
YOUR BRAND TOOLBOX

ABOUT SUBSTANCE151

Substance151 is a strategic brand communications firm for organizations on the edge of evolution – whether that evolution is inspired by growth, changing conditions, stronger competition, new customers, products and services or a desire for a more relevant brand.

Our expertise includes every step of the branding process – from research & strategy through design, across print and digital, and covering all aspects of marketing communications.

You can reach Substance151 at brand@substance151.com or 410-732-8379.

GETTING STARTED

Branding Is a Process, Not a Deliverable

Building a strong brand is anything but easy. What's more, your brand is a living entity and it must be able to evolve as your company and its goals, needs, and the competitive landscape change over time.

Although rebrands vary considerably in cost, time and exact deliverables, following a strategic and disciplined process can help reduce headaches and prevent both costs and timelines spiraling out of control.

Why Should We Invest?

If done right, having a focused, differentiating and recognizable brand has numerous business and marketing benefits:

- » Brings everything into focus – from business strategy and goals to daily operations.
- » Enables your company to secure ideal customers and projects more easily and less expensively.
- » Warrants higher fees and shields you from being seen as a commodity.
- » Helps your company to attract, retain and engage top talent.
- » Creates relevance and builds trust.

This guide was designed to help marketing and business leadership to better understand the rebranding process from planning through rebrand and beyond.

But first, what is a brand?

“ Brand is not what you say it is. It’s what they say it is

– Marty Neumeier, The Brand Gap

A brand is **not** a logo! Or a tagline, or an identity system. A brand is different from your products or services and it’s so much more than your marketing materials.

A brand is an expectation of experience, a perception that your audiences have about your company.

Your company builds its brand, or rather the perception of its brand, with every customer contact, planned or unplanned. Every interaction, no matter how small it may seem, shapes your brand’s perception and drives your audience’s behavior.

Although the definition is simple, building a strong brand is anything but easy. In fact, a strong brand begins with clearly defined foundation – a brand platform.

➔ Suggested reading: [Do You Understand the Anatomy of Your Brand?](#)

From there, you must translate the brand platform into:

- » **Brand Identity:** Look and feel, tone, style, and personality.
- » **Brand Touchpoints:** Traditional and digital marketing materials, corporate and sales tools, branded physical and virtual environments, and more.
- » **Marketing Communications:** The actual messages you put in front of your target audiences.

And, still, you’re not done!

Constantly changing market conditions, emerging audience needs, and changes in your company's strategic direction can cause your brand to become out of alignment with today's needs.

Even if everything seemingly remains status quo, there's still significant value in conducting a brand audit from time to time. Should your audit reveal that your brand is no longer in alignment with your company's goals, it's time for a rebrand.

To assist you with the entire process – from conducting your brand audit through rebranding, we've developed this **Brand Toolbox**.

Let's get started!

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TOOL 1: BRAND ASSESSMENT



BRAND ASSESSMENT

Find your starting point by assessing the strength of your current brand and marketing communications.

Clarity is key to building a strong brand

You need a clear picture of your company's vision, offerings, target audiences and desired outcomes. You also need to assess your company's current positioning and communications.

The following sets of questions will help you achieve that clarity, honestly assess your current brand and determine whether or not it's time for a change.

First, take stock of where you are now:

- » **Target Audiences:** Who are your target audiences and what are their needs and challenges?
- » **Brand Visibility:** What is the level of awareness of your company among your target audiences?
- » **Brand Perception:** What is the current perception of your company and is it different from how you would like to be perceived?
- » **Market Share:** What is your current market share? Are there opportunities to expand and what are the main obstacles to making it happen?

Then, get specific about your goals:

- » **Increase Visibility:** Do you need to increase the visibility of your company among your target audiences?
- » **Shift Brand Perception:** Is the perception your target audiences have of your company dated, inconsistent or plain wrong?
- » **Boost Market Share:** Is there room to capture a larger piece of the pie?
- » **Capture New Markets or Audiences:** Are you looking to enter into new markets or attract new audiences?

Next, prioritize:

Of all your goals, what are your top priorities and what can be realistically accomplished in the next year or two?

You now have a general overview of where you are and what you want to do. The remaining questions will help you get even more specific and determine if your company is prepared for a rebrand.

How does your brand measure up to your competition?

- » **Positioning:** What is the position that your company owns in the marketplace?
- » **Competitor Positioning:** How are your competitors positioned? Make sure to consider competitors in your specific markets (industry, geography, etc.), as well as those that come up in the same search results as your company, or considered similar by your clients.
- » **Competitive Differentiation:** What is your primary point of difference? What sets you apart?
- » **Desired Position:** Do you need to make changes in your company's positioning to better leverage what makes you different/better than anyone else?

How effective are your communications?

- » **Value Proposition:** Are you communicating the tangible value your company brings to its target audiences?
- » **Target Audiences:** Are you communicating in a way that resonates with and is relevant to your audiences?
- » **Clarity and Targeting of Message:** Do your communications clearly and directly address each target audience and their unique needs, wants and challenges?
- » **Frequency of Communication:** How often do you communicate with your target audiences and is this enough to stay top of mind?
- » **Calls to Action:** Does each of your communications have a clear call to action, spelling precisely what next step you want your audiences to take?



CHECKLIST 1: DO WE NEED TO REBRAND?

10 questions to ask:

1. Are competitors leaving us in the dust?
2. Do we lose more proposals than you win?
3. Are we doing more proposals than you should?
4. Does it always seem about the price?
5. Are we struggling to articulate how our company is different/better?

If you answered yes to any of these questions, you have a positioning problem. You are not perceived as a premium brand or the top expert in solving your clients' business problems, and it's not clear what makes you better than the rest.

6. Are we planning to enter a new market, expand geographically or add new service offerings?
7. Are we planning to grow?
8. Has our leadership changed?
9. Have we acquired/merged with another company(s) or been acquired?
10. Are we struggling to attract and retain top talent?

If you answered yes to any of these questions, it signals a need for a rebrand.



CHECKLIST 2: WHAT TO CONSIDER BEFORE YOU START

Is now the right time to rebrand the company?

- » **Internal Support.** Do you have the support of the leadership team and key stakeholders? Do you need to enlist the help of a branding firm to provide you with the necessary ammunition that you can use to get internal buy-in?
- » **Key Milestones.** Is there a significant event, such as a corporate anniversary or a new product/service launch, that makes this the ideal time to rebrand?
- » **Resources.** Does the company have the necessary resources (human and financial) to rebrand?
- » **Consequences of Inaction.** What will be the missed opportunities and where might you fall short of your goals?

Do you have the right people in place to rebrand the company?

- » **Internal Strengths.** Does the internal team have all the branding expertise required?
- » **Outside Expertise.** What is the value of an outside branding firm, either to provide guidance or take on the project from start to finish?

If you're like most companies that haven't audited their brands in some time, the Brand Assessment section has probably triggered the thought of at least a few aspects you would like to change about your brand.

The remaining tools in the Brand Toolbox will help you better understand the branding process and determine the best path to take.

TOOL 2: BRANDING ROADMAP



BRANDING ROADMAP

Navigating your company through a branding process can be highly rewarding. But it's also a monumental challenge. So how do you ensure that both the process and the outcome is an undeniable success?

Our Branding Roadmap holds the keys to your role as the leader – whether you're strengthening your current brand or initiating a complete rebrand, and whether you're the CEO, CMO or another key player on the marketing team.

Key 1: Understand the Big Picture

During the process, your team may spend countless hours arguing about colors or a font style – your job as the leader is to stay out of the weeds. Yes, the details are critically important, but unnecessary obsession will cost significant time and money. Keep your eye on the big picture and you'll be able to navigate your team through every decision in an objective and timely manner.

Key 2: Consider Your Options

Unless you have a full set of branding experts in house, don't be afraid to outsource the strategic and creative process – you are bringing in an ally. When designing your selection process, remember that you are seeking both sound strategic thinking and exceptional creative execution. Keep in mind that most branding firms excel at one, not both.

Key 3: Chart a Path

Treat this like any other project – creating timelines, assigning responsibilities and allocating resources. But remember that branding is an ongoing process, not a deliverable – chart your course with that in mind and thinking beyond the initial project or a set of deliverables. Allocate adequate time, budget and resources in your annual marketing plan for audit, staff training and ongoing brand management.

Key 4: Manage Mindsets

As the person leading the charge, it's up to you to instill a positive perception throughout your company about the branding process and the coming change. Strategic and open internal communications are a must – usually, people simply want to know what's going on.

Key 5: Launch Out Loud

Dropping new business cards on everyone's desks and calling this the brand launch shows you've spent too much time watching *The Office*. Use the launch to celebrate accomplishments, reconnect with past clients and media, and get everyone involved in creating the future. Take the time to remind the marketplace about what your company stands for.

In general, it's a good idea to plan your rollout long before you start, especially if you're performing a complete rebrand. A big, one-time launch is always best, but if carefully pre-planned, a staged rollout can make rebranding on smaller budgets or tight timelines possible.

 Suggested reading: [Launch! How to Execute a Breakthrough Brand Rollout](#)

Key 6: Never Loosen Your Grip

After the launch, your role changes from the branding process leader to the brand steward. Get graphic guidelines from your expert or design department, prepare to explain why “adjustments” to the new visual identity or message are not permissible, and give all staff and future hires a brand book to help them better understand, and communicate, your company’s brand.

Key 7: Cement Your Story

It’s not enough to make a great differentiating promise. You must deliver on it. Your new brand must extend into your company’s business processes, culture and every action. It is your responsibility to continue bringing additional value to your company’s marketing effort by doing what it takes to ensure your company’s brand is fully realized.

➔ Suggested: [Living Your Brand: How to Ensure Your Brand Isn’t Dead on Arrival](#)



REBRAND VS. REFRESH: WHAT'S RIGHT FOR YOUR COMPANY?

How do you know if you need a fresh coat of paint or a major rehab? Ask yourself: Is there a need for a fundamental shift in your company's positioning? Or, are issues mostly image related?

Rebrand

A true **rebrand** implies fundamental changes in your brand strategy before you get involved in tactical details of execution.

- » Are competitors charging ahead at neckbreaking speed while you find yourself drowning in the red ocean?
- » Do you have a positioning problem or a lack of alignment and loss of relevancy?
- » Have you experienced significant growth or change in business direction but the marketplace still sees you as the "old company"?
- » Have you gone through an M&A or a change in leadership (planned or unplanned)?
- » Are you losing the war for best qualified talent?

If you answered Yes to any of these or a myriad of similar questions (also see our checklist on p. 10), it's time to rebrand!

Refresh

If there's nothing wrong with your current positioning and message, if your brand strategy is solid, if you are not looking to enter new markets, and it's mostly the message and design system that are lacking power and consistency, you have a good case for simply clarifying and re-focusing your brand image and story through a refresh.

➔ Suggested reading: [Rebrand vs. Refresh: What's Right for Your Company?](#)



REBRANDING PROCESS

Phase 1: Planning

- Secure management sponsorship
 - Determine key participants who will add value
 - Define budget and realistic timelines
 - Select outside agency/consultant(s) or assemble an internal team
 - Set up measurement metrics for before and after
 - Plan rollout from the start
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Phase 2: Brand Assessment, Research and Analysis

- Define business and marketing objectives, priorities and desired outcomes
 - Perform an existing brand audit: define the gap
 - Conduct audience research: internal and external stakeholder input
 - Scan the competitive landscape
 - Perform a communications audit
-

Phase 3: Brand Strategy

- Develop brand architecture
- Develop brand platform (positioning, purpose, promise, personality and more)
- Define message architecture

➔ Suggested reading: [Is Your Brand Strategy MIA?](#)

Phase 4: Brand Identity and Marketing Communications Tools

Define, design and develop:

- Verbal identity: naming, tagline
 - Visual identity
 - Design system
 - Marketing and sales collateral
 - Website, digital tools and templates
 - And more
-

Phase 5: Brand Launch

- Prepare brand launch strategy and plan
 - Rollout your brand internally
 - Orchestrate external launch
 - Conduct internal brand training and education
-

Phase 6: Ongoing Brand Building and Management

This includes:

- Marketing planning and execution
- Brand building

Make sure to track, measure and adjust! Remember what we said at the beginning – this is a process, not a deliverable and your brand needs to be audited at least as often as you revisit your business plan.

TOOL 3: BRANDING PITFALLS



BRANDING PITFALLS

Branding is not brain surgery. But it's not hopscotch either. It requires real expertise. Here are 7 Branding Pitfalls that separate the pros from the amateurs.

Pitfall 1: Thinking Your Brand Is Your Logo

As we identified earlier, a brand is the perception that your key stakeholders (current and prospective clients, employees, partners, industry and media) have of your company. That perception is created through every single interaction with your company at every single brand touchpoint.

To ensure that every interaction leaves a memorable, consistent and accurate impression, the information you share at each touchpoint needs to stem from your brand strategy. The foundation for this strategy is called a brand platform.

A brand platform consists of several essential elements that are a must for creating a strong brand, including: positioning, purpose, promise, essence, values, personality and more.

Remember, your logo, tagline or marketing materials are all expressions of your brand, but they are not the brand. Therefore, the branding process should never begin with a question like: What should the new logo look like?

 Suggested reading: [Do You Understand the Anatomy of Your Brand?](#)

Pitfall 2: Building a Brand that Can't Achieve Your Business Goals

Your brand must align with your company's business goals. You can't have a brand that promises innovation, for example, if your goal is to be the largest technology reseller. Clearly define what you want to achieve first, then build a brand that's capable of getting you there.

Pitfall 3: Believing Your Brand Only Lives in Your Marketing

Your external message and the experience within the walls of your company must be in synch. Remember that your employees are your brand's best ambassadors. Your brand must be a reflection of your company's culture, and every employee has to fully embrace it and live it with every action, every day.

➔ Suggested: [Living Your Brand: How to Ensure Your Brand Isn't Dead on Arrival](#)

Pitfall 5: Setting and Forgetting Your Brand – For Decades

A great brand stands the test of time – to a point. Making sure your brand keeps pace with the times and changes in cultural, economic, demographic and other forces inside and outside of your company is essential. Is your brand in alignment with where you are today and does it still resonate with your audiences?

After all, you can't say your company is cutting-edge if your identity and marketing materials look circa 1990.

Pitfall 6: Not Putting Yourself in Your Audience's Shoes

It's important that a brand be meaningful to the company that created it – but not to the exclusion of its audiences. Just because everyone on your team knows what your brand is about, doesn't mean everyone else will. Take the time to ensure your brand touchpoints and marketing communications are relevant to those who do not have any history with your company. Speak the language that resonates with them, motivates and inspires them.

Pitfall 7: Being Too Humble

Strong brands don't overpromise. But they don't underpromise either. In other words, they're not bashful about drawing their audiences' attention to their strengths. Don't be afraid to toot your own horn. As long as you are telling the truth, and provide value, it only helps your customers in their decision-making process.

TOOL 4: ADDITIONAL RESOURCES



ADDITIONAL RESOURCES

Substance151 has a library of information to support our clients and community in their branding and marketing efforts.

Substance151 Blog

If you're hungry for more information on building a strong brand, visit our blog at www.substance151.com/blog/#insight.

Branding Resource Center

Our branding resources page is continuously updated, so make sure to visit often, or you can [subscribe here](#) to ensure you never miss another article.

How Substance151 Can Help

You don't have to venture into the complicated world of branding alone! Substance151 can be your guide in a rebranding process – from start to finish. **[Contact us to schedule a conversation!](#)**

And make sure to join the conversation on [LinkedIn](#), [Twitter](#), [Facebook](#) or [Google+](#).

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