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BRAND STRATEGY TOOLKIT

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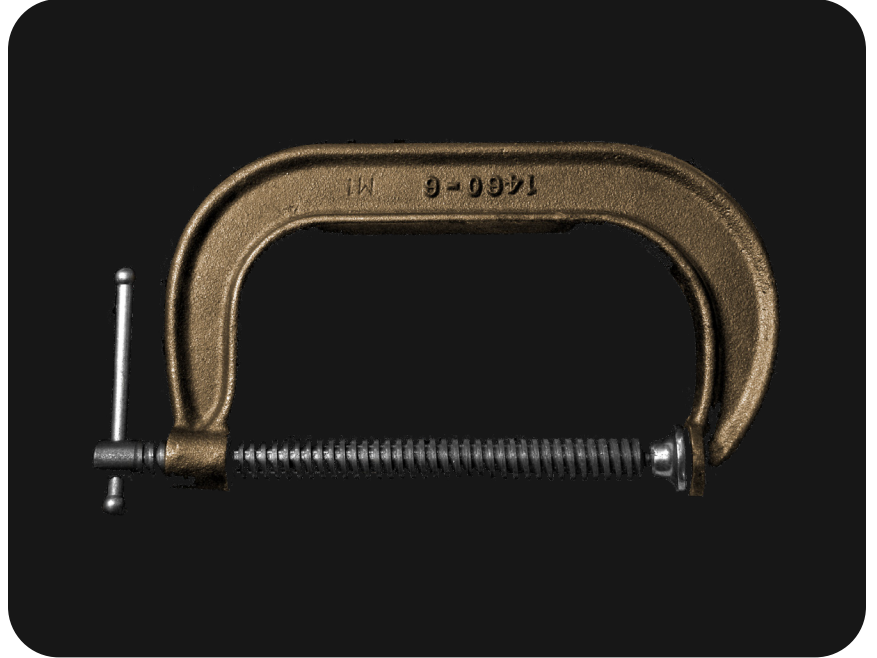
Welcome to the Brand Strategy Toolkit

We've assembled 5 tools, more tips, and the templates you need to build a brand from the ground up. Work through each step in order, jump to the issue you need to solve, or sift through this toolkit as you need! Of course, we recommend the order we've set out, but regardless, we hope this toolkit helps.

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BRAND CORE WORKBOOK



Identify your brand purpose, vision, mission, and values in order to build a brand with a strong foundation.

Purpose

Why do we exist?

Write down, sketch, brainstorm, and think through your purpose. Finish with one succinct purpose statement.

Examples

Studio Ostendo

To visually organize the world in order to cultivate better culture, relationships, and creation.

IKEA

To create a better everyday life for the many people.

Special Olympics

To transform communities by inspiring people throughout the world to open their minds, accept, and include people with intellectual disabilities and thereby anyone who is perceived as different.

San Diego Zoo

To become a world leader at connecting people to wildlife and conservation.

Life is Good

To spread the power of optimism.

Charles Schwab.

Helping investors help themselves.

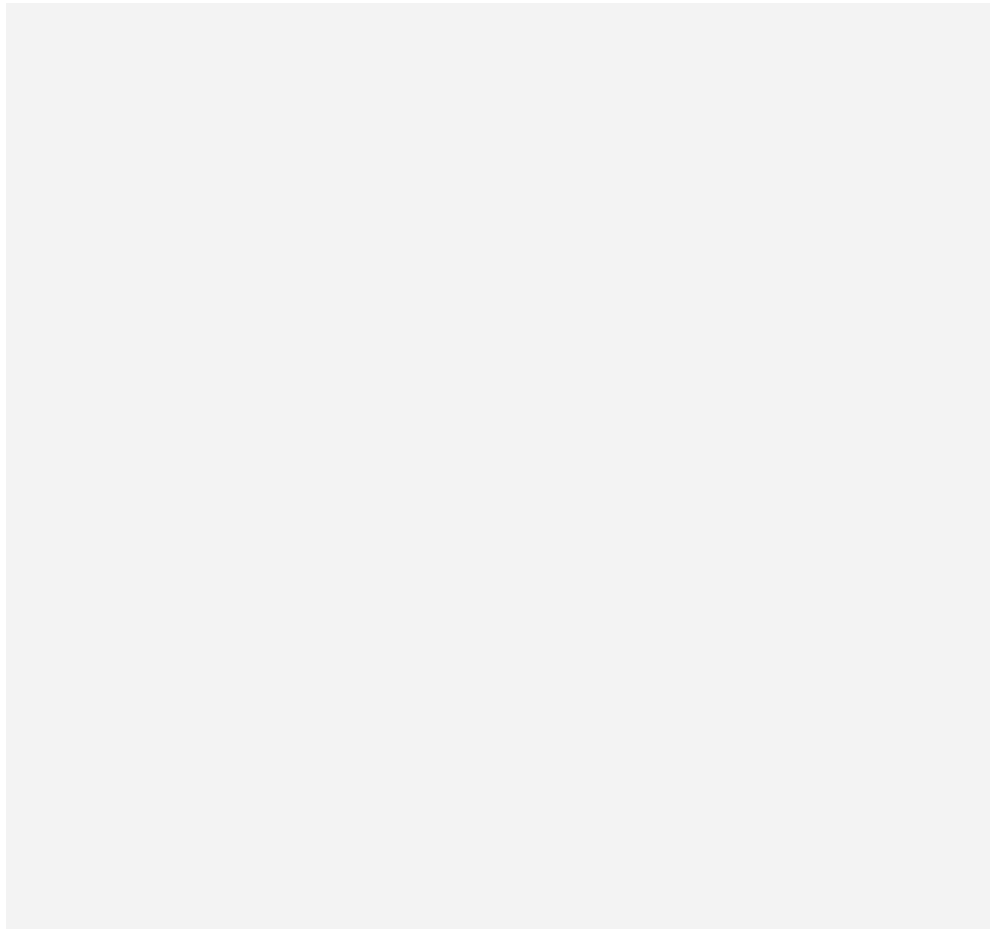
Casper

We believe sleep is the superpower that charges everything people do.

Vision

What future do we want to help create? What does the future look like?

Write down, sketch, brainstorm, and think through your ideal future. Finish with one succinct vision statement.



Examples

Studio Ostendo

To create a clear, communicative, and aesthetic world.

Casper

We're here to awaken the potential of a well-rested world.

Uber

Smarter transportation with fewer cars and greater access. Transportation that's safer, cheaper, and more reliable; transportation that creates more job opportunities and higher income for drivers.

Caterpillar

Our vision is a world in which all people's basic needs—such as shelter, clean water, sanitation, food, and reliable power—are fulfilled in an environmentally sustainable way and a company that improves the quality of the environment and the communities where we live and work.

Oxfam

A world without poverty.

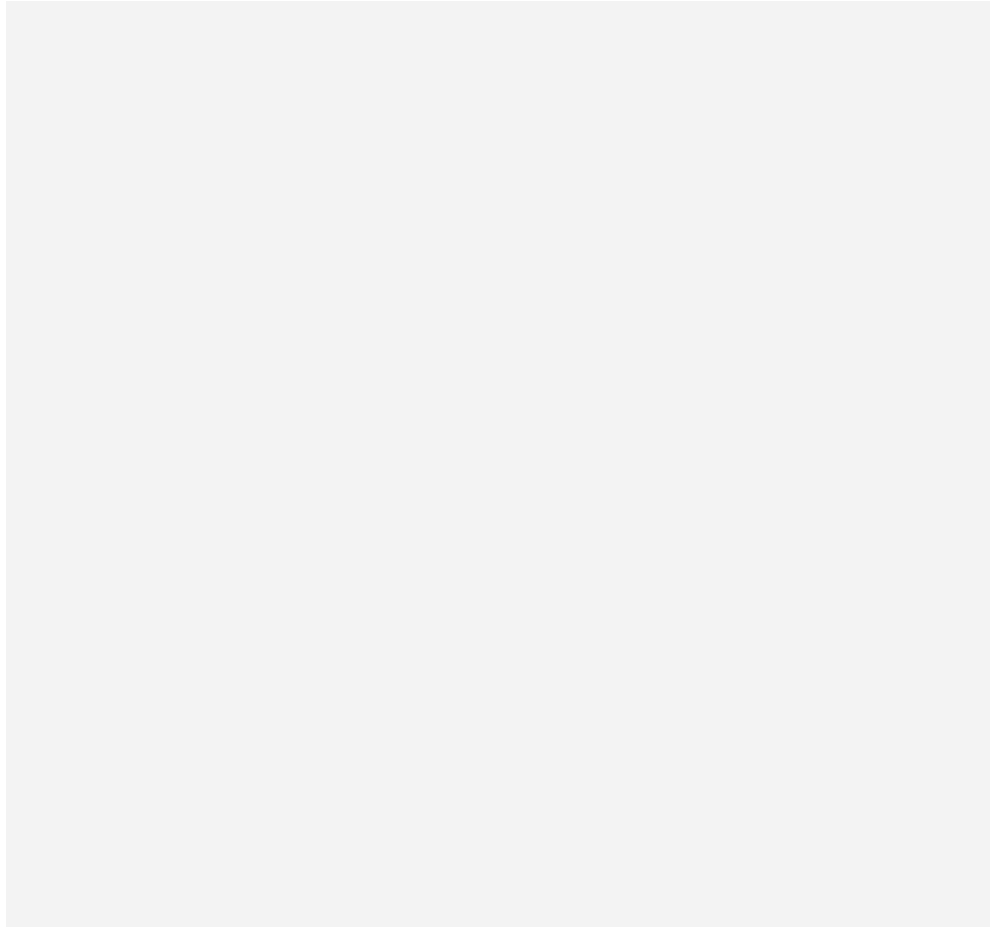
Alzheimer's Association

A world without Alzheimer's disease.

Mission

What are we here to do? How can we create that future?

Write down, sketch, brainstorm, and think through what your mission is. Finish with one succinct mission statement.



Examples

Studio Ostendo

To bring 1000 ideas to life that bring people together and elevate the human experience.

Casper

We're setting a new standard in sleep innovation.

JetBlue

To inspire humanity—both in the air and on the ground. We are committed to giving back in meaningful ways in the communities we serve and to inspire others to do the same.

Dropbox

We're here to unleash the world's creative energy behind designing a more enlightened way of working.

Yeti

Build the cooler you'd use every day if it existed.

Ra Yoga

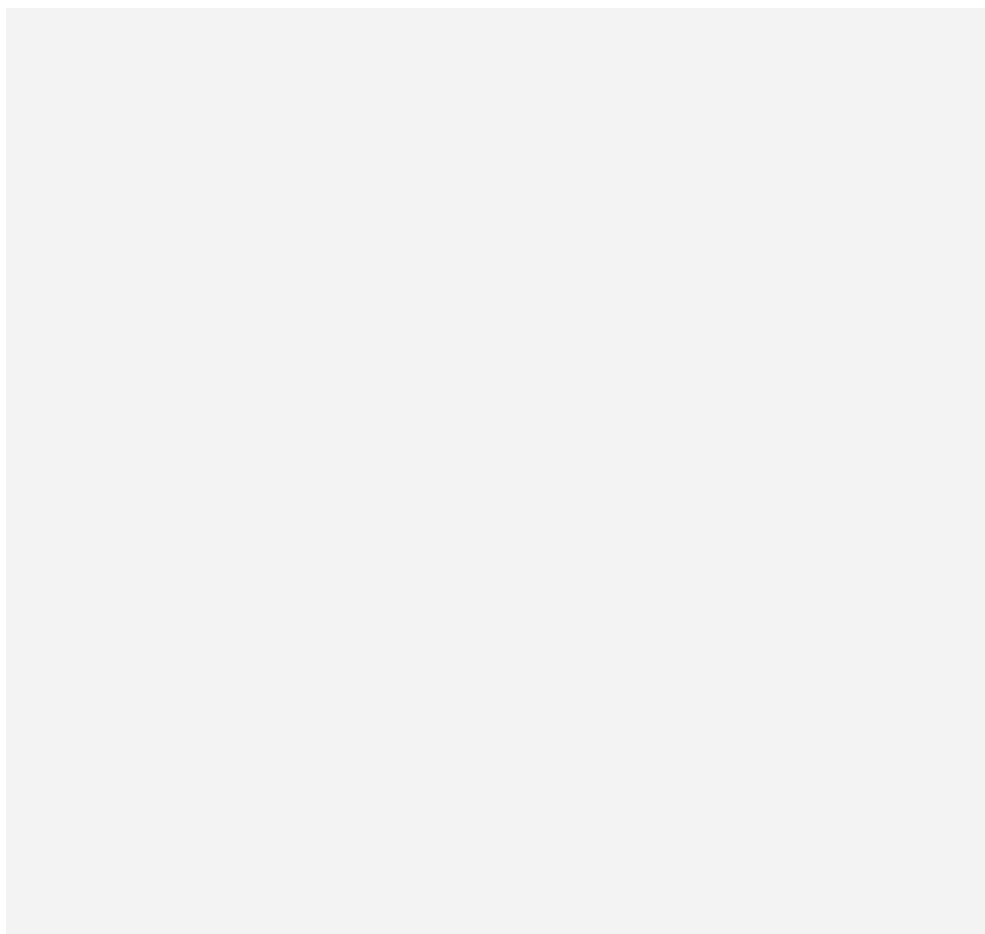
Create connection, opportunity, love and space for the human condition.

Values

How will we conduct ourselves in support and pursuit of our mission, vision, and purpose?

You can add as many as you like, but 3–5 is a healthy start.

Each Value may be a succinct statement with a description of how that is carried out. See the first point of each example.



Examples

Studio Ostendo

1. Have More Fun Than Anyone Else.
That is, enjoy the work, or create work that you enjoy. The same sentiment is competitive, like sport, which is core to who we are at Studio Ostendo.
2. Creat Work You Are Proud Of, No Matter What.
3. Seek First to Understand, then to be Understood.

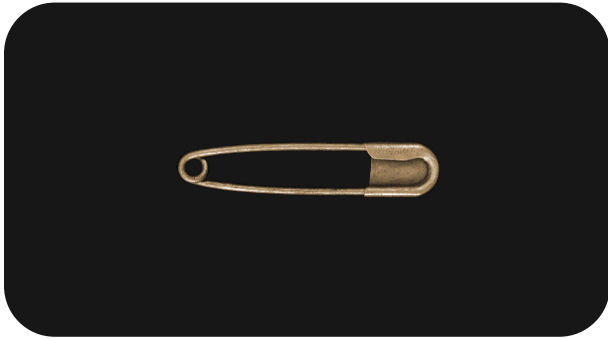
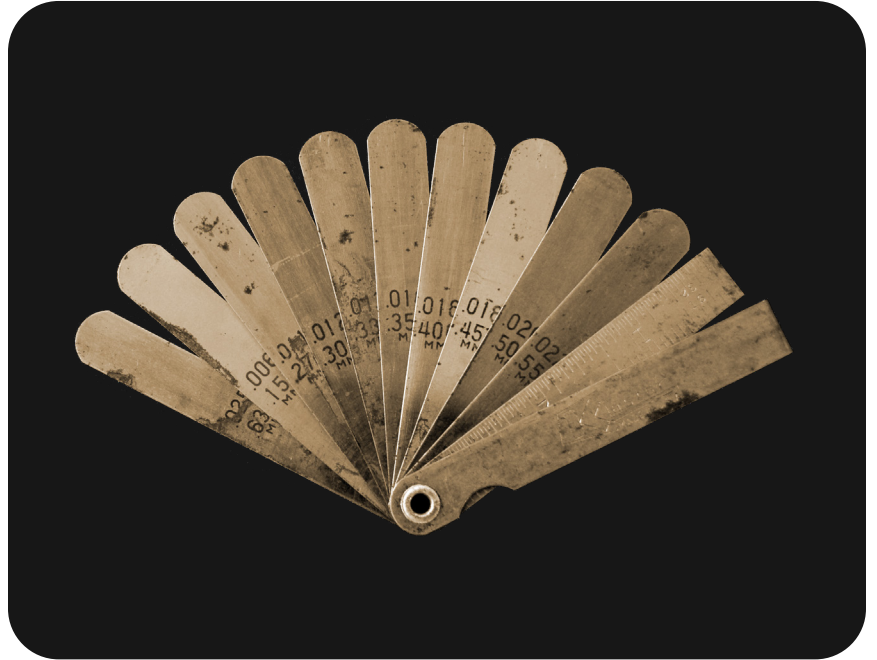
Whole Foods

1. We Satisfy and Delight Our Customers.
Our customers are the liveblood of our business and our most important stakeholder. We strive to meet or exceed their expectations on ever shopping experience.
2. We Promote Team Member Growth and Happiness
3. We Care About Our Communities And the Environment
4. We practice Win-Win Partnerships with Our Suppliers

Patagonia

1. Use Business to Protect Nature
The challenges we face as a society require leadership. Once we identify a problem, we act. We embrace risk and act to protect and restore the stability, integrity, and beauty of the web of life.
2. Build the Best Product
3. Cause No Unnecessary Harm
4. Not Bound by Convention

PERSONAS TEMPLATE



Identify your audience members
in order to better understand
how your brand can speak to their
unique needs.

Brand Prersonas

Personas are a comprehensive “map” of your audience’s minds and personalities, helping you see the world from their perspective which help you create a solid representation of the actual humans you want to attract and speak to. Generate 3–7 personas, each with different traits and perspectives.

Name Your Persona

Age

Gender

Persona 1

Image

Find an image to visualize this person

Job Title

Income

Interests

What do they like to do? What do they wear? What do they prefer to eat?

Goals

What are there goals? What do they want? What is their desired result or transformation?

Pain Points

What are the barriers to what they want?

Brand Quotient

On a scale from 1–10, how close to your brand are they?

1

2

3

4

5

6

7

8

9

10

No ConnectionBiggest Fan

Persona Story

Describe this person as if they are your friend that you are introducing to another using the details above..

Persona 2

Name Your Persona

Age

Gender

Image

Find an image
to visualize this
person

Job Title

Income

Interests

What do they like to do? What
do they wear? What do they
prefer to eat?

Goals

What are there goals? What do
they want? What is their desired
result or transformation?

Pain Points

What are the barriers to what
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Biggest Fan

Persona Story

Describe this person as if they
are your friend that you are
introducing to another using
the details above..

Persona 3

Name Your Persona

Age

Gender

Image

Find an image
to visualize this
person

Job Title

Income

Interests

What do they like to do? What
do they wear? What do they
prefer to eat?

Goals

What are there goals? What do
they want? What is their desired
result or transformation?

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Persona Story

Describe this person as if they
are your friend that you are
introducing to another using
the details above..

COMPETITIVE ANALYSIS TEMPLATE

Identify who you're competing against so that you can better differentiate your brand.



Competitive Analysis

Conduct a brand identity audit on your top 3-5 competitors by reviewing each competitor individually and documenting findings as you go. To understand each brand's identity, take a look at their website, social media profiles, etc.

	Competitor 1	Competitor 2	Competitor 3
Competitors in your market doing what you want to do.			
Purpose, Mission, and Vision			
Brand Look and Feel Use adjectives as well as specific terms. Like "warm and inviting", or "navy blue".			
Value Proposition			
Tagline			
Core Products or Services			
How do they talk about their customers?			
Customer Acquisition			

Competitive Analysis
Continued.

	Competitor 1	Competitor 2	Competitor 3
Competitors in your market doing what you want to do.			
Marketing Channels			
Advertising Channels (if applicable)			
Annual Revenue			
Strengths			
Weaknesses			
Similarities to Your Brand			
Differences to Your Brand			

BRAND MESSAGING TEMPLATE



Articulate your value proposition, tagline, and messaging pillars to help team members tell a consistent brand story.

Brand Messaging

Your brand messaging architecture is a carefully constructed framework comprised of your Tagline, Value Prop, and Messaging Pillars. This framework is built intentionally, from the tagline (the big idea), down to value prop (what you do), to your brand messaging pillars (how you do it).

Tagline

Value Proposition

Messaging Pillars	Pillar 1	Pillar 2	Pillar 3
Name the Pillar			
Supporting Point 1			
Supporting Point 4			
Supporting Point 3			

BRAND VOICE QUESTIONNAIRE



Identify your brand voice to
humanize your brand and
communicate consistently.



When people interact with our brand, how do we want them to feel?

For example, a security company that wants to be perceived as a trusted protector would use a confident and reassuring voice.

What adjectives would we use to describe our brand?

Choose 3-5 adjectives. For example, a toy brand might describe themselves as playful, silly, and adventurous.

Who do we NOT want to be/what do we want to avoid?

Identify buzzwords you hate, phrases to avoid, etc.

What is another brand with a voice we love?

Don't emulate them directly, but identify how and why their voice resonates with you.

If our brand were a celebrity, who would we be?

For example, a hip luxury suit brand might describe themselves as George Clooney's younger brother.

How do we want to talk about ourselves?

Think about your brand messaging, what you want to convey, the type of language you use, etc.

Blank response area for brand strategy exercises.

VISUAL IDENTITY CHECKLIST



Use this checklist to design an effective and comprehensive visual identity that communicates your brand.

Visual Identity Checklist

Logo

Design a logo that reflects your brand personality.

- ☐ A great logo works in only black and white.
 - ☐ Ensure the logo design works in print and online.
 - ☐ Test the logo at large and small scales.
-

Color Palette

Curate a simple yet flexible color palette.

- ☐ Choose one (1) primary color.
 - ☐ Choose up to two (2) secondary colors.
 - ☐ Choose 3–5 complementary colors.
 - ☐ Add two (2) neutral/complimentary colors.
-

Typography

Select a typeface that works as an extension of your logo.

- ☐ Select a primary typeface and font weight.
 - ☐ Consider a secondary typeface.
 - ☐ Consider pairing a serif and sans serif font.
 - ☐ Test for readability in print and online.
-

Hierarchy

Create a logical, intuitive System.

- ☐ Guide the viewer through the content easily.
 - ☐ Include specifications for headers, sub-headers, body copy, images, etc.
-

Photography

Use consistent, cohesive visual styles.

- ☐ Ensure images are high quality and resolution
 - ☐ Be mindful of inclusive representation
 - ☐ Develop art direction for consistent image styles
-

Illustration

Focus on creating cohesive visual styles with illustrations.

- ☐ Choose a single illustration style.
 - ☐ Keep images relevant to the subjects.
-

Iconography

Focus on clarity and simplicity.

- ☐ Select one type of icon and stick to it (filled, outlined, etc.)
 - ☐ Make sure icons render clearly at small sizes.
 - ☐ Ensure icons are relevant to the subject.
-

Data Visualization

Design for comprehension.

- ☐ Avoid clashing patterns.
 - ☐ Don't over-illustrate or use 3D charts.
 - ☐ Order data intuitively (ie. alphabetically, ascending, or descending).
-

Video & Motion Graphics

Keep branding consistent.

- ☐ Choose an animation style.
 - ☐ Provide guidelines for kinetic text.
 - ☐ Use consistent video openings and closings.
-

Web Design & Interactivity

Focus on creating the best user experience.

- ☐ Start with the point, don't get to it.
 - ☐ Consider accessibility.
 - ☐ Design for mobile interactions first.
-

BRAND/REBRAND QUESTIONNAIRE



Examine the current state of your branding to identify how you'd like to change going forward.

Current Core Identity

This details the foundational elements of your brand.

Organization Name

What You Do

Briefly describe your business

Brand Core

Write down your purpose, vision, mission and values.

How is our brand currently perceived? Does it align with our Brand Core?

Who are your target personas?

How do we want to be perceived? Where is the disconnect between what you want to have happen and what is actually happening?

How has our brand changed over time?

Who are your target personas?

Who is our audience?
Who are your target personas?

How do we differentiate our brand?

Our brand is...

Exclusive		Accessible
Traditional		Progressive
Corporate		Friendly
Serious		Fun, Playful
Understated		Bold
Simple		Complex
City, Urban		Natural, Rural
Familiar		Disruptive
Steady, Stable		Dynamic
Realistic		Idealistic

Current Visual Identity

If you already have a visual identity, audit your existing identity and document what does or doesn't work about each element.

Logo

Colors and Typography

List the details of your colors and how to use them. List your fonts and outline the typographic hierarchy.

What does our current visual identity communicate?

What do we NOT like about our current visual identity?

How does our current visual identity align or misalign with our values and Brand Core?

How has our visual identity changed over time?

Brand Quotient

On a scale from 1–10, how
relevant is your current brand?

1

2

3

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Horrible.

Love it!

How do we feel about our current
logo and mark?

Why are we creating a new and
unique logo? Why now?

Should our new logo be
"evolutionary" or "revolutionary"?
As in, do you update your current logo or
start completely fresh.

What type of "character" or
"personality" would we like your
new logo to have?

Current Verbal Identity

This is how you speak and write about your brand.

Tagline

Sum up what you do in a single sentence.

Value Proposition

What unique value do customers get from purchasing your product/service?

Key Messaging

List your main selling points or messaging pillars.

Voice

How do you speak in your content?

What is our current brand personality?

You can describe your brand as a persona, ie. George Clooney or Conor McGregor with Jack Black's humor.

Feeling stuck?

We'd love to help. Find out what it's like to work with us on your rband identity, or book a free chat.

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