Research paper

Brand Management in SMEs: Conceptualization of Differences and Research Agenda

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Abstract

Purpose: The purpose of this paper is to contribute to a holistic conceptualization of how and why brand management concepts differ in the context of SMEs, and to suggest a research agenda for further investigation.

Methodology: The methodology is based on a qualitative approach focused on the perceptions and practices of brand management from the perspective of SMEs' owners-managers and marketing executives, involving the analysis of ten site case studies of the Portuguese footwear industry SMEs through in-depth interviews, observations and related documents.

Findings: The empirical results showed how SMEs' owner-managers approach brands in a different way and develop their own processes of branding, which allow them, in a simplified but relatively efficient way, to collect some of the benefits associated to brand building. Essentially, the results revealed that there is a link between certain characteristics inherent to owner(s)-manager(s), the intensity of their entrepreneurial orientation, the brand management tactics and brand performance in the long run.

Research limitations: Results need to be expanded and confirmed with other national and international SMEs from different economic sectors that are managing brands.

Originality/value: The paper emphasizes the current lack of a consistent, systematic theoretical framework and, above all, one that has been validated by empirical research on brand management practiced in SMEs. A contribution is made to build an entrepreneurial paradigm and theory of brand management in such enterprises, and a set of six theoretical propositions with implications concerning theory and management, aiming at a further investigation, is suggested.

Keywords: Brand management, Entrepreneurship, Small to medium-sized enterprises, SME branding, Research agenda.

Introduction

Brand building is a topic that has been at the forefront of contemporary debate and is subject to a transformation into a management philosophy in this century (De Chernatony, 2001).

An analysis of the literature concerning brand management reveals that there is a systematic tendency for conceptualisations and empirical research to focus on the case of large companies and consumer packaged brands that tend to be heavily advertised (e.g., Kapferer, 1992; Aaker, 1996; De Chernatony and McDonald, 1998; Davis, 2000; Clifton and Simmons, 2004; Keller, 2008). However, an increasing volume of academic and professional literature has been calling some attention to the fact that brand

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management[1] is an important theme not only for large companies that operate in mature product categories and use a vast number of brand specialists (consultants, designers and marketers). In fact, there has been an increased interest in the specific phenomenon of brand building (of services and products) in the context of small and medium-sized enterprises[2] (SMEs) (e.g., Kapferer, 1990 a); Keller, 1998; Abimbola, 2001; Krake, 2005; Merrilees, 2007; Ahonen, 2008; Bresciani and Eppler, 2010; Spence and Essoussi, 2010).

This reference literature asks for a better understanding in the sense that (i) every company, from suppliers to manufacturers, and retailers, regardless of their size, can adopt a brand policy before developing any marketing programme, with the purpose of migrating rapidly up the value chain and creating sustainable competitive advantages; (ii) the characteristics and needs of the SMEs' sector determine modifications in brand practices (which must be identified and conceptualised), since they aim at satisfying specific requirements; and (iii) although branding principles may be common to large and small companies at a conceptual level, at the operational level there may be some relevant differences with regard to principles that are not applied, or to the emphasis placed on specific elements of SMEs' brands.

Taking into account the increasing importance and opportunity of this topic, the purpose of this paper is to offer a review of relevant literature and to integrate the various contributions (both theoretical and empirical) concerning the following research problem:

RP: *How and why brand management concepts differ in the context of SMEs?*

The aims of this paper are more specifically:
- To identify how and why brand management concepts differ in SMEs within a holistic perspective;
- To contribute to the knowledge on this topic by disclosing major empirical findings obtained within a doctoral research; and
- To propose a research agenda that would expand the frontier of knowledge in brand management in SMEs, and contribute to develop a sound theoretical framework within an entrepreneurial brand management paradigm[3].

The organisation of this paper is the following: first, a literature review on the importance of the brand management topic in SMEs, the lack of research related to the topic, and the distinct nature of its management style and brand management is presented. The methodology used is then explained, followed by an analysis and discussion of major empirical evidence taken from the author's research, including the proposal of a theoretical model of brand management in SMEs and a set of derived propositions. The paper closes with the identification of some relevant implications and a research agenda for further investigation on the research problem.

Literature review

Importance of the brand management topic in SMEs

Among the reasons reviewed in literature for brands to be considered strategically relevant in the area of SMEs' marketing, the following should be pointed out:
- SMEs have to recognise worldwide a new era of intense global competition and have to confront the same challenges (globalisation, deregulation and advanced technologies) that large multinational companies are facing, since the majority of these companies is subject to the rules of international competitiveness (Bedbury, 2002). Among these rules, the following should be mentioned: the need to fight more aggressive competitors, the constant technological innovations and political

dynamics, more demanding and better informed consumers, and markets that are aware of the effects of globalisation;

- Brands can perform an important role in market situations in which it is more difficult to compete simply relying on the product quality or price basis (e.g., Simon, 1996);
- The only way SMEs can reduce their vulnerability to distribution giants and ensure that they are sought after by the market is building a brand which is well-known and with a specific image to the target public (Badoc, 2001; Kapferer, 2002);
- The creation of a brand image can be an effective method of fighting the competition of large production companies, allowing some small-scale companies to escape the vulnerable condition of mere subcontractors (Badoc, 2001; Merrilees, 2007; Bresciani and Eppler, 2010).

Because of external events, competitive market pressures and changes in industries, many SMEs need to find a focus and direction. Thus, new marketing instruments (such as the brand) are being adopted to make them more competitive. In this context, branding can be considered an economic process already used or still to be used by some SMEs to gain market power through a differentiation of products or services, making these profitable and allowing companies to stay ahead of the competition. Some empirical evidence supports this. For instance, Doyle (1990), after collecting evidence about strong brands, concluded that a small brand can be profitable, and that a strong brand in a niche market can achieve a higher level of profitability than a strong brand in a large market. SMEs should aim at building strong brands that dominate their market segments and bear in mind that niche brands can be profitable, as long as they are strong within their own target markets (Randall, 2000:17) and ensure a continued commercialisation of quality products and brands.

Empirical evidence also showed that, through internationalisation, niche brands built by SMEs may develop and become larger businesses than many non-international generic brands (Simon, 1996). This author argues that opting for the brand is rapidly transforming the way many SMEs products are marketed and promoted and how these companies are being run. Such a transformation is reflected on the way many industrial SMEs are defining and managing their brands for the future, and it is possible that brands are quickly becoming their main competitive activity. With this intention, Mazzarol and Ramaseshan (1996:185) demonstrated in a study on SMEs' marketing activities in Western Australia that there is a statistical relationship between company success and the use of certain marketing practices in small companies, including the development of brand equity.

Following such perspectives, the analytical point of view adopted is based on the following two fundamental assumptions: (i) SMEs are essentially distinct from large companies (e.g., Brooksbank, 1999; Carson and Gilmore, 2000; Curran and Blackburn, 2001; Gilmore et al, 2001; Hill and McGowan, 1999; Hulbert et al., 1998; Stokes, 2000), and (ii) conventional brand management theory is adapted to the characteristics and needs of large companies. In particular, there has been a gap between academic marketing theories and the way marketing is practised in SMEs (Carson, 1990) for a long time, and it would seem that the same is true for conventional brand theory. This situation reflects a need to interpret the phenomenon of branding in a way that is more appropriate to the specific context of SMEs, while questioning the generalisation of brand management models and concepts proposed in conventional brand literature (i.e. to evaluate their external validity) and analysing the main brand conceptual differences in SMEs. The fact, that knowledge concerning marketing management processes, namely in terms of real marketing practices in SMEs, is still very limited, fragmented and superficial (Carson *et al.*, 2001:29). In particular, the phenomenon of brand building in this context is under-explored, having received very little attention so far, despite the

fact that it has been acknowledged that an increasing number of SMEs are being forced or induced to follow brand policies.

In short, the topic of brand management in the context of SMEs is particularly important considering: (i) the high relevance of the SMEs' sector to the national and global economy, and to employment and innovation (Graham, 1999; Day, 2000); (ii) the increasing phenomenon of brand experiences in SMEs of most developed economies, where the brands of such companies are important components in their differentiation strategies as possible sources of sustainable competitive advantage and instruments for the creation of a market "indispensability"; (iii) the lack of significant scientific research on the topic; and (iv) the relevant interest in potential applications of results from an in-depth research.

Lack of research related to the topic

Several research recommendations have been found in literature related both to brand and to how brand management processes could and should be considered in the context of SMEs. For instance, one of such priorities for the academic research identified and disclosed by the Marketing Science Institute for the period 2002-2004 was the study of "niche *versus* mass market branding*"* (p. 5). Normally, SMEs seek to serve niche-type markets and it is in this area of activity that they build their brands and develop their brand activities. The recommendation of Shipley and Howard (1993:65) should also be taken into consideration. This means that "future branding research should account for the effects of firm size...".

In fact, there is a clear knowledge gap concerning the way branding processes are affected by differences in company size and management challenges, and the effects caused by the brand in the SMEs' sector. Until now, only some of the differences in smaller scale companies have been studied (Hamilton and Lawrence, 2001; Paolillo, 1984). The recommendation made by Carson and McCartan-Quinn (1995:30) concerning the marketing problems of small-scale companies is also important, with regard to the fact that "there is a need for meaningful 'practitioner friendly' descriptions of marketing theory".

These authors made a recommendation for a large scale research into the specific reality of the SMEs, because "practice is enhanced and improved by theoretical/formal frameworks...", and a special effort should be made at "broadening awareness and *conceptualising intuitive actions*".

This topic is equally consistent with one of the research priorities identified by Keller (2001:5; 2002:171) and concerning the need to develop more refined models for specific applications in branding. This would allow a more in-depth understanding of the similarities and differences for different areas of application in a way that could be adjusted to the individual user's needs (Keller, 2000:20). Other recommendations made in literature were also considered, such as the need of contributions to improve the understanding of brand management processes through empirical studies (Barwise, 1993:102-3; Louro and Cunha, 2001:868), and the need to carry out empirical research on how to manage successful brands (Hankinson and Hankinson, 1999:136). Finally, Ahonen (2008) suggested "that corporate branding issues could be more often utilised and researched among SMEs".

In short, there is a need for a significant future debate and development related to this topic. The aspects of branding content seem to be the dominant research area in such literature, while research on real SMEs' brand management processes and practices has attracted little attention. Many papers seem to rely solely on the experience of their authors and unsystematic case study analyses.

SMEs have a distinct management style

The literature review has revealed that the concepts and conventional brand management models have essentially derived from the perspective of the large companies' reality. Such concepts are thus based on assumptions which best suit the characteristics of larger-size companies, namely: (i) rationality of behaviours and procedures; (ii) use of formalised brand management processes ensured by individual professionals or within a team (use of the traditional figure of brand manager or other more or less complex organisational structures and solutions); (iii) holistic and strategic approach to brand management, with an explicit brand strategy integrating the formal plan of corporate strategy; (iv) consistent use of marketing programmes involving an intensive use of mass media to build and sustain the brand; (v) development of systematic activities of measuring brand equity and evaluating brand performance, involving sophisticated monitoring indicators and studies.

This literature analysis also served to show that branding varies in practice (and in theory) within different economic sectors (De Chernatony and McDonald, 1998), whether they are consumer markets, manufacturing markets (Mudambi et al., 1997), services (De Chernatony and Dall'Olmo Riley, 1999; De Chernatony and Segal-Horn, 2001) or retail markets (De Chernatony, 1989). Some empirical studies also emphasise that differences in the organisational demography can influence approaches to brand building and brand management (e.g., APQC, 1999). As we have seen, conventional concepts of brand management (specifically those related to brand conception, brand organisation, brand strategy, brand building and brand evaluating and improving) do not fit in with the reality and specific business practices of small-scale enterprises.

SMEs' marketing literature shows that this type of company has a distinct management style, essentially characterised by: (i) an emerging, non-planned nature and personalized in the owner-manager figure, who normally has a prominent role in management; (ii) independence of performance, property, action scale and, above all, operational sphere; (iii) limitation of resources and budgets; (iv) marketing practices with specific characteristics and less explicit knowledge; and (v) difficulty in attracting and keeping competent employees (e.g., Carson and Cromie, 1989; Hills, 1994; Brooksbank, 1996; Stokes et al., 1997; Coviello et al., 2000).

While large companies are normally exemplified through the power of their brand marketing communications, empirical research has shown that SMEs are rarely involved in formal marketing activities to promote their products. In practice, SMEs seem to distinguish themselves by developing niche markets and using a more creative, aggressive marketing and by being based, above all, on more informal internal mechanisms aimed at increasing innovation and building a reputation for their products (Stokes, 2000).

Research on the nature of brand management in SMEs

There is a lack of an established literature basis, which might identify the relevant connections and establish the nature of brand management in SMEs. The interest in this topic has been increasing (mainly in the last two decades), involving the contributions of both academic researchers (e.g. Kapferer a), 1990; Williams et al., 1991; Egan et al., 1992; Shipley and Howard, 1993; Keller, 1998; Lodish et al., 2001; Krake, 2005; Merrilees, 2007; Bresciani and Eppler, 2010; Spence and Essoussi, 2010) and marketing and brand consultants (e.g. Simon, 1996; Morgan, 1999; Hill and Rifkin, 2000; Dickinson, 2001; Trout, 2001).

The limited available literature on branding deals mostly with consumer or industrial markets. Among such literature, some works approach SMEs' branding more or less laterally (e.g., Kapferer, 1990 b; Egan et al., 1992; Shipley and Howard, 1993; Simon,

1996; Koehn, 2001), and others contain particular theoretical contributions to SMEs' brand management (e.g., Kapferer, 1990 a; Keller, 1998, 2003; Abimbola, 2001; Bergvall, 2001; Dickinson, 2001; Lodish et al., 2001; Kapferer, 2002).

Four central ideas have been elicited from the works reviewed, and may be summarised as follows: (i) there are significant differences among brand management perceptions and practices in large and small companies (Shipley and Howard, 1993); (ii) brands will only be accessible to some SMEs; ((iii) brand management may play an important role in SMEs' competitiveness (Williams *et al*., 1991; and (iv) there must be differences in the emphasis given to the manifestation of specific aspects of SMEs' brand management.

Based on the literature review, a synthesis of conspicuous brand management differences in SMEs was made, highlighting the relevant contributions identified (see **Table 1**). This theoretical framework helps in seeing the problem of brand management within an SME context. More precisely, a major contribution is the organization of the (scarce) existing theory and empirical findings in brand management within such a context around five analytical categories (brand conception, brand organization, brand strategy, brand building, and brand evaluation and improvement), so that further theoretical developments and empirical studies can be made based on such a framework. This is often more useful to managers than theories, and a forerunner to actual theory building (Day and Montgomery, 1999).

Table 1 – Synthesis of brand management differences in SME

Categories	Differences in emphasis	References
Brand Conception	• Focus on clear, innovative brand concepts and not on consumers.	Morgan (1999); Bergvall (2001)
	• Need to deeply understand the strengths and challenges caused by bigger brands and take advantage of their weaknesses.	Bergvall (2001); Dickinson (2001)
	• Relevance of tacit knowledge and common sense in brand management processes.	Simon (1996); Abimbola (2001)
	• Brand values of a more functional, symbolic and implicit nature.	Dickinson (2001); Spence and Essoussi (2010)
	• Brand vision as a personal vision of owner-manager, not always articulated but adaptable to new situations.	Morgan (1999); Dickinson (2001); Merrilees (2007); Spence and Essoussi (2010)
Brand Organization	• Brand leadership taken over by the owner(s)–manager(s), concerned with never delegating such responsibility.	Simon (1996); Hill and Rifkin (2000); Dickinson (2001); Krake (2005); Merrilees (2007)
	• Individualized and improvised brand decision-making, mainly rooted upon experience, dynamism and intuition of owner(s)-manager(s).	Koehn (2001); Krake (2005)
	• Need of motivated and loyal collaborators, who also have some functional flexibility, even though a low specialization on brand management.	Bergvall (2001)
	• Use of flexible and fast practices of brand organization and management.	Morgan (1999); Koehn (2001)
Brand Strategy	• Gain of leadership positions within local, regional or global markets, focusing on narrow and concentrated markets, with early integration of the international dimension.	Simon (1996); Bergvall (2001), Patten (2001); Kapferer (2002),
	• Irrelevance of creation of a brand system.	Lodish *et al*. (2001)
	• Innovative and creative brand strategies based on the definition of a brand essence that is easy to implement.	Morgan (1999); Bergvall (2001), Dickinson (2001); Merrilees (2007)
	• Choice of a generic brand strategy according to the enterprise's characteristics, namely: a) the niching strategy, b) the free-riding strategy, and c) forming strategic alliances.	Lee et al. (1999); Dickinson (2001)
	• Employing a rather corporate branding strategy can be an efficient means to build brand equity, although the focus may be on a major family brand.	Keller (2003); Merrilees (2007)
	• Building of a simple and consistent brand identity based on attractive and easily recognizable visual images.	Bergvall (2001)

Brand Strategy	• Well-integrated and consistent use of a set of brand elements that enhances brand awareness and brand image.	Keller (1998)
	• Preferential use of a brand name belonging to an actual living person directly or indirectly behind the enterprise.	Dickinson (2001)
	• Differentiation of brand products through perceptible innovations and relevant contributions to diversity, authenticity and local flavour.	Dickinson (2001); Kapferer (2002)
	• Avoid competition with main products of bigger brands, aiming rather at creating and leading new product categories quickly and easily recognized by consumers.	Morgan (1999); Hill and Rifkin (2000), Trout (2001)
	• Adoption of innovative and subtle brand positioning that takes advantage of weaknesses and failures of big brands.	Dickinson (2001)
	• Emphasis on building only one or two strong brands.	Keller (2003)
	• Leveraging as many secondary associations as possible, especially those that help to signal quality or credibility.	Keller (2003); Spence and Essoussi (2010)
	• Investment in the brand as long as it has a positive short-term incremental impact on the brand's revenues.	Lodish et al. (2001)
	• Spur growth through various brand diversification strategies, consistent with the company's capabilities	Spence and Essoussi (2010)
Brand Building	• Implementation of creative and consistent brand marketing programmes, focused on one or two main brand associations.	Simon (1996); Morgan (1999); Bergvall (2001); Keller (2003), Spence and Essoussi (2010)
	• Creation of a distribution network through *de facto* push strategies and exploration of commercial leverage effects, without overlooking possible pull campaigns to attract clients' attention and create demand.	Kapferer (2002), Keller (2003)
	• Concern with sales activities at stores, aiming at increasing brand visibility through the enlargement of the range of products.	Kapferer (2002)
	• External communications based on direct contacts with clients, personal networks and word-of-mouth, public relations and sponsorships and other initiatives designed for the media.	Simon (1996); Morgan (1999); Bergvall (2001); Koehn (2001); Kapferer (2002); Keller (2003)
	• Use of innovative packaging as a substitute for advertising campaigns.	Keller (2003)
	• More flexible, personalized and creative consumer services than those of big brands aiming at providing unique experiences and quicker responses.	Bergvall (2001); Dickinson (2001)

Brand Evaluation and Improvement	• Focus on the creation, reinforcement and nourishment of special and direct brand relationships with clients, with the active co-operation of collaborators.	Martz Marketing Group (2002)
	• Brand tracking placed upon simple indicators, involving customer satisfaction surveys, as well as periodic readings from potential customers on how they perceive the product offers' value *versus* its competition.	Lodish et al. (2001)
	• Tracking brand equity should be observed more in spirit by many entrepreneurs.	Lodish et al. (2001)
	• Reciprocal learning with clients and own mistakes and implementation of quick adjustments is crucial.	Koehn (2001)
	• Development of a multiplicity of incremental innovations in products, processes and technologies that simultaneously satisfy the needs of distributors and final clients, and support brand equity management.	Simon (1996); Abimbola (2001); Dickinson (2001); Lodish et al. (2001); Kapferer (2002); Merrilees (2007); Spence and Essoussi (2010)

Source: Author

Methodology

A *qualitative/interpretative approach*

Considering the lack of theoretical development of the phenomenon under study, its complex nature and the need to be investigated in a natural context, a qualitative research approach was adopted. The importance of a detailed qualitative research lays in the need to understand phenomena and gain significant insights about circumstances and changes (Carson and al., 2001). Gummesson (2000) advocated that from qualitative studies "has come a good deal of empirical and theoretical advancement as well as critical and useful interventions into organizational functioning" (p. ix). But Carson and al. (2001) pointed out that "whilst qualitative research will allow a statement about what occurs in a given context, a 'general' statement is better achieved by a more positivistic approach using quantitative methodologies, which may if required have derived its frameworks from qualitative research" (p. 31). Several authors have suggested that to investigate SMEs a qualitative approach is more suitable: e.g, Hill and McGowan (1999) and Curran and Blackburn (2001) defended that analytic induction using cases studies may have (and has had) an important role in small business research.

Justification of case study methodology

The case study technique has been chosen to generate theory, because its "qualitative nature is a particularly rich way of understanding marketing behaviour in a situation that has not previously been well articulated or generalised" (Merrilees and Tiessen, 1999, p. 326/7). The literature review on SME research showed that small business research has actually been more close to some variant of the inductive rather than a hypothetic-deductive approach (Curran and Blackburn, 2001, p. 43). According to these authors "case studies are particularly popular in small business research", and Yin (1994) clarified that a case study method must be used when the researcher wants "to cover contextual conditions" and as a research strategy, the case study: 1) copes with the technically distinctive situation in which there will be many more variables of interest than data points; 2) relies on multiple sources of evidence; 3) benefits from the prior development of theoretical propositions to guide data collection and analysis (p. 13). We followed the suggestion made by Curran and Blackburn (2001) that "in practice, most small business research will have an element of solid theory in the fieldwork but the bulk of the analysis and interpretation of the results will take place after the fieldwork is complete" (p. 89).

The definition of case study research methodology as proposed by Perry (1998) as "a research methodology based on interviews...involving a body of knowledge" (p. 786) has been adopted. The building of theory from case studies has the following strengths: possibility of generating new theory by juxtaposing contradictory or paradoxical evidence, the emergent theory can be tested (as assessed during case analysis), and the resulting theory is very similar or valid because it is linked to real cases (Larsson, 1993). The concept of theory proposed by Curran and Blackburn (2001, p. 43) was also adopted, which means that the propositions move together with additional and linking statements "which form an overall interpretation but with a much lower emphasis on prediction" (p. 52).

Since the phenomenon of branding in an SME context is still little explored, the nature of this investigation was characterised as exploratory and descriptive. This implies that the main questions answered in this investigation were "what" and "how" (and, in some cases, "why"). According to Easterby-Smith et al. (1991), human action (especially in the context of marketing) derives from the sense of perception that people have of

different situations, instead of being a straight answer to external stimuli. Therefore, the prime aim of this investigation was to obtain insights based on the perceptions and real life experience of brand owners and brand managers of SMEs in the Portuguese footwear industry, and to outline their universe of meanings, attitudes and values. We also interviewed advertising agents, industrial personalities and marketing consultants.

Description of the methodological framework

It was adopted the methodological framework of Eisenhardt (1989) in case studies that requires: clearly defined research questions, a deliberated method of case selection, the use of a semi-structured protocol to ensure a consistent method of in-depth interview in each case, the development of a *gestalt* model in the first instance, a well-defined standard of criteria, an analysis of cases in comparison with this standard, whether in within-case or in cross-case analysis, comparison with the relevant literature and ending up with the formulation of the new theory. A degree of flexibility was allowed in each case to allow the exploration of special questions applicable to that case.

In the research, the existing theory played an important part in the preparation of case studies and in the analysis of data obtained from case studies. In fact, Eisenhardt (1989) pointed out that a priori constructs are acceptable in empirical qualitative investigation, since their origins are firmly rooted in literature or experience.

The unit of analysis was the set of perceptions and practices of those involved directly or indirectly in brand management in SMEs. The case studies were analysed in accordance with the recommendations of Miles and Huberman (1994).

Number of cases and selection criteria

Ten cases of footwear brands of Portuguese enterprises were studied and thirty face-to-face interviews were carried out involving owner/managers and marketing executives, officials from the Sectorial and Technological Centre of Foot-Wear Association, and other organisations related to the sector, as well as consultants and other brand specialists closely related to the support of SMEs. The number of cases chosen was considered sufficient to offer the needed balance between breadth and depth of experiences on branding, while being small enough to allow an in-depth examination of the detailed processes of brand activity, yet large enough to include a variety of business types of different ages and brand analyses.

Each case was selected according to the following criteria: (i) *dimension* (larger or smaller SMEs); (ii) *company's foundation date* (older and more recent companies); (iii) *commercial range of action* (companies with an exclusively international commercial activity and other nationally-oriented companies); (iv) *geographical location* (companies with different geographical locations in the North of Portugal); (v) *being involved in building brand*(s) at least in the last decade; and (vi) *owner/manager showed willingness to participate* in the investigation.

A logical replication rather than sample logic was preferred, and the criterion of representation, as advocated by various authors, was not followed (Yin, 1994, Stake, 1994). Among the strategies of purposeful sampling (as opposed to random sampling) proposed by Patton (1990), the "maximum variation" sampling was adopted, since we believe that this was the most appropriate for the research objectives.

Considering that the case study involves methodological triangulation and multiple visits to one or more firms, the following mix was used: interviews (unstructured and semi-structured, single and repeated) with one or more types of people in the firms; respondent diary keeping; the collection of documentary data; contacts with the firm's suppliers and providers of support services, namely in branding advice and advertising agencies.

With the purpose of a good understanding of the studied phenomena, in-depth interviews and analysis of a few sources were conducted, alongside with qualitative and thematic, individual and face-to-face interviews, using a semi-structured interview guide format, which was unique to each group of respondents. The group of respondents was composed of ten owner-managers of SMEs, and there was another group of twenty contextualized actors (namely academics, sector and management officials, experts, and brand and marketing consultants for the SMEs), to triangulate information and obtain some more explanations. Each owner-manager was invited to describe their practices and perceptions related to the management of their brand(s), with a view to interpret their meaning and identify critical success factors in the management of their SMEs' brands. In addition, there was an analysis of other sources (documentation and reports' analysis, and observation), which allowed to obtain an appropriate amount of data for analysis.

Procedures for the analysis of case studies

In data analysis, first of all an individual analysis of each case was carried out, followed by a cross analysis of the cases. The analysis of data and the conclusions reached at the end of the research were based on the analysis technique known as "pattern matching", which is considered the most appropriate (Yin, 1994). A framework containing brand management concepts identified in literature was used in the research to analyse brand management in SMEs. These principles were considered as 'sensitising' principles' to branding in SMEs, because of our commitment to a non-positivist research.
Finally, in case analysis the software QSR N6 Student - A version for 2002 NUD * IST was used. The use of this software was advocated by Gummesson (2003), who recognized that it can increase the speed and efficiency of the data interpretation process.

Analysis and discussion of the empirical evidence

Specificities of brand management in SMEs

Empirical results on brand management in SMEs revealed that, in practice, the main limitations this type of companies face seem to be related to their specific style of management (entrepreneurial or not in nature), to possible attempts of inadequate use of brand strategies best suited to large companies (namely due to the inexistence of SMEs' brand management models), or the need to manage some brand activities which are more difficult to implement and control.

Essentially, the major findings have shown that brand management within the context of SMEs seems to be distinct because *it is related to the intensity of entrepreneurial orientation for the brand as shown by the owner-manager, and because the brand is especially a result of his/her personality*. Accordingly, the consistent development and maintenance of a high intensity of entrepreneurial orientation for the brand by manager(s)-owner(s) has been identified as the critical challenges for a long-term successful performance of brands managed within SMEs.
The construct of *entrepreneurial orientation for the brand* is defined as the attitude and business behaviour associated with proactivity, innovation and willingness to take calculated risks especially related with brand creation and building. It is a multidimensional construct, whose focus is placed in its composite dimension, i.e. including those three variables simultaneously. *Entrepreneurial intensity* results from the combination of the level and frequency of entrepreneurial orientation. The *level of entrepreneurial orientation* is a variable defined by the balance between proactivity, innovation and willingness to take risks.

In a SME with a high entrepreneurial orientation for the brand, decision making is catalysed by a strong leader with the ability to uncover technically and commercially viable brand opportunities, and there is an active involvement in terms of brand innovations, and the adoption of risky initiatives and proactive innovations. The *frequency of entrepreneurial orientation* is related to the number of entrepreneurial initiatives for the brand that are triggered over time.
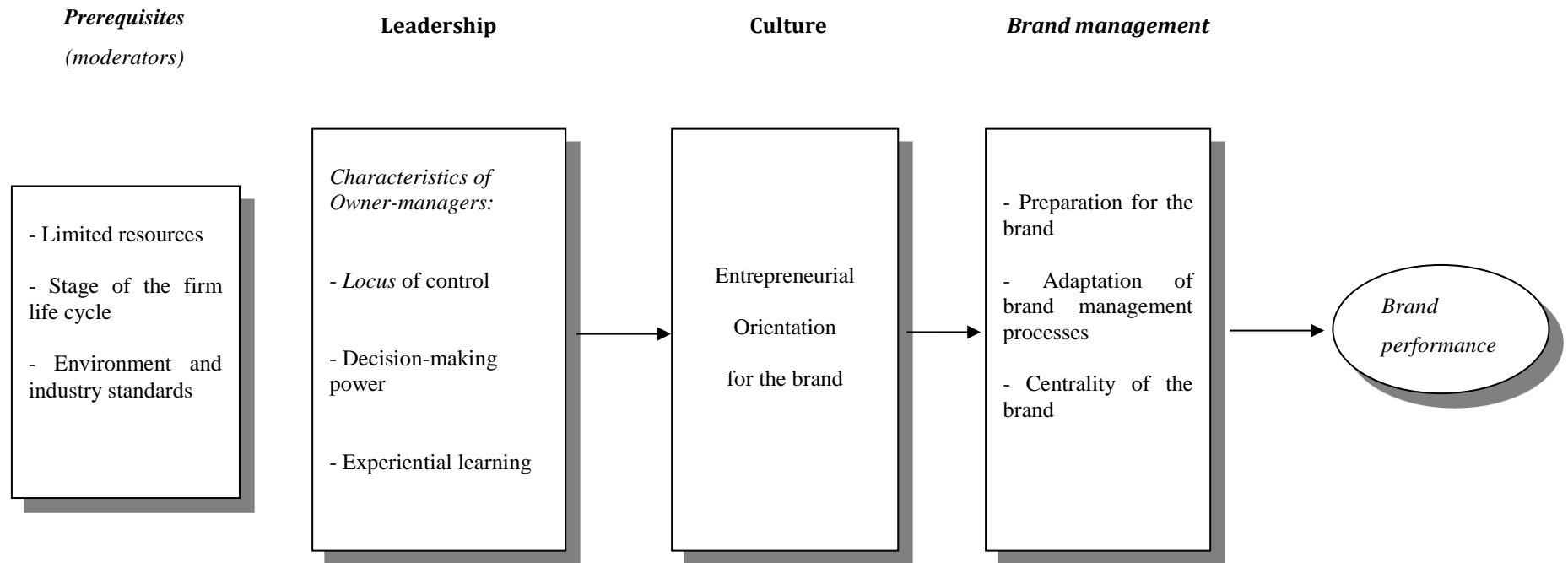
More specifically, the empirical findings suggested that brand management as practiced by SMEs is different, because it consists of a mental attitude and of a more intuitive, empirical and voluntary process, particularly influenced by three individual inherent characteristics of their entrepreneurs/owners-managers: (i) '*locus of control*' (an "internal" owner-manager is one who believes he/she has control over his environment and destination, thus being willing to take on entrepreneurial behaviour); (ii) *decision making power* (centralization of management decision-making power in one owner-manager), and (iii) *experiential learning* (learning acquired through experience and developed as an accumulation of knowledge and experience built on and from the communication and judgment).

These characteristics are shown with variable manifestations of intensity (a combination of the level and frequency) of entrepreneurial orientation for the brand, each producing diverse effects on the capacity of brand management operationalization and on the long-term brand performance.

It was, thus, identified an intrinsically distinct *brand management style*, which implies that, *at an operational level,* there are relevant differences in the emphasis placed upon the manifestation of specific aspects that involve brand management activities deserving a proper conceptualization. The conceptual model proposed in **Figure 1** is intended to explain and connect the fundamentals of brand management identified in the empirical research.

The case studies researched have indicated that such differences have specifically to do with: (i) the role and relative importance of intervening *actors*; (ii) the nature and dynamics of the *processes* that are used; and (iii) the content or substance of the *brand activities* that are practiced. Still, those differences allowed an identification of some intrinsic characteristics in brands built by SMEs.

Figure 1 – Theoretical model of brand management in the context of SMEs

Source: Author (Data Analysis).

More concretely, within a holistic perspective, successful brand management in SMEs seems to consist of (taking into account the adopted five analytical categories that allow an integrated approach):

Brand conception. The entrepreneurs/owners-managers who strive to develop a certain entrepreneurial competence, based on an essentially intuitive, empirical, pragmatic and improvised decision style, are those who are directly and personally involved in the process of conceiving and building value-added and innovation-geared brands, rather than experienced brand managers and/or brand specialists who act in a rational, programmed and delegated manner (however, intermediaries, commercial/salespeople and designers can play an important role in the creation and / or development of the brand).

Brand organization. Organizational competencies for the brand usually tend to be developed in a progressive manner, through and adoption of simple and centralized structures, with a single management level and few rules, and flexible and adaptable processes and systems to implement the brand policy, instead of creating formalized and complex structures. In other words, owner-managers are usually the ones who lead and directly coordinate the work of their employees and assure speedy implementation of the activities of the brand, within a unified and strong brand culture.

Brand strategies. Use of concise, innovative and simple to apply niche brand strategies, which tend to be simultaneously deliberate and emergent - deliberate on strategic brand vision and emerging in the way the details of such a vision will unfold in practice with the use of relatively limited information, and preference for a kind of 'guerrilla marketing'. Formalism and planning of the brand's activities are reduced, being privileged the targeting of customers and other influential groups in a perspective essentially bottom-up (customers are the most important constituent). There is a tendency to simplify the brand activities, mainly due to the relative scarcity of resources (technical, human, financial and time) and a natural predisposition to action.

Brand building. Brand building is carried out with limited resources and budgets, relying primarily on unplanned, creative, interactive and tentative tactical marketing initiatives (use of below-the-line, word-of-mouth and recommendations instruments), focused on the use of seeding methods of brand communication, a greater emphasis on creating and leveraging direct, permanent and interactive relationship networks with suppliers, distributors and customers (informal networking and marketing one-to-one). Brand building relies on a simple brand identity using a reduced number of brand elements (with emphasis on the brand name, packaging and logo).

Brand evaluation and improvement. Owner-managers proceed to direct and cyclic monitoring of the performance of the brand, which facilitates obtaining quick feedback effects. The procedures include unsophisticated indicators mostly oriented to sales and customer analysis, with relative little attention paid to the brand's financial impacts and brand equity, and regular brand improvement efforts are placed upon the development of incremental innovations in terms of products, processes and technologies, instead of adopting systematic, formal and indirect brand evaluation systems and disruptive brand innovations. The return on investment in the brand includes a great deal of elements of subjective, intangible and emotional nature for owners-managers (e.g. ego satisfaction, brand considered "a personal creation" and business reputation), and the evolution of the brand is closely linked to their development.

Theoretical propositions

Derived from the proposed conceptual model (**Figure 1**), empirical research data suggested that, in the SMEs under scrutiny, it seems there are links between constructs according to the six propositions set out below:

P1: The limitation of resources and the stage of the SME life cycle, as well as the environment and industry standards in which it operates, have a moderating influence on the link between entrepreneurial orientation for the brand and brand management, and between this and the brand performance.

P2: The level of entrepreneurial orientation for the brand in an SME is greater: (a) the more internal the location of the control of owner(s)-manager(s); (b) the more centralized the decision-power in one owner-manager; (c) the greater the accumulated experiential learning of owner(s)-managers(s).

P3: The greater the level of entrepreneurship orientation for the brand, (a) the more likely the SME will prepare in advance for the brand, (b) the more likely the SME will adapt the conventional brand management processes, and (c) the more likely the SME brand will play a central role in the company's strategy.

P4: The more the SME prepares in advance for the brand challenges, the better the performance of the brand in the long run.

P5: The more the SME adapts the conventional brand management processes, the better the performance of the brand in the long run.

P6: The greater the centrality of the brand in the SME strategy, the better the performance of the brand in the long run.

Inconsistencies in relation to existing theory

Additionally, the following important inconsistencies/changes were detected in relation to reviewed literature:
- It does not seem that rigorous planning (Abimbola, 2001), the emphasis on a good organization or on creative sales promotions supporting the sales force (Bergvall, 2001), the consistent innovation (Kapferer, 2002), the focus and consistency of brand marketing programs (Keller, 2003), or other factors determine, by themselves, the effectiveness of brand management in the SME, but rather, and essentially, the intensity of entrepreneurial orientation for the brand as shown by the owner-manager;
- Two evidence inconsistencies were identified in relation to Keller (1998, 2003): (i) in practice, SMEs are induced to adopt a multi-brand approach to enhance their differentiation and gain shelf space; and (ii) there is a preference for 'product brand" rather than 'corporate brand', since this one limits their flexibility. Actually, the dependence of a corporate brand strategy seems to condition the flexibility of SMEs to the extent that corporate image can inhibit expansion into new market segments. On the other hand, a multi-brand strategy appears to result when genuinely new products are launched, since customers expect an innovative approach (that is, new values and operation methods). In practice, both the corporate strategy, and the multi-brand strategy are used in this sector, but with an increasing incidence in recent years on building product brands. SMEs do not go as far as having a "corporate image" like a large company, because they choose to invest on building simple brand identities. Such situations can be justified considering that owners-managers tend to favor the concept of brand-as-product, in addition to the need of diversifying their value offer. This finding contradicts the suggestion by Ahonen (2008) that SMEs should adopt (and research) a

more corporate branding. However, the diversification of brands may cause difficulties to SMEs in terms of logistics, sustainability and consistency of brand building, hence to the strength of their brands;

- The time evolution of the brand in SMEs seems to occur in a manner that is different from the evolutionary models of Goodyear (1996) and Kunde (2000). Brands of SMEs can be started as mere basic brands to become, with time, extended brands. According to the evidence, a successful and sustained progression of this type may last a decade, since the owner-managers show a high intensity of entrepreneurial orientation for the brand. The four phases of identified brands (basic brand, augmented brand, identity brand and extended brand, beyond the pre-stage of the generic product) may be considered either as levels that accumulate over time, or as a possible phases any brand developed by an SME may undergo in terms of added value.

Conclusions, implications and research agenda

The literature review revealed that conventional approaches to brand management and adopted by large companies need to be modified to adapt to the idiosyncrasies and needs of SMEs. Because of this, the topic of brand management in SMEs has received increased attention in the last two decades, especially due to the emerging phenomenon of brand building in this important economic sector. It was stressed that business academics and consultants have been turning their attention to the SMEs' branding research agenda. Concepts and approaches proposed by both groups have been identified and summarised, but it was seen that there is a certain ambiguity in the existing literature as to what brand management in SMEs really means, and when and how should it be practised considering its inherent characteristics. Despite their topicality and importance, approaches to this theme are still poorly integrated and systemized. It is an area lacking in consistent, unified theoretical foundations upon which prescriptions on effective brand management in SMEs can be based.

Of prime importance is the conclusion that brand management in the SME context seems to be distinct because it is essentially related to the intensity of entrepreneurial orientation for the brand as shown by the entrepreneur/owner-manager, and because the brand is especially a result of his/her own personality. As it focuses on such a critical construct, it highlights the central and irreplaceable importance of the role of the owners-managers in determining the brand's current and future performance. Further research should be carried out to contribute to the development of a sound theoretical framework within an entrepreneurial brand management paradigm.

In short, the empirical findings revealed that for the operationalization of brand management to be feasible in this context, SMEs' owner-managers tend to simplify the use of the brand instruments and synthesize the various brand procedures, because they are normally constrained by a shortage of resources, time and experience in this field. In other words, they make brand management less complex and affordable, and use a basic set of brand elements and activities, which reflect what is considered possible and strictly essential for them.

Implications

Considering the major findings referred above, a particularly relevant implication is that raising the level and frequency of entrepreneurship by developing a strong leadership is a far more important issue than the mere direct provision of more resources to the brand and the creation of a positive environment for the entrepreneur. In other words, in the SME context, what seems particularly important is the development and maintenance of the intensity of entrepreneurial orientation for the brand by the owner-manager and not to emphasize the limitations of financial resources. That is to say, the development of

competent entrepreneurs and with a high intensity of entrepreneurial orientation for the brand within a long-term perspective seems to be a key issue for building successful brands in SMEs.

Another important theoretical implication is that the owner-manager of any SME needs to pay attention to the three critical dimensions of brand management, namely: *the preparation for the brand* (associated to proactivity); *the adaptation of the brand management processes* (associated to innovation); and *the centrality of the brand* (associated to the willingness to take risks). The concern with only one of these dimensions cannot ensure a positive brand performance over time, which should be seen as a result of the moderating or interactive relationships of such dimensions, and of the intensity of entrepreneurial orientation and its relevant factors.
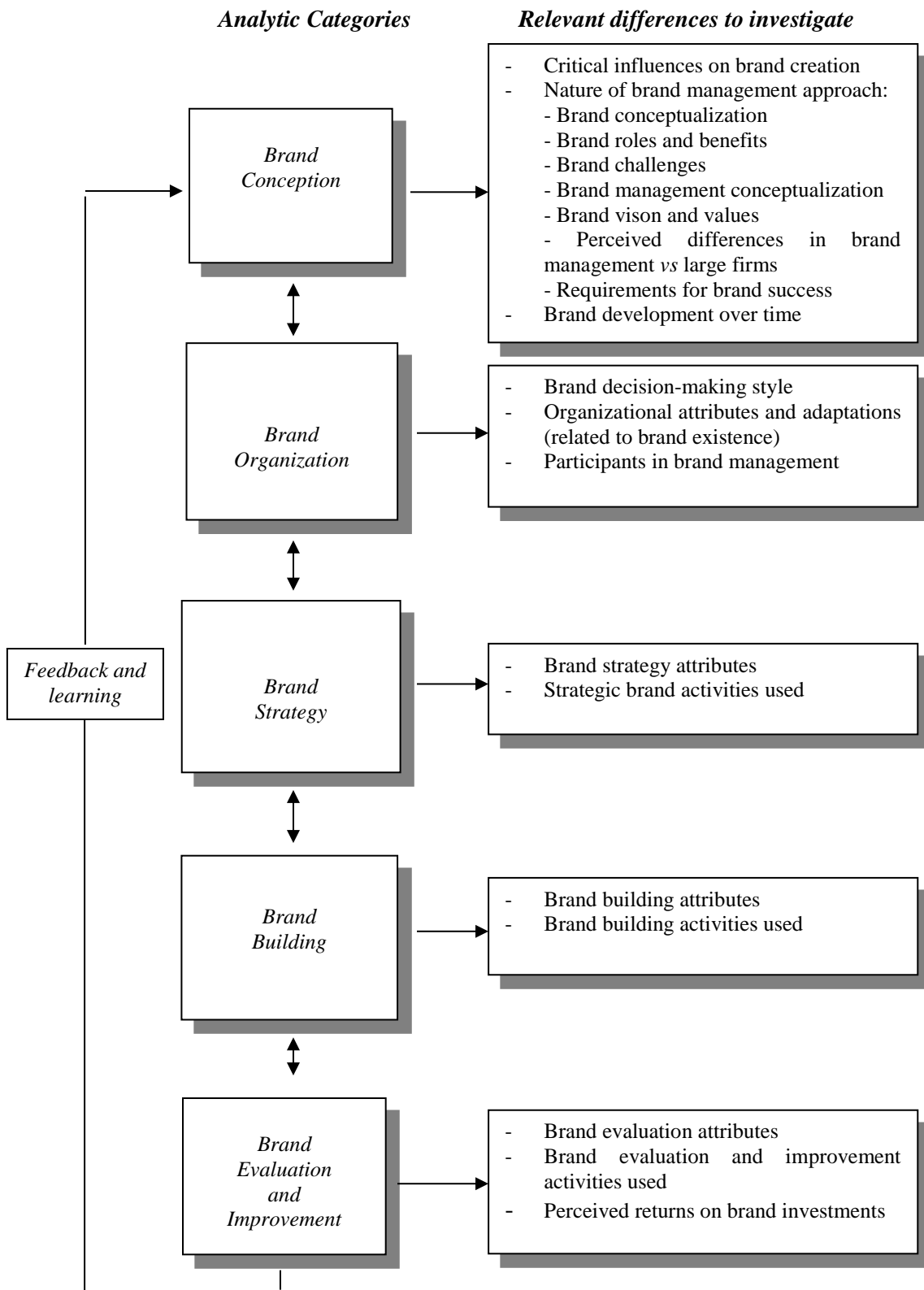
Research agenda

The literature review and the empirical findings have shown that existing brand management theory does not provide an adequate and comprehensive interpretive solution to the phenomenon of brand management in the SME context. This situation reveals that brand theory needs to integrate new contributions of systematic and empirical research, which may fulfill this knowledge gap. Against this background, it is desirable that more contributions arise for a detailed description and understanding of what really happens in terms of brand management in SMEs, including answers to the following questions:

- *Where?* In what type of SMEs tends to arise the impetus for branding?
- *What?* What main factors (variables or constructs) should be considered as part of the explanation of brand management, and which activities, tools and methods are used in practice?
- *How?* Is it interpreted and characterized the brand and how is brand management processed?
- *Who?* Who decides, influences, and participates in the management of the brand?
- *When?* Under what circumstances are brands created and built?
- *Why?* What justifies the adoption of brands by SMEs and of certain practices and not others?

A need to undertake in-depth qualitative and quantitative research into the phenomenon of branding in the specific context of SMEs was identified. Exploratory studies based on systematic approaches to these questions are imperative, since brand management practice in (most) SMEs has been running ahead of theory. Without a set of principles and concepts based on empirical studies of SME branding, theory can neither be falsified nor based on experience. As a result, entrepreneurs/owners-managers are currently departing from a trial and error basis. Given the lack of an empirically based, consistent, and sound framework that offers a complete interpretation of the topic under study, it may be concluded that there is a need to develop a holistic conceptualisation as to how and why brand management concepts differ in the context of SMEs.

To this end, qualitative and inductive approaches should be used with a view to carrying out in-depth, systematic, empirical research into the perceptions and practices of brand management as far as owners-managers and SMEs' marketing executives are concerned. In his empirical research on SME branding, this author used the conceptual framework shown in **Figure 2**, which brought together important data on some of the aforementioned knowledge gaps. This conceptual framework was built according to a holistic perspective and is proposed for future research on the focal topic. It allows the identification of what variables (or relevant differences to investigate) seem to be most important, what relationships are likely to be most meaningful, and, as a consequence, what information should be collected and analysed – at least at the outset.

Figure 2 – Conceptual framework for researching brand management in SMEs

Analytic Categories   *Relevant differences to investigate*

| Brand Conception | → | - Critical influences on brand creation
- Nature of brand management approach:
  - Brand conceptualization
  - Brand roles and benefits
  - Brand challenges
  - Brand management conceptualization
  - Brand vison and values
  - Perceived differences in brand management *vs* large firms
  - Requirements for brand success
- Brand development over time |

| Brand Organization | → | - Brand decision-making style
- Organizational attributes and adaptations (related to brand existence)
- Participants in brand management |

| Brand Strategy | → | - Brand strategy attributes
- Strategic brand activities used |

| Brand Building | → | - Brand building attributes
- Brand building activities used |

| Brand Evaluation and Improvement | → | - Brand evaluation attributes
- Brand evaluation and improvement activities used
- Perceived returns on brand investments |

Feedback and learning

Source: Author.

<div align="center">

Table 2 – Proposed research questions on brand management in SMEs

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RQ.1 How and why is it characterized the conception and evolution of brands in the SME context?

SQ1a What are the main influences on brand creation and brand management in SMEs, and how are they shown and related to each other?

SQ1b What distinguishes the perspective of brand management in SMEs?

SQ1c How do SMEs' brands evolve over time?

RQ.2 How different are the organizational behavior and functioning in SMEs that develop brands?

SQ2a How are brand decisions taken, and who participates in the brand management?

SQ2b What are the most relevant attributes and organizational adaptations associated to the existence of brands?

RQ.3 How and why have brand strategies been used in SMEs?

SQ3a What is the degree of accuracy and formalization of brand strategies?

SQ3b What brand activities of a strategic nature are developed in practice, and how?

RQ.4 How and why have SMEs sought to ensure the building of their brands?

SQ4a What are the typical attributes of the brand building initiatives?

SQ4b What brand building activities have been used, and how?

RQ.5 How do SMEs evaluate the performance of their brands?

SQ5a What are the attributes of brand evaluation?

SQ5b What brand evaluation and improvement practices are most used?

SQ5c How has the return on investment on brands been seen?

Source: Author.

The proposed framework also enables comparative analyses with other national and international case study research, facilitating important contributions to develop brand management knowledge. In **Table 2,** some relevant research questions that can be analyzed and replicated within other academic or professional studies are proposed.

Finally, the following areas appear to be of a particular importance for future research:

- Replication of empirical research in different sectors of economic activity, countries, regions and continents, by different investigators, and covering SMEs with successful and unsuccessful brand management processes to verify and refine the differences already identified. Information from multiple respondents belonging to all levels and functions in SMEs should also be obtained, whenever possible. Such studies are likely to contribute to a greater consistency and validity of the findings;
- Development of specific constructs and theoretical propositions for the conceptualization of brand management in the SMEs' context, duly based on the acquired knowledge and empirical evidence of the perceptions and practices from the perspective of SMEs' owner-managers and marketing executives;
- Conducting hypothesis tests, using quantitative/positivist techniques to verify the correlation between categories and identified relevant factors, and/or identify relationships between relevant variables;
- Conducting studies on customers' perceptions (intermediary and final) related to brands developed by SMEs; and
- Conducting longitudinal studies on brand management practices in SMEs.

Notes

[1] Brand management is considered an operational process and it is defined according to a holistic perspective. It consists in the use of an integrated set of managerial processes, both internal and external to the enterprise, involving marketing activities, tools and initiatives related to the brand conception, organization, strategy, building, and evaluation and improvement. Its teleological objective is to gain sustainable competitive advantages for the enterprise, thanks to the systematic creation of differences and endowing products and services with brand equity.

[2] The definition by the Economic and Monetary Union (EMU) as to what is considered a SME has been used. A *micro company* has less than 10 workers, *small companies* have 10 to 49 workers, *medium-sized* companies have 50 to 249 workers. Any company with more than 250 workers is classified as a *large company*. In this paper, only the small and medium sized companies are considered.

[3] The definition of the brand management paradigm proposed by Louro and Cunha (2001) is adopted here, and it consists on "a deep-seated way of seeing and managing brands and their value, shared by the members of an organizational community marked by a common culture. In this sense brand management paradigms constitute an organization's portfolio of implicit assumptions, collective beliefs, values and techniques concerning the *why* (the objectives and performance measures of brand management), the *what* (the concept of brands), the *who* (the organizational structure of brand management) and the *how* of branding (the variables of brand management)."

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