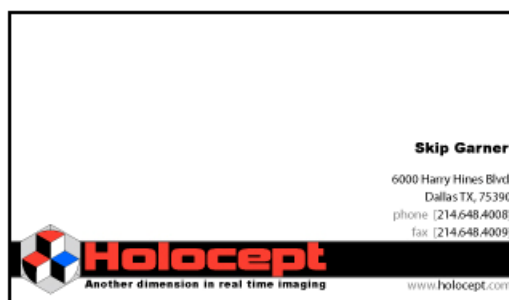


Figure 3-8. Business card design.

Business Plan

A business plan layout is different from the letterhead layout. The purpose of a business plan is to communicate specifically the strategy and foreseen future of the planned company. The same page layout and design techniques used in designing the letterhead and business card should also be applied to the business plan. This not only makes a page more appealing but the information will also be more organized and easier to follow.

The business page cover began as a very simple layout that included a mock logo and a block of images (Figure 3-9a). Although this layout could have served its purpose, with a

few changes a more interesting page was created. To begin with, the block of images were separated but kept aligned (Figure 3-9b). The space between the images became an element of the overall piece. More space is also included by removing a few images which may seem unnecessary but was done with purpose. This reflected the patterns that make up what is called an interferogram, which is what is used to make the holograms. Therefore this image layout is not only more visually interesting it also makes a direct reference to the technical concepts by its imagery and layout. A faded background image was added to help unify the business plan design with that of the web design (Figure 3-9c). This may not have been necessary for the business plan design alone but by doing so a visual connection is made with another part of the overall identity which is something we are looking to accomplish.

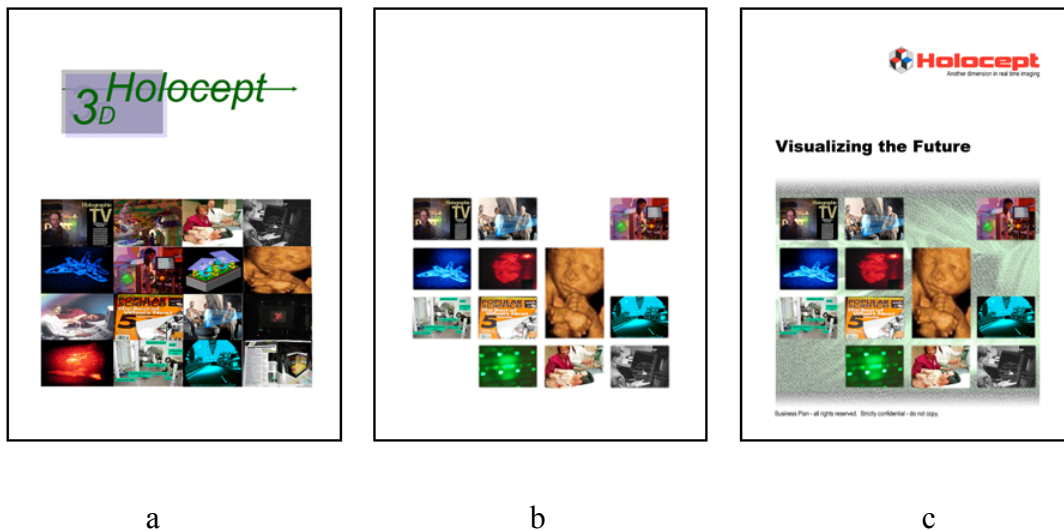


Figure 3-9. Business Plan layout design.

a) Initial design. b) Revised layout. c) Final layout.

Finally, the secondary pages were simplified to include only a header containing the name, logo and tag line. A few images from the cover page were also included to maintain consistency and a confidentiality statement was added in fine print along the bottom (Figure 3-10). There are several other possibilities for the design of the secondary pages however this layout was kept simple to allow room for content.



Figure 3-10. Business Plan secondary page design.

PowerPoint® Presentation

PowerPoint presentations are an essential tool in presenting information effectively and efficiently. Microsoft® PowerPoint® software provides a visual aid to help in communicating ideas. Because it is a visual aid, the same principles of layout design apply to help organize the information and make it visually appealing. There are some guidelines that

must be taken into consideration specifically for PowerPoint presentations but the principles of design still apply.

A PowerPoint presentation is a projected medium. Because of this, the information has to be legible to all viewers within the room it is intended to be projected in. The first method to achieve this is using an appropriate font and size. The typography guidelines for PowerPoint include using serif fonts for titles and sans serif fonts for content. To be clear and legible, titles should be 40 point size, a minimum of 36, and content 24, minimum of 18. The number of different font types should be limited to three. To emphasize text, a bigger font size, style, bold type or color can be used. Italics should generally be avoided because they are harder to read. Unless there is a specific reason for doing so, decorative or elaborate font styles should also be avoided as well as the use of all capital letters.

The organization of the material also contributes to its legibility. Organization techniques consist of including no more than one topic per slide and the use of an outline format to present the information, using bullets to separate ideas and numbers to show a ranking order or sequence of events. Center aligned text is not as effective as left aligned. Finally, you should not have too much text in the slide. Following a six by six rule, six lines of text with six words per line, is generally a good practice to help keep the amount of text to a minimum. There will usually be more text that needs to be displayed but this can always be split into several slides.

The background color should be kept neutral. Patterns make it difficult to read the text especially if there are a lot of gradients. Good contrast should be used with text, dark letters for light backgrounds and light letters for dark backgrounds. Tables, graphs or charts,

should be kept as simple as possible. Contrasting solid colors are bold and clear whereas patterns create optical illusions and can become confusing. Pictures and clipart should be used sparingly and with purpose allowing enough room around each illustration. Lastly, be consistent with the color scheme from slide to slide. A presentation is not based on the slides. The slides should be used to focus the attention of the audience (Guidelines for PowerPoint Presentations).

At the beginning of a PowerPoint presentation, a title slide is usually displayed. This serves a couple of purposes. One is to introduce the presentation and who it's by and another is to allow the presenter an opportunity to introduce themselves and briefly talk about what can be expected. For the Holocept design, some of the images used in the business plan cover sheet were also applied to the title slide (Figure 3-11a). The background image was also repeated to continue the visual consistency already established. A banner was created containing the company name, logo and tag line for the main slides. Once again to maintain consistency, the background image was included. Because this company is conducting research and development in a new technology, a few graphic details were included to give the design just a bit more of a digital appearance. The images that were used on the business plan cover were also applied to this banner, however, in this case it may be too distracting considering other images will be included as part of the presentations. Finally, a neutral background color was applied.

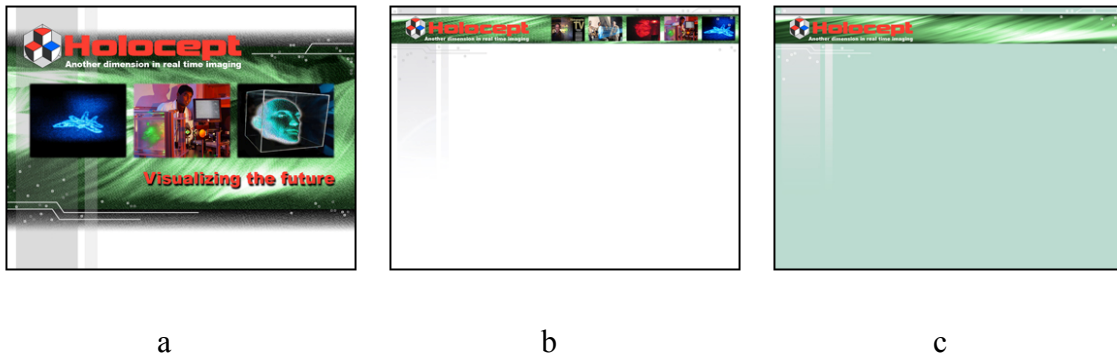


Figure 3-11. PowerPoint slides design.

a) Title slide. b) Main presentation slide design. c) Final design.

Web Site

The World Wide Web has become a household name since its introduction. People can do most everything online now from shopping to paying bills, doing research, communicating with others or simply entertaining themselves. Having an online presence is no longer a luxury but a commonplace tool for living and doing business. There are three aspects of a web site that need to be addressed before its design and creation can begin, the purpose, target audience and navigation.

A web site designed to teach or inform an audience will differ from one designed to advertise. Understanding the purpose will help make decisions faster and more efficiently throughout the design process by maintaining a focus on a single direction. The target audience must also be kept in mind along with the intended purpose. When creating an educational web site, for example, the content and language will differ if it's intended for the general public versus experts or researchers on the same topic. Each audience requires an

appropriate level of detail. Lastly, a web site must be easy to navigate. In the same way that a book is organized into chapters of related information that can be easily referenced to, a web site needs to be organized into sections of related content that are easily accessed. This includes creating consistent and repeating menus that will lead a visitor exactly where they intended to go.

The Holocept web site needed to serve a couple of purposes. First and foremost it needed to promote the new company. Second, it needed to recruit new talent to help continue its development. In order to do this, it needed to present information on the technology being developed not only to potential investors but also other laboratories, researchers and colleagues, future graduate students and post doctorate fellows.

Before any design was created, the sections to be included on the site were determined. The content needed to include information about the company, holographic imaging, the research and development being conducted, the laboratory where the research is carried out, the laboratory personnel, contact information, published papers and links to internet resources (Table 3-4). Dr. Garner and the staff developing the holographic technology put together the content for the Holocept web site. This included some of the images but more were created to supplement the content that was created and the other images that already existed.

home page	private page	opportunities
contact information	company mission	investors
links	company team	careers
about Holocept	research	licensing
The Holocept story	real image projection	publications
latest news	virtual image viewer	software

Table 3-4. Content categories for Holocept web site.

The fields that would be included were organized into relevant categories to narrow down the number of links to simply the navigation menus. This hierarchy included seven main page links that led to various secondary pages (Figure 3-12). These were as followed: About Holocept, Research, Opportunities, Publications, Contact Us, Private and Links. The sections About Holocept and Research contained general information about the company and its team members as well as more detailed information on holographic imaging and technology being developed. The Opportunities section presented information for those interested in getting involved with the company financially or otherwise. Links and Publications offered related internet resources and a listing of published works and magazine articles related to the holographic technology. The Contact Us section gave detailed information on how to get to the laboratory as well as email information and street address. A Private section was also included that would be password accessed only so that lab members could transfer and communicate sensitive information securely.

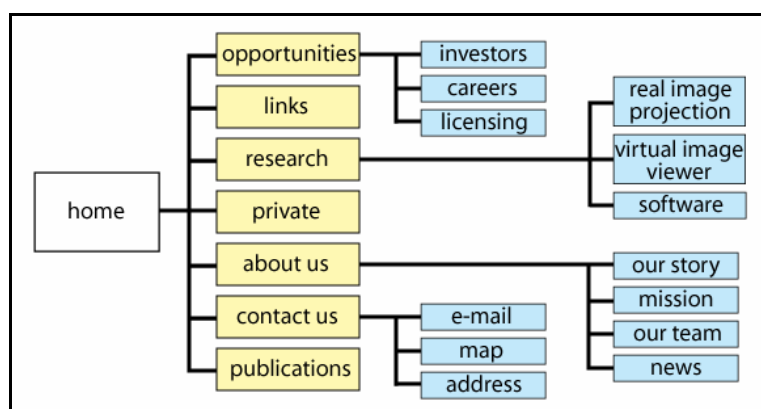


Figure 3-12. Navigation flow chart for Holocept web site.

Each main section of the web site was organized into a folder that contained all the web pages associated with it. These were then placed into one folder for the entire site that also contained an images folder and style sheet created for the web site. The image folder held all the photographs and illustrations used for the web site and the style sheet set the parameters used to define the appearance of the text.

The design layout for the Holocept web site was done using Adobe® Photoshop CS2® in order to take advantage of all the photo editing tools and capabilities it offers. This program also allows content to be exported and saved as html files using Adobe® ImageReady CS2® to optimize the pages and images so that they can be loaded on a browser as quickly as possible. All the content in the form of text was written and edited with Microsoft® Word®. This was then copied and placed into the html files for each page of the site along with pertinent images.

Macromedia® Dreamweaver® was the web authoring program used to create the Holocept site. This program works seamlessly with Adobe® Photoshop CS2® so that a design created in Photoshop® can be exported as an html format. This html file can be read by Dreamweaver® to add the appropriate content, hyperlinks and behaviors that a website requires.

The final navigation design was one that contained the navigation links horizontally along the top (Figure 3-13). This is actually not the best solution because there is a chance of having the menu items fall off the screen on the right if the viewer has a low resolution setting on their monitor. Non-the-less this design was selected based on the assumption that most new monitors would have a default resolution setting that would not encroach on the navigation links or the right side of the page. Also, a footnote would be included to indicate what the best resolution setting is to view this site. This may not be the best solution but due to the fact that we really cannot be sure of what settings any monitor may have, it is a good idea to let the viewer at least know what the web site was designed for.

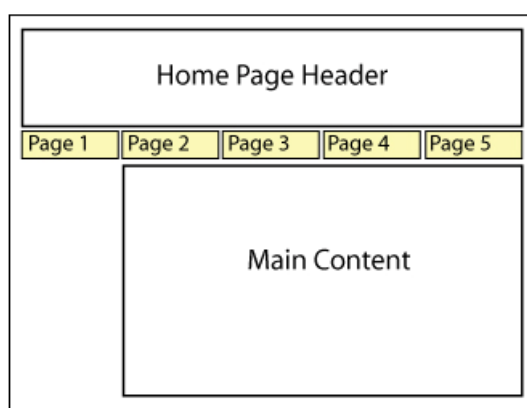


Figure 3-13. Navigation design for Holocept web site.

The color scheme used was based on the holographic device being developed which uses lasers to project the image. The two predominant colors used for this task are red and green colored lasers. Blue has also been used but green was selected since it seems to be synonymous with a laser. Red is also associated with lasers but because it is a warm color it stands out too much where as green recedes. Black was also selected due to the idea that the green laser is used to project an image on a black background so it can be seen. An abstract image served as the background reflecting these ideas and that of a laser being an oscillating wave of a particular frequency.

The first layout design consisted of the background image sitting within a banner that would include other images taken from the laboratory (Figure 3-14a). The name, logo and tag line were included along the top. The navigation links were split into two groups. The one along the bottom of the banner consisted of the links offering specific information about the company and technology. The one along the top offered links to contact information and other related web sites. The same design and color scheme was used for the top level and secondary pages. The banner was reduced in size to allow room for content but the navigation links remained consistent (Figure 3-14b).



Figure 3-14. Holocept webpage designs.

a) Main page. b) Secondary pages.

Although this design could have worked, the design just didn't seem to fit with a company that is working on high tech equipment. Some elements were included that made it look a bit more digital, graphic lines and oversized pixels, but it still lacked a dramatic element. Generally, dark backgrounds should be avoided because it may be difficult to read text. However, in some cases they can be more effective. By using a dark background, we reflect the idea of the holographic images being projected into an empty space. Not only that, but this allows the use of elements that have a metallic look to them. The dark background emphasizes the highlights a chrome bar would have. The end result is a design that looks more technical which suits the company Holocept better (Figure 3-15).



Figure 3-15. Holocept revised webpage designs.

a) Main page. b) Secondary pages.

Because the laboratory uses a dedicated server for other programming and computational tools used for experiments and data analysis, it was not necessary to find a server host to upload the Holocept web site to or to use the university's own server. Instead, an account was created, in the same way a server host would, to upload the web site to the local server. When this was done the URL that was reserved earlier, www.holocept.com, was linked to the account that held the web site files.

URL

URL stands for Uniform Resource Locator and is also referred to as a domain name. To be specific, a URL for a website would be <http://www.example.com> whereas the domain name is simply [example.com](http://www.example.com). A URL gives a website a specific way of being located, what is

called a web address. Every computer that is used to host a web site, called a server, assigns a unique IP (Internet Protocol) address to it. This is simply a series of numbers (56.192.034.166) but it is easier to remember a name than a series of numbers. For this reason a URL is used that can be associated with the IP address. This is not only much easier to remember but if one was to change the server host, the IP address would change according to the new server but the URL can remain the same. The only thing that needs to be done is to associate the URL with the new IP address.

Once a web site has been prepared, a URL, or domain name, must be determined so that clients can view it. There are many name provider web sites that can help with this task. Once there, the name desired for the site is entered and a results page reveals if that URL is available. For the Holocept web site, a search for holocept.com was done using the Google™ search engine. Since there were no results for this search, the URL was available. Using Yahoo! site for small business, the domain name holocept.com was acquired. Even though the actual Holocept web site was not yet created, the domain name was reserved.

Fax Sheet

The fax cover sheet is used to identify the sender and recipient of any documents that are sent. Its layout design is very simple. The information included in the fax sheet are: name, logo, tag line, company address, telephone and fax number, an area to indicate who is sending the fax and what their specific contact information is, the date, a space indicating the number of pages being transferred to insure that the recipient is aware of what they should

have received, an area to indicate who the recipient is, their contact information, and an area for any comments.

For the Holocept fax sheet, a colored document was design using the same banner created for the letterhead (Figure 3-16a). All the information that is required was placed to maintain a consistent appearance with the letterhead and business card. Because black and white are usually used with fax machines, this colored document would have to be changed to black and white. In doing so, the contrast between the name and the black bar becomes very low (Figure 3-16b). This low contrast may cause the name to blend in with the black bar once it is faxed. This theory was tested and the low contrast did in deed affect the clarity in which it is reproduced (Figure 3-16c). The same was true for the logo. This was easily corrected by adjusting the black and white document creating a higher contrast between the name and the black bar (Figure 3-16d).

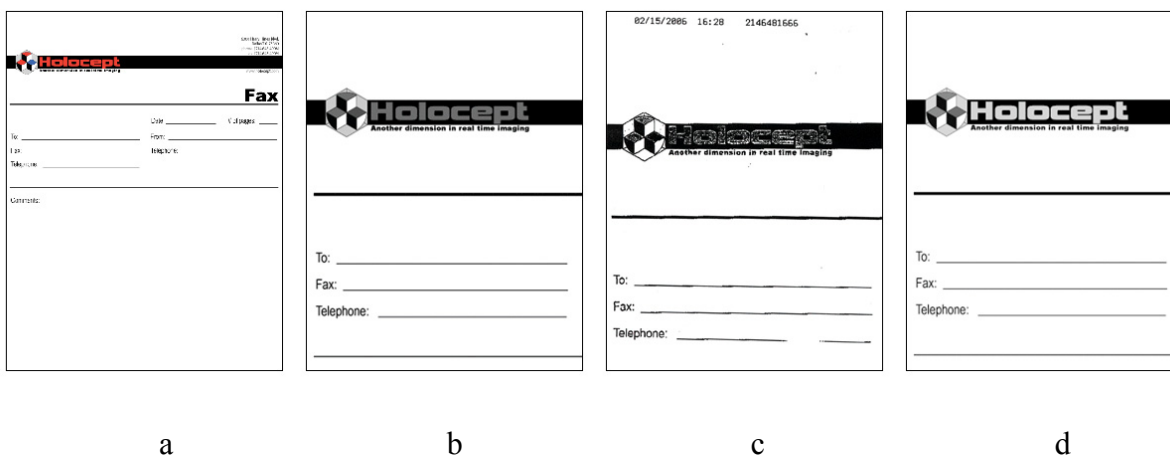


Figure 3-16. Holocept fax sheet design.

a) Colored design. b) Grayscale design. c) Facsimile test. d) Revised design.

Corporate Identity Design Guide Subject Matter

Creation of an identity for the holographic imaging company was essential in determining the necessary subject matter to be included in the guide. The experience not only provided a real world example of the process creating a corporate identity, including setbacks, but it allowed an assessment of the knowledge, skills and resources a laboratory researcher might have or lack in creating an identity themselves. This along with other guides designed for researchers, provided a better understanding of what approach works well in presenting the material.

Determining Researchers' Skill Level

Most of the researchers within Dr. Garner's laboratory had some experience either creating a web site, doing some type of programming for an experiment, or creation of a tool or maintaining or adding content to a web site. Everyone was extremely familiar with web navigation and communication. Although none had formal training in graphic design, most had some experience designing graphics and presentation slides for experiments performed or presentations given over results and discoveries from those experiments. As mentioned before, Dr. Garner did have experience forming spin out companies and developing corporate identities. From his experience designing identities and observations of researchers' lack of design expertise and judgment, the content for the guide on designing corporate identity was recognized and accounted for the particular needs of a researcher.

Defining Basic Concepts

Several concepts presented themselves each unique to every component of an identity package. Two of these remained consistent for every component and were used as a foundation and means of direction when designing them; audience and purpose. These two are the most important concepts to be kept in mind when creating any material. Without an understanding of what your purpose or who your audience is, one can not effectively communicate a message or design any piece of work. Without a clear purpose we are merely drifting along hoping to stumble into something worth exploring. Without a specific audience we are not directing our attention or concentrating our efforts toward a specific goal.

A project may have more than one purpose and audience but defining the ultimate goal streamlines its creation. The purpose of the identity package created for the holographic imaging company is to promote its presence as a viable company. The purpose of the design guide is to present the information on creating a corporate identity to researchers and assist them in their own identity creation. The intended audience for the corporate identity in promoting the company is potential investors and possibly other laboratories, researchers, colleagues and future partners. Finally, the intended audiences for the corporate identity guide are researchers interested in creating an identity for possible spin out companies. Audience is an important consideration because it gives us insight into who we are trying to reach and how we can go about it. We would promote a company differently if our target audience were average consumers versus potential investors.

Because every component is unique, the concepts and characteristics of each were addressed as they presented themselves. The information was divided into ten sections, one

for each component to be discussed: name, logo, tag line, letterhead, business card, business plan template, power point template, web site, url, and fax sheet. Characteristics and topics concerning each component were addressed within their respective sections and examples were given to demonstrate each idea. Additionally, a subsection was included that reiterated the same information as it applied to the identity created for the holographic imaging company Holocept. This offered a real example that remained consistent from section to section of the application of the techniques discussed.

Graphic Design Concepts

In addition to identifying basic concepts of each identity component, a section presenting basic graphic design concepts and principles was also included. From the beginning of this project, it was clear that visual design techniques needed to be discussed as they relate to each identity component. Researchers, for the most part, are not formally trained in visual graphics, illustration or design so discussions on effective graphic techniques were fundamental. During the production of the identity guide, it was observed that there was a repetition of the same information about design in different identity component sections. As the project progressed, it became evident that more was necessary in order to provide an explanation of the techniques used and advice on what works well. As a result, the section on design was created to fulfill this need. To organize the information presented, the graphic design section was divided into four topics: design elements, design principles, typography and technical matters.

The first topic in the design section, design elements, included a discussion of the visual tools that are used when creating images or a design. The tools mentioned include the use of color, line, shape, texture and space. These elements are the basic building blocks from which ideas are translated onto a design. General examples were incorporated throughout each discussion to help explain the use of each element or its qualities, characteristics and effects.

The second topic, design principles, is a discussion of the techniques used to help organize the visual content created by the design elements. The concept of design is synonymous with the idea of creativity. However, design also concerns itself with the visual organization of a piece. Creativity adds originality to a project but it must still be organized to be the most effective. The techniques mentioned include figure/ground relationships, balance, emphasis and gestalt theory. A brief explanation of each was also illustrated with examples to help clarify an understanding of each principle.

Typography, or designing with type, is concerned with the appearance of words and letters by their attributes which include font style, size, color and placement. In this section the different font styles were address not only to make the reader aware of these differences but also to demonstrate how to use them to create better designs. The principle of contrast as it applies to text and the properties of text were also discussed. These topics also included visual examples to very clearly illustrate the meaning and application of typographic techniques.

Several issues arose from the development of both the corporate identity and the graphic design materials. These could not be included within any specific section due to the

fact that they simply dealt with matters outside the scope of the material being covered and could apply to many or all the sections. Therefore, the technical matters section detailing concerns such as resolution and color gamut was included to help explain certain details one should be aware of when designing work to be printed or displayed on a computer screen.

As an attempt to streamline the presentation of the material, the graphic design section was created so that it could be cross referenced by hyperlinks from the identity component sections as a particular design element or principle was referred to. This approach was believed to be more effective for several reasons. First of all, it kept each section designated to a particular identity component free of excess information that would also be repeated in subsequent sections. Secondly, by isolating the section on graphic design, a more comprehensive, integrated and simplified discussion of these principles could be achieved. Lastly, because it is separated, this section could be used as an instructional or reference tool itself and applied to other areas requiring effective graphic design techniques and applications.

Corporate Identity Design Guide Format

The format used for this guide reflected the work of Marla Wilkins and her interactive guide on web design as well as other internet resources using a similar web based format. There are several advantages in using a web based format for creating guides such as this one. First of all, the interactivity of the guide makes it extremely easy to work with and include plenty of material without it becoming confusing provided that a good and redundant navigation

system is set up. Another advantage is accessibility from any location as long as a web connection can be established. Because of these advantages, the guide was designed as an interactive slide show allowing a viewer to follow the material presented one topic at a time from beginning to end or choose a particular subject and go directly to a specific section.

Designing the Guide's Interface

Application of Design Guide Topics to Design Guide

The same principles developed for the guide during the creation of the Holocept identity were applied to the design of the guide's interface. A horizontal format was used to reflect a slide show presentation where no scrolling would be necessary. A consistent design was maintained throughout each page. A few values of green were used as the primary color scheme along with black, white and gray for text and graphics as accents (Figure 3-17).

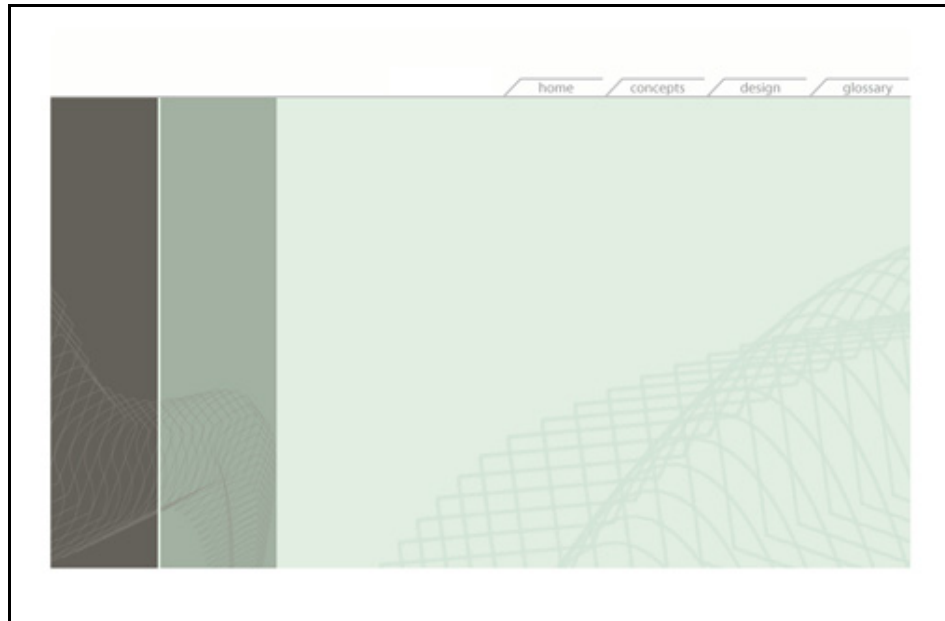


Figure 3-17. Identity design guide background.

The navigation used included a menu along the top that linked to the general sections and a menu along the left side that led to a specific section. Finally, a third menu was added beside the section menu that contained an outline of the topics being discussed within that section that could be linked to directly without having to view the entire tutorial if desired. Along the bottom right, a simple navigation was included that allowed the following and preceding pages to be viewed consecutively. A row of circles was included to provide a visual cue of the progress made within that section (Figure 3-18).

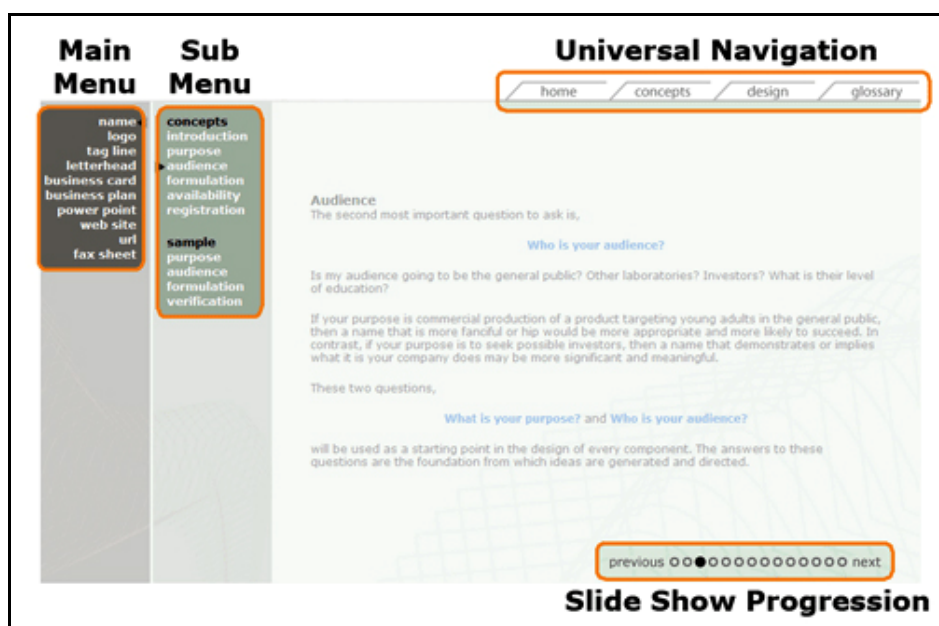


Figure 3-18. Identity design guide navigation menus.

Design Guide Setup and Software

The layout, content sections and top menu were designed in Adobe Illustrator and exported as html files using Adobe® ImageReady®. These files were then opened in Macromedia® Dreamweaver® in order to add content, create the additional menus, add interactivity and organize the pages that were created. This was a similar process used for the creation of the Holocept web site. Each page was designed with an aspect ratio of 955 x 600 pixels (1024 x 768, maximized). The examples that were included were sited along the text and a rollover was assigned to it. This allowed the viewer to see a specific example or step in a sequence as the topic was discussed. Links were also included as key terms or subjects were mentioned so

that further explanation of these could be accessed if desired. A marker along each menu on the left also indicated the progress made within any given section.

Addition of Supplemental Sections

To help demonstrate the application of the topics discussed, a subsection was added within each main section that used the identity created for Holocept as the example. This was supplemented with a discussion on its development and application of techniques previously discussed. A glossary section was created that defined terms used within the content discussed in case more a more detailed definition was needed. In addition, a foreword was included to help explain the purpose and navigation of the guide. Finally, a bibliography of sources was placed at the end of the guide following the glossary.

Creation of Figures, Illustrations and Text Content

Most of the subjects discussed in this guide required the use of figures or illustrations to better demonstrate its application. This was particularly important in detailing the process and application of the techniques discussed as they applied to the creation of the Holocept identity. The examples given were referenced in the text and a rollover action was applied to allow the figures and illustrations to be seen as needed. The figures and illustrations were created in Adobe® Photoshop® and Illustrator® and exported using Adobe® ImageReady® to optimize its file size and download time to make it appropriate for web delivery and screen display. The text content was derived from research conducted on designing corporate

identities and design principles and the application of these on the development of a corporate identity for the spin out holographic company Holocept. This content was compiled using Microsoft® Word® and imported as HTML text within Dreamweaver®.

Editing and Revision

During the design and development of the guide, a few elements were reconfigured to simplify the design and navigation. First, the section on design principles was separated from the corporate identity content to keep the identity content free of extraneous information that would not only be repeated in subsequent sections but also increase the content volume. Instead, hyperlinks were created when key terms were introduced that would lead the viewer to the design principles section and the particular topic being addressed for further explanation and illustration. A section was also added discussing technical matters relevant to resolution and computer displays. Secondly, some content on envelope design was corrected and revised due to discrepancies with actual practices and requirements set by the US postal service. Minor typographical errors were also corrected on all sections.

The guide was tested on several internet browsers, Internet Explorer® 6.5, Firefox® 1.0 and Safari 2.0, as well as on two computer platforms, PC and Macintosh. A few problems did arise with each browser. Because Internet Explorer® was used as the default browser when testing the design guide pages from Dreamweaver® as they were created, a problem that arose was a slight shifting of the arrows indicating the section and subsection the visitor was currently viewing. This was due to the settings assigned to the browser within each

computer. There was a similar, but less noticeable, instance when using the Safari browser for Macintosh computers. However, the Internet Explorer® browser for Macintosh would not load the background image on the concepts and design sections. A complete resolution to this problem was not reached and further research into it revealed that the Microsoft Macintosh Business Unit announced that Internet Explorer® for Mac would undergo no further development, and support would cease in 2005. As a result, Mac users were instructed to use the Safari browser. The only problem encountered with the Firefox® browser was that certain text, the headlines in particular, would blink on and off. This was resolved easily by changing the tag associated with that text using Dreamweaver®.

CHAPTER FOUR

Results

Method of Evaluation

After the completion of the Holocept identity and identity design guide, the guide was posted on the web to facilitate its evaluation. There was a varying body of panelists from around the country and Europe that included researchers and entrepreneurs who were sought after to participate in this evaluation.

Evaluation Audience

Fifteen persons were asked to participate in the evaluation of the identity design guide. These were part of the intended target audience. A few had some experience in either the process of creating a spin out company and/or the creation of an identity. They were all versed in computer and Internet navigation.

Evaluation Form

The evaluation form was created as a simple Word document and e-mailed to each evaluator. The form included instructions on accessing the identity design guide and how to fill out the questionnaire. The questionnaire consisted of two sections. The first section contained six questions regarding background information (Figure 4-1). The second included nine

questions evaluating the identity guide's effectiveness and value as a resource tool for other scientific researchers in the process of spinning out a company (Figure 4-2).

A Likert scale was used as the method of response which measures either a positive or negative response to a statement. The evaluator was asked to select one response from five: Strongly Agree, Agree, Neutral, Disagree, and Strongly Disagree. Finally, a space was provided for comments on anything that might not have been addressed in the questionnaire or overlooked.

1. What is your occupation or research position?

2. Have you ever created or helped create a spin out company?

If “yes,” briefly describe the company created.

If “no,” are you interested in creating a spin out company?

3. Have you ever created or helped create a corporate identity package?

If “yes,” briefly describe the identity created and method of creation.

If “no,” are you interested in creating a corporate identity package?

4. How familiar are you with the methods and tools used to create a corporate identity?

Very Unfamiliar	1	2	3	4	5	Very Familiar

5. How familiar were you with the methods and principles of graphic design prior to reviewing this guide?

Very Unfamiliar	1	2	3	4	5	Very Familiar

6. How familiar are you with the following software programs?

	Very Unfamiliar	1	2	3	4	5	Very Familiar
Adobe Photoshop							
Adobe Illustrator							
Adobe GoLive							
Adobe InDesign							
Macromedia Fireworks							
Macromedia Dreamweaver							
Macromedia Freehand							
Macromedia Flash							
Quark Xpress							
Microsoft Word							
Microsoft PowerPoint							
Microsoft Excel							
Microsoft Front Page							
Microsoft Publisher							

Figure 4-1. Evaluator’s background information.

1. The ID guide's navigation was clear and easy to understand.				
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

2. The concepts on creating a corporate identity were presented clearly and efficiently.				
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

3. I have been well prepared to design a corporate identity after reviewing the ID Design guide.				
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

4. I would use the ID design guide in the future.				
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

5. I would recommend the ID design guide to colleagues and other researchers interested in designing a corporate identity for a spin out company.				
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

6. The section on design presented the materials clearly and effectively.				
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

7. My understanding of the principles of design has increased significantly after reviewing the section on design.				
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

8. The section on design effectively increased my understanding of design principles and their application in creating a corporate identity.				
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

9. a. In your own words, state the purpose of the ID design guide.				
b. The ID guide accomplished its purpose.				
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

10. Additional Comments:				
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Figure 4-2. Identity design guide evaluation questions.

Results of Evaluation

Of the fifteen evaluations requested, only one was returned. Often researchers are focused on the science they are conducting or meeting their institutional responsibilities as faculty members. Considering this, however, the comments were considered valuable and will be discussed briefly.

Background of Evaluators

The targeted evaluators were either researcher scientists and/or entrepreneurs of technology companies. The one evaluator in particular that responded was a general manager of a biotech entrepreneur company. He had experience creating spin out companies and some experience developing corporate identities. He expressed that he was fairly familiar with both the methods and tools used in the development of an identity and familiar to some extent on the methods and principles of graphic design prior to reviewing the identity design guide. Although the main target audience was scientific researchers with little or no knowledge of identity design interested in creating a spin out company, the comments and feedback from this evaluator was extremely useful due to his experience.

Evaluation of Identity Design Guide

The guide's interface was found to be easy to understand and navigate. No problems in understanding its method of presentation were reported. This was also true for the content. It was agreed that its presentation was clear and efficient. After reviewing the guide, the

evaluator stated that he felt well prepared to design a corporate identity himself. The same was true when asked about the materials presented in the section on design. He felt his understanding on the principles of design and how they apply to the creation of a corporate identity had increased significantly. However, he remained neutral when asked if the section on design was presented clearly and efficiently.

When asked to state in his words what the purpose of the identity design guide was, the evaluator did not include a response and remained neutral when asked a follow up question if the guide accomplished its purpose. One assumption for this could be that the purpose was perhaps unclear or vague which would be supported by some of the comments that were included:

“Impressive work that I believe appeals to many users, but maybe also looses some of the core people you want to target, namely the university researcher, since a lot of them would probably find it complicated. . . If the audience for the guide is the average researcher, I would imagine that it appears rather detailed and technical (scientific). Accordingly, I predict that many researchers would find some guidance in the guide, but also be somewhat ‘frustrated’ from experiencing all the elements that goes into creating a corporate identity.”

Although the evaluator did feel better prepared to design a corporate identity and posses a higher understanding of design methods, principles and their application in the

creation of an identity, when asked if he would use this guide again to assist him in the future he remained neutral. He also remained neutral when asked if he would recommend this guide to colleagues or other researchers interested in creating a spin out company. As mentioned earlier, he stated that the guide seemed a bit complicated for a researcher who might not have any knowledge on the subject matter. As he put it,

“Maybe it should be simplified for the ‘man on the street’. . . As it is composed now, it maybe most appealing to the semi-skilled person in the field.”

The changes that were suggested included: 1) to use real life examples of corporate identities that are common or easily recognized as a means of relating the material presented and 2) to find a way of composing the guide so that it is used more than once. The idea of using “real life” examples was considered in the beginning. However, the better solution was believed to be the use of the identity created for the spin out company, Holocept. It was believed that this would allow more control of all aspects of an identity as it was developed from start to finish and could be presented as a working example of how the materials covered in the guide correlated with the design of a specific identity for a university spin out company.

CHAPTER FIVE

Conclusions and Recommendations

Accomplishment of Goals

The goal of this thesis was the creation of a corporate identity design guide to educate university based researchers on the fundamentals of creating an identity package for a spin out company. The objectives in order to reach this goal were 1) to research the steps necessary to develop an identity package for a spin out company, 2) to determine the needs and design skill levels of researchers wishing to create an identity by working with such a group in creating a corporate identity, and 3) to apply the information acquired to the design and development of a web delivered guide presenting the fundamentals of designing a corporate identity package to researchers. The objectives were met and the goal was accomplished.

Areas of Success

There were several areas of success in the undertaking of this thesis project. The first success was the gathering of information from the research conducted on designing a corporate identity and applying it to the production of an identity package for a university spin out company. Another success was the use of this identity package as an example for other researchers interested in creating an identity for their own spin out companies. The biggest

success was the creation of an interactive guide on designing a corporate identity package which included the example identity. In addition, the inclusion of a section on design principles which can be cross-referenced from the sections discussing the corporate identity package was also a success.

As noted earlier, The Development of an Instructional Module on the Basics of Web Design for Scientist Interested in Creating a Web Page by Marla Wilkins determined that the use of a hybrid slide show/web page format was very effective in presenting the material to its audience. A similar success is also reflected in this thesis project with the creation of the identity design guide Spin Out: a Researcher's Guide to Corporate Identity. Also stated by Ms. Wilkins was the successful application of several software programs in the design and creation of this type of guide which included Adobe® Photoshop®, Illustrator® and ImageReady®, Macromedia® Dreamweaver® and Microsoft® Word®. This success is reflected in this project as well. These programs work well together and offered no set backs due to incompatible file formats.

Room for Improvements

The identity design guide is intended for researchers in general and attempts to presents the information in a concise yet comprehensive manner. Researchers possess varying skill levels, knowledge or understanding of design principles, spin out companies, corporate identities or software programs. Some may need more detailed and extensive information if they are already versed in a particular topic. Others may find the information presented overwhelming

due to their lack of knowledge and understanding which may require a more condensed and simplified version of the guide.

A key point in the design of the identity guide was the use of an identity package from a university spin out company as a specific example for other researchers to follow and better understand the information presented. This was believed to be the best approach, however as noted in its evaluation, the incorporation of existing corporate identities from other well recognized and successful spin out companies may be a better solution. This may help emphasize the concepts presented and perhaps even make the information appear less foreign due to the familiarity of some of these “real life” examples. Including examples of what not to do may also emphasize these concepts.

Due to the lack of responses in the evaluation of the identity guide, there is not enough evidence to fully determine its effectiveness in addressing and presenting the concepts for creating an identity package. This is also true in ascertaining the effectiveness of the guide’s method of presentation and ease of use. More completed evaluations may shed more light into this but the actual effectiveness would be better determined by the use of the identity design guide by researchers in creating an identity for a spin out company. Their progress could then be evaluated to determine what areas seemed to be of great use and helpful from those that might be lacking and offer possible solutions.

Although there was only one response to the evaluation questionnaire, the comments were valuable and provided some insight for possible improvements. Additionally, the lack of responses may reiterate the need from researchers for quick access information. Often they are more focused on the science they are conducting to sacrifice the time required to explore

other aspects or issues that may become relevant to their research, such as developing a corporate identity package when the opportunity is presented.

In such a case, they may not look for this information until they are in need of it and this brings up the issue of how they may go about finding it. In order to examine possible solutions, a manuscript will be submitted to a journal that can be accessed using Medline. This manuscript will describe the aspects of the corporate identity guide and direct the readers to it which will be available via the internet. Another solution will be the use of keywords and meta terms upon submission to a server host to make the guide easily searchable from many popular internet search engines, which is a great benefit of designing a guide that can be presented and delivered online.

Despite the lack of responses and the room for improvement, the goal of creating a corporate identity guide for researchers was a success. Although its effectiveness may not be known for some time, this project does present information on creating an identity package with a specific example from a university spin out company. Addressing the issues for improvement and revising the guide will improve its value.

Recommendations for Further Study

There are a few areas for further study that this thesis has revealed. Revising this guide and creating two versions, one more concise and simplified and another more detailed and comprehensive, could better meet the needs of researchers. Evaluating how effective this guide is in assisting researchers in creating an identity package and a more focused and

detailed survey on how to better communicate similar information are two other areas that could be studied further.

Revision of Identity Design Guide

As previously noted, often a researcher will not have enough time to properly research the development of a corporate identity package. Revising the identity design guide created as part of this thesis and including other information that may become relevant to the idea of corporate identities could be beneficial to researchers as well. Information such as the increased use of PDF documents, the use of trademark sounds such as the NBC chimes or the Yahoo! yodel and the possibilities stemming from the increasing use of mobile devices with web access and Bluetooth technology. The revised content could then be used to create a “quick start” version and a more comprehensive version presenting design topics in relation with corporate identities and modern and future media.

Effectiveness of Identity Design Guide

This thesis explored the creation and presentation of a guide to help researchers design an identity package for a spin out company. One aspect that remained unanswered was the guide’s effectiveness in communicating the concepts addressed. To better understand this, analyzing how researchers use the guide in creating an identity would reveal important details on the guide’s effectiveness and the method of presentation. The method approached in the development of the identity design guide was modeled after another guide, The Busy Researcher’s Guide to Understanding Web Design by Marla Wilkins, whose format was

found to be functional and useful. However, the format employed was not the focus of the project. A more detailed examination on methods of communicating similar information would be of great benefit to the development of future teaching tools.

APPENDIX

Identity Design Guide

The identity design guide has been included with this document. To view the guide, navigate to the folder titled *IDguide*. Inside this folder, find the file titled *index* and double-click on it to open the guide in Internet® Explorer. The file can also be opened within this or other Internet browsers.

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VITAE

José Antonio Cabrera was born in Long Beach, California, on December 20, 1975, the son of Antonio Cabrera and Teresa Cabrera. He was raised in Wichita Kansas and after completing his work in 1994 at North High School, entered Wichita State University. He received the degree of Bachelor of Science with a major in general studies from Wichita State University in May, 1999.

During the following four years he pursued several interests including certification as a dive master, rock climbing, photography and preparation for medical school. Realizing and increased interest in the arts and a chance meeting with a former chemistry teacher who considered a career as a medical illustrator, José applied to and was accepted into the master's degree program in the Graduate School of Biomedical Communications at the University of Texas Southwestern Medical Center at Dallas in May, 2003. He was awarded the Master of Arts degree in Biomedical Communication in June, 2006.

José enjoys traveling to the desert southwest, camping and hiking, endurance sports, and seeking out new interests. He hopes to learn how to play the guitar, sail around the Caribbean, and to never grow up.

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