

DESIGN YOUR BRAND

Workbook



For those starting or rebranding
their company.

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Introduction

Your brand is the first impression that potential customers have with your company, and you know what they say about first impressions... you only get one.

Your brand encompasses your **brand style guide, tone** in your website copy and on social media, your **color palette and logo**, and the aesthetic of your website.

Not only does your brand include visual elements, but it **portrays your company's mission and values**.

For example, Starbucks is dedicated to empowering employees and provides benefits like healthcare and educational opportunities.

CEO Howard Schultz, a de facto brand loyalty expert, comments, "If people believe they share values with a company, they will stay loyal to the brand."

HubSpot

What a Brand is Not

Let's first peel away some very common misconceptions:

- Your brand is not your firm's name.
- Your brand is not your logo or tagline.
- Your brand is not your website or marketing collateral.
- Your brand is not your mission statement.
- Your brand is not your advertising.

These items may help communicate your brand to the world. They may even help clarify it. But they are not your brand.

Hinge Marketing

Brand consistency is how an organization delivers messages aligned with its core values and mission, culminating in a cohesive brand experience.

7-Step Brand Development Strategy

1) Overall Business Strategy

Your overall business strategy is the context for your brand development strategy, so that's the place to start. If you are clear about where you want to take your firm, your brand will help you get there.

2) Target Audience / Clients

Who are your target clients? If you say "everybody" you are making a very big mistake. The narrower the focus, the faster the growth. The more diverse the target audience, the more diluted your marketing efforts will be. So how do you know if you have chosen the right target client group? That's where the next step comes in.

3) Brand Positioning

How is your firm different from others and why should potential clients within your target audience choose to work with you?

A positioning statement is typically **three to five sentences** in length and captures the essence of your brand positioning. It must be grounded in reality, as you will have to deliver on what you promise. It must also be a bit aspirational so you have something to strive for.

4) Messaging Strategy

The messages to each audience will emphasize the most relevant points. Each audience will also have specific concerns that must be addressed, and each will need different types of evidence to support your messages. Your messaging strategy should address all of these needs. This is an important step in making your brand relevant to your target audiences.

5) Name, Logo and Tagline

These are not your brand. They are a part of your brand identity, the ways to communicate or symbolize your brand. You must live it to make it real.

6) Content Marketing Strategy

content marketing increases both visibility and reputation at the same time. It is also the perfect way to make your brand relevant to your target audiences.

7) Build a Website (online presence)

Your website is your single most important brand development tool. It is the place where all your audiences turn to learn what you do, how you do it and who your clients are.

8) Marketing Toolkit

This might include one-page “sales sheets” that describe core services offerings or key markets served. In addition, there may be a brief “pitch deck” that overviews the firm or key offerings and an e-brochure about the firm. These are rarely printed pieces anymore. Increasingly this marketing toolkit also includes videos. If prepared appropriately, these tools serve not only a business development function but also are important for brand development.

9) Implement, Track, Adjust

tracking both the implementation of the plan as well as results. Did the strategy get implemented as planned? What happened with the objective measures, such as search traffic and web visitors? How many new leads, employee applications and partnering opportunities were generated? Only by tracking the entire process can you make sure you are drawing the right conclusions and making the right adjustments.

Your Checklist

Check off each item as you complete the task.

- ☐ Overall Business Strategy
- ☐ Target Audience / Clients
- ☐ Brand Positioning
- ☐ Messaging Strategy
- ☐ Name, Logo and Tagline
- ☐ Content Marketing Strategy
- ☐ Build a Website (online presence)
- ☐ Marketing Toolkit
- ☐ Implement, Track, Adjust

Business Strategy

A business strategy is an outline of the actions and decisions a company plans to take to reach its goals and objectives. A business strategy defines what the company needs to do to reach its goals, which can help guide the decision-making process for hiring as well as resource allocation.

There are six key components of a business strategy, including:

1. **Vision and business objectives:** A business strategy is intended to help you reach your business objectives. With a vision for the direction of the business, you can create clear instructions in the business strategy for what needs to be done and who is responsible for completing each step.
2. **Core values:** A business strategy guides top-level executives, as well as departments, about what should and should not be done, according to the organization's core values. It helps everyone stay on the same page and with the same goals.
3. **SWOT analysis:** SWOT stands for strengths, weaknesses, opportunities and threats. This analysis is included in every business strategy, as it allows the company to rely upon its strengths and use them as an advantage. It also makes the company aware of any weaknesses or threats.
4. **Tactics:** Many business strategies articulate the operational details for how the work should be done in order to maximize efficiency. People who are responsible for tactics understand what needs to be done, saving time and effort.
5. **Resource allocation plan:** A business strategy includes where you will find the required resources to complete the plan, how the resources will be allocated and who is responsible for doing so. In this regard, you will be able to see where you need to add more resources in order to complete your projects.
6. **Measurement:** The business strategy also includes a way to track the company's output, evaluating how it is performing in relation to the targets that were set prior to launching the strategy. This helps you to stay on track with deadlines and goals, as well as budgetary concerns.

Recommended Reading & Action Plan

Ultimate Guide To Strategic Planning

<https://www.indeed.com/career-advice/career-development/strategic-planning>

Target Audience

Your target audience refers to the specific group of consumers most likely to want your product or service, and therefore, the group of people who should see your ad campaigns. Target audience may be dictated by age, gender, income, location, interests or a myriad of other factors.

It's possible that you have **more than one target audience**. This is common, and you can perform the same exercise to determine each one. Repeat the process of asking the questions about each persona.

Determine the following factors about your customer:

Age	Location(s)	Gender	Income Level
Education Level	Marital Status	Occupation	Ethnic Background
Personality, Attitudes, Values		Interests & Hobbies	

How does your product/service fit into their lifestyle?

How/when will they use the product/service?

What features are most appealing to them?

What media do they turn to for info?

Buyer Persona Examples

Another target audience activity is to create buyer persona's for each type of customer. This activity put a name/face to each buyer type and comes in handy when you have more than one target audience.

Buyer Persona – Linda



Linda

CPA & Business Owner

Key Attribute

- Age: 49 years old
- Occupation: CPA with advanced education
- Status: Divorced
- Location: Upper class neighborhood, USA
- Tech Savvy: 7 out of 10, hates IT issues, on LinkedIn and Twitter
- Education: MBA, Accounting & Business, CPA
- Type A, Skeptical

Needs

- Deal with many clients in difference industries so software and online tech is key
- Quick access to proposal development tools to save time and increase lead to client ratio
- Get many things done with small staff

Motivations

- Does not accept mediocrity
- Comfortable and stable life
- Providing for herself
- Lead by example to other women

Technologies

- Understands its value
- Willing to learn more
- Would rather not have to think about it
- Patient with issues

Challenges

- Loss of time and productivity
- Sloppy accounting staff
- Over-promising vendors
- Office out of order or routine (lacks workflows and processes)

Brands

- Lexus
- Talbots
- National Geographic Travel channel
- Apple iPhone
- Whole Foods

Goals

- Continue to build toward retirement
- Continue to receive community recognition / best of awards

Short Description

Accounting firm owner. Very well respected within her community. Engaged with her rotary and community clubs. Active AICPA / State chapter member. Hyper focused on a high level of excellent within her firm. Does not accept mediocrity.

Buyer Persona – Dave



Dave

Owner and Founder

Key Attribute

- Age 35 years old
- Occupation: Accounting firm founder and entrepreneur
- Status: Single
- Location: Town home in small city
- Tech Savvy: Loves tech and want to use it as much as possible
- Education: Accounting/CPA
- Years of Exp: 10

Needs

- Managing cash flow
- Hiring and keeping the right people
- Keeping existing clients
- Getting sales
- Finding new clients
- The right tools to pivot and dynamically plan my business

Challenges

- Not an expert in all areas
- Not enough time
- Digital marketing
- Business skills: sales, lead generation, networking, vendor management
- Introvert
- Fears business failure
- Whole team reports to him
- Hard time tracking payments related to company operations

Goals

- Driving the business model and externally telling our story
- Gaining understanding of volatility and risk across the firm
- Working with the CIO to digitally transform the business
- Decrease the time spent on operative tasks
- Achieving the team's productivity

Short Description

He's an overachiever and initiative-taking person. Has a decade of experience. Doesn't get fooled easily. Data driven and hard worker. Proactive approach always having an eye out for new tools to ease up the process. Respects honesty and straight to the point approach.

Motivations

- Results
- Incentives
- Fast learning process
- Wants to make parents proud
- Become a mentor/leader in the community

Buyer Persona Template



Key Attributes

TIP: Duplicate these pages to repeat the exercise for another persona.

Persona 1
Name / Image

Needs

Challenges

Goals

Motivations

Brands

Technology

Short Description

5 Brand Components

There are five key factors that drive brand success.

1) Brand Identity

Brand identity is what you often think of when you think of branding. This is your externally facing image and all the components included within that. For example, your brand identity would be your **logo, brand colors and website** (just to name a few). In other words, your brand identity is the **“look and feel” of your brand**.

Brand identity is the most common thing customers remember, so it needs to stand out. In addition to being on-trend and in alignment with customer expectations, it needs to be different enough to be identified in a crowd of your competitors.

2) Brand Purpose, Mission, Vision, And Values

While purpose, mission and values are all different components of your brand, they should all work together to tell a larger story about who you are and what you do. Your **purpose** is what you do and what you can promise your customers, your **mission** is the larger goal you hope to achieve through doing business and your **values** are what your brand represents.

For example, if your company is a mobile-first CRM, your purpose might be to deliver a better management experience to mobile users. Your mission might be to help on-the-go professionals thrive in busy environments, and your values might be to deliver top-of-the-line service at a reasonable price.

3) Brand Messaging

Your brand messaging is the **voice of the brand**. Just like the brand identity, the messaging helps you connect with your customer base to deliver a better experience. It's the **language you use** on your website, in social media posts and in conversations with your customers.

It's important that brand messaging is consistent, no matter who the customer is talking to. You should train your sales team, customer service reps and anyone else with a customer-facing role to use the same language and tone when conversing with customers.

4) Brand Differentiation

Your brand differentiation is what makes you **different from competitors**. In other words, this is your unique selling proposition — what do you have to offer that customers won't get anywhere else?

Brand differentiation can be price, but it's easy to get cut out of the market this way. Instead, you want to offer a feature or unique value that your customers can't copy or imitate. Find a truly unique differentiator for long-term brand success.

5) Brand Experience

The brand experience is the **way your customers connect or interact** with your products, services, team and various connection points along the way (such as your social media). Everything from when a customer engages with a salesperson to when they use your product is considered brand experience.

Continuing to build your brand post-sale through delivering an above-and-beyond experience can create long-term connections with customers who buy again and again. Even better, customers who have had a great experience with your brand tell their friends and family and grow your customer base for you.

Brand Purpose Activity

What is the **purpose** for the brand you'll be creating for this class?

Dig deep and find those nuggets of truth to distinguish your brand from others!

BRAND:

PRODUCT / SERVICE

**WHY DO YOU EXIST?
WHY SHOULD PEOPLE
CARE?**

**HOW ARE YOU
DIFFERENT?**

**WHAT PROBLEM DO
YOU SOLVE?**

Brand Value Activity

Choose up to five (5) terms from the brand-value list and explain how your brand upholds such a value. Think of ways to make the words specific to your business.

Accessibility	Ease	Honesty	Recognition
Accountability	Education	Hope	Reliability
Achievement	Empathy	Humility	Reputation
Adventure	Empowerment	Imagination	Respect
Alignment	Energy	Impact	Safety
Authenticity	Entertainment	Influence	Satisfaction
Beauty	Entrepreneurial	Innovation	Security
Boldness	Evolution	Integrity	Service
Challenge	Excellence	Joy	Spirituality
Cleanliness	Excitement	Kindness	Simplicity
Collaboration	Experimentation	Leadership	Stability
Comfort	Expertise	Learning	Status
Community	Fairness	Loyalty	Success
Compassion	Faith	Meaningful work	Sustainability
Competency	Family	Openness	Teamwork
Courage	Flexibility	Optimism	Transformation
Creativity	Focus	Optimization	Transparency
Curiosity	Fortitude	Originality	Truth
Customer-centric	Freedom	Passion	Trust
Craftsmanship	Friendliness	Peace	Value
Dependability	Friendship	Perseverance	Warmth
Determination	Fun	Positivity	Wealth
Discipline	Generosity	Presence	Wellness
Discovery	Gratitude	Proactiveness	Willpower
Diversity	Growth	Quality	Wisdom

Now apply the terms you chose to your brand.



Example: Coca-Cola

- Leadership: The courage to shape a better future.
- Collaboration: Leverage collective genius.
- Integrity: Be real
- Accountability: If it is to be, it's up to me.
- Passion: Committed in heart and mind.
- Diversity: As inclusive as our brands.
- Quality: What we do, we do well.

Brand Vision Activity

Brand Vision

While brand mission and vision may seem similar, they are quite different. The **vision** should be a *descriptive* statement of your company's ideal future, your **mission** should be the *action* statement that will make your vision a reality.

Brand vision examples:

- "Advancing man's capability to explore the heavens". (NASA)
- "To live in a healthy, honest and supportive world". (Core Foods)
- "To fill the earth with the light and warmth of hospitality". (Hilton)
- "To make sustainable living commonplace". (Unilever)
- "To provide access to the world's information in one click". (Google)
- "To help individuals and businesses realize their full potential". (Microsoft)
- "To leave a sustainable world for future generations". (The Nature Conservancy)
- "Helping investors help themselves". (Charles Schwab)

Brand Vision Templates

When crafting your brand vision use the following templates.

Template 1

To (provide, give, create, make, etc...) a (healthy, happy, productive, safe, etc...) (world, place, dream, reality, existence, etc...) for (the group of people you want to help).

Template 2

(Providing, giving, creating, making, etc...) a (healthier, happier, more productive, safer, etc...) (world, place, dream, reality, existence, etc...) for (the group of people you want to help).

Your Turn:

Brand Mission Activity

A brand mission statement clearly communicates a brand's purpose, objectives and how it plans to serve its audience. It is **action-oriented** and gives readers an idea of what your business does and what impact it wants to make. It aims to create an emotional connection with your audience.

To write an effective mission statement, you need to answer several key questions before you write your mission statement:

1. What is our business? The answer should encapsulate your company's core operations.
2. How are we doing it? The answer should be a values-based description of how you operate and what you're hoping to achieve.
3. For whom are we doing it? The answer describes your core customer base.
4. What are our core values? The answer is the "why" of your company's existence.

Example: Starbucks

"To inspire and nurture the human spirit—one person, one cup, and one neighborhood at a time." It emphasizes a concern for the well-being of team members, customers, and the community.

1. What our business is: "One cup," i.e., Starbucks is a retailer of coffee.
2. How we are doing it: Starbucks prioritizes every customer and their community in everything it does.
3. Whom we serve: You and your community.
4. What our core values are: To inspire and nurture the human spirit.

Your Turn

Brand Personality

Place dots closest to wherever your company falls along the spectrum. Try to not over think this, and don't be afraid to envision where you'd like your company to be, even if it's not there now.

Personable and friendly	_____	Corporate / Professional
Spontaneous, high energy	_____	Careful thinking, planning
Modern or high tech	_____	Classic and traditional
Cutting edge	_____	Established
Fun	_____	Serious
Accessible to All	_____	Upscale

Where Does Your Company Live on the Spectrum?

Are most of your dots toward the left? Your company is contemporary, fast-moving and energetic. You like to make ideas happen quickly, and you don't mind taking risks. Your communication style is friendly and approachable.

Are most of your dots toward the right? Your company is traditional, relies on solid planning and established ways of getting things done. You might be trying to appeal to upscale clientele, and your communication style is corporate and professional.

What Does It Mean?

A clear vision of your brand personality will guide your choice of colors, typography, word and actions.

A company that is traditional and established will use classic typefaces that have been around for centuries. The color palette chosen leans toward conservative, rich hues. The communication style is formal and corporate. This company's brand image stands the test of time. Because it relies on elements that have been in use for decades, the style will still look fresh five years from now.

A company that is contemporary and high energy will have colors, typography and communication style that reflect this. The color palette might be vivid and trendy. The typefaces used have been released in the last ten years. The graphic style is open, airy and asymmetrical. The copy-writing voice is friendly and approachable. This company will likely have to re-make their image more often than the traditional one to stay ahead of visual trends.

If your dots are mostly in the middle? The middle is Blandsville. Avoid it all all costs.

If your dots are all over the place, you have a quirky brand that doesn't fit easily into a box. That's good! Feel free to mix and match traits from the list above. You might use traditional typography and colors, but a very friendly and approachable copy-writing style, for example.

Choose the three to four words that best represent your brand, and complete a chart that looks like the one below. Explain how each trait should and shouldn't be represented in your marketing.

Characteristics	Description	Do	
Passionate	We're passionate about changing the way the world works.	Use strong verbs Be industry champions Be cheerleaders	Be lukewarm Wishy washy Passive voice
Quirky	We're not afraid to challenge the status quo & be ourselves	Use unexpected examples Take the contrarian view Express yourself	Use too much slang Use overplayed examples Lose sight of the audience / core message
Authentic	We're going to give you the tools and insight to make your job easier. That may not always be through out product	Be honest and direct Stick to your word Own any issues or mistakes; show how you will address them.	Use marketing jargon Over promise Over sll the product's capabilities

If you chose and actor's voice, who is the actor?

Characteristics	Description	Do	Don't

Voice in Action

Now that you know what your voice sounds like (and who the actor would be), how would your brand respond to the following interactions?

- Customer loves the brand and provides a 5-star review on Google.
- Customer calls the hot-line and angrily complains the product was damaged.
- Social media post gets a lot of positive comments about your post.
- Negative feedback on a social media post.
- Heckler at a conference event.
- Customer service complaint at live event.
- A bad review on your website.

Brand Differentiator

With so many direct and subliminal messages flooding the senses, it's becoming increasingly challenging for brands to gain the attention of their target market. This is where brand differentiation comes in. When you individualize your brand from the competition in a way that's relevant to your customers, you create a relationship, establish credibility, and ultimately increase their loyalty. – HubSpot

To be successful, a differentiator must be:

- True
- Proven
- Relevant

Recommended Reading

HubSpot's "Product Differentiation and What it Means for Your Brand," which includes examples of each of the following differentiators below.

Choose an option below to demonstrate how your brand is different from its competitors.

1. Price
2. Quality
3. Reliability
4. Features
5. Design
6. Location
7. Brand image
8. Customization
9. Distribution channels
10. Post-sale support

Which option would choose for your brand and how would you make it stand out?

Brand Competitor Activity

YOUR BRAND:

PRODUCT / SERVICE

Research two (2) competitors for a product or service you are going to brand.

Competitor Name:

Website:

Key Terms:

Differentiator:

Competitor Name:

Website:

Key Terms:

Differentiator:

Brand Experience Activity

Think of brand experience as an umbrella term that describes a subset of activities that include events, meetings, trade shows, stunts, mobile applications and other meaningful interactions with brands and products.

Done well, these interactions result in deeper emotional connections and greater brand affinity. Done poorly, they can have the opposite effect.

Example

Vans: House of Vans

The House of Vans event spaces are located in Brooklyn, New York, Chicago and London but also appear as pop-ups in various locations. The shoe retailer has created these event spaces for the skateboarding community to get together and enjoy shared passions like music, film, and sports.

On International Women's Day, Vans used its spaces to promote women in skateboarding, hosting skate sessions, documentary screenings, and live music. The immersive experience brought members of the skate community together to promote female visibility within the scene, part of an overarching marketing strategy for the brand.

What could you do to help customers and leads experience the brand?

5 Actions Great Brands Take

1) Master the art of communication

"Good communication is just as stimulating as black coffee, and just as hard to sleep after." – Anne Morrow Lindbergh

It's no surprise to anyone that successful brands thrive in all areas of communication. However, it's not always easy to make adjustments in this area.

Adhere to the following in order to build an established set of principles to point to:

- **Create a brand persona.** It becomes a lot easier for all forms of communication to be successful with customers if they can envision your brand as a person with human characteristics. Determine the way you want customers to think of your brand and start from there.
- **Understand your market.** There's going to be tons of disconnect between your communication and the audience if you don't truly know them. Learn who they are, what they want and what they need, then start crafting your voice.
- **Build brand ideals.** Being able to refer back to your brand ideals makes all the difference when communicating. It is like a guiding light throughout conversations.

2) Stand out

"Determine who you are and what your brand is, and what you're not. The rest of it is just a lot of noise." – Geoffrey Zakarian

There are a lot of near-identical products and services on the market at all times. Most people wouldn't be able to tell the difference between one product or the other if it weren't for the brand on the label. The more brand differentiation you achieve, the higher the chance you'll draw in customers and keep them.

3) Thrive on genuineness

"Honesty is the first chapter in the book of wisdom." – Thomas Jefferson

We see it time and time again – brands with inferior products and services outselling and outlasting bigger brands. This pattern, of course, is a direct result of brands who are genuine and authentic throughout all endeavors. More than ever, with information so available to everyone, the great brands are open and honest.

4) Commit to consistency

"Consistency is the true foundation of trust. Either keep your promises or do not make them." – Roy T. Bennett

In reality, brand consistency is what makes brands successful and keeps them at the top through thick and thin.

Does this mean you can't make changes, such as upgrades or re-brandings? Of course not. But the consistency of numerous brand elements absolutely needs to be in place.

5) Understand their image

"A brand is no longer what we tell the consumer it is – it is what consumers tell each other it is." – Scott Cook

The best brands are aware of their brand image, and work hard to influence it in a positive manner. Of course, the greatest indicator of how successful our image will be is brand identity. Great brands realize this and build one in order to influence the other.

After crafting their image, the best brands are the ones who understand it. Knowing how customers view you is key to all future campaigns.

Examples



Apple's products seem to boost one another. They cross-promote items in a practical way. For example, the Apple Watch is an accessory to the iPhone, making its purchase more justifiable once you have one or the other. This type of branding lures customers into an entire world of Apple technology.



Taco Bell accomplishes things other brands only dream of by reinventing their logos, slogans and designs all the time with something new that seems to work every time. Taco Bell engages their customers with things like the creative arts and other lifestyle hobbies, both on packaging and lining the walls of restaurants. It uses topical branding to connect with their customers on a deeper level in order to have similar success in your own marketing campaigns. Taco Bell shows us that change and reinvention can be frequent if done right. Look for new ways to stand out with your own brand.

Examples, cont.



Despite having a product that never really undergoes major changes (sportswear), Nike has remained relevant over the years by attaching unique ideas and images to its brand through marketing campaigns. It's products are nothing special in and of themselves, but the brand behind them, through their calculated risks and unique marketing campaigns, have elevated the products to mean something more. Nike realized the only way to stand out in their industry is through risky marketing techniques and attaching themselves to relevant icons. Look for ways to distance yourself in similar ways.



Amazon is the one example of a brand that takes something everyone else already does and accomplishes it more efficiently and more conveniently for customers. As a result, they have become a great brand through sheer effectiveness. Each time they take on a new service, it becomes the industry standard, and most often the competition can't keep up. Competing sometimes requires a cutthroat approach. Great brands often meet this challenge head on.



For the products IKEA sells, they are talked about way too much. How can a furniture brand get so much attention and word-of-mouth advertisement? The answer comes in the way they've branded themselves to be infinitely different than other furniture retailers. Probably the most prevalent reason is their brand experience, which is on display anytime someone purchases a new product from IKEA and puts it together. It really isn't all about what you have to offer in terms of products or services. Strive for something more.

Great brands are great not only because of how successful they are, but because of how well they can influence and inspire other brands to rise up. Now that you see the many things other great brands do, it's time to achieve greatness of your own.

Name, Logo, & Tagline

A great brand name is not just something that looks cool on your business card or is fun to say. And it isn't great because you like it. It's great because it communicates something to customers.

Ideally, you want something that's:

- **Meaningful:** It communicates your brand essence, conjures an image, and cultivates a positive emotional connection.
- **Distinctive:** It is unique, memorable, and stands out from your competitors.
- **Accessible:** People can easily interpret it, say it, spell it, or Google it. (Even if you have an unusual or bizarre name, it must be understandable.)
- **Protectable:** You can trademark it, get the domain, and "own" it, both legally and in the general consciousness.
- **Future-proof:** It can grow with the company and maintain relevance—and be adapted for different products and brand extensions.
- **Visual:** You can translate/communicate it through design, including icons, logos, colors, etc.

Tip: Search for brand name generators on a search engine. There are a dozen free ones to help you come up with a name.

Activity

- Write down all the adjectives, e.g., "beautiful," "smooth," or "heavy," that describe your product/service.
- Describe what you want your customers to feel when they use your product / service.
- Do a free association of words about your product/service, i.e., first word that comes to mind.

Name, Logo, & Tagline

Once you have one or two brand names chosen, it's time to determine if it's available to use. Search the United States Patent and Trademark Office's database of registered trademarks <http://tmsearch.uspto.gov>.

If your choices are taken, it's back to the drawing board. But if you found unregistered names on the first try, narrow it down to your top three to test.

Choice Name 1:

Is it available: Yes / No

Choice Name 2:

Is it available: Yes / No

Choice Name 3:

Is it available: Yes / No

Choice Name 4:

Is it available: Yes / No

Once you have a brand name you can trademark, register the name, it's logo or mark in the countries in which you plan to use it. You do not need a lawyer to do this for you, but it's not a bad idea to work with one.

Recommended Reading

Register your business name to protect it, from the Small Business Administration. <https://www.sba.gov/business-guide/launch-your-business/choose-your-business-name>

Name, Logo, & Tagline

A logo is a symbol made up of text and images that identifies a business. A good logo shows what a company does and what the brand values. The most fundamental function of a logo is giving your business a unique mark that differentiates you from other businesses.

Logo Elements

1. Typography
2. Imagery
3. Color
4. Context – when and where logos can be applied
5. Static or Dynamic – (static) one which looks the same everywhere it exists; or (dynamic) one which changes depending on its context.

Activity

1. Login to Canva.com (create your own account later)
 - SocMedStuds@gmail.com
 - St^d3nts20!
2. From the home screen, click Marketing
3. Scroll right until you see Logo, click Logo
4. Let's look through some of the logo designs
5. Click on the white box in the center to get a light blue outline, above it in the nav bar, click the colored box.
6. Choose black.
7. On the left sidebar, click Elements.
8. Search for dog. Scroll down until you see the pink dog silhouette. When you do, click it. With the corner circles, enlarge the graphic.
9. In the top, change the color from pink to white.
10. On the left sidebar, click Text.
11. Scroll through some combinations. If there's one you like, click it.
12. Drag the font so it sits under the dog. Click the font box to resize it.
13. Double-click on the text to change it. I changed "brunch" to Heels
14. Double-click the text in the box under the large font and change it to "Teaching Humans How to Behave." Change the URL to Heels.com
15. When I've completed the design (it's saving it as we're building it), choose Download and choose a file format.



Name, Logo, & Tagline

What is a tagline?

"A tagline is a short phrase that captures a company's brand essence, personality, and positioning, and distinguishes the company from its competitors." Alina Wheeler

What makes a great tagline?

- Memorable
- Likeable
- Related to the brand
- Clarity of message
- Creativity of phrasing
- Inclusion of a benefit

Examples

- M&M's: Melts in your mouth, not in your hand.
- Las Vegas: What happens in Vegas, stays in Vegas.
- Nike: Just do it!
- Taco Bell: Think outside the bun.
- BMW: The ultimate driving machine.

How to write a great tagline.

1. Write a paragraph that explains who you are and what you do.
2. Condense that paragraph into one or two lines. Likeability matters. Inject emotion. Less is not always more.
3. Condense even further.
4. Test your taglines with your customers and employees.

Example

1. "We believe your content is telling a story about your brand. We help brands discover and tell their best stories. We do this by designing a plan to reach your brand's goals, crafting stories that engage, educate and inspire, and making sure your stories get seen and heard."
2. "We help brands discover and tell their best stories—stories that educate, engage, and inspire people to work with your brand."
3. "Best Story Wins."

Tagline Activity

Write your tagline.

1. Write a paragraph that explains who you are and what you do.
2. Condense that paragraph into one or two lines. Likeability matters. Inject emotion. Less is not always more.
3. Condense even further.

Need inspiration?

Here are 15 Perfect Tagline Examples from Brands of All Sizes

<https://www.columnfivemedia.com/13-unique-tagline-examples>

Fonts

Typography is more than an accompaniment to your brand. It can be your brand. And even if your branding is heavy on graphics, all written words need fonts and styling. But there are thousands of fonts available online, and many have a reputation attached to them. How do you choose which ones to use?



Source: <https://www.beltcreative.com/blog/typography-101-fonts-for-your-brand>

Which font suits your business?

Start by determining where your business falls in the following categories.

Formal	▢ _____ ▢	Informal
Classic	▢ _____ ▢	Modern
Dramatic	▢ _____ ▢	Light

If your business is more formal and classic, but with a lighter presence, you may want to use a thin script or serif font for your main font, and a sans serif with varying line weights. On the other hand, if your business is more on the informal side, with a modern and dramatic feel, a bold display font and a sans serif could be a good pairing.

Here are some examples of how the different types of fonts can be implemented.

- **Serif:** Traditional, classic, invokes a professional feel, can be used in dramatic and light branding
- **Sans Serif:** Modern, best style for body fonts, most versatile, and tends to be the most legible
- **Script:** Usually has traditional values, but can also be used in a modern branding, not suited for small or body text, can invoke feelings of luxury or femininity
- **Display:** Hyper modern, least suited as a body font, best used when at a larger size, most diverse style, can invoke a wide range of feelings and emotions, best used in dramatic branding



Macchiato Coffee

CAFÉ AND PATISSERIE

The main font is a light, modern script, while the subfont is thick, rounded sans serif. The thickness of the sans serif is important here, because of how thin the script font is by comparison. If one font is thicker, it's important to balance it out with a thinner font.

A.



**Bumble
Honey**

HUMANE LOCAL HONEY

B.



Bumble Honey

HUMANE LOCAL HONEY

A) The type of fonts in the first logo could be swapped so that the main font is a serif, and the sub-font is a sans serif. Serif fonts complement a professional, traditional business practice better than sans serifs, which tend to look more modern. In all caps, the lettering looks powerful and structured.

B) Instead of such a bold sans serif, a modern handwriting font was chosen for the main font. A simple sans serif then makes a good complement as a subfont.

Notes:

Steps To Choosing Your Fonts

Use this guide as a checklist for choosing all of the fonts for your brand.

1) Choose your main font. This will be the font used in your logo, and ideally, also used in main headers or for emphasis. This should be the most impactful font in your brand.

2) Choose your supporting fonts. These will be the fonts chosen to complement your main font. Keep in mind that ideally, you should stick to two or three fonts in total for your brand. If your main font is something highly stylized, and will be used sparingly, you can choose a font for headers and one for your body font. Otherwise, two fonts are adequate.

3) Make sure your fonts complement each other. The easiest way to do this is to type a simple pairing of your fonts in any software you have available. Look at them together. Do they balance each other in style and appearance? Do you like the way they look together?

4) Styling. Now that you have your fonts chosen, you need to decide how to style them. Styling means choosing how your fonts are used: whether they're in all caps, italicized, or bold.

Tip: 10 Excellent Font Pairing Tools For Designers

<https://dribbble.com/resources/font-pairing-tools>

Recommended Reading

Canva's ultimate guide to font pairing <https://www.canva.com/learn/the-ultimate-guide-to-font-pairing/>

Font Activity

Let's create a font collection together!

1. Login to Canva.com (create your own account later)
 - SocMedStuds@gmail.com
 - St^d3nts20!
2. On the left sidebar, choose Templates; then click Logos
3. Choose the blank logo (first item on the top, left)
4. Templates are where we'll start; scroll through some to see what's there.
5. We'll choose one and work on modifying it together.

According to a study, 62-90% of a product assessment is based on colors alone; so it's important to get your brand palette right.

1. Elicit emotions and feelings (see below)
2. Convey certain information
3. Form an initial impression without even knowing what your product is about.
4. Help customers decide whether or not they want to engage.

- Green: money, growth, fertility, freshness, healing; envy jealously, guilt
- Purple: royalty, nobility, spirituality, luxury, ambition; mystery, moodiness
- Turquoise: spiritual, healing, protection, sophisticated; envy, femininity
- Silver: glamorous, high tech, graceful, sleek; dreamer, insincere
- Pink: healthy, happy, feminine, compassion, sweet, playful; weak, femininity, immaturity
- Yellow: bright, energy, sun, creativity, intellect, happy; irresponsible, unstable
- Orange: courage, confidence, friendliness, success; ignorance, sluggishness
- Gold: wealth, prosperity, valuable, traditional; greed, dreamer
- Tan/Beige: dependable, flexible, crisp, conservative; dull, boring, conservative
- Grey: security, reliability, intelligence, solid; gloomy, sad, conservative
- Black: protective, dramatic, classy, formal; death, evil, mystery
- White: goodness, innocence, purity, fresh, easy, clean; winter, cold, distant

Most brands have more than one color. While the logo might be blue, the website might include yellow or green as well. This is called a **brand palette**, and important to have those colors work together in harmony.



How to pick the perfect color palette.

1. Identify your brand personality
2. Pick a core brand color based on your brand personality traits
3. Use a formula:
 - 1 core brand color plus a few neutral shades, or
 - 1 core brand color plus 1-2 analogous colors, or
 - 1 core brand color plus a contrasting accent color, or
 - 1 core brand color plus 3-5 equally bright colors

Where colors should appear:

1. Logo
2. Website and emails
3. Social media
4. Advertising
5. In store
6. Stationery
7. Staff uniforms
8. Events
9. Promotional items

Activity

1. <https://www.canva.com/colors/color-palette-generator/>
2. Click on explore color combinations button
3. Create a custom palette
 - Login to Canva (create your own account later)
 - SocMedStuds@gmail.com
 - St^d3nts20!

Style Guide

A brand style guide is a rule book containing specifications on everything that plays a role in the look and feel of your brand—everything from typography and color to logos and imagery.

It lets everyone know exactly how to present your brand to the world. It guides the design for all your content.

It includes:

1. A brand overview. The history, mission statement, and personality of your brand.
2. Tone of Voice. The way you speak to customers or messages you want to communicate.
3. Logo treatment. The size it should appear or where it should appear on a page or email.
4. Color palette. PMS, CMYK, RGB, and HEX.
5. Typography or font. For use in emails, print, or websites.
6. Image styles. Such as the photos you use on social media.
7. Design styles. For things like office stationery such as business cards or letterheads.

Style Guide Examples

HubSpot at

<https://blog.hubspot.com/marketing/examples-brand-style-guides>

Canva using one of their Style Guide templates

<https://www.canva.com/search/templates?q=style%20guide>



Copyright

Copyright is a form of intellectual property law, and protects:

1. Original works of authorship, including literary, dramatic, and musical
2. Artistic works, such as poetry, novels, movies, songs, computer software, and architecture.

8 Copyright Categories

- Literary, musical and dramatic works
- Pantomimes and choreographic works
- Pictorial, graphic and sculptural works
- Sound recordings
- Motion pictures and other AV works
- Computer programs
- Compilations of works and derivative works
- Architectural works

A single unauthorized use of a work can potentially infringe more than one exclusive right.

For example, uploading an MP3 file of a song to a website without permission would infringe both the reproduction and the distribution rights.

Copyright Owner's Rights – The right to:

1. Reproduce works
2. Create derivative works like sequels, spin-offs, translations, and other forms of adaptation
3. The distribution right grants the copyright owner the ability to control the manner in which a work or a copy of a work is transferred to others, whether by sale, rental, lease, or lending.
4. The public performance right grants the copyright owner the ability to control the manner in which a work is publicly performed.
5. Authors have the exclusive right to control the public display of works that can be displayed—like photographs or graphic designs.
6. Owners of rights in sound recordings have the exclusive right of public performance by means of digital transmission.

Learn more <https://copyrightalliance.org/faqs/what-rights-copyright-owners-have/>



Don't steal from people using
Google Search/images!

How to get a copyright.

1. To register your copyright, you need to go to the eCO Online System
2. Create an account
3. Fill out the online form.

There's a basic fee of \$35 if you file online. The processing times are generally faster if you apply online, but eFiling still takes between three and four months, according to [Copyright.gov](https://copyright.gov).

Does my company own my stuff?

The LLC (company) would not own the copyright in any articles, posts, or other content created by an independent contractor unless the work fits within one of nine statutory categories in the copyright statute and the independent contractor expressly agrees in writing that the ...

What about this kind of company?

<https://www.dmlp.org/legal-guide/copyright-ownership-content-business>

Can I sell a copyright?

A U.S. copyright may be sold or transferred as long as the transfer is in writing and signed by the party relinquishing ownership. However, a copyright is rarely sold outright; more often it is transferred as part of a business agreement. Selling a work or a copy of the work usually doesn't transfer copyright.

How do you show copyright?

The copyright notice generally consists of three elements:

1. The symbol © (the letter C in a circle), or the word "Copyright" or the abbreviation "Copr.";
2. The year of first publication of the work; and.
3. The name of the owner of copyright in the work.

Is a logo trademarked or copyrighted?

Logos are not copyrighted, they are actually trademarked. Whether or not legal action is taken for replicating a trademarked logo is fully up to the company or entity that owns the trademark. A company still has legal rights to their logo even if it's not trademarked.

What are the most common infringements?

Image and text copyright are two common types of infringement. The moment you create an original image, whether it's a selfie or a majestic landscape, you automatically own the rights to that image.

Trademark

A trademark is generally a word, phrase, symbol, or design, or a combination thereof, that identifies and distinguishes the source of the goods of one party from those of others. A trademark typically protects brand names and logos used on goods and services.

A service mark is the same as a trademark, except it identifies and distinguishes the source of a service rather than goods.

Do I need a lawyer to register a trademark?

No. You do not need an attorney to file an application for registration of a trademark with the United States Patent and Trademark Office (USPTO).

How much does it cost?

Between \$250 – \$250 for the first registration, plus an additional fee for maintenance going forward. <https://www.uspto.gov/trademarks/trademark-fee-information>

Wait – there's maintenance?

To maintain your trademark registration, you must file your first maintenance document between the 5th and 6th year after the registration date and other maintenance documents thereafter.

Your registration certificate contains important information on maintaining your federal registration. If the documents are not timely filed, your registration will be cancelled and cannot be revived or reinstated, making the filing of a brand new application to begin the overall process again necessary.

Trademark Lookup

- <https://www.uspto.gov/trademarks>
- Click Find it Fast in the top, right corner.

Branding Mistakes

Common branding mistakes might include:

- Launching a brand without a strategy
- Using a brand name or logo that doesn't resonate
- Lacking a messaging strategy in alignment with your brand
- Not doing preliminary research on the competition and industry
- Brushing off customer (or employee) feedback
- Focusing on new prospects and forgetting current customers
- Not considering how tone translates for the current climate

Klint Marketing shared these 35 branding fails you might want to check out before you launch your brand. <https://klintmarketing.com/35-rebranding-fails/>

At the end of the day, branding is ...

much more than marketing or a logo.

Branding is ...

exactly how your customer feels about you and your products/services and every touch point they've ever experienced from your business.

Resources

- Learning from great brands: The 5 things they do right: <https://www.canto.com/blog/great-brands/>
- How to Build a Brand eBook – Hubspot
- Branding Guide – Hinge Marketing
- 5 Components of a Strong Brand – Forbes:
<https://www.forbes.com/sites/theyec/2021/03/09/five-components-of-a-strong-brand>
- A 10 Step Brand Development Strategy for Your Professional Services Firm:
https://hingemarketing.com/blog/story/a_10_step_brand_development_strategy_for_your_professional_services_firm
- Brand Value List: <https://lisafurze.com/blog/brand-values-list/>
- Brand value list: <https://stephcorrigan.com/brand-values-list/>
- Brand Mission & Vision: <https://www.digglescreative.com/blog/create-your-brand-vision.html>
- What is a brand mission and how to define it: <https://sproutsocial.com/insights/brand-mission/>
- How to Write an Effective Mission Statement in 3 Steps:
<https://www.masterclass.com/articles/how-to-write-an-effective-mission-statement-in-3-steps>
- Brand Personality Zurek Design / BigBrandSystem.com
- Content Marketing Institute: Brand Voice Chart
- The Differences Between Brand Experience, Experiential and Events:
<https://www.chiefmarketer.com/the-differences-between-brand-experience-experiential-and-events/>
- Experiential marketing: 9 examples of brilliant brand experiences:
<https://www.thedrum.com/news/2019/05/22/experiential-marketing-9-examples-brilliant-brand-experiences>
- Steps to Find Your Target Audience: <https://www.marketingevolution.com/marketing-essentials/target-audience>
- The Ultimate Guide to Building Your Brand – FreshSparks
- Product Differentiation and What it Means for Your Brand
<https://blog.hubspot.com/sales/product-differentiation>
- 10 Business Strategy Examples (And Why It Helps To Have One) <https://www.indeed.com/career-advice/career-development/business-strategy-examples>
- How to Choose Your Brand Name in 5 Simple Steps <https://www.columnfivemedia.com/how-to-choose-a-brand-name/>
- Choose your business name <https://www.sba.gov/business-guide/launch-your-business/choose-your-business-name>
- What is a logo? <https://99designs.com/blog/tips/what-is-a-logo/>
- How to Write a Great Tagline (According to Science) <https://www.columnfivemedia.com/the-secrets-behind-a-great-tagline/>
- 15 Perfect Tagline Examples from Brands of All Sizes <https://www.columnfivemedia.com/13-unique-tagline-examples>
- Typography 101: How to Choose the Fonts for your Brand
<https://www.beltcreative.com/blog/typography-101-fonts-for-your-brand>
- Canva's ultimate guide to font pairing <https://www.canva.com/learn/the-ultimate-guide-to-font-pairing/>
- <https://www.wikihow.com/Copyright-Your-Writing-for-Free>
- <https://www.perzonalization.com/blog/marketing-mistakes-avoid-2021/>
- <https://www.bizjournals.com/bizjournals/how-to/marketing/2021/01/7-common-brand-mistakes-that-keep-marketers-up-at.html>

About

Becky Livingston is the President and CEO of Penheel Marketing, a NJ-based firm specializing in social media and digital marketing for CPAs and small business owners.

With over 30 years of marketing and tech experience, she is also the author of "SEO for CPAs - The Accountant's SEO Handbook: Get Found Online Organically," "The Accountant's Social Media Handbook," and "SEO Secrets, Myths, and Truths to Being Found Online."



In addition to being a practitioner and speaker, she has also been a passionate educator and student mentor for nearly fifteen years with a strong desire to help students recognize the connection between learning and experience.

With an outgoing, energetic, and motivating personality Becky uses hands-on learning to encourage students to participate in in-class discussions and activities. She specializes in social media and digital marketing topics.

Becky's forte is big-picture thinking and strategic management of complex initiatives. Her tech background has taught her a great deal about project management and what it takes to make projects come to life.

For her, learning is key and sharing that learning is even more powerful. That's why she attends several annual events, as well as speaks at events across the country ranging from CPA-related conferences and social media forums, to non-profit groups and educational settings. Topics are often presented to her, which she customizes to meet the audience needs and learning objectives.

Connect with Becky to begin networking with her today.

Twitter: @Penheel @bmliving plus Facebook, LinkedIn, Instagram, YouTube, and Pinterest