

THE
Brand
Identity
Guidebook

HOW TO STAND OUT
IN AN AGE OF INFINITE CHOICE



kenna

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HOW TO USE THIS GUIDEBOOK

The intention of this Guidebook is to provide an easy and quick reference source to developing a brand identity.

A brand identity is much more than the collection of images and assets that make up the visual library. It is a declaration of the value a brand creates for people, expressed and amplified through all forms of media. More than anything, it is an abstraction of the brand idea.

The key to creating a unique and compelling identity is to be truthful to the brand essence and values, and consistent in its tonal representation across different formats, devices and channels, whether through words or images. And that can be a challenge today in an age of infinite media, with so many points of interaction.

The brand identity needs to evolve out of a clear understanding of brand strategy and goals. Most importantly, it hinges on a clear articulation of the brand promise and why it matters to people.

This guidebook provides a detailed step-by-step roadmap, based on best practices, for creating a brand from scratch. It presents a series of steps that should be taken, and questions that need to be answered, along the development path, from deciphering the brand DNA, to creating a coherent messaging framework. As a reference guide, it is not designed to be a paint-by-numbers process map. This Guidebook simply serves as a shortcut to asking the right questions.

Once the brand identity work has been completed, the job of developing a visual identity can begin.

INTRODUCTION TO BRAND IDENTITY

The purpose of a brand is to serve as a symbol of the value a company or organization creates for the customers it serves. The brand enables customers to identify and relate to a company rationally and emotionally. Critical to brand success is creating a vivid impression in the minds of people of what the brand can do for them, now and in future.

BRAND IDENTITY

What people think about a brand and how they relate to it as part of their life is critical to its success. The goal of brand identity development is to create a favourable and lasting impression in the minds of people. It is the difference between a brand that is indistinguishable and substitutable and one that would be dearly missed if it ever ceased to exist. To define that identity, it is critical to know the unique value a brand offers and why it matters. A sharply defined identity is recognizable, memorable and affecting, and serves as a unifying force across the organization.

BRAND STRATEGY

The path to defining a brand identity involves a stepwise process requiring a full immersion in the brand DNA – what makes it different and why. Included in the scope of this discovery process is the brand vision, ideals, values, and key competitive differentiators. It is also essential to determine the preferred positioning and the desired brand perception.

BRAND EXPERIENCE

The identity governs how the brand is experienced across all touchpoints. By establishing a recognizable identity, a brand can make it easier for people to not only remember it, but ensures consistency across all communications and interactions, speaking with one distinctive voice, visually unified, and singular in its expression.

BRAND ARCHITECTURE

The brand architecture refers to the hierarchy of brands and how they relate to each other. Separate but linked identities are developed for corporate, division and category brands as well as individual sub-brands. The more specialized a product is, the easier it is to create a distinctive identity. Sub-brand identities may be created in isolation but more often they are endorsed by a master brand and inherit some of the key values.

WHEN A NEW BRAND IDENTITY IS NEEDED

New Product Launch

The extent of the work will depend on the brand architecture design; how clearly defined the parent brand is; whether the product is entering a new market; or whether it is a sub-brand or line extension within an existing market where the corporate brand is already widely recognized.

Brand Revitalization

At some point, identity fatigue may set in, when the brand needs to be modernized. Or a challenger brand may have suddenly emerged which is stealing market share. Or the market has evolved so much that the brand appears to be behind the times. In all of these circumstances a brand refresh can energize both customers and employees while making the brand more salient (top of mind).

Brand Unity

As a brand portfolio expands, or where new brands are acquired, the relationships between the brands may become confusing, leading to market incoherence. All of the various brands may appear to be coming from different companies. A new master brand identity may be required, at the corporate or division level, to resolve the inconsistency.

Brand Reposition

Here the playing field may have changed, due to competitor moves or shifting market conditions. The brand may need to reposition itself to be seen as a more relevant solution. Or the brand may be seeking to appeal to a newly formed market segment.

BRAND IDENTITY PROCESS

Creating a brand identity from scratch involves four distinct phases, each building on the work that preceded it. The outcome is a strategic definition of how the brand should express itself in the market which can then be used to develop a visual identity.

PHASE 1 – IMMERSION

The purpose of this phase is to review the brand strategy and goals in order to understand the competitive landscape, the category needs of customers (the job that needs to be done), and the specific functional needs that are uniquely served by the brand. Most, if not all of, this information can be found in the Brand Plan and synopsis as an anchor point for the brand identity development work to follow.

INPUT: Brand Strategy and Goals
OUTPUT: Brand Review

PHASE 2 – FORMULATION

The goal of this phase is to clarify the core value proposition – what makes it truly different, better or best – and explain how the brand improves the lives of customers. Once the value proposition is made clear, a positioning statement can be defined, leading to a desired perception in the minds of customers.

INPUT: Brand Review
OUTPUT: Brand Brief

PHASE 3 – EXPRESSION

The goal of this phase is to establish the higher order purpose of the brand (why it exists and its credo) leading to development of a single strategic concept that will serve as a North Star and unify all communication elements.

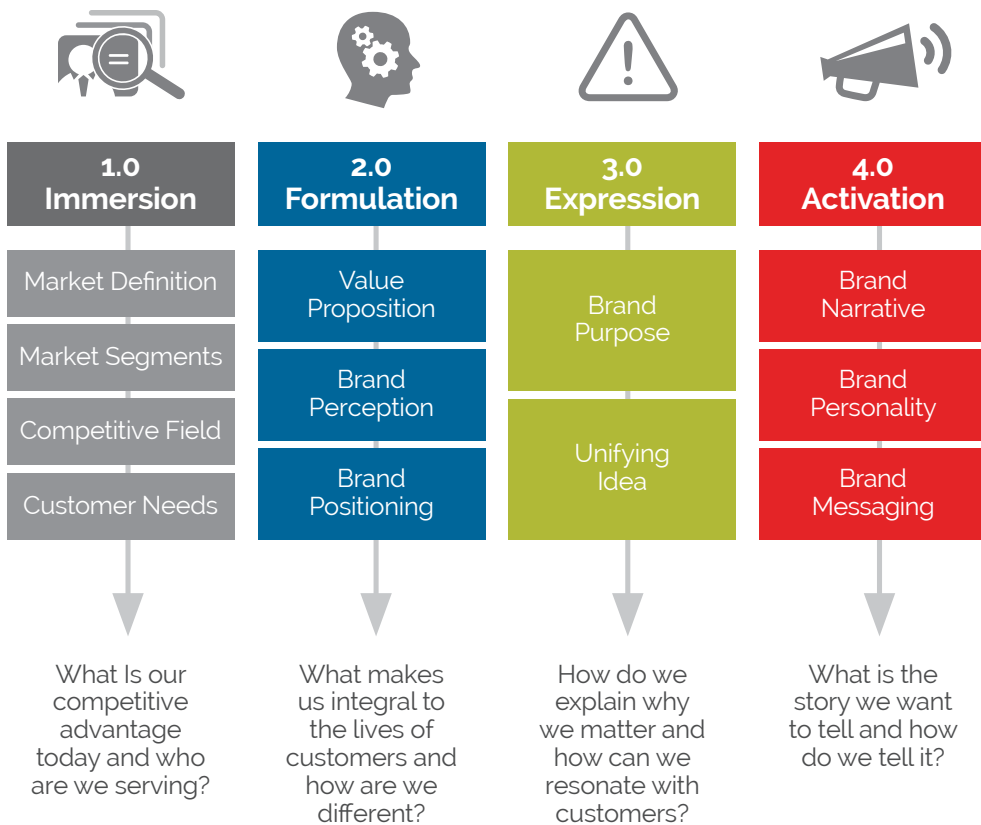
INPUT: Brand Brief
OUTPUT: Unifying Idea

PHASE 4 – ACTIVATION

The goal of this phase is to convert the brand purpose and value proposition into a brand narrative which is the complete story that can be easily told to the market and all stakeholders. The brand personality is defined, which in turn shapes the brand voice so that all communications are consistent in tone and manner.

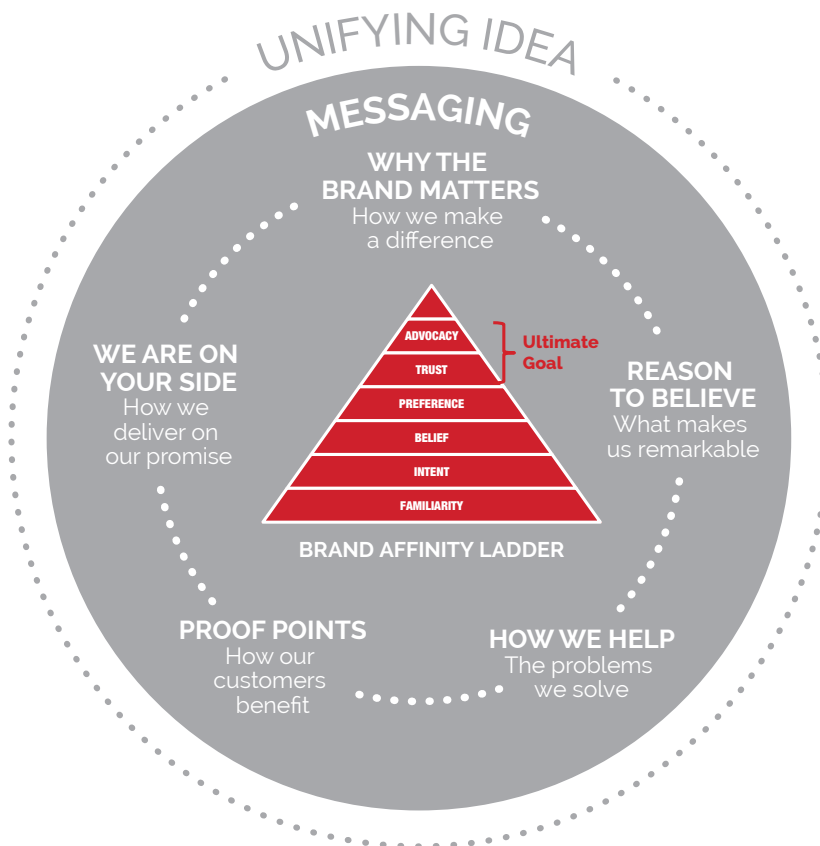
INPUT: Unifying Idea
OUTPUT: Brand Identity

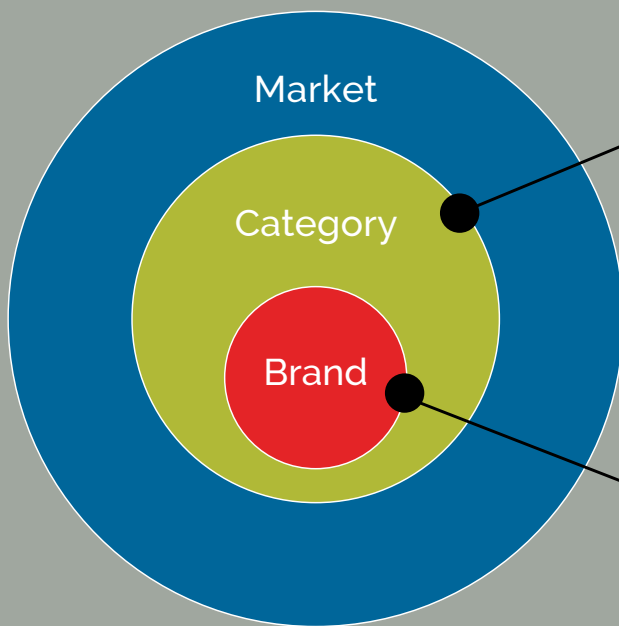
BRAND DEVELOPMENT WORKFLOW



TEN KEY QUESTIONS

1. What business are you in?
2. How would you describe what you do in a single sentence?
3. What value do you create for people and why should they care?
4. How are you integral to their lives?
5. What do you do differently or better than anybody else?
6. Why does your brand exist, and would anybody notice if it disappeared?
7. How do people think and feel about your brand today? How would you like them to feel?
8. Why should people trust you?
9. What is the one thing about your brand that people should know and remember?
10. What does your brand stand for?





Size
Growth Rate
Seasonality, Cyclicity
Marketing dynamics
External Forces
Trends

Share
Goals
Barriers
Opportunity
Strengths / Weaknesses
Degree of Salience
Resonance
Perception
Loyalty



TOP QUESTIONS

1. What is the single most important challenge facing the brand?
2. What is the overall salience and resonance of the brand?
3. What is the most sustainable competitive advantage?
4. How loyal are current customers to the brand and why?

Market Definition

Market Segments

Competitive Field

Customer Needs

1.1 MARKET DEFINITION

The first step in the process is to clarify the exact market being served and the factors that are exerting the greatest influence on brand performance. This information helps provide strategic context for brand building.

1. What are the defining characteristics of the market category being served?
2. What are the key dynamics affecting the health of the category?
3. What are the major trends affecting current and future buying patterns?
4. What are the major challenges facing the brand today?

1. Defining Characteristics

Provide an overview of the category being served. Include a definition of the market need; the size and growth rate of the market; its product lifecycle maturity; the seasonality and sales cyclicity; and an overview of the competitive landscape.

2. Market Dynamics

Provide an overview of the forces that are shaping the market and how they might change in future. The factors to consider might be distribution

channel pressure; the entry of new or generic substitutes; regulatory or environmental factors; the buying patterns of customers; significant technological changes; and global and domestic economic and trade factors.

3. Major Trends

Provide an overview of the demographic, societal, and industry trends that are influencing category buying and brand choice. Consider changes in the values, attitudes and priorities of buyers that might affect their decision making.

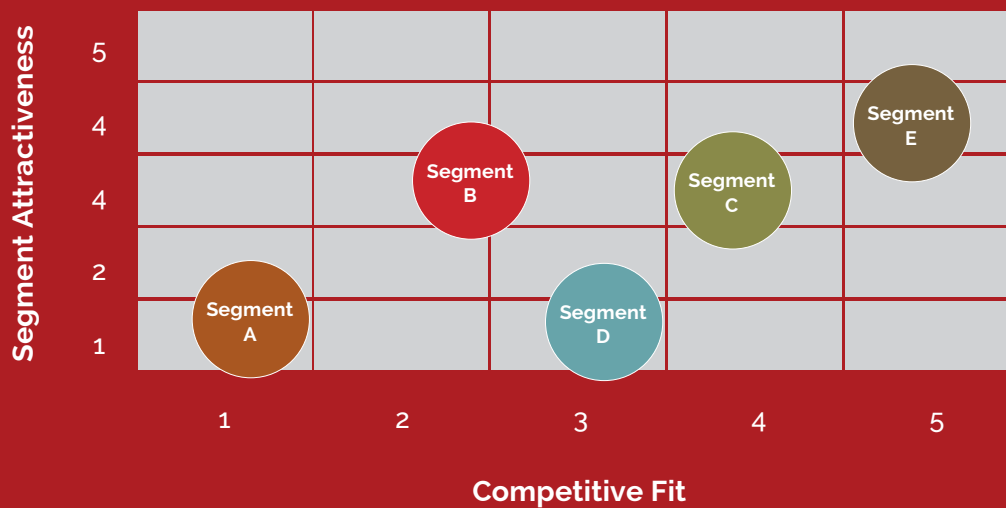
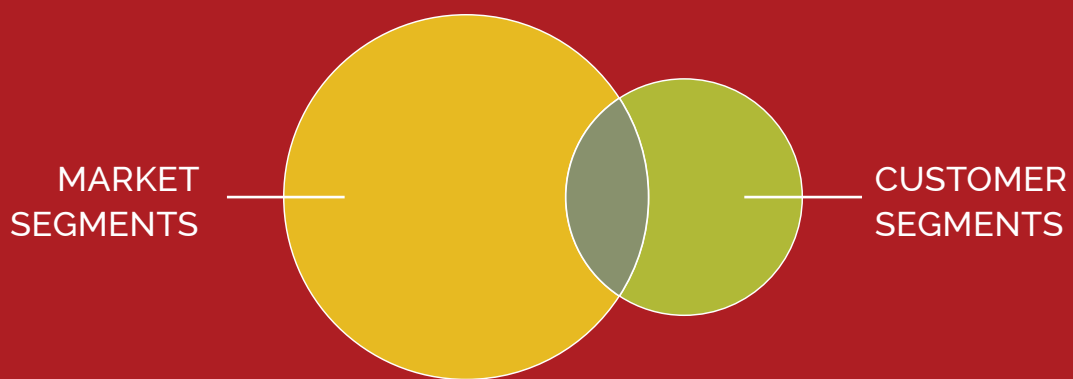
4. Current State

Provide an overview of the state of the brand and the specific challenges it faces. Explain where it is in its product lifecycle; its current market share and goals; its general perception in the market; its level of brand salience, recognition and loyalty in the market; and its critical success factors.

IMMERSION



IMMERSION





TOP QUESTIONS

1. Which segments offer the greatest opportunity for success?
2. How do the segments differ?
3. What are the major segment needs?
4. What are the brand goals for each segment?

1.2 MARKET SEGMENTS

The second step in the process is to define the key market and customer segments that the brand is meant to serve. This information ensures that the brand positioning will resonate with potential buyers.

5. What are the key market segments based on size, buying power, known needs and potential demand?
6. What is the relative attractiveness of each market segment and how do they rank in priority importance?
7. What are the key customer segments based on current and potential share of wallet?
8. What are the marketing goals by segment?

5. Identify Key Market Segments

Provide a description of the key market segments based on business characteristics, operating style, functional needs and buying approach. Be clear in defining the problems each segment needs to solve and why. Identify the primary and secondary decision makers. What do they hope to gain? What keeps them up at night? How do the segments differ?

A market segment is a distinct group of buyers sharing a similar set of characteristics and needs.



6. Determine Segment Attractiveness

Determine the relative attractiveness of each segment. Use an Attractiveness Matrix to score each segment according to weighted criteria incorporating factors such as segment size, growth potential, competitive fit, and likelihood to buy. Plot the position of the segments on a matrix based on the attractiveness score and competitiveness.

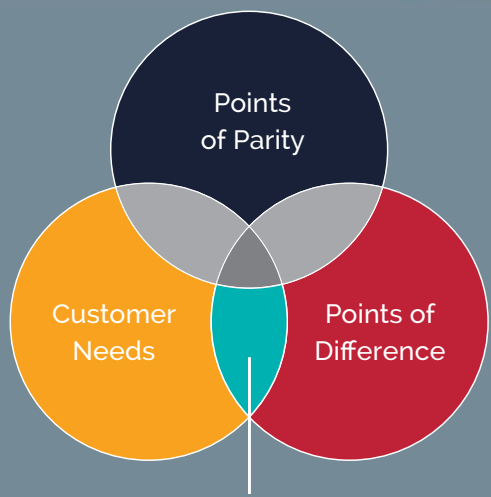
7. Identify Key Customer Segments

Provide a description of the key customer segments based on their relationship profile, past buying behaviour, share of wallet and expected demand. Plot the intersection of customer and market segments to show the degree of overlap

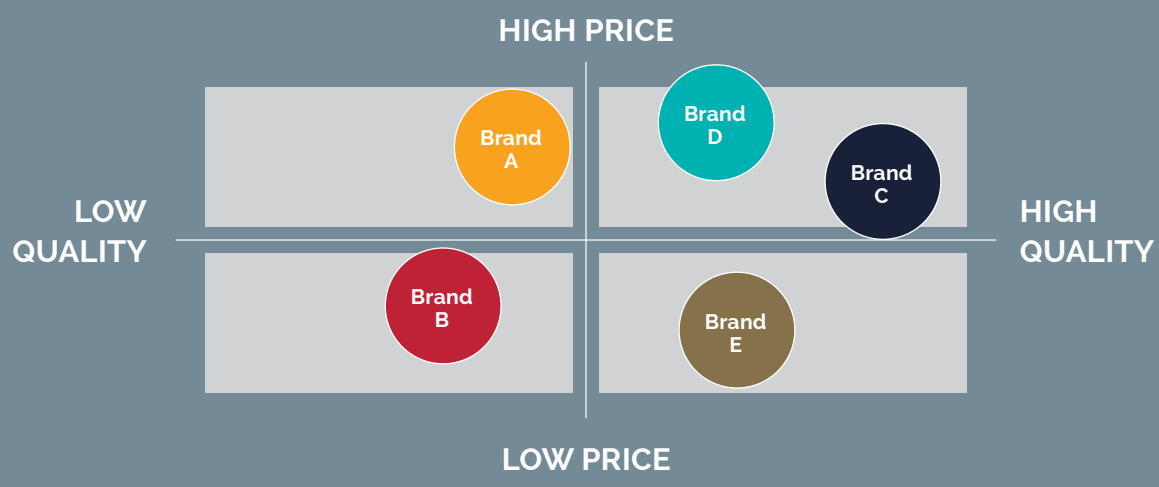
A customer segment is a distinct group of customers sharing a similar set of characteristics and behavioural patterns.

8. Define Segment Goals

For each of the primary market and customer segments, list the brand goals in terms of expected demand, relationship management, and sales conversion. Summarize their dominant needs and the benefits that might be of greatest interest to them.



UNIQUE CLAIM





TOP QUESTIONS

1. What are the brand's key strengths?
2. What is the "ownable" space between brand strength and customer needs?
3. Which competing brand is the true enemy?
4. What one claim can the brand make that no else can?

1.3 COMPETITIVE FIELD

The third step in the process is to define the competitive landscape and how the brand differs. This information is essential to establishing a unique brand positioning.

9. Who are the major direct competitors? Indirect competitors? Are there any challenger brands?
10. What are the major points of parity and points of difference between the brands?
11. How does the brand rank in overall strength versus the competition?
12. How do the other brands position themselves?

9. Identify the Competitive Set

Provide a description of the competitive landscape and profile the main contenders, describing their value proposition, market strengths and weaknesses, go-to-market strategy, and known or anticipated future strategies. Include in the analysis niche or flanker brands (such as generic labels), as well as new challenger brands who may pose a threat in future by disrupting the value chain.

10. Identify the Points of Difference/Points of Parity

Identify the brand attributes shared across one or more competitive brands. Distinguish between must have benefits necessary in order to compete and nice-to-have ancillary benefits that are less critical to brand choice. Next identify all of the brand attributes that are unique to the brand and which can form the

basis of a distinct claim.

11. Rate the Competitive Strength

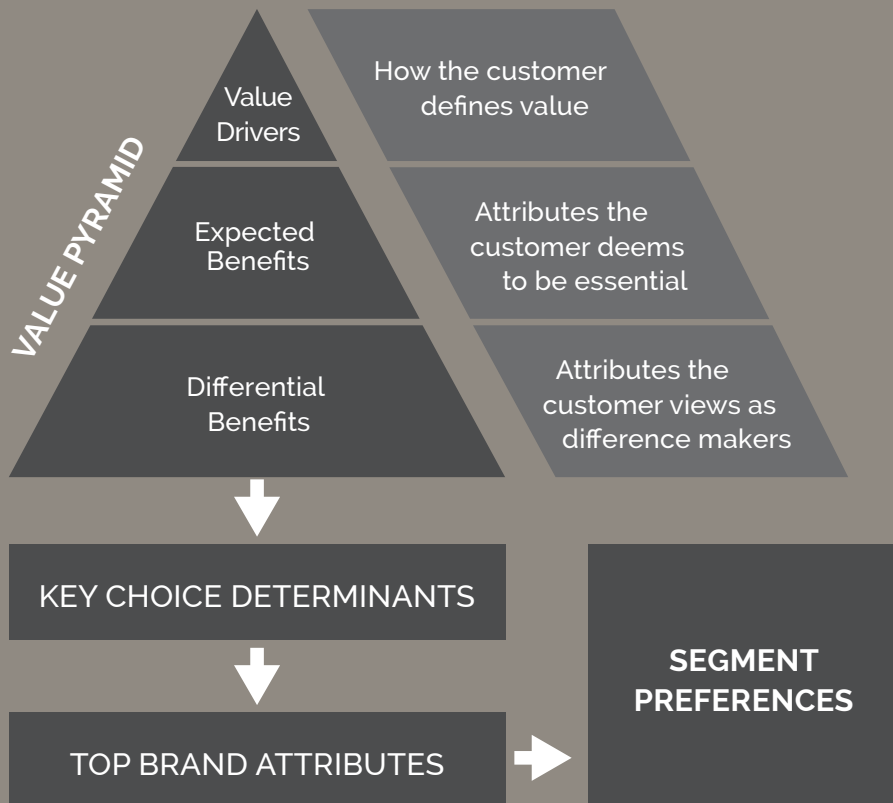
Provide an assessment of the brand competitive strength. First establish the key success factors such as quality, effectiveness, reliability, affordability, customer support, supplementary services and entitlements. Weight each of these factors in accordance with their importance to the buying decision. Next score the brand based on its performance against each attribute (e.g., superior, strong, weak). Then rate the top 3 competitors. Finally compare the relative strength of each brand in a matrix. The sum of the performance scores is the competitive brand position. Identify the one brand which represents the toughest foe.

12. Compare Brand Positioning

For each of the top ranked competitive brands, describe their current positioning and messaging strategy. To compare the brand positioning, create a perception map which visualizes the brand position relative to the competition. The map has two dimensions based on the most important attributes from a customer standpoint (e.g., quality and price). More than one map can be used if required.



IMMERSION





TOP QUESTIONS

1. What are the top problems customers are seeking to solve?
2. How does the brand make life easier and better for customers?
3. What are the main attributes customers are looking for when they make a choice?
4. Do the segments differ in their priorities and preferences?

Market Definition

Market Segments

Competitive Field

Customer Needs

1.4 CUSTOMER NEEDS

The fourth step in the process is to define the direct and indirect benefits offered by the brand. This information is used to define the core value proposition and the brand messaging strategy.

13. What are the relevant needs customers are trying to satisfy and the main barriers to achieving their goals?
14. What are the ways in which the brand helps customers address their needs?
15. What are the Key Choice Determinants that drive brand consideration and purchase?
16. How do the Choice Determinants differ by segment?

13. Identify Customer Needs

Provide a description of the jobs or tasks customers are trying to perform; the problems they are trying to solve; their specific needs as they relate to the challenges and difficulties they face; the outcomes they wish to achieve; and the barriers that stand in the way of success.

14. Identify How the Brand Creates Customer Value

Identify the ways in which the brand enables the customer to solve the problem or perform the job more easily and efficiently. Describe all of the benefits of using the brand from a customer viewpoint: how it will make their lives simpler, more productive and more convenient. Express each benefit as a value

statement. Include both minimum expected benefits (necessary to be in the consideration set) and extended benefits that provide differential value.

15. Identify the Key Choice Determinants

Draw up a list of all the brand attributes (features, advantages and benefits) and score them according to their relative importance to customers using a 5-point scale (where 5 = must-have). Rank them and then select the top-rated benefits. Take those benefits and score them based on the relative performance of the brand compared to the competition.

A Key Choice Determinant is an attribute which a customer regards as decisive when considering which brand to buy.

16. Identify Segment Preferences

Using the Key Choice Determinants that are both important to the customer and where the brand offers equal or superior value, map the list to each of the key market segments to determine whether they differ in their preferences and order of priority.

IMMERSION



FORMULATION



ALTERNATIVE CHOICES



CORE VALUE PROPOSITION

[what the brand does best]



TOP DISTINCTIVE ATTRIBUTE



OUR **offering** IS THE **ONLY** **category** THAT **benefit** .

★ ★ ★ ★ ★
BENEFITS
★ ★ ★ ★ ★

MAIN CUSTOMER BENEFITS



TOP QUESTIONS

1. What are the pros and cons of the alternative choices?
2. What unique attributes does the brand offer compared to the other choices?
3. How do those differentiating attributes help the customer in a way no other choice can?
4. Which one differentiating attribute will resonate the most?

Value Proposition

Brand Perception

Brand Positioning

2.1 VALUE PROPOSITION

The fifth step in the process is to provide a concise reason why customers should choose the brand over competitive alternatives. This reason is codified in the form of an "onliness statement".

17. What are the alternative ways customers can solve their problem other than choosing the brand?
18. What unique advantages does the brand offer that none of the alternatives can match?
19. How do those unique attributes help those customers most in need of a solution?
20. What is the main point of differentiation?

A Core Value Proposition is the intersection between what a brand does best and the decisive reasons a customer will choose a brand.

those attributes based on their level of importance to the customer. Develop a value proposition statement which is a synthesis of the top ranked attributes (what the brand does best).

Include evidentiary support in the form of facts, measures, endorsements and use cases.

17. Identify the Alternative Choices

Thinking about the main problem customers are trying to solve, identify the alternative solutions they are most likely to consider (including doing nothing). Identify the pros and cons of each alternative solution. Rank the alternatives based on the likelihood of customers choosing them.

18. Identity the Unique Brand Attributes

Review the range of benefits that customers care most about (Key Choice Determinants) and identify the brand attributes most closely aligned to those needs. Identify those attributes that are true of the brand and no other alternative, in full or in part. Rank

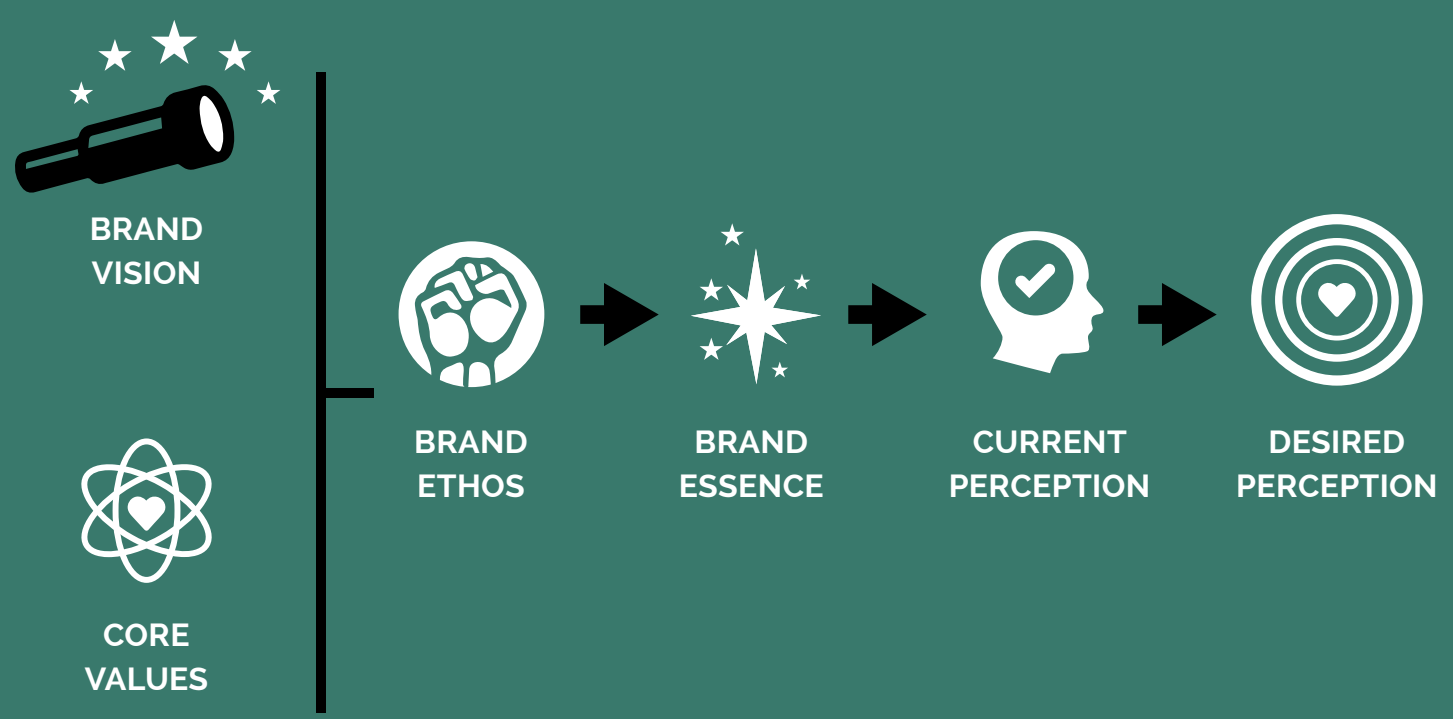
19. Explain How the Value Proposition Benefits the Customer

For each unique attribute, describe how the customer will benefit and why it delivers superior value. Of all the attributes listed (the core value proposition), identify which one is likely to resonate the most with customers based on degree of uniqueness and importance to the customer and explain why.

20. Create an Onliness Statement

Based on the main differentiating attribute, develop an "onliness statement". This statement should include: the category; the differentiating attribute; how the customer benefits; and why. "We are the only [company in the industry] that can [defining attribute] for [market served] who want [associated benefit]."

FORMULATION





TOP QUESTIONS

1. What values does the brand share with its customers?
2. What is the image of the brand today in the minds of customers?
3. How should the brand be seen by customers?
4. How should customers feel toward the brand?

Value Proposition

Brand Perception

Brand Positioning

2.2 BRAND PERCEPTION

The sixth step in the process is to determine how customers should think about the brand and their feelings toward it. Defining the desired perception is critical to designing the brand identity.

21. What are the values and principles of customers?
22. What is the future vision of the brand? What role will it continue to play 10 years from now?
23. What are the brand beliefs and values (ethos)?
24. What is the core essence of the brand (most distinctive intangible attribute)?
25. What is the desired brand perception?

21. Identify Shared Values

Thinking about those customers who are most important to brand success, define the values and beliefs by which they live their lives. What are their guiding principles? Beliefs? Ethics? Worldview? Which values might be important to customers in how they relate to brands?

22. Define the Brand Vision

Broadly describe how the brand contributes to the success of customers and their communities. Then describe how the brand sees itself in future: how will it continue to make itself indispensable in the lives of customers? Why is it critical for the brand to exist in future? What is the brand BHAG (big hairy audacious goal)? How will it be seen as a category leader and innovator?

23. Define the Brand Ethos

Describe the ethos of the brand: how it believes the world should work; the fundamental beliefs it holds to be true; the ideals and values it cherishes; the principles it holds in common with customers. Develop a short credo statement or manifesto which expresses the brand ideology in a way that can inspire all stakeholders.

24. Define the Brand Essence

Taking into account the core value proposition (brand promise) and the brand vision and ethos (how it serves the world at large), create a short, pithy phrase that captures the driving force behind the brand (its most distinctive soft attribute).

A Brand Essence is the core characteristic which is the emotional connection point with customers. It is an intangible attribute that separates the brand from the competition when all else is equal.

25. Define the Desired Perception

Brand perception is the totality of feelings a customer has about a brand. These thoughts and feelings are evoked whenever a customer interacts with the brand. They are the guiding force behind brand choice and loyalty. What thoughts and feelings should the brand evoke (in words a customer might use)?

FORMULATION



MARKET TREND

The reason to act with urgency

ONLINESS STATEMENT

The top attribute which makes the brand distinctive



POSITIONING STATEMENT

MARKET VOID

The gap between customer desires and available choice.

INDISPUTABLE CLAIM

The main reason for customers to believe



TOP QUESTIONS

1. What trend makes now the right time to choose the brand?
2. What one statement can be said about the brand that is indisputable?
3. How would a customer describe their ideal choice in their own words?
4. What is the one lasting impression we want customers to have about the brand?

Value Proposition

Brand Perception

Brand Positioning

2.3 BRAND POSITIONING

The seventh step in the process is to define how the brand should be positioned in the minds of customers. The positioning statement serves as both a strategic beacon and inspiration for development of the brand identity.

26. Are there any key market trends that make the brand particularly relevant to the customer at this time?
27. How would customers describe an ideal solution?
28. What market gap is the brand addressing?
29. What one takeaway image do we want customers to associate with the brand?

26. Identify Relevant Market Trends

Consider all of the market trends and developments that might influence buying decisions. They can be technological, socio-cultural, environmental, economic, or even lifestyle related. Determine which trend (if any) is most relevant to the brand choice decision and will increase the sense of urgency to act immediately.

27. Describe Ideal State from a Customer Perspective

Consider those customers in the sweet spot of the market who represent the ideal customer. In words they would use, describe how they would define their

ideal choice: the reasons they would choose one brand over the other.

28. Describe How the Brand Fills a Market Void

Thinking about the core value proposition, define the one true statement about the brand that no one can dispute, and which customers would find important and meaningful. Explain why it fills a void in the market and is something the competition cannot match.

29. Define the Brand Position

Develop a concise summary of why the brand is the best choice for the customer based on how closely it matches their ideal choice and why it is better than the alternatives. The statement should take into account the functional and emotional benefits of the brand.

A Brand Position Statement is a guide to strategic marketing and brand management that summarizes how the brand should be positioned in the minds of customers. It must be short; sustainable; credible; and important to customers.

FORMULATION



WHAT THE BRAND DOES BEST



CUSTOMER WORLDVIEW
[how the world should work]



BRAND ORIGIN STORY
[motivation]



SHARED IDEOLOGY
[how to make the world a better place]



BRAND PURPOSE
[why the brand exists]



BRAND CREDO
[convictions]



Brand Purpose

Unifying Idea

EXPRESSION

TOP QUESTIONS

1. How do customers view the world around them?
2. How does the brand make the world a better place?
3. What do customers deeply care about that align with the brand beliefs?
4. How will the brand stay true to its convictions?

3.1 BRAND PURPOSE

The eighth step in the process is to define the reason the brand exists beyond making money and how it serves the world at large. The brand purpose expresses why the brand is integral to the lives of people and serves as a “North Star” for all stakeholders.

30. What are the attitudes, beliefs, and perspectives of customers as they relate to their view of the world?
31. What is the origin story of the brand?
32. What contribution does the brand make to society?
33. What are the principles and beliefs that guide the conduct of the brand?

30. Describe the Worldview of Customers

Reflecting on the attitudes, values and core beliefs of customers, describe what kind of world they want and the principles by which they guide their lives and contribute to the community. Identify the causes and movements they care about and the activities that give meaning to their lives.

31. Describe the Genesis of the Brand

Look back on the history of the brand and how it came into being. Identify aspects of that story that reveal the initial inspiration and motivating factors. Find, if possible, a connection point between that origin story and the ambition to make a difference in the world.

32. Define the Brand Purpose

Thinking about how customers would like to change the world, and the reason why the brand came into existence in the first place, create a concise statement which summarizes the role of the brand in making the world a better place. The statement should be a higher order sentiment which is authentic, meaningful, uplifting and relatable by all stakeholders – a “North Star” which will serve as a unifying force by positioning the brand as a change agent.

33. Create a Brand Credo

Develop a credo statement which lays out why the brand exists, its ideology and convictions, and why

A Brand Purpose Statement expresses how the brand makes the world a better place for all stakeholders. It serves to humanize the brand by making it more relatable and meaningful.

and how it strives to make the world a better place. The statement should be universal in its sentiments and apply to all stakeholders, explaining how it serves their interests and the world at large. It should serve as the reason people believe and trust in the brand in their heart.

My Story

EXPRESSION

BRAND CONCEPT CANVAS

BRAND PURPOSE

Why the brand exists (makes the world a better place)

BRAND ROLE

How the brand directly improves the lives of customers
(in their words)

BRAND ESSENCE

What makes the brand truly remarkable, in a single phrase

POSITIONING STATEMENT

How the brand delivers value in a way no other brand can

DESIRED PERCEPTION

How customers should think and feel about the brand versus the alternatives

BRAND ATTRIBUTES

The main ways the brand delivers value to customers

OWNABLE CLAIMS

Brand statements that the brand can claim as its own



Brand Purpose

Unifying Idea

EXPRESSION

TOP QUESTIONS

1. What is the main way the brand helps customers succeed?
2. What do we want customers to believe about the brand?
3. How do we want customers to feel about the brand?
4. What do we want customers to say about the brand to each other?

3.2 UNIFYING IDEA

The ninth step in the process is to define an original and ownable idea that best expresses the value of the brand to all stakeholders and can be used to unify all forms of brand identity and communication.

34. How is the brand integral to the lives of customers?
35. How does a customer feel when they solve the problem with the help of the brand?
36. What ownable phrases describe the brand?
37. Which phrase best expresses the brand essence?

34. Create a Brand Overview

Taking into account the brand essence (core strength), brand purpose (why the brand exists), positioning statement (what makes the brand different or better), and desired perception (how customers should think and feel), develop an overview statement of the role that the brand plays in the lives of customers; how it helps them perform the jobs that need to be done; how it makes them feel as a result; why they swear by it; and why they would miss it if it did not exist.

35. Develop a “Day in the Life” Storyboard

To help illustrate the real world value of the brand, develop a short script and storyboard, describing the use of the brand to solve a real problem and the feelings it engenders with customers as they experience the benefits. Ideally, use a true customer scenario.

36. Identify Ownable Words and Phrases

Develop a set of keywords most closely associated with various aspects of the brand experience including societal benefits (e.g. sustainability); functional benefits (e.g., ease of use); emotional

benefits (e.g., satisfaction and pride); stakeholder benefits (e.g., enhanced reputation); and cultural (e.g., pioneering). Convert the most relevant word associations into adjectival phrases that can be used to describe the brand (e.g., great value for money). Identify the key words and phrases that should be owned by the brand.

IDEA CHECKLIST

1. Simple,
2. Unique
3. Inspirational
4. Adaptable
5. Ownable

37. Create a Concept Canvas

Compile the brand overview into a brand concept template which can be used to secure stakeholder consensus and support the eventual development of a more in-depth creative brief. The components of the brand concept canvas include: Brand Purpose; Brand Role; Brand Essence; Brand Positioning; Brand Perception; Brand Attributes; and Ownable Claims (phrases). Use the template as a springboard to generate a Unifying Idea.



STORY ARC

Once upon a time ...
 our hero had a problem ...
 which could not be solved ...
 causing stress and angst ...
 until one day along came a solution ...
 which allowed the hero to live happily
 ever after.



MASTER NARRATIVE

How the brand serves the world at large

CUSTOMER STORY

How the brand helps customers succeed

PARTNER STORY

How the brand supports its partners

COMMUNITY STORY

How the brand helps customers succeed

EMPLOYEE STORY

How the brand helps employees prosper



TOP QUESTIONS

1. Who is the hero of the story and what are they striving for?
2. What is stopping them from achieving what they want?
3. How do they overcome their obstacles?
4. How are they better off than before?

Brand Narrative

Brand Personality

Brand Messaging

4.1 BRAND NARRATIVE

The tenth step in the process is to develop a brand narrative and signature stories that convey the brand promise in a way that is memorable, meaningful, relatable and credible.

38. What is the story architecture?
39. Who is the hero of the story and what is their quest?
40. What are the biggest obstacles facing the hero?
41. What is the happy ending?

38. Create a Central Narrative and Supporting Stories

Create a storyboard framework which establishes the different levels of brand narrative. The Master Narrative should pivot around the highest order purpose and depict the role of the brand in the world at large. The supporting stories are told from various vantage points (customers, partners, employees) focusing on different storylines and outcomes based on their respective challenges. The story is told in the first person using the voice of the hero.

39. Identify the Main Character and Their Quest

Describe the main protagonist, their characteristics and their higher order aspirations and desires (drawing on the segment personas) relating to their personal goals in

life (e.g., wealthier, happier, more fulfilled). Explain what their ambitions are and how they define success. Create a hero whom customers can recognize in themselves.

40. Identify the Obstacles and Challenges

List the main sources of conflict the hero faces which the brand can solve – the problems that keep them up at night. Describe their frustration and how it makes them feel. Why they think it may be unfair or wrong. Choose the most salient challenge which customers can relate to.

41. Describe the Hero's Journey

Thinking about the main challenge, explain how the hero has tried and failed to solve the problem in the past, using alternative methods and

solutions. Identify why those solutions were inadequate. Then explain how one day the hero discovers the brand and enlisting its help is able to finally achieve their goal. Describe how the hero now feels compared to before.

WHAT IS A SIGNATURE STORY?

A unique story that revolves around a relatable protagonist (archetypal customer) facing an issue or problem which stands in the way of achieving their goals who finds a way (through the help of the brand) to overcome the challenges and transform their life.

ACTIVATION



CORE
VALUES



PERSONAL
ATTRIBUTES



BRAND
PERSONALITY



BRAND
VOICE



PERSONALITY
DIMENSIONS



- Style
- Tone
- Manner
- Volume

Sincerity

Sophistication

Excitement

Ruggedness

Competence



TOP QUESTIONS

1. What type of person is the brand most like?
2. What does that person hold to be true?
3. What does that person sound like?

Brand Narrative

Brand Personality

Brand Messaging

4.2 BRAND PERSONALITY AND VOICE

The eleventh step in the process is to personify the brand by identifying a personality type which can be associated with it and then to develop a recognizable tone and voice that can be applied to all forms of communication.

42. What core values will customers relate to the most?
43. What are the human traits most closely aligned with the core values?
44. What tone of voice should the brand use to express itself?

should be recognizable, distinctive and memorable, and can never be mistaken for a competitive brand. Most importantly, the brand personality must make an emotional connection with people. A brand personality can be identified using existing frameworks (e.g. Aaker's Brand Personality Dimension Framework) or through a workshop exercise identifying the attributes that best correlate with the core values.

42. Describe the Core Brand Values

CORE VALUES

Core brand values are the beliefs that the brand stands for (its ethos).

The core values should be drawn from the brand ethos (what the brand believes). Values should evoke a sense of emotion, intimacy and belonging, creating a deeper sense of connection. The core values must be unique to the brand (not ownable by any other brand) and resonate with customers.

44. Define the Brand Voice

After deciding the brand personality type, a distinctive tone and voice needs to be developed which can be applied to all forms of communication, ensuring universal recognition and consistency. In other words, if the brand represents a type of person, how would they speak?

The tone of voice can range anywhere from authoritative to academic to passionate. The first step is to analyze the personality and voice of competitive brands to assess how much room there is for differentiation. The second step is identifying a unique voice (through word clustering) which reflects the brand personality. The final step is to develop a Brand Personality Profile which describes what they're like.

BRAND VOICE

Brand voice is the consistent tone and language used across all forms of branded communications so that all of it sounds like it comes from one company.

43. Define the Brand Personality

The purpose of personifying a brand is to make it easier for people to relate to. The brand personality is at the heart of brand identity development because the goal is to make the brand relatable and, ideally, loveable. The personality

BRAND PERSONALITY

Brand personality is a set of human characteristics that are attributed to a brand and can help make it more relatable.

ACTIVATION



STRATEGIC MESSAGING MODEL
The purpose is to provide a uniform basis for message development, linking the highest tier positioning around the brand vision to the lowest tier messaging around solutions and capabilities.

UNIVERSAL BRAND MESSAGING

Why the brand exists



STRATEGIC MESSAGING

How the brand creates value



SEGMENT MESSAGING



How the brand is relevant to different segments

KDM MESSAGING



How the brand is relevant to different decision makers

SOLUTION MESSAGING



How the brand delivers specific business outcomes

CAPABILITY MESSAGING



How the brand solves specific customer needs



TOP QUESTIONS

1. What role does the brand play in the world at large?
2. What is the core brand promise?
3. How is the brand relevant to different segments?
4. How many ways does the brand create value?

Brand Narrative

Brand Personality

Brand Messaging

4.3 BRAND MESSAGING

The final step in the process is to develop a strategic messaging model which enables greater uniformity and consistency in how the brand expresses itself to serve different purposes.

45. How does the brand create value for the top needs of customers?
46. How does the brand make a difference in the world?
47. What does the brand do differently or better than any other choice?
48. What makes the brand relevant to different customer segments?
49. What solutions and capabilities does the brand offer?

emotional connection that resonates with people and which can be a difference maker in highly competitive categories.

47. Define Strategic Messaging (Value Proposition)

The focus of this messaging tier is to sharply define the core value proposition: what the brand does differently, better or best than any other option, expressed as an outcome. It should address a specific need where the brand can claim a particular advantage and it should have broad appeal to a cross-section of customers in different segments.

45. Create a Strategic Messaging Framework

The first step is to gain alignment around the model framework and the different levels of messaging required. This process is begun by connecting the top needs of customers and the issues they face with how the brand can help solve them and why they need to act now. The "value matrix" is then used as a reference point to devise the different levels of messaging (universal, strategic, tactical).

48. Define Customer Messaging

This messaging tier is aimed at different segments which might have unique needs and where the central value proposition must be adapted to show how it is relevant to their specific challenges. If it is important to address different key decision makers, the messaging must address their individual needs, focusing on the outcomes and criteria important to them.

46. Define Universal Brand Messaging

The purpose of messaging at this level is to convey the role of the brand in the lives of the community it serves: why it exists, how it makes a difference, what it believes, and the beliefs and values it holds in common with customers. The idea is to create an

49. Define Solution Messaging

At the lowest messaging tier, the focus is on mapping desired business outcomes to specific solutions and capabilities, either at the category level or relating to specific products.

ACTIVATION

A. PROCESS OVERVIEW

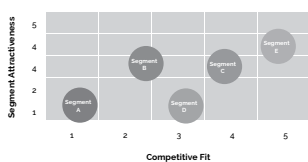
IMMERSION

What Is the Competitive Advantage Today And How Is the Brand Perceived?



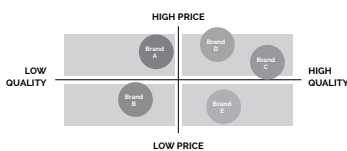
1.1 - Market Definition

An overview of the market category, its size and structure and key trends affecting buying patterns and product choice.



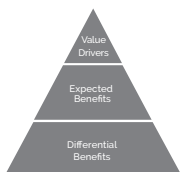
1.2 Market Segments

The key segments within the market, how they differ and the most attractive ones to pursue.



1.3 Competitive Field

The competitive products, their relative value, distinctive attributes and how they position themselves.



1.4 Customer Needs

The relevant needs of target segments and their key decision criteria

FORMULATION

What Makes the Brand Integral To The Lives Of Customers?



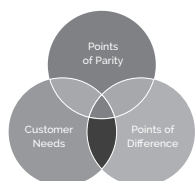
2.1 Value Proposition

What makes the brand superior, different or unique..



2.2 Desired Perception

How the product/service should be perceived rationally and emotionally by the customer.



2.3 Brand Positioning

The central brand promise positioned in a way that will resonate with customers.

A. PROCESS OVERVIEW – continued

EXPRESSION

How Does the Brand Explain Why It Matters And What It Does For People?



3.1 Brand Purpose

Why the brand exists (how it makes a difference in the world) .



3.4 Unifying Idea

A singular cohesive concept that conveys the meaning of the brand to all stakeholders.

ACTIVATION

How Do We Activate the Brand Identity?



4.1 Brand Narrative

The central narrative that communicates the vision and essence of the brand..



4.2 Brand Personality and Voice

The brand archetype (universal character) and voice

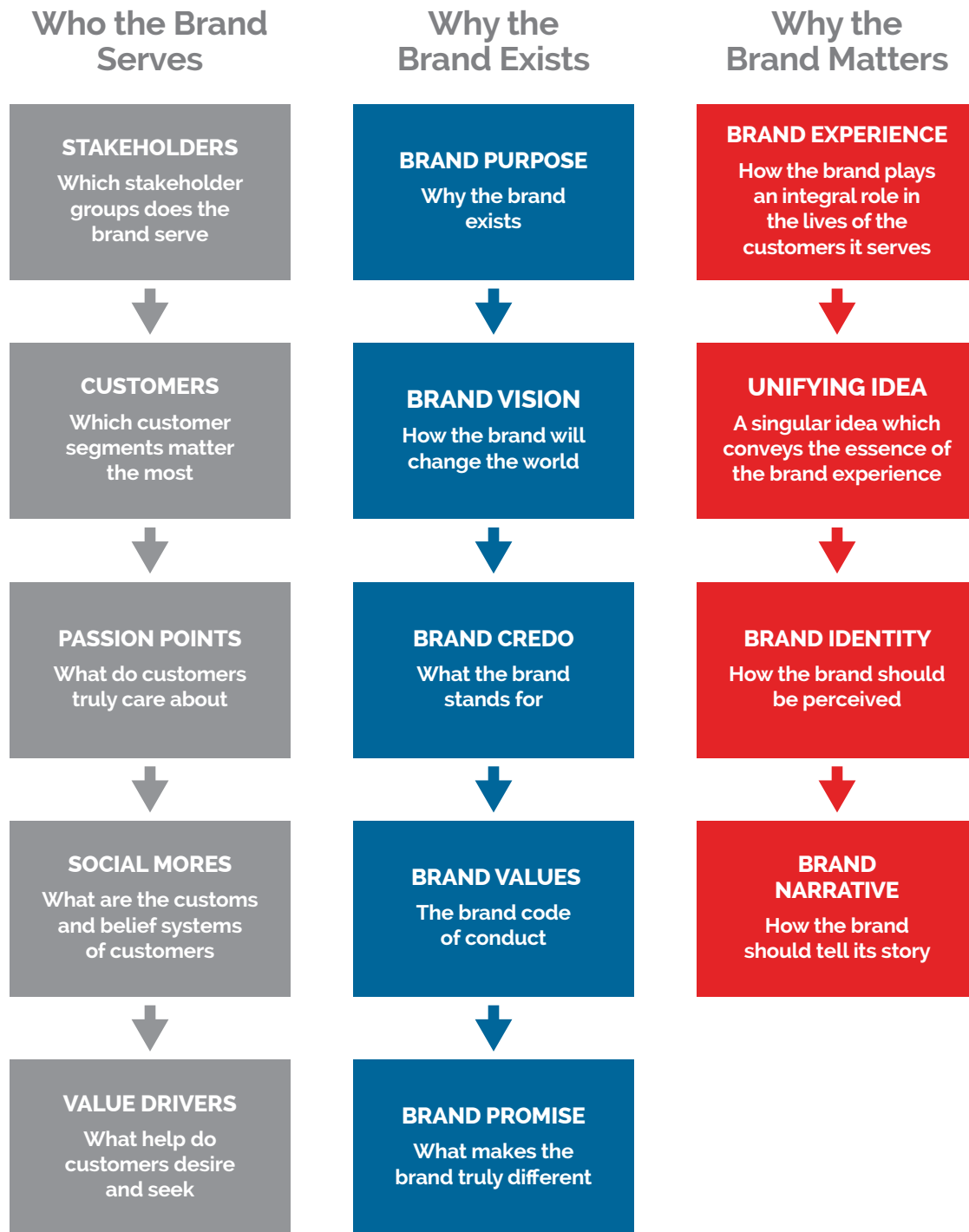


2.3 Brand Messaging

The messaging hierarchy that will appeal to different audiences.



B. Branding Elements



C. CREATIVE BRIEF

1. PROJECT OVERVIEW

Describe the communication goals of the project and how it will support the brand strategy. Indicate how we want the target audience to respond and react. Describe key deliverables.

2. AUDIENCE PROFILE

Paint a full picture of the intended audience: who they are, what motivates them, their worldview, their demographics, their orientation and their defining characteristics. The profile should be detailed enough to form a clear image of an actual person.

3. CUSTOMER NEEDS

Identify the topline needs of customers within the brand category. Describe their goals and needs in the way a customer might describe them. Identify how customers would address those needs if the product did not exist.

4. CUSTOMER PROBLEM

Define the exact problem being solved. Capture the feelings of the audience. Describe the pain point as specifically as possible: the negative feelings they may experience in the absence of a solution. Provide a relative understanding of where the problem fits within their priorities.

4. KEY INSIGHTS

List any major insights derived from existing research pertaining to category usage. Use first-person quotes from verbatim interviews that reflect the voice of the customer.

5. BRAND RELATIONSHIP

Describe how customers feel about the brand today: What makes them prefer the brand over competitive options? Conversely, identify factors that inhibit customers from buying.

6. MAIN MESSAGES

Develop a set of nested benefit statements, explaining why people should buy the product; what makes it unique, better or different; and the call to action (if any).

7. PROOF POINTS

List the main reasons that support the product positioning and claims. Provide proof that the product is "one of a kind" or distinctive.

8. UNIFYING IDEA

Describe the "unifying" brand idea: the singular brand concept that explains why the brand plays an integral role in the lives of people.

8. BRAND VOICE

Describe the preferred brand voice and tone: how we want to talk to our audience, using vernacular and style consistent with the brand identity.

9. MEDIA AND TOUCHPOINTS

Describe the mix of media that will be used and the touchpoints that will drive engagement.

10. MANDATORIES

List the mandatory elements such as assets, calls to action, and brand styleguide requirements.

D. ARTIFACTS

BRAND REVIEW

This artifact is designed to serve as a current state analysis, providing an overview of the brand opportunities and challenges. Specifically, it should provide:

1. A description of the market category
2. An overview of market dynamics
3. A review of major trends
4. A depiction of the state and health of the brand
5. A description of the key market segments
6. A segment map depicting their relative appeal
7. A description of the key customer segments
8. A high level profile of the target segments
9. A description of the competitive landscape
10. The points of parity and difference between the brands
11. A competitor ranking and comparison of positioning along with a perception map
12. A summary of customer needs by segment
13. Identification of key choice determinants and how they vary by segment

BRAND BRIEF

This artifact is designed to provide an overview of the brand value proposition, including how the brand should be positioned and perceived. Specifically, it should provide:

1. A description of the alternative solutions available to customers
2. A ranking of brand attributes based on how well they map to the key choice determinants
3. A description of how the top ranked attributes benefit the customer
4. An onliness statement based on the top ranked attribute
5. A description of the most relevant market trend that increases the sense of urgency
6. The ideal brand choice in the words of a customer
7. A description of the market gap which the brand is addressing
8. The one brand claim which is indisputable
9. The brand positioning statement
10. The values important to customers
11. The brand vision and ethos
12. The brand essence
13. How customers should perceive the brand

D. ARTIFACTS – continued

UNIFYING IDEA

This artifact is designed to describe the brand purpose and an original and ownable idea that best expresses the value of the brand. Specifically, it should provide:

1. A description of the customer "worldview".
2. The origin story of the brand
3. The brand purpose (why it exists) and credo
4. The key words and phrases that should be "owned by the brand"
5. A single, ownable idea that can unify all communication elements

BRAND IDENTITIY

This artifact is designed to show how the brand will explain itself to the market and position itself in the minds of customer. Specifically, it should provide:

1. A description of the Master Narrative pivoting around the Brand Purpose.
2. The storytelling framework.
3. The signature story that needs to be told
4. The brand personality
5. The brand voice
6. The strategic messaging model
7. The universal brand messaging (corporate story)
8. The value proposition messaging
9. The customer messaging (segment and decision makers)
10. The solution messaging

E. LIST OF QUESTIONS

Immersion – Market Definition

1. What is the single most important challenge facing the brand?
2. What is the overall salience top of mind consideration and resonance of the brand?
3. What is the most sustainable competitive advantage?
4. How loyal are current customers to the brand and why?

Immersion – Market Segments

5. Which segments offer the greatest opportunity for success?
6. How do the segments differ?
7. What are the major segment needs?
8. What are the brand goals for each segment?

Immersion – Competitive Field

9. What is the brand's key strength?
10. What is the sweet spot between brand strength and customer needs?
11. Which competing brand is the true enemy?
12. What one claim can the brand make that no one else can?

Immersion – Customer Needs

13. What are the top problems customers are seeking to solve?
14. How does the brand make life easier and better for customers?
15. What are the main attributes customers are looking for when they make a choice?
16. Do the segments differ in their priorities and preferences?

FORMULATION – Value Proposition

17. What are the pros and cons of the alternative choices?
18. What unique attributes does the brand offer compared to the other choices?
19. How do those differentiating attributes help the customer in a way no other choice can?
20. Which one differentiating attribute will resonate the most?

FORMULATION – Brand Perception

21. What values does the brand share with its customers?
22. What is the image of the brand today in the minds of customers?
23. How should the brand be seen by customers?
24. How should customers feel toward the brand?

E. LIST OF QUESTIONS – continued

FORMULATION – Brand Positioning

25. What trend makes now the right time to choose the brand?
26. What one statement can be said about the brand that is indisputable?
27. How would a customer describe their ideal choice in their own words?
28. What is the one lasting impression we want customers to have about the brand?

EXPRESSION – Brand Purpose

29. How do customers view the world around them?
30. How does the brand make the world a better place?
31. What do customers deeply care about that align with the brand credo?
32. How will the brand stay true to its convictions?

EXPRESSION – Unifying Idea

33. What makes the brand remarkable?
34. What do we want customers to believe about the brand?
35. How do we want customers to feel about the brand?
36. What do we want customers to say about the brand to each other?

ACTIVATION – Brand Narrative

37. Who is the hero of the story and what are they striving for?
38. What is stopping them from achieving what they want?
39. How do they overcome their obstacles?
40. How are they better off than before?

ACTIVATION – Brand Voice

41. What type of person is the brand most like?
42. What does that person hold to be true?
43. What does that person sound like?
44. What role does the brand play in the world at large?

ACTIVATION – Brand Messaging

45. What is the core brand promise?
46. How is the brand relevant to different segments?
47. How many ways does the brand create value?

F. GLOSSARY

BRAND

A symbolic representation of the value a company or organization creates for customers.

BRAND ARCHETYPE

A way of presenting a brand as a type of persona, making it more relatable.

BRAND ARCHITECTURE

The organization of brands into distinct hierarchies, showing how they relate to each other. There are three types of brand architecture models: the branded house, the house of brands, and the endorsed brand.

BRAND ATTRIBUTES

The characteristics and qualities that make a brand unique and recognizable.

BRAND CREDO

The rallying cry of a brand designed to excite and inspire all stakeholders in the aspirations of the brand (also known as the brand "North Star").

BRAND EQUITY

The intangible value of the brand based on the degree of buyer recognition, perception and acceptance in the market.

BRAND ESSENCE

The single intangible [emotional] attribute that differentiates a brand from competitive brands.

BRAND ETHOS

The guiding set of beliefs and principles behind the brand purpose.

BRAND EXPERIENCE

All of the ways a customer interacts with a brand to form a singular and lasting impression of the value it offers.

BRAND IDENTITY

The immediate thoughts that come to mind when people think of a brand. It is the bonding agent that unifies all forms of communication and interaction.

BRAND NARRATIVE

How a brand explains itself to the world in the form of a story with a beginning, middle and end. The hero of the story is the customer solving the problem to achieve the desired outcome.

BRAND PERCEPTION

How a customer should think of the brand, rationally and emotionally.

BRAND PERSONALITY

A set of personality traits associated with the brand which help to make it more relatable and leads to determining the brand voice.

BRAND POSITIONING

How a brand should be positioned in the minds of customers to form a distinct impression.

BRAND PURPOSE

The reason the brand exists beyond making money, and how it serves the world at large.

BRAND SALIENCE

The degree to which the brand is thought of or noticed in the path to purchase.

F. GLOSSARY – continued

BRAND RESONANCE

The intensity of affection for the brand measured by the degree of brand advocacy and depth and sustainability of the relationship.

BRAND STRATEGY

How the brand will achieve its business and financial goals by increasing market share and share of expenditures.

BRAND VALUES

The core values that guide the behaviour of the brand in interacting with all stakeholders.

BRAND VISION

How the brand will continue to serve the needs of customers into the distant future.

BRAND VOICE

The style, tone and manner of all brand communication elements.

BRAND TYPES

MASTERBRAND

A masterbrand is used to connect all of the products and services to the corporate entity.

PARENT BRAND

A brand representing a distinct operating division serving a unique market.

SUB-BRAND

A brand that is affiliated with a masterbrand or parent brand but owns its own identity.

BRAND EXTENSION

The use of the brand name to enter adjacent markets where name recognition and trust can help it win early acceptance.

KEY BRANDING TERMINOLOGY

KEY CHOICE DETERMINANT

The main factors that determine brand choice in the buying process.

ONLINESS STATEMENT

This statement identifies what makes the brand truly different: Our brand is the ONLY [business category] that [point of difference].

SIGNATURE STORY

The main storyline a brand wants to share with people to explain its role in their lives.

STRATEGIC MESSAGING FRAMEWORK

The hierarchical model that defines the different levels of messaging required to communicate the purpose and value of the brand to different segments and audiences.

UNIFYING IDEA

The central idea that links the purpose of the brand with all of the ways it delivers value to customers.

VALUE PROPOSITION

The main reason a customer should choose the brand over competing alternatives.

