BRAND BREAKTHROUGH ACTION GUIDE

Activities, Checklists and Templates to Develop and Fine-tune Your Brand Personality

CENTERBOARD MARKETING

Welcome to the
Brand Breakthrough Action Guide

The content in this action guide runs parallel to the book *Brand Breakthrough: How to Go Beyond a Catchy Tagline to Build an Authentic, Influential and Sustainable Brand Personality.* Hands-on activities, checklists, interview questions and templates included within will help you apply the information you learned in the book and kickstart your brand journey.

Keep in mind, this isn't a one-size-fits-all formula. Each organization will navigate the brand personality process based on its business goals and organizational structure and will end up in a different place. Stay true to your culture, listen to your customers and customize the exercises in the workbook as you need.

Get ready to help your company take the next step in its growth, build powerful relationships and stand out from the crowd.

BRAND SWAT TEAM

Your brand SWAT team includes the folks with ultimate responsibility for planning and execution of your brand personality. The specific size and makeup of the team vary by organization but there are a few key roles that every brand team requires.

List every member of your team and specify their responsibilities. Determine who has decision-making authority for key marketing messages, timeline and budget.

Brand guardian
Name
Responsibilities

Product managers (may include product marketing and customer service)
Name
Responsibilities

Sales
Name
Responsibilities

HR
Name
Responsibilities

Executive sponsor
Name
Responsibilities

Project manager
Name
Responsibilities

External facilitator
Name
Responsibilities

BRAND TOUCHPOINTS

List all the places your target audience could experience your brand. Consider online and offline experiences, interactions with people and with your product. Assign an internal owner to each category and, if necessary, to each named touchpoint. Estimate the cost to update and the date you plan for changes to go live.

BRAND TOUCHPOINT	LAUNCH DATE	OWNER	COST
Website			
Key webpages			
Online chat			
Emails			
E-newsletter			
Sales emails			
Customer service emails			
Advertisements			
Digital ads			
Print ads			
Social media descriptions			
LinkedIn			
Twitter			
Facebook			
Presentations			
Sales pitch deck			
Product presentations			
Event presentations			
Event booth and signage			
PR boilerplate			
Collateral			
Brochures			
Product sheets			
White papers			
Infographics			
Videos & interactive tools			
Partner/reseller materials			
Third-party websites			
Store signage			
Experiential marketing			
Office locations			
Your product interface, error messages and micro-text			

QUESTIONS TO ASK YOUR INTERNAL TEAM

Below are sample questions you can use in your employee discussions or brand workshops. You may want to send some questions ahead to get people thinking. Don't be afraid to follow up their answers with additional questions to confirm or gather more details.

QUESTIONS FOR COMPANY LEADERS

- **Was there a higher purpose or aspirational goal when the company was started? Has it changed as the company has evolved?**

- **What is the most important thing your prospects should know about the company before developing a relationship with you?**

- **If this organization did not exist, how would your customers solve their problems? What would be the pitfall of doing so?**

- **What traits do you look for in a new hire?**

- **What qualities do you think make an employee successful?**

QUESTIONS FOR SUBJECT MATTER EXPERTS

- **What questions do potential customers often ask you?**

- **What questions do you think potential customers should be asking, but most do not?**

- **What challenges will this industry need to overcome in the next one to three years?**

- **What would most people disagree with you about?**

QUESTIONS FOR ALL EMPLOYEES

- **Why do you love coming to work here?**

- **How is this organization different from other places you've worked?**

- **Can you describe a time when you or your team went above and beyond what was expected?**

QUESTIONS TO ASK CUSTOMERS

Below are sample questions you can use in your interviews with prospective, current or lost customers.

- **What caused you to seek a solution (offering/product/service) like ours?**

- **Can you describe your decision-making process? What factors were most important to you?**

- **In the end, why did you decide to choose our company to help solve your problems?**

- **How does the experience of working with us differ from other vendors you've worked with?**

- **How does working with our organization help you meet your professional goals?**

- **How about personal goals?**

- **How do you measure the value of working with us?**

- **What do you expect from our organization in the long term?**

- **How would you solve your problems if our organization did not exist?**

- **What advice would you have for others in a similar situation?**

BRAND PYRAMID

Gather a cross-section of employees for this hands-on activity.

Create a starting list of words that describe your company's culture, values and behaviors. Write them down on index cards or Post-it notes. Keep some blank ones in case your group wants to add something.

Draw a pyramid on the wall, divided into three sections from bottom to top: **Core, Defining** and **Differentiating.**

- **"Core"** refers to any characteristic of your organization that's fundamental to what you do.

- **"Defining"** includes the benefits you offer and the nuances of the features and functions you provide.

- **"Differentiating"** are the characteristics that make you special among all other similar organizations. To graduate from Defining to Differentiating, a characteristic has to be so unique, a benefit so exceptional, that none of your competitors could say the same.

Have the group discuss each word in turn, evaluating the degree to which it represents the organization and to which of the three levels it belongs. You can have people vote, but be sure to force them to prioritize. Based on their decisions, place the words on the pyramid.
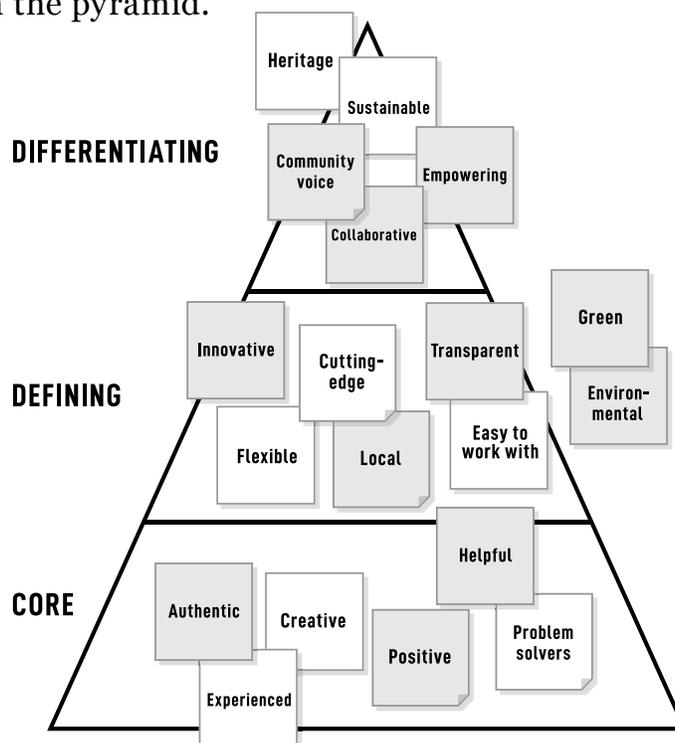
EMOTIONAL GOALS

Create a list of things you want your customers to feel as they interact with your organization. For example:

Brave	**Empowered**	**Safe**
Wise	**Triumphant**	**Rebellious**
Strong	**Delighted**	**Inspired**
Protected	**Healthy**	**Competitive**
Confident	**Connected**	**Optimistic**
Cool	**Amused**	**Energized**
Lighthearted	**Unique**	**Comfortable**
Relieved	**Nurtured**	**Hopeful**

Have your group rank these emotions thorough a survey or in a discussion format. Prioritize the top three to four emotions you'd like customers to experience. Root out areas of potential inconsistency.

Now, check this list against what your customers told you is most important to them. Find areas of overlap to make sure your goals ring true with your customers' needs.

CUSTOMER VALUE DRIVERS

Take all the things your customers told you are critical and list them as "value drivers." These could be their strategic goals, pain points, purchase criteria or success metrics. Prioritize value drivers by level of importance and percentage of customers that cared about the issue.

Next, plot your own brand and your competitors on the chart. Honestly assess whether your brand and your competitors sufficiently address each value driver.

CUSTOMER VALUE DRIVERS	YOUR BRAND	COMPETITOR A	COMPETITOR B
Strategic goals a. b.			
Pain points a. b.			
Purchase criteria a. b.			
Success metrics a. b.			

MARKETING MESSAGE TEST

For a message to rise to the level of a "key message" it needs to pass the message test.

Is it true?

Whatever you say about your organization should be true right now. Another way to think about the word "true" is to ask if your message is "authentic."

Can you prove it?

Even if you know something to be true, if you can't back up what you say, your customers will be skeptical. Choose key messages you can support with examples, testimonials from clients or data points.

Is it unique?

If a message is something others in your industry could also say, customers consider it "table stakes" and it won't set you apart. Your goal is to prioritize the messages that are unique to you.

Is it something customers really care about?

Just because you think something is important enough for your brand personality to talk about doesn't mean your customers care about it. Check that each key message you've listed reflects their concerns.

Fill in the chart for each key message. The messages that pass the test should rise to the top of your messaging architecture.

	TRUE	PROVABLE	UNIQUE	CUSTOMER-CENTRIC
MESSAGE 1				
MESSAGE 2				
MESSAGE 3				
MESSAGE 4				
MESSAGE 5				
MESSAGE 6				

CUSTOMER-CENTRIC BRAND ARCHITECTURE

This format forces you to think about what each type of customer in your sales process would ask if he was in the room with your brand. Your messages and supporting points follow, according to each customer's priorities. Add additional buyers and rows as you need.

TARGET BUYER 1 BRAND MARKETER	BRAND X ADDRESSES THESE NEEDS BECAUSE WE...	AS PROOF OF OUR CAPABILITIES, BRAND X...
I care about...	A.	I.
	B.	II.
	C.	III.

TARGET BUYER 2 E-COMMERCE MANAGER	BRAND X ADDRESSES THESE NEEDS BECAUSE WE...	AS PROOF OF OUR CAPABILITIES, BRAND X...
I care about...	A.	I.
	B.	II.
	C.	III.

YOUR BRAND ARCHETYPE

Archetypes anchor your brand against concepts that are already known to your audience. Determine which brand archetype is the best reflection of your organization.

To apply archetypes to your brand development process, give them something to say. Take one of your key messages and try writing it in different ways, as if each archetype was saying the message using its own "voice."

BRAND PERSONALITY	PERSONALITY TRAITS	HOW THEY MIGHT SAY KEY MESSAGE
The Pioneer	• First to do something • Truth-telling • Optimistic about the future	
The Rebel	• Aggressively undoing wrongs • Potentially controversial or counter culture	
The Guide	• Experienced • Confident leader • Trusted advisor	
The Jester	• Whimsical • Playful • Quirky	
The Muse	• Cheerful • Pure • Aspirational	
The Defender	• Resolute • Passionate • Fighting for justice	

ABOUT CENTERBOARD MARKETING

Centerboard Marketing helps companies clarify their brand positioning, develop content-driven campaigns and accelerate sales. We combine curiosity about people, strategic thinking, research and sharp writing to build exceptional marketing programs. Founded in 2012, our clients include Fortune 500 brands, innovative technology companies and growth-stage startups.

To learn more, visit **www.centerboard-marketing.com**.